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Public Attitudes to Broadcasting in Scotland

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**PUBLIC ATTITUDES TO BROADCASTING
IN SCOTLAND**

TNS System Three
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EXECUTIVE SUMMARY

BACKGROUND

1. To assist the Scottish Broadcasting Commission in their investigations of the role for broadcasting in Scotland's cultural life and broadcast journalism in Scotland, TNS System Three was commissioned by the Scottish Government to conduct research amongst a representative sample of the adult Scottish population. This research utilised the Scottish Opinion Survey (SOS). Face-to-face fieldwork took place during the period 27th February to 5th March 2008 and 1021 interviews were achieved. The sample was representative of the adult population in terms of sex, age, employment status and socio-economic group (SEG). The sample covered 43 constituencies throughout Scotland, with sampling points selected to be representative in terms of geographical location and party of Member of the Scottish Parliament (MSP). The results were weighted to match Scottish population estimates using figures from the National Readership Survey 2006.

2. The two objectives of the research were to:

- Investigate perceptions of and satisfaction with the way Scotland is currently covered by broadcasters, with particular emphasis on the way current broadcasting reflects life in Scotland and Scottish identity; and coverage of Scottish news and different aspects of Scottish news in network news programmes; and

- Examine behaviours and expectations in relation to broadcasting with specific reference to:

- Importance of seeing Scottish news on television
- Regional level at which respondents would like news to be based
- Importance of choice of channels in provision of Scottish news on television
- Use of different media to find out about world/UK/Scottish/local news
- Use of different platforms to find out about different aspects of news
- Interest in a new Scottish digital channel and views on what this might look like
- Views towards 'topical' Scottish broadcasting issues.

KEY FINDINGS

Importance of and satisfaction with coverage of Scotland by broadcasters

3. The research examined views on seven different aspects of television programmes, namely whether they:

- Include everyone living in Scotland
- Reflect Scotland's character
- Inform and teach you about Scotland
- Do not stereotype Scotland
- Reflect Scotland's arts
- Represent the way people in Scotland live their lives today
- Represent your local area.

4. The percentages claiming that the portrayal of Scotland in television broadcasting is important ranged from 81% to 71% across seven different aspects rated. Moreover such views were shown to be strongly held, with a substantial percentage in each instance claiming that each aspect was ‘very’ important. The following three aspects emerged as particularly important in terms of Scottish broadcasting: *include everyone in Scotland*, *reflect Scotland’s character* and *inform and teach you about Scotland*.

Ratings of satisfaction with aspects of TV programmes

4. In comparison to levels of importance, satisfaction levels in relation to these same seven aspects were considerably lower. Overall, opinion was generally slightly more positive than negative but there was only one aspect, *reflect Scotland’s character*, which achieved a satisfied rating from more than half the sample (52%). There were also sizeable levels of dissatisfaction recorded across all aspects, ranging from 25% for *reflect Scotland’s character* to 33% and 36% for *inform and teach you about Scotland* and *represent your local area*, respectively. The size of the gap between importance and satisfaction for the educational/informational role of broadcasting about Scotland, suggests that this is the area most in need of improvement.

5. In relation to the same dimensions as those noted above, levels of satisfaction with the portrayal of Scotland varied fairly widely across the five channels, although for each channel at least one in five claimed to be dissatisfied. ITV/Channel 3 emerged with the highest level of satisfaction, with just over half (55%) claiming to be very or fairly satisfied. Satisfaction with the two BBC channels was also high, while the results for Channel 4 were slightly less positive. However, it was the figure for Channel 5 that emerged as particularly poor, with the same proportion of respondents saying they were dissatisfied as satisfied.

Amount of Scottish coverage in TV programmes

6. Demand for more Scottish coverage in TV programmes was greatest for history/heritage programmes (56%) and other factual/documentary programmes (51%). Views toward comedy and programmes on music/arts/books were more evenly split between those who thought that current levels of coverage were about right and those wishing for more Scottish coverage. The view that there is too much Scottish coverage was only in evidence for drama (17%) and sports (28%), with the remainder in each instance slightly more likely to prefer the status quo rather than increased Scottish coverage. News programmes were the area where respondents were the most supportive of the current amount of Scottish coverage – 65% claimed to be happy with this; only 25% claimed there was too little coverage and 8% too much.

7. Overall, respondents were more likely to be satisfied than dissatisfied with the way in which Scotland is reported in UK news programmes, but a sizeable proportion fell into the latter category (48% satisfied versus 36% dissatisfied). In terms of specific aspects of the news, weather stories achieved the highest level of satisfaction. Scores for crime, political news and sports were also moderately good, whereas Scottish coverage of social issues and entertainment/arts/music evoked the highest levels of dissatisfaction (31% and 29% respectively).

8. The majority (75%) considered it to be important for the news to be clear when reporting whether an item relates to Scotland or not. Moreover a third (34%) believed this

strongly. The frequency with which this clarity was evident varied primarily between those claiming that they ‘usually’ find it clear (asserted by 35%) and those saying ‘sometimes’ (asserted by 36%). Just under a fifth though (18%) claimed that it occurred only ‘rarely’ or ‘never’, whereas less than one in ten (7%) said they ‘always’ find the reporting of Scottish news items clearly marked as such. The overall pattern of response therefore demonstrates that frequency of clarity could be much improved.

9. The vast majority were interested in watching local Scottish news and over a third (37%) expressed a strong interest. There were significant variations according to region on this measure, with those in the South much more interested than those in other regions, but most noticeably compared to those in the North East and Lothians.

10. Respondents were asked at which level they would like to receive their local news out of three possible levels: city, region and area. The most popular response was ‘region’, but only by a slight majority of 54%. Amongst the substantial remainder views were equally split between those who preferred the emphasis on ‘city/town/village’ and those preferring the broader coverage of ‘area’. However, views were strongly affected by area of residence of respondents, with, for example, those in Lothians and Glasgow most in favour of ‘your city/town/village’ whereas in the Highlands & Islands support was more widely recorded than elsewhere for ‘area’ (39%), and weaker than elsewhere for ‘city/town/village’.

Choice of channels for watching news on television

11 Having a choice of channel for watching news about Scotland was considered to be important by a large majority (76%); moreover for over half of this majority it was considered to be ‘very’ important. However, not all respondents actively use different channels to watch the news: 36% claimed to regularly watch the news on the same channel compared to 57% who indicated that they use a number of channels.

A new Scottish news programme

12. Amongst the vast majority who watch the TV news there was widespread interest (74%) in a new Scottish news programme (to be broadcast on a different channel from ones that might currently be watched), even amongst those who currently regularly watch the news on the same channel.

13. When presented with a choice between two options for the early evening news programme, Option 1 being a one hour programme presented and broadcast from Scotland and Option 2 being two half hour programmes, one based on the UK news presented from London and the other a programme presented from Scotland, Option 1 achieved the widest support. However there was also a substantial level of support for Option 2 - the status quo: 53% favoured Option 1 and 36% favoured Option 2, with the remaining 10% having no clear preference.

14. Reflecting interest in increased Scottish coverage in various types of programme and in a new Scottish news programme, most of the sample (83%) agreed that it was important for broadcasters to provide debate and discussion programmes on topical Scottish issues outside of the ‘news’ style programme format.

A new Scottish television channel

15. Additionally, the vast majority (82%) expressed an interest in a new Scottish channel for people living in Scotland, with almost half this group claiming to be 'very' interested in this. In terms of the types of programmes to be broadcast on this new channel, interest was most widespread for news programmes (58%) and to a slightly lesser extent, for other documentary/factual programmes (52%) and history/heritage programmes (50%). Support for comedy and drama was more moderate by comparison (43% and 38% respectively), whereas there was limited support for feature films (29%). However, it is important to note that the pattern of preference differed significantly amongst different age groups and according to social grade.

Communication platforms used to obtain news

16. TV is the dominant source of information for news at the International, UK and Scottish national news levels (over 80% claimed to use TV for each of these). For local news, newspapers play the most prominent role (77% claimed to use newspapers for this purpose) and, newspapers also emerged as the main secondary source for all other levels of news. Radio usage was significant but comparatively much lower for each type of news with only around a quarter endorsing this platform on each level of news, and likewise, the internet (on the computer) achieved a lower but still reasonable level of claimed usage, ranging from just under a fifth (18%) for international news, to 9% for local news. Conversely, internet on the mobile phone was mentioned by only 1% for each level of news. Patterns of usage for all platforms, but especially the internet, were strongly affected by age and social grade.

Live football coverage on free terrestrial television

18. Not surprisingly perhaps there was widespread support for the showing of international live Scottish football matches on free terrestrial TV rather than only on subscription. Of more importance, perhaps, is the finding that there was widespread (71%), and strong (61%) agreement with this proposition amongst the substantial proportion (39% of the total sample) who claimed that they were generally not interested in watching live Scottish national football.

CHAPTER ONE BACKGROUND, METHOD AND OBJECTIVES

1.1 The Scottish Broadcasting Commission was established in August 2007 to conduct an independent investigation into the current state of television production and broadcasting in Scotland. Its purpose is to define a strategic way forward for the industry and it will report in summer 2008.

1.2 Taking account of the economic, cultural and democratic importance of broadcasting to a modern, outward looking Scotland and its creative industries, the Commission will:

- Make recommendations for Scottish Government action in those areas that lie within the scope of the powers currently devolved to the Scottish Parliament
- Focus attention on issues where other organisations have responsibility and encourage action to address these issues
- Identify matters for further consideration and debate in the Scottish Parliament.

1.3 In making recommendations and in identifying matters for action or further debate, the Commission is asked to take account of “*the economic, cultural and democratic importance*” of broadcasting. The economic imperative phase largely relates to television production for the UK and international markets, and as such the investigation is to be addressed through means other than survey research.

1.4 The cultural imperative phase of the investigation will consider the distinctive role for broadcasting in Scotland’s cultural life through reflecting and stimulating creativity across Scotland’s different regions and groups, and through communications between Scotland and the wider world. The democratic stage of inquiries will look at broadcast journalism in Scotland and at whether improvements need to be made to the existing range of programmes and services available to viewers.

1.5 To assist in their investigations into the areas of culture and democracy in broadcasting TNS System Three was commissioned by the Scottish Government to conduct research amongst a representative sample of the adult Scottish population. The research was carried out using the Scottish Opinion Survey (SOS).

1.6 The SOS is a monthly omnibus survey conducted amongst a sample of around 1,000 adults in Scotland using Computer Aided Personal Interviewing (CAPI). For this research, fieldwork took place during the period 27th February and 5th March 2008 and a total of 1,021 interviews were achieved. This sample was representative of the adult population in terms of sex, age, employment status and socio-economic group (SEG)¹.

¹ The standard six socio-economic (SEG) or social grades, commonly used in research, are based on the current or previous occupation of the chief income earner in the household. AB includes higher and intermediate managerial, administrative and professional occupations, C1 includes supervisory or clerical, and junior managerial, administrative or professional occupations, C2 includes skilled manual workers whilst DE includes semi and unskilled occupations, state pensioners and the long-term unemployed.

1.7 The sample covered 43 constituencies throughout Scotland, with sampling points selected to be representative in terms of geographical location (including one island point – Orkney) and party of current Member of the Scottish Parliament (MSP). The SOS uses a quota sampling methodology and interviewers use a ‘random route’ technique within each sampling point to select addresses. Only one interview per household is permitted. Additionally for this survey the Highlands and Islands area was boosted with an additional sample point to increase the base size for analysis purposes. As is the case each month, the achieved sample was weighted to ensure that it represents Scotland’s population and is consistent between waves should future tracking be required. The weighting applied is based on population estimates from the National Readership Survey 2006. Table 1.1 outlines the composition of the sample for the SOS in February 2008.

Table 1.1 - Sample profile

Base: All respondents (1021)

		Unweighted (1021) %	Weighted² (1021) %
SEX:	Male	45	48
	Female	55	52
AGE:	16-24	10	13
	25-34	14	13
	35-44	18	18
	45-54	17	16
	55-64	16	17
	65+	26	23
SOCIO-ECONOMIC GROUP:	AB	20	23
	C1	26	28
	C2	18	21
	DE	37	28

1.8 Given the importance of ascertaining the views of adults living within different regions of Scotland, where there are significant differences by region these are highlighted in the text. The eight regions referred to within the report are: Highlands & Islands, North East, Mid & Fife, Lothian, Central, Glasgow, West and South. The specific sampling points included within each of these regions (and within the three broader areas of West, East/South and North) are listed in Appendix 3.

² Weighting is the process by which data are adjusted to reflect the known population profile. This is to counter any effects of differential refusal rates, interviewers falling short on particular quotas, or to correct for any over-sampling of minority populations. A 'weight' is the percent assigned to a particular criterion. If this is not carried out then the results will not properly reflect the views of the population being considered.

1.9 The principal aim of the project was to provide research into the views of adults on broadcasting in Scotland.

1.10 In order to meet this aim, 2 key research objectives were addressed:

- 1 Investigate perceptions of, and satisfaction with, the way Scotland is currently covered by broadcasters, with particular emphasis on:
 - the way current broadcasting reflects life in Scotland and Scottish identity;
 - coverage of Scottish news and different aspects of Scottish news (e.g. politics, sport, public life, entertainment) in network news programmes;
- 2 Examine behaviours, and expectations, in relation to broadcasting with specific reference to:
 - importance of seeing Scottish news on television;
 - regional level at which respondents would like news to be based;
 - importance of choice of channels in provision of Scottish news on television;
 - use of different media to find out about world/UK/Scottish/local news;
 - use of different platforms to find out about different aspects of news;
 - interest in a new Scottish digital channel (e.g. on Freeview, Sky, Broadband) and views on what this might look like;
 - views towards ‘topical’ Scottish broadcasting issues (e.g. the format of the early evening news programme, live coverage of Scottish national football matches on terrestrial TV).

1.11 A copy of the questionnaire used in the survey is provided in Appendix 1.

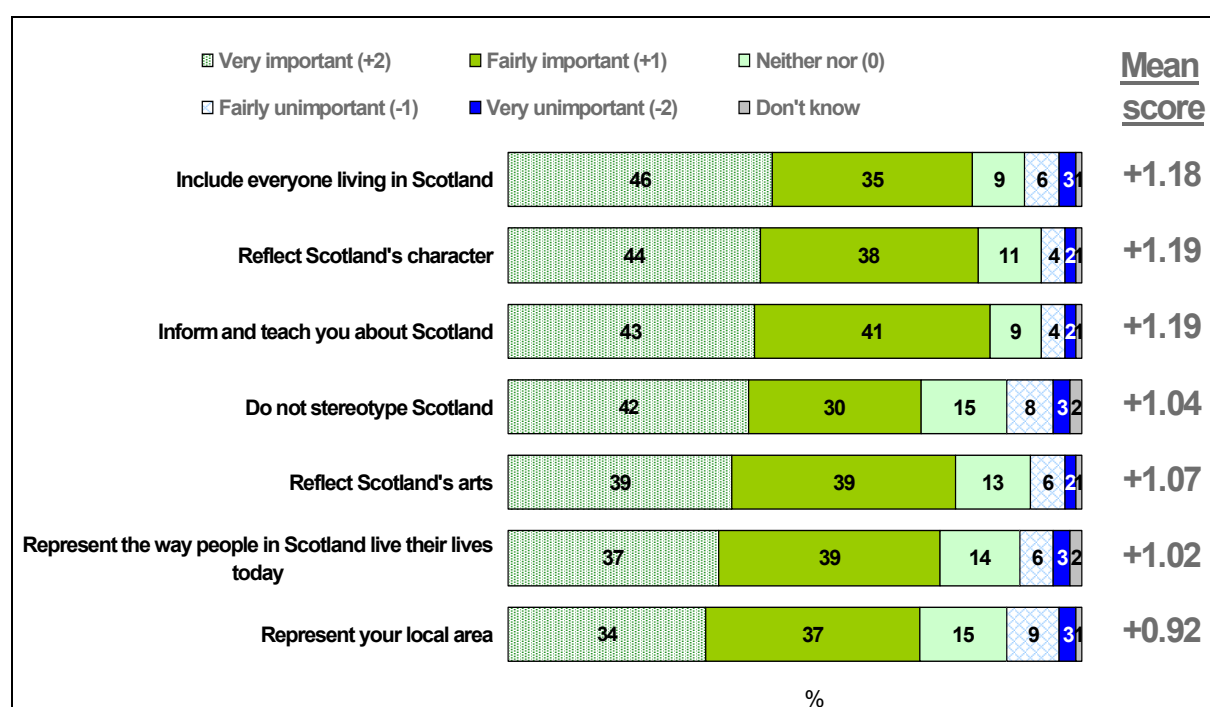
CHAPTER TWO MAIN FINDINGS

Importance of, and satisfaction, with coverage of Scotland by broadcasters

2.1 In the first instance respondents were asked to rate the importance of various aspects of television programmes in Scotland. For each aspect the specific question asked was, “How important is it to you that television programmes in Scotland...?” Respondents were asked to select their answer from a five point rating scale, ranging from very important to very unimportant. The results are shown in Figure 2.1 below for each of the 7 aspects rated.

Figure 2.1: Ratings of importance of aspects of TV programmes

Unweighted base: All respondents (1021)



NB. Mean scores were calculated by applying values from +2 to -2 to the five points on the rating scale

2.2 The level of importance attributed to each of the seven aspects was high, ranging from 82% saying either very or fairly important for *reflect Scotland's character* to 71% for *representing your local area*. Moreover a significant minority claimed that each aspect was very important. Almost half (46%) of respondents selected this answer for *include everyone in Scotland*.

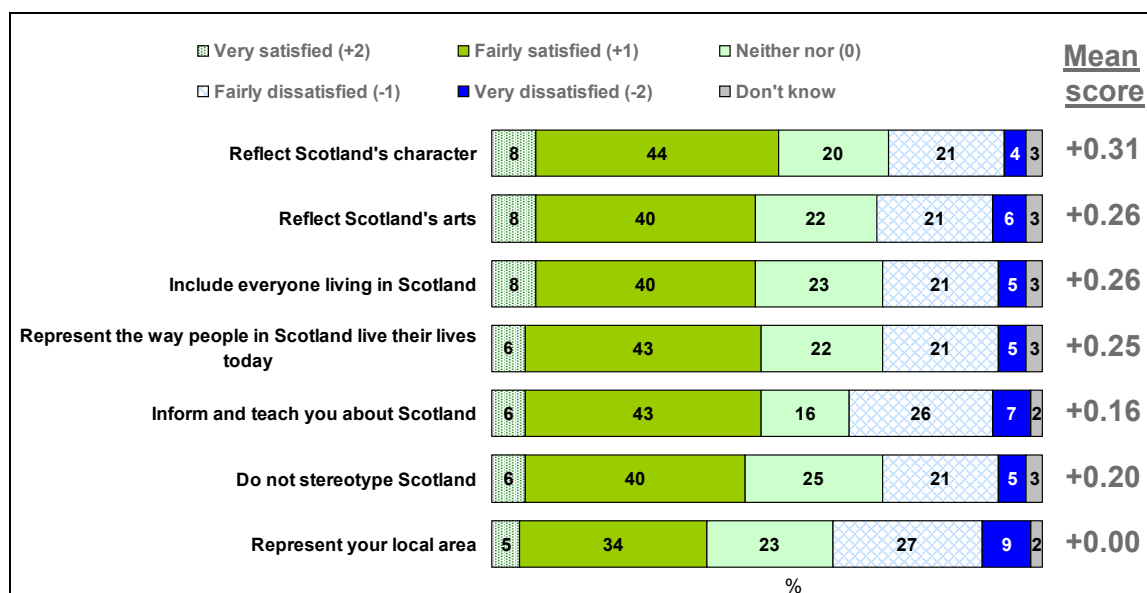
2.3 The mean score values are shown on the right hand side of Figure 2.1. These summarise clearly that whilst the portrayal of Scotland in television programmes is considered important across all the dimensions listed, there was some variation. Specifically, three aspects, *include everyone in Scotland*, *reflect Scotland's character* and *inform and teach you about Scotland*, achieved higher levels of importance than the remaining four.

2.4 Whilst the differences across age groups were not statistically different the pattern of results indicates lower levels of importance amongst the younger age groups, and the 16-24 year olds in particular.

2.5 All respondents were also asked to indicate how satisfied they were with the representation/coverage on television programmes, on each of the seven dimensions. Each respondent was asked to respond using a five point rating scale ranging from very satisfied to very dissatisfied, and the results obtained are shown in Figure 2.2. below.

Figure 2.2: Ratings of satisfaction with aspects of TV programmes

Base: All respondents (1,021)



NB. Mean scores were calculated by applying values from +2 to -2 to the five points on the rating scale

2.6 The first point to note is that levels of satisfaction were significantly lower than levels of importance across each dimension, with ratings of very or fairly satisfied ranging from just over 50% for *reflect Scotland's character* to just under 40% for *represent your local area*. Satisfaction levels were therefore moderate as opposed to strong for many and, furthermore, sizeable minorities in each instance claimed to be dissatisfied. Very similar levels of dissatisfaction were recorded for five out of the seven dimensions (26% or 27%), whereas for *inform and teach you about Scotland* and *represent the local area* the percentages claiming to be dissatisfied were much higher (33% and 36% respectively).

2.7 The mean score values, shown on the right hand side of Figure 2.2, provide an overall score of satisfaction. Whilst there was some variation between mean score values at the higher end of the scale, it is the figure for *represents your local area* (mean score + 0.00) which stands out as significantly lower than any other aspect. However, as this dimension also achieved the lowest ratings of importance, the gap between the two measures is the same as for several others. The largest gap between satisfaction and importance was recorded for *inform and teach you about Scotland*.

2.8 On measures of satisfaction the mean scores recorded amongst the youngest age group, the 16-24 year olds, tended to be much higher than for all other age groups. In particular they were generally significantly higher than those recorded for the middle age range group (35 to 55 year olds).

2.9 Differences according to gender and SEG were not apparent but there were significant differences according to area of residence. As noted in Chapter 1, the sample was split into 8 regions, and on all dimensions, with the exception of *include everyone living in Scotland*, those living in the South region recorded the lowest levels of satisfaction. Such differences were most pronounced with regard to *represent your local area* for which the South recorded a mean score of -0.43 which was significantly lower than all other regions (except Central). Moreover, this aspect was rated as more important in the South compared to all other regions, and significantly higher than in North East, Mid & Fife and Central. Conversely, Lothians and Mid & Fife regions tended to record higher levels of satisfaction than elsewhere.

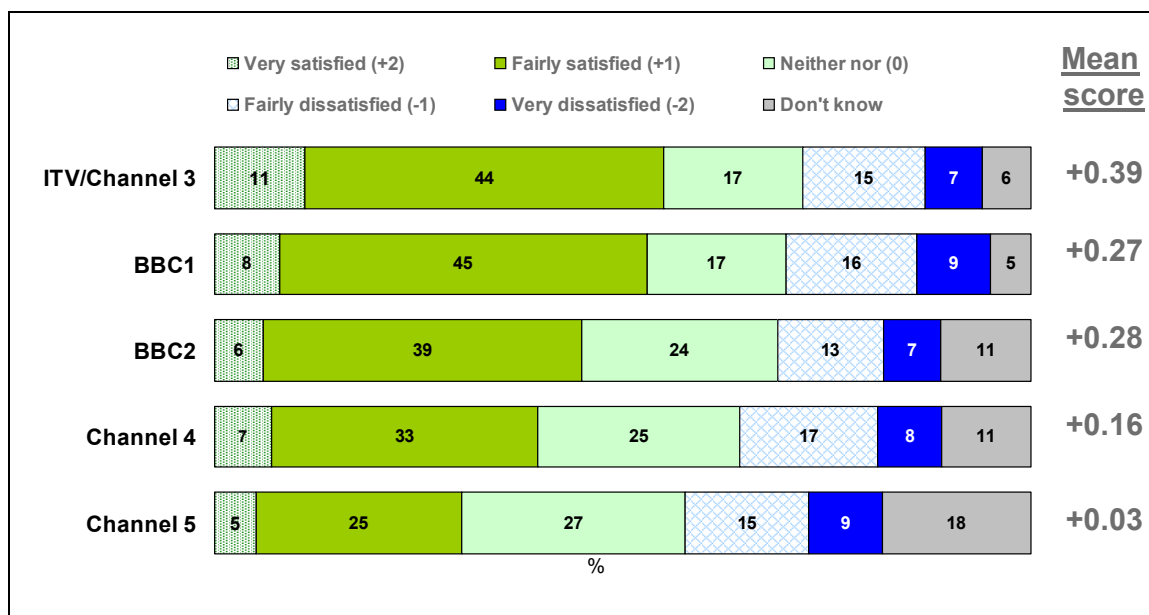
2.10 Interestingly the regions representing the two more geographically remote areas of Scotland, Highlands & Islands and the North East, recorded very different results: levels of satisfaction were average or higher for Highlands & Islands region, most notably with regard to *reflect Scotland's character* (mean score = +0.71) and, conversely, they were lower than average for six out of seven aspects in the North East region.

Level of satisfaction with portrayal of Scotland across the five terrestrial TV channels

2.11 All respondents were also asked to rate their overall level of satisfaction with each of the five terrestrial television channels based on the same seven aspects previously rated. Again respondents were asked to choose their response from a five point rating scale, ranging from very satisfied to very dissatisfied. The findings, including the mean score values, are shown in Figure 2.3 overleaf.

Figure 2.3: Ratings of satisfaction with channels (in relation to previously mentioned 7 dimensions)

Base: All respondents (1,021)



NB. Mean scores were calculated by applying values from +2 to -2 to the five points on the rating scale

2.12 Levels of satisfaction with the portrayal of Scotland varied fairly widely across the five channels, although for each channel at least one in five claimed to be dissatisfied. ITV/Channel 3 emerged with the highest level of satisfaction, with just over half (55%) claiming to be very or fairly satisfied. A similar proportion (53%) also rated themselves as satisfied with BBC1 but, in comparison to ITV there was a marginally higher level of dissatisfaction – hence the lower mean score for BBC1.

2.13 In line with different viewing figures for these channels generally, the level of ‘don’t know’ responses was not consistent across the five channels. The high figure (of almost one in five) for Channel 5, for example, arguably also reflects that not everyone is able to access this channel. The mean score, which excludes a ‘don’t know’ response, therefore provides a better comparative measure across the channels. Thus, whereas the percentage figures for BBC2 appear less positive than those recorded for BBC1, the mean scores indicate a very similar level of satisfaction overall.

2.14 Also, whilst the results for Channel 4 are slightly less positive than those for the BBC and ITV channels it is the figure for Channel 5 that emerged as particularly poor, with a much lower mean score of just +0.03.

2.15 With the exception of BBC2, the youngest age group, the 16-24 year olds, tended to rate satisfaction more positively across the channels, with this difference most pronounced for BBC1: amongst this age group only 11% claimed to be dissatisfied with BBC1 (in the context of the aforementioned issues) compared to figures of over 20% for dissatisfaction amongst all other age groups.

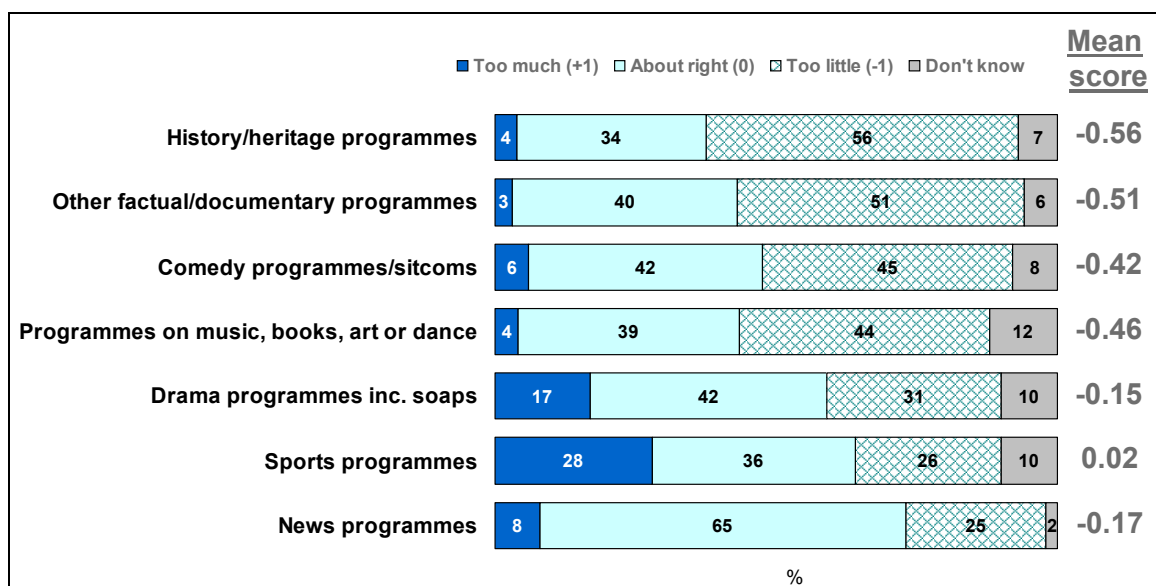
2.16 The results also showed that respondents who were dissatisfied with one channel were more likely to also be dissatisfied with another channel suggesting that the negative perceptions of Scottish coverage reflect perceptions of TV programmes on all channels rather than those specific to a particular channel.

Perceptions of the amount of Scottish coverage in TV programmes

2.17 To ascertain whether the general public have concerns regarding the amount of Scottish coverage (i.e. in relation to Scottish issues, characters, presenters, settings, etc.) all were asked to indicate, for seven types of programmes, whether they felt there was too much, too little or about the right amount of Scottish coverage. Figure 2.4 below summarises the results for each type of programme, with the mean score again shown in a column on the right hand side. This was calculated by ascribing values of +1 for ‘too much’, -1 for ‘too little’ and 0 for ‘about right’.

Figure 2.4: Amount of Scottish Coverage

Base: All respondents (1,021)



2.18 Opinion on the amount of Scottish coverage varied significantly across the different types of programme. Around half the sample, for example, indicated that there was ‘too little’ coverage in history/heritage programmes (56%) and factual/documentary programmes (51%), highlighting a widespread appetite for a greater emphasis on the Scottish ‘angle’ in these types of programme. For comedy, and programmes on books/arts/dance too, substantial percentages claimed that there was insufficient Scottish coverage, but respondents were equally likely to indicate that they were happy with the current coverage.

2.19 On the other hand, for drama programmes, respondents were most likely to indicate that the coverage was ‘about right’ (42%), with considerably fewer concerned that there was insufficient (31%). Moreover, a substantial minority indicated that they felt there was ‘too much’ Scottish coverage in current drama programmes (17%).

2.20 Sports programmes produced the least clear cut response with about equal proportions (around a quarter) claiming that there was ‘too much’ and ‘too little’ Scottish coverage. However, not surprisingly, there was a strong gender effect: 37% of females claimed there was ‘too much’ Scottish coverage compared to only 18% of men, whereas, conversely 36% of men claimed there was ‘too little’ compared to 17% of women. Arguably, for females the level of opposition to more Scottish coverage in sports programmes also partly represents the view that there is too much sports coverage generally, Scottish or otherwise.

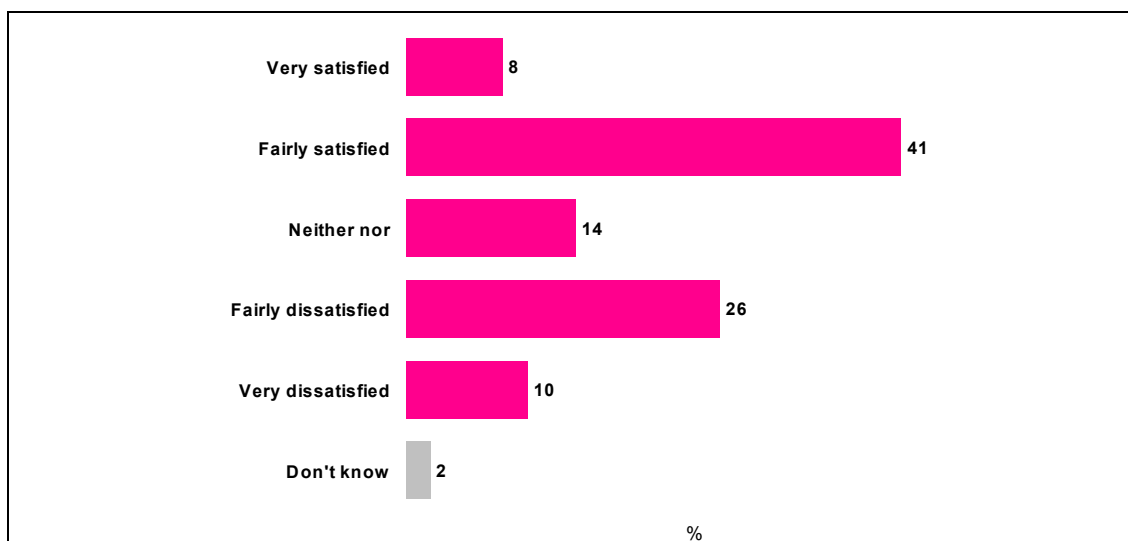
2.21 Views towards news programmes were the most consensual with around two thirds (65%) indicating that they felt the level of Scottish news coverage was ‘about right’. Most of the remainder (25%) claimed there was ‘too little’ and only 8% indicated that there was ‘too much’.

Satisfaction with the way in which Scotland is portrayed in the news

2.22 In the first question in this section respondents were asked to rate their overall satisfaction with the way in which Scotland is reported in UK news programmes. As for previous questions, responses were obtained using a five point rating scale ranging from very satisfied to very dissatisfied. Figure 2.5 below summarises the results.

Figure 2.5: Overall satisfaction with Scottish reporting on UK news programmes

Base: All respondents (1,021)



2.23 Overall respondents were more likely to be satisfied (48%) than dissatisfied (36%) with the way Scotland is reported in the news, but the proportion opting for a negative response was undoubtedly substantial. Moreover relatively few claimed to be very satisfied (8%). As seen elsewhere, the analysis by subgroup highlights, a more positive response amongst younger age groups: specifically the 16-34s (58% satisfied) compared to those aged 35-55 years in particular (42% satisfied). In terms of socio-economic group, satisfaction was higher amongst DEs (56%); significantly so in comparison to ABs (39%).

2.24 The results across the 8 regions also differed on this measure, with those in the South significantly less satisfied than those residing elsewhere. Moreover this was the only region where respondents were more likely to be dissatisfied (53%) than satisfied (32%).

2.25 Following on from the overall satisfaction measure, levels of satisfaction were obtained with the way Scottish stories are reported in different aspects of UK news programmes. Specifically respondents were asked to rate their satisfaction level on 6 different aspects and the results for each were as follows:

Figure 2.6: Satisfaction with Scottish reporting on UK news programmes

Base: All respondents (1,021)



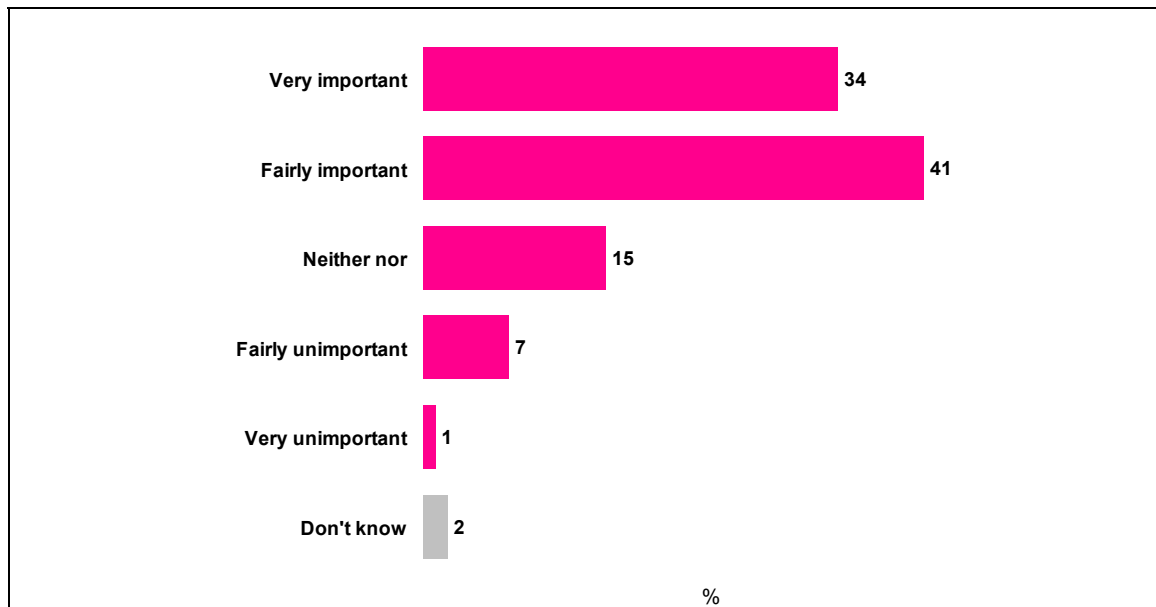
2.26 Generally the results across the 6 different news topics were fairly similar, with the balance of opinion (as summarised by the mean score values) only slightly positive in each instance. Furthermore, on all aspects, a substantial minority (around 25%) claimed to be dissatisfied. The pattern for each aspect is therefore similar to that recorded for overall satisfaction with the reporting of Scotland on UK news. On balance views towards weather news were the most positive by a small margin, and they were the least positive towards social issues and entertainments, the arts, and music news (in terms of mean scores). Similar sub-group differences to those observed in relation to news reporting were recorded, although they were less pronounced. It is also worth noting that whilst females were more likely to give a ‘don’t know’ response to the question on sports news, those that did respond gave a similar response to males.

Clarity of Scottish news reporting

2.27 Information was also collected in relation to the perceived clarity of items of news that relate specifically to Scotland. In the first instance, respondents were asked to indicate how important it is to them that UK news programmes make it clear which items relate to Scotland and which do not. Respondents were asked to select their response from a five point rating scale, ranging from very important to not important at all. The results are presented in Figure 2.7 overleaf.

Figure 2.7: Overall importance of clarity of Scottish reporting on UK news programmes

Base: All respondents (1,021)



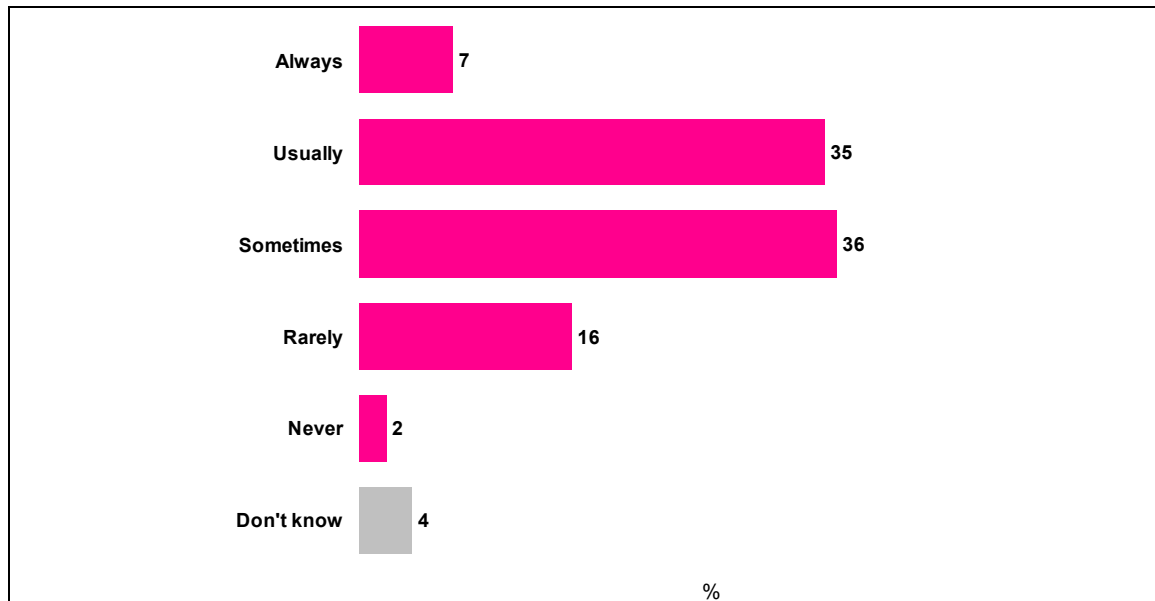
2.28 The evidence strongly suggests that identifying an item as relevant to Scotland matters to most, with three quarters (75%) of the sample claiming that this was important to them. Moreover, just over a third of the sample considered this to be very important. Conversely only a small minority (8%) are unconcerned about this issue, with a further 15% undecided on their opinion either way. Reflecting the consensus of opinion, views between different demographic sub-groups were mainly very similar. That said, the figures according to age range suggest that importance increased as the age of the respondent increased, although only the difference between those aged 16-24 years and over 65 year olds was statistically significant (68% important and 79% important respectively).

2.29 Analysis by region highlights that the importance attached to clarity of news items relating to Scotland was lowest amongst those in the South (63% important) and the North East (66% important). The result for the former is perhaps surprising given their relatively high levels of dissatisfaction with Scottish news coverage. It therefore suggests that it is factors other than this that influence their opinion of Scottish news coverage.

2.30 Additionally the survey sought to establish how often it was clear, to the general public, which items related to Scotland in UK news programmes. Respondents were asked to indicate how often they found clarity in reporting: always, usually, sometimes, rarely or never. The results obtained are shown in Figure 2.8 overleaf:

Figure 2.8: How often find it clear whether UK news relates to Scotland

Base: All respondents (1,021)



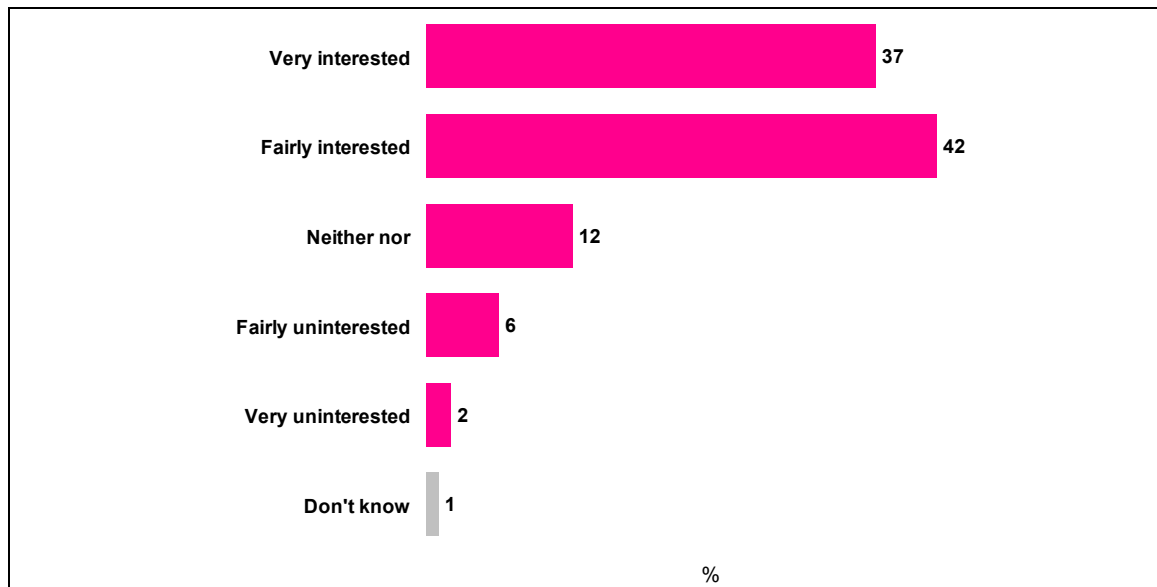
2.31 The sample was mainly split between those ‘usually’ finding it clear that a news item relates to Scotland (35%), and those that find this only occurs ‘sometimes’ (36%). A very small minority considered it to be ‘always’ clear (7%) and just under one in five (18%) believed it happened ‘rarely’ or ‘never’. Additionally, those who were dissatisfied with the way Scotland is reported in the news were more likely to find that clarity happens ‘rarely’ or ‘never’ (32% compared to 10% of those who were satisfied).

Interest in local Scottish news on television

2.32 In addition to examining views towards Scottish national news, the survey also sought to determine interest in watching local Scottish news i.e. news from a local area rather than Scotland-wide issues. In the first instance, respondents were asked to rate their level of interest in seeing local news on television, using a five point rating scale that ranged from very interested to very uninterested. Figure 2.9 overleaf summarises the response for the overall sample.

Figure 2.9: Overall level of interest in seeing local Scottish news

Base: All respondents (1,021)

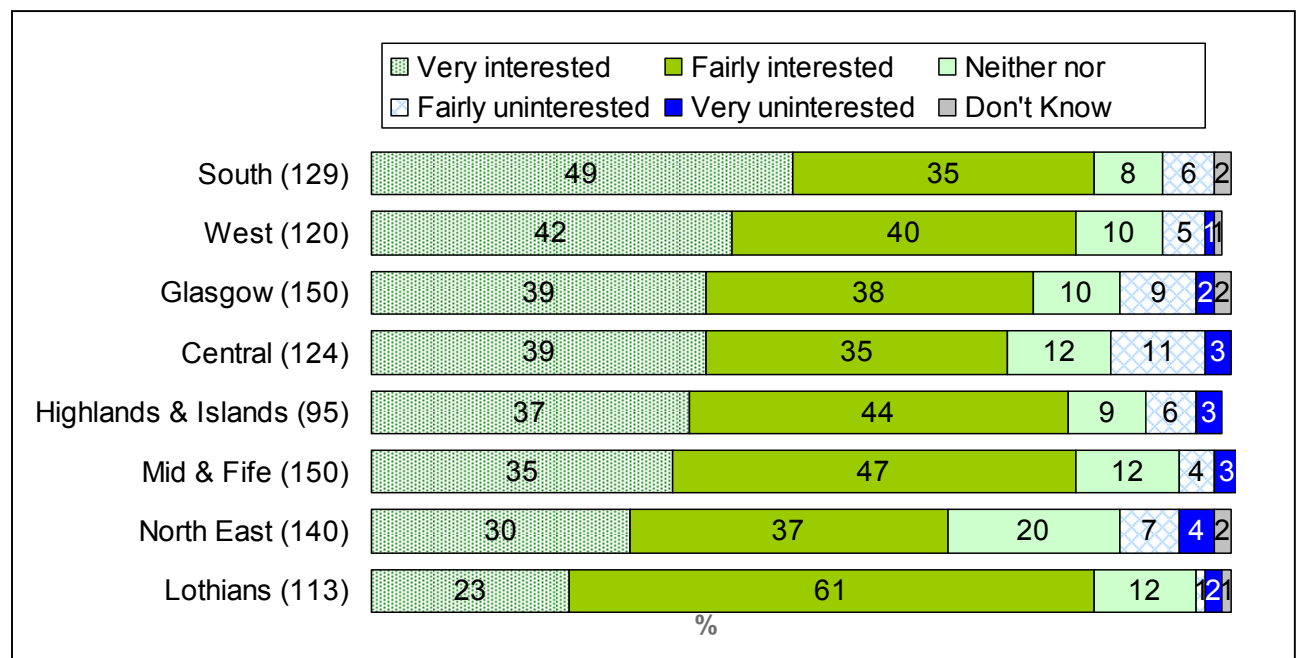


2.33 Undoubtedly there was widespread and strong interest in seeing local news coverage, with almost eight in ten respondents claiming to be interested (79%) and over a third claiming to be very interested. This widespread opinion in favour of local news coverage was evident across all age and standard socio-economic groups.

2.34 However, some differences were apparent when the results were analysed by region, as Figure 2.10 below illustrates.

Figure 2.10: Level of interest in seeing local Scottish news

Base: All respondents (1,021)



NB: Where figures total less than or more than 100% this is due to rounding.

2.35 Those in the South region expressed the strongest interest in local news (49% very interested), particularly when compared with the North East (30%) and Lothians (23%). The higher than average number in Lothians claiming to be ‘fairly’ interested (61%) rather than ‘very’ interested (23%) suggests that for these residents the current Scottish news is already sufficiently ‘local’, perhaps reflecting that much Scottish coverage, certainly within the political context, relates to the Scottish Parliament in Edinburgh.

2.36 Those who indicated an interest in seeing local Scottish news on television were also asked to indicate how ‘local’ they wished this coverage to be, from a choice of three options: your city/town/village; your region; your area of Scotland (examples of each of these were also given to respondents to illustrate the response options). The results obtained are provided in Table 2.1 below.

Table 2.1: How local would like coverage to be

Base: Respondents interested in watching **local** Scottish news (812)

	Those interested in watching local Scottish News	
		%
Your region		54
Your area of Scotland		24
Your city/town/village		21
Don't know		1

2.37 A slight majority of those asked expressed a preference for ‘your region’ with the remainder fairly evenly split between those preferring local to equate to a city/town/village and those preferring the wider connotation of ‘your area of Scotland’. However, on this measure the region of residence of the respondent affected the results strongly, as Table 2.2 below demonstrates.

Table 2.2: How local would like coverage to be, by region

Base: Respondents interested in watching **local** Scottish news: individual base sizes shown in brackets

Region	Your region	Your area	Your city/ town/ village
(Row percentages)	%	%	%
Highlands & Islands (77)	51	39	8
North East (96)	63	24	11
Mid & Fife (124)	65	21	13
Lothians (95)	46	14	39
Central (95)	51	29	18
Glasgow (119)	37	24	38
West (98)	43	31	24
South (108)	74	16	10

NB: Where figures total less than 100% the remainder are “don’t know” responses. These were very low, between 0% and 2%, across all regions.

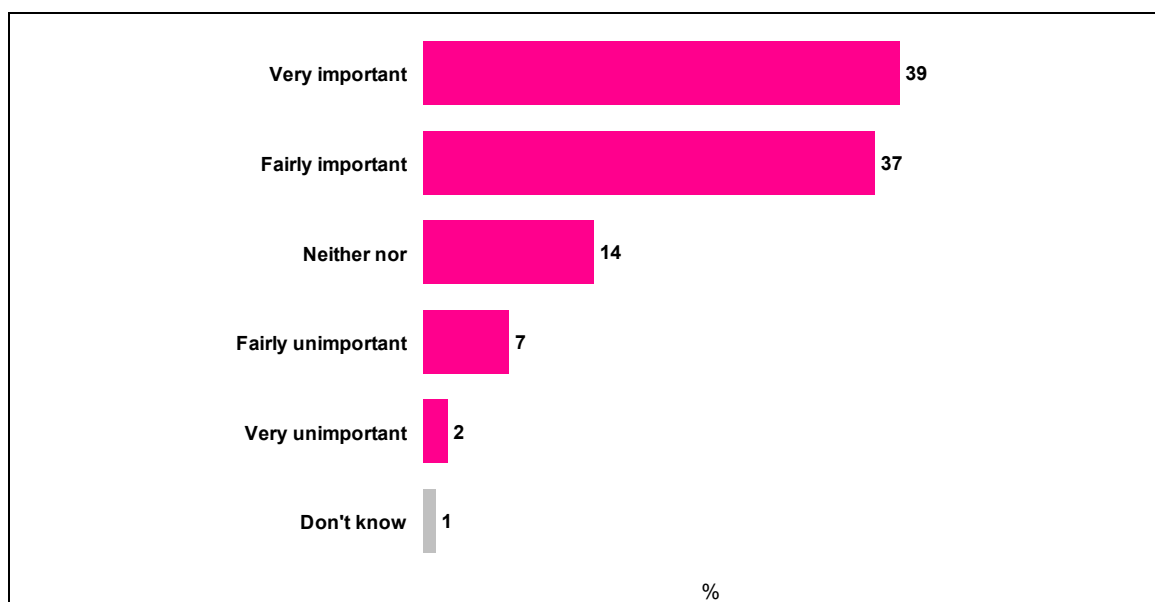
2.38 In 3 regions, North East, Mid & Fife and the South especially, there was a much stronger preference for ‘your region’, and relatively few opting for ‘your city/town/village’. Conversely, reflecting the fact that many of the respondents live in or close to Edinburgh and Glasgow, the percentages in Lothians and Glasgow that opted for ‘your city/town/village’ were significantly higher than for the other 6 regions (39% and 38% respectively). The Highlands & Islands also differed slightly from the other regions insofar as the percentage preferring ‘your area’ was much higher than average (39% versus 24%). Given that those residing in the Highlands & Islands are likely to be well used to this term, or the usage of the definition ‘North of Scotland’, to describe where they live, it is perhaps not surprising that preference for this broader level of ‘local’ news was preferred.

Importance of choice of channels for watching news on television

2.39 All respondents were asked to indicate the importance of having a choice of television channels for watching Scottish news. The results obtained were as follows:

Figure 2.11: Importance of having a choice of channels for Scottish News

Base: All respondents (1,021)



2.40 Clearly the majority of the sample regards channel choice as important: in total 77% rated it as important, and almost one in four (39%) claimed it was ‘very important’. Conversely fewer than one in ten appear to be unconcerned. As with other measures, age was the main demographic influence: the younger age groups, 16-34 year olds, and especially those aged 16-24, were the least likely to consider choice of channel for news to be important (69%), especially in comparison to those aged 55+ (81%). However, there were also significant differences according to socio-economic status: ratings of importance were highest amongst DEs (79%), although this partly reflects the higher proportion of those over 65 years in this group.

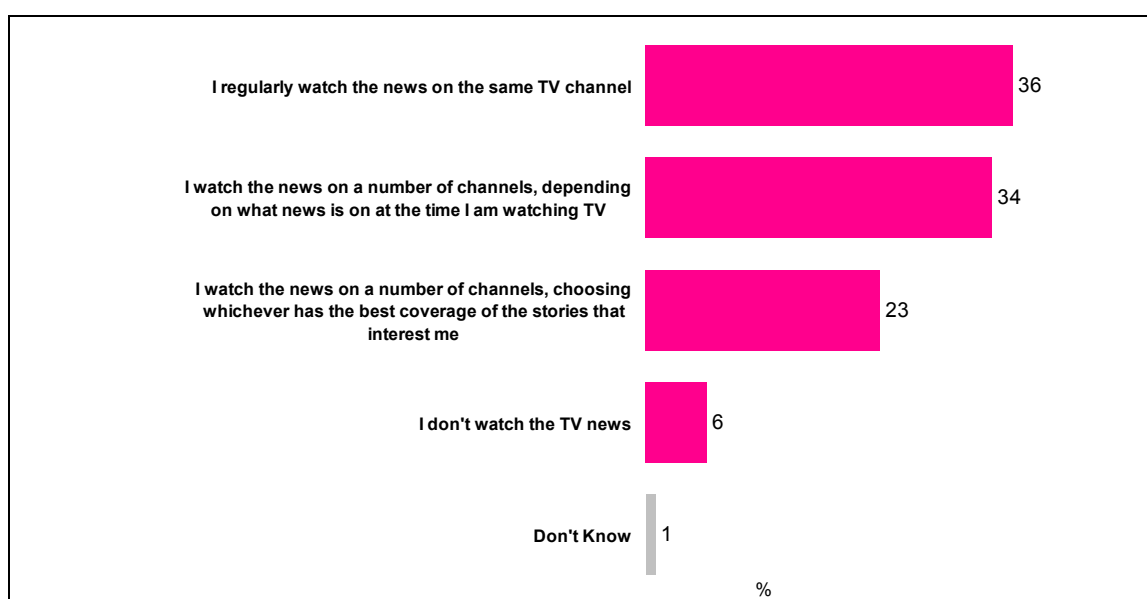
2.41 As regards region, those in the North East attached significantly less importance (66%) to choice of channel for news compared to all regions except Lothians (75%) and the South (72%), where levels of importance for choice of channel were also slightly lower than elsewhere.

Interest in a new Scottish news programme

2.42 The survey also sought to determine the level of interest in watching a new Scottish news programme. However, before seeking this information, respondents were first asked to indicate the way in which they currently watched the news via a vis usage of different channels. Respondents were presented with a list of options and asked to state which one best represented how they currently watch the news. The main findings are shown below.

Figure 2.12: How currently watch the news on TV

Base: All respondents (1,021)



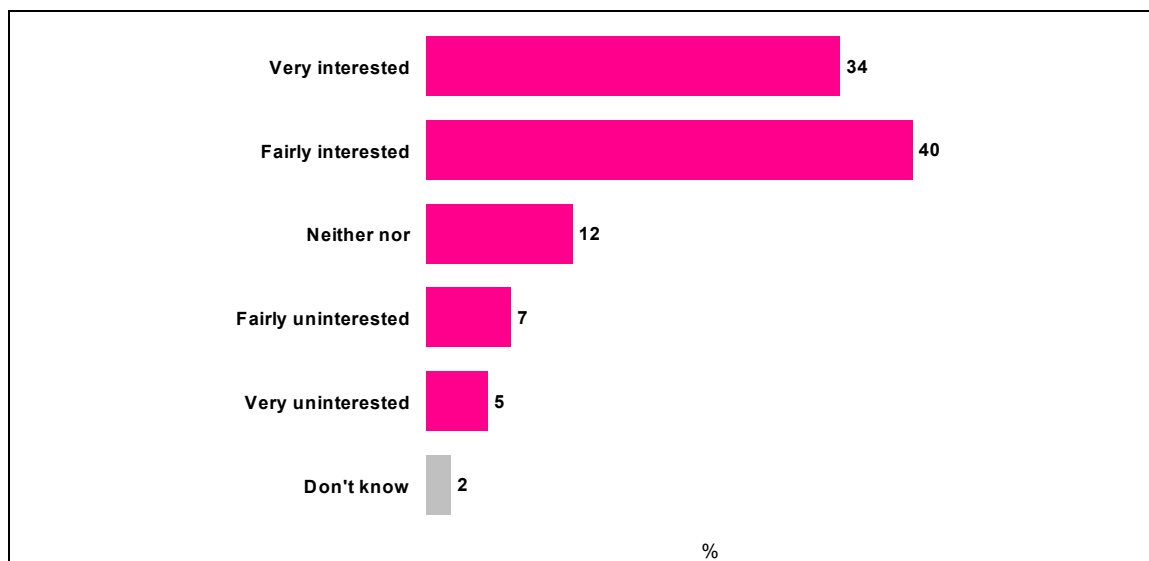
2.43 The key findings on this measure are, firstly, that the majority do watch the news (93% in total) and, secondly, that there was no one dominant behaviour with regard to channel usage when watching the news. Respondents were as likely to regularly watch the news on the same channel (36%) as to watch it on whichever channel was broadcasting the news at the time of watching (34%). Furthermore, a significant minority (23%) claimed to watch the news on several channels depending on which one was providing the best coverage of the stories that interested them.

2.44 Whilst only a small percentage of the total sample (6%) indicated that they did not watch the TV news, the figure for 16-24 years olds was much higher (11%); and significantly higher compared to those aged 55 plus (2%).

2.45 Those who claimed not to watch the news were excluded from the question relating to interest in a new Scottish news programme. The remaining majority were asked to respond using a five point rating scale, ranging from very interested to very uninterested. Importantly they were specifically asked to rate their interest in a new Scottish news programme to be shown on a different channel than the one they might usually watch. The results obtained are presented in Figure 2.13 overleaf.

Figure 2.13: Level of interest in new Scottish news programme on another channel

Base: All respondents who watch the news (963)



2.46 Interest in a new Scottish news programme on another channel was widespread and strong: around a third (34%) claimed to be very interested, and almost three quarters (74%) were interested in total. Conversely only a minority expressed (12%) little or no interest. Interest was widespread across all demographic sub groups, albeit slightly lower amongst males (70% versus 77% for females), and the youngest and oldest age groups (71% for each). ABs also appeared to be slightly less interested than those in other social classes.

2.47 Importantly, whilst the highest level of interest in a new Scottish news programme on another channel was recorded amongst those who choose the news according to the best coverage (83%) there was also widespread interest shown amongst those who regularly watch the news on the same channel (70%).

Preference for one news programme produced/presented in Scotland, or for two half hour programmes, one from London and the other from Scotland

2.48 The final question on Scottish news coverage required respondents to choose between two options for the showing of the main early evening news programmes in Scotland. The two options presented were as follows:

- Option 1. One programme running from 6-7pm that is produced and presented from Scotland which covers both the main news from Scotland as well as the main UK and international news edited to reflect a Scottish perspective.
- Option 2. Two programmes between 6 and 7pm, where one half hour programme is produced and presented for the whole of the UK (from London) and the other half hour programme is produced and presented in Scotland for Scotland.

2.49 Slightly over half the sample (53%) preferred Option 1, and 36% preferred Option 2. The former therefore represents the more popular choice, but the preference for the latter is substantial. Additionally 10% of respondents had no preference and 1% were not able to answer the question. Overall opinion therefore remained fairly divided on this issue.

2.50 There were no significant differences on this measure by age or gender, but analysis by SEG highlights a much stronger preference for Option 1 amongst DEs (58%) compared to ABs (45%). Moreover, amongst ABs there was virtually no difference in the percentage preferring Option 1 (45%) and Option 2 (43%). A complete lack of consensus on this issue was also apparent in 2 out of the 8 regions: in the North East and Lothians the level of preference was virtually the same for each option.

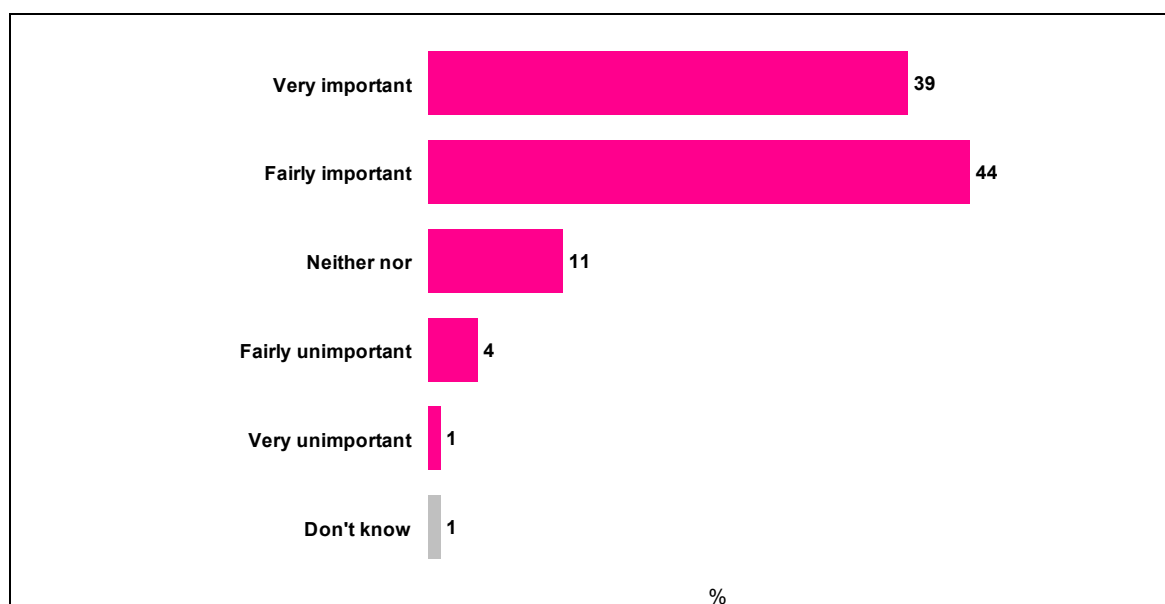
2.51 Not surprisingly perhaps, those who claimed to be dissatisfied with the way in which Scotland is reported in UK news programmes were more likely to prefer Option 1 (63%) than those who claimed to be satisfied (51%). Reflecting the perception that Scotland would achieve better coverage in a one hour news programme produced and presented from Scotland, a clear majority of the former thus favoured a change from the status quo, with only 33% preferring Option 2.

Interest in debate and discussion of topical Scottish issues (in addition to news reporting)

2.52 The Scottish Broadcasting Commission also required the survey research to obtain information on the public's interest in seeing topical Scottish issues being discussed and debated outwith news programmes. Respondents were therefore asked, "How important is it that television broadcasting in Scotland includes programmes in which topical Scottish issues are debated and discussed as well as reported?" The results obtained, based on a five point rating scale, are shown in Figure 2.14 below.

Figure 2.14: Overall importance that Scottish issues are debated and discussed

Base: All respondents (1,021)



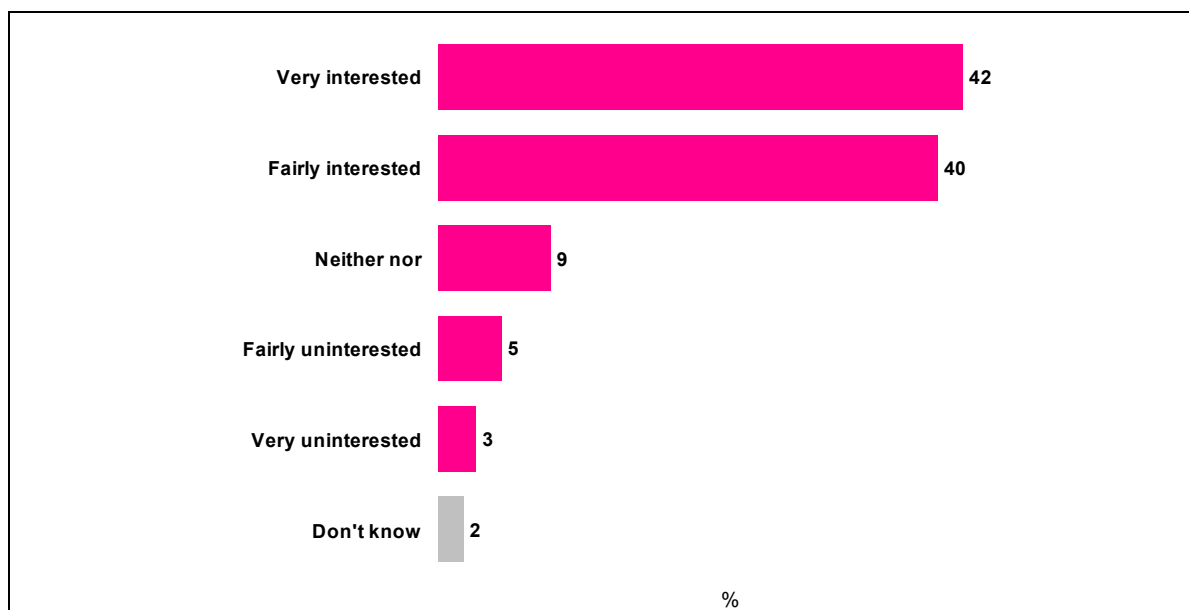
2.53 The figures demonstrate the importance of broadcasters providing debate and discussion on Scottish issues on television, in addition to news programmes. Of the total sample over 80% indicated that they regarded this as important and just under half of this group believed this strongly. Moreover, only 5% claimed that this was unimportant. There were no differences according to social grade or gender, but as age increased levels of importance also increased, from 72% amongst those aged 16-24 to 90% amongst those aged 65 years and over.

Interest in new Scottish television channel

2.54 Having obtained detailed views of the current portrayal of Scotland on television generally, and on news programmes specifically, the survey sought to assess the level of interest in a new Scottish television channel. In the first instance respondents were therefore asked, “If there was a new channel broadcast on television made for people living in Scotland, how interested would you be in watching it?” Respondents were given a five point rating scale from which to choose their response, ranging from very interested to very uninterested, and the results obtained were as follows:

Figure 2.15: Interest in new Scottish television channel

Base: All respondents (1,021)

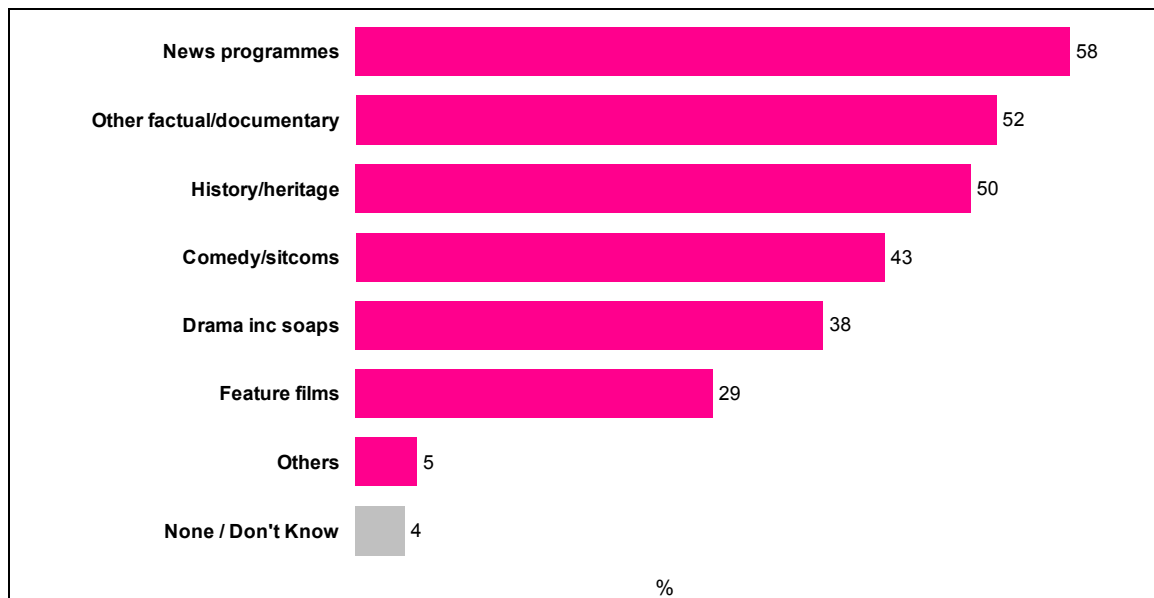


2.55 Given the views expressed previously in relation to the portrayal of Scotland in broadcasting generally, and in the news specifically, it is perhaps not surprising that there was widespread support for a new TV channel for people living in Scotland. Amongst the total sample just over 80% claimed to be interested in this, whereas only 8% indicated that they were not interested. Moreover around half of those in favour of the new channel expressed a strong interest in watching it. Given that there was a widespread consensus of opinion on this issue, there was little variation in evidence across the various demographic sub-groups. Also whilst we would expect to find high levels of interest generally in most ‘new’ media propositions, the strength of interest in the new channel confirms that there would be an appetite for this.

2.56 To help inform decision-making on the ‘make-up’ of the new channel, all respondents were also asked to indicate the types of programme that they would be most interested in seeing. Respondents were asked to select a maximum of three choices, and the results obtained were as follows:

Figure 2.16: Types of programmes interested in for a new Scottish channel

Base: All respondents (1,021)



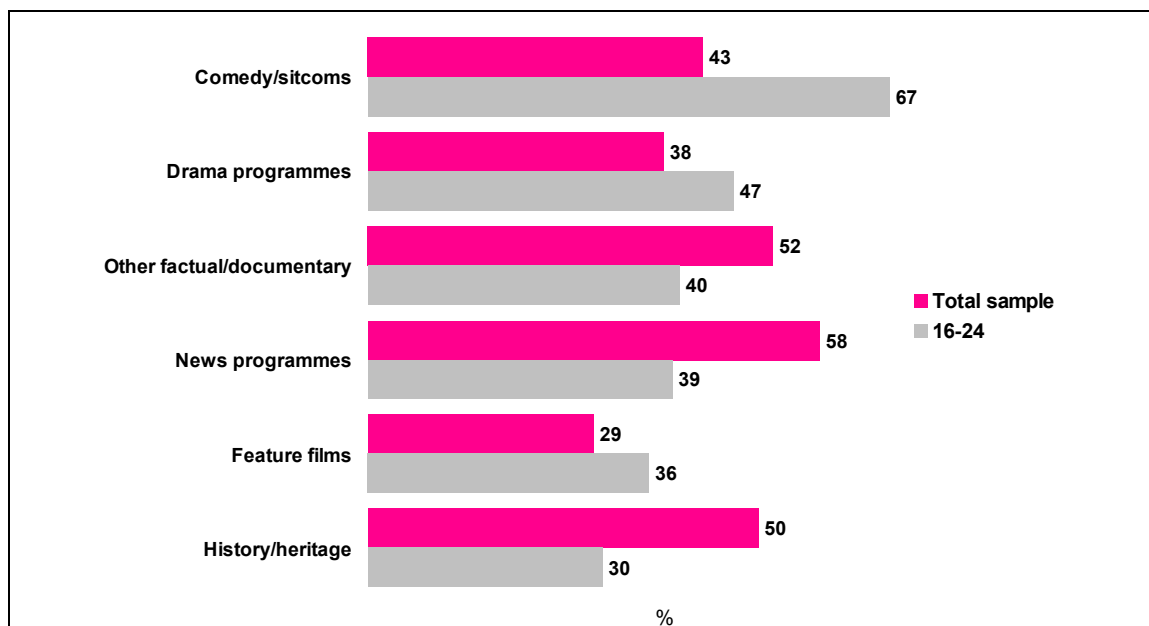
2.57 Overall the pattern of response indicates a clear preference for news and documentary type programming, including history/heritage programmes, in comparison to ‘lighter’ types of programming such as comedy and drama (including soaps). Feature films emerge as the least popular type of programme for the new Scottish channel.

2.58 Not surprisingly, those who had previously claimed that they were dissatisfied with Scottish news coverage in UK news, were much more likely to choose ‘news’ as choice of programme for the new channel (67%) compared to those who were satisfied with the current coverage (55%).

2.59 Finding the right mix of programmes to suit all tastes in Scotland is likely to be a difficult challenge for any new Scottish channel, as further analysis reveals major differences according to age and social grade. The results presented in the figure above largely reflect the views of an older audience; there is a very different pattern of preference amongst younger people and the 16-24 years olds in particular. To illustrate this point Figure 2.17 overleaf shows the results for this age group compared with those of the overall sample.

Figure 2.17: Types of programmes interested in for a new Scottish channel; total sample versus 16-24 year olds

Base: All respondents (1,021); all aged 16-24 years (107)



2.60 The two key points to note include, firstly, the widespread interest amongst 16-24 years olds in the new channel showing comedy/sitcom programmes (which two thirds claimed to be interested in) and, secondly, the preference also for drama programmes (including soaps) ahead of news or factual programming. However, these findings are consistent with the lower tendency to watch the news and the lower concern for news related issues, reported previously in this report. Interestingly the percentage figure expressing an interest in comedy/sitcoms varied hugely by age: whilst the highest level of preference was recorded amongst the 16-24 year olds (67%), those aged 25-44 (50%) were also much more likely to select this type of programme than those aged 45+ (33%), for whom ‘lighter’ programming appears to be a lower priority for a new Scottish channel.

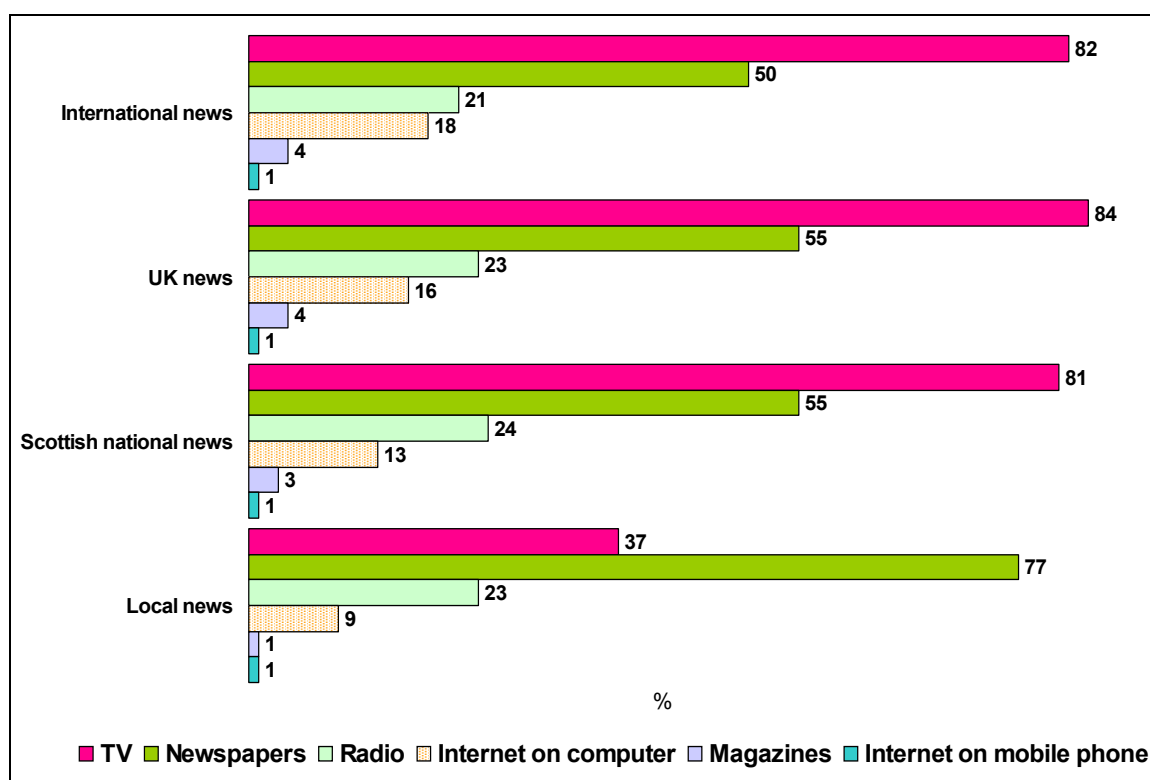
2.61 The pattern of response at the overall level also masks a considerable degree of variation according to social grade. Interest in news programmes, for example, decreased as social grade decreased, from 67% choosing this amongst ABs to 52% amongst DEs. This same pattern occurred with respect to history/heritage programmes (58% ABs compared to 43% DEs) and other factual/documentary programmes (62% ABs compared to 45% DEs). Conversely the opposite is true for drama (32% of ABs expressed an interest compared to 43% DEs) and feature films (19% ABs compared to 37% DEs). Likewise choice of comedy/sitcoms was strongly affected by social grade: 32% and 40% of ABs and C1s respectively selected this as a preference compared to 51% and 48% of C2s and DEs respectively.

Communication platforms used to obtain news

2.62 In addition to researching views and opinion of news coverage, the survey sought to obtain information on usage of different communication platforms to obtain news. In the first instance information was obtained in relation to sources used to find out information on different ‘levels’ of news, from international to local. For each ‘level’ respondents were shown a list of options and asked to indicate which ones they used regularly. Figure 2.18 below summarises these results.

Figure 2.18: Sources used to find out about different ‘levels’ of news

Base: All respondents (1,021)



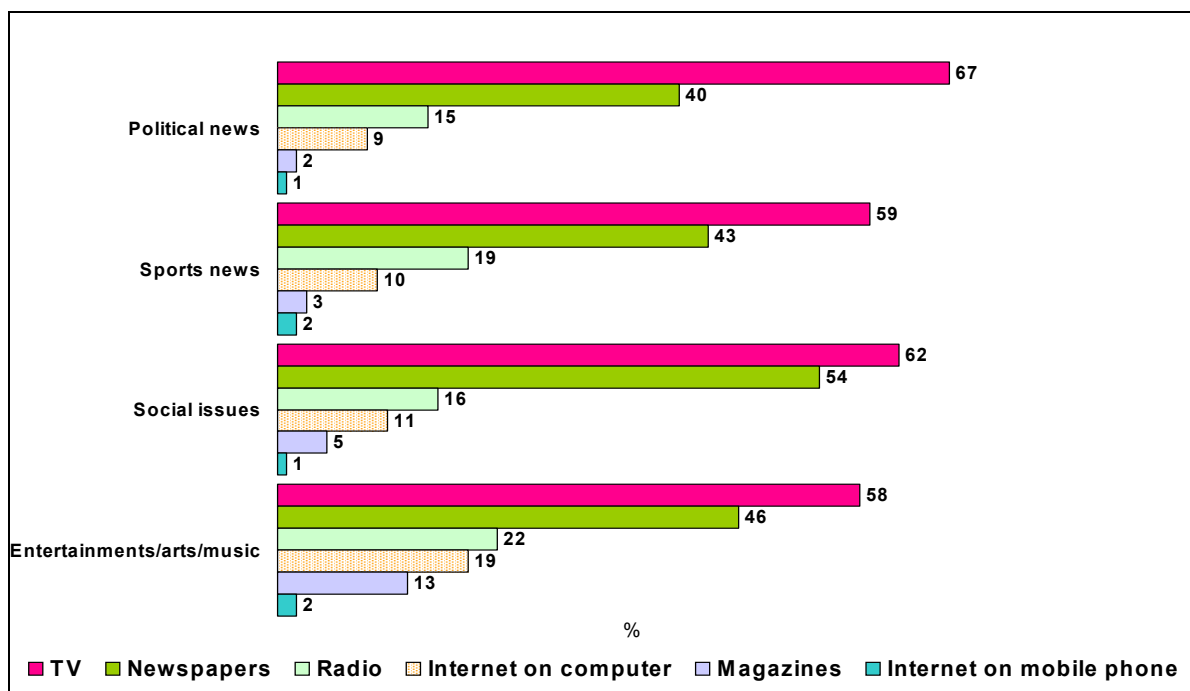
2.63 TV was the dominant source mentioned, by some considerable margin, for International, UK and Scottish national news. Newspapers were also widely mentioned across all ‘levels’ of news; however, for local news they were most likely to be named as a source used regularly. A significant minority, of around a quarter, claimed to regularly use the radio, and this figure was consistent across all news ‘levels’. The internet (on the computer) was only marginally less likely to be used as a source than the radio for International news, and usage reached a sizeable level too for UK and Scottish national news. It plays a less important role though for local news, as less than 10% claimed to use it regularly for this purpose. Magazines and internet on a mobile phone were both very rarely cited as regular sources of news, across all levels.

2.64 Significant differences emerged when these figures were analysed by demographic sub groups, and in particular those relating to usage of the internet (on the computer). For example, males were more likely than females to claim that they used the internet with respect to International and Scottish news and the 25-54 year age group emerged as the heaviest users, particularly in comparison to the 55-65 year old and 65+ age groups (amongst whom internet usage was only around 10% and 3% respectively for each news level). SEG is also influential, with ABs much more likely to cite usage of the internet for all types of news. Those in the highest social grades also emerged as heavier users of newspapers for International and UK news, but not for Scottish or local news. TV, whilst high across all groups, was cited much less often as a source of news amongst 16-24 year olds – across all news levels.

2.65 In addition to examining usage of different platforms for different levels of news, the survey also sought to establish usage of different platforms for different types of news. As before respondents were given a list of options and asked to indicate which ones they used regularly to obtain information on each of the different news types. Figure 2.19 below summarises the results for each.

Figure 2.19: Sources used to find out about different types of news

Base: All respondents (1,021)



2.66 Whilst the overall percentage opting for each source was lower than on the previous measure the pattern of response was very similar, with TV the dominant source and newspapers the key secondary source. Interestingly, usage of the different platforms was very similar for political and sports news, and, to a slightly lesser extent, social news, although newspapers were more widely mentioned in relation to social than any other type of news. However, claimed usage of different platforms for entertainment/arts/music was notably different: there were fewer mentions of TV and higher mentions, by comparison, of the internet and magazines. The increased significance of magazines for entertainment /arts/music arguably reflects the reduced need for up-to-date information, whereas political, sports and social ‘stories’ tend to change and develop on a frequent basis requiring daily

access to media broadcasting/publishing. However the internet is also clearly developing as a major provider of this type of information.

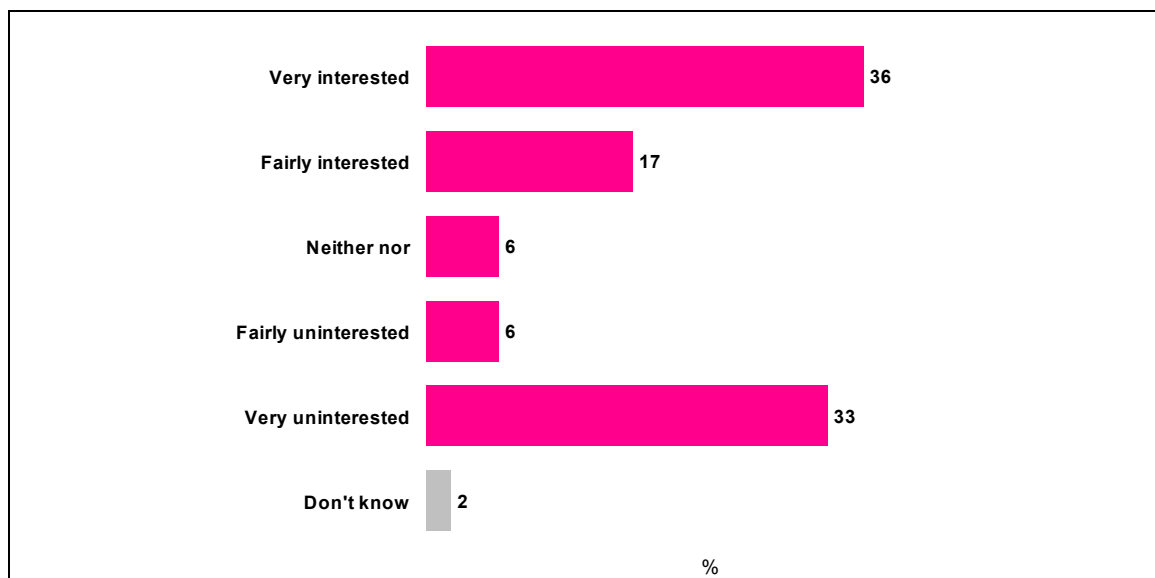
2.67 The aforementioned demographic differences in platform usage were also evident for the different types of news but they were less pronounced. Age, in particular, remains a key variable in relation to usage of the internet, with the youngest and oldest age groups much less likely to be using this platform for any type of news. Likewise, differences according to SEG were evident for using the internet to access news of all types, although most notably for political and social news. Also, the younger age groups, 16-24 year olds and 25-34 year olds were less likely to be users of TV in relation to obtaining political and social news. Finally, usage of platforms for political and sports news is also affected by gender, with males more likely than females to use any platform.

Opinion towards live football coverage on free terrestrial TV

2.68 Continuing with the sports theme, another specific objective of the research was to examine views of the general public in relation to showing free live coverage of Scottish international football matches on terrestrial television, as opposed to on pay TV channels. Firstly, all respondents were asked to indicate their level of interest in watching live coverage of Scottish national football (without reference to the platform). They were asked to respond using a five point rating scale, ranging from very interested to very uninterested and the following results were obtained.

Figure 2.20: Overall interest in watching live coverage of Scottish football

Base: All respondents (1,021)



2.69 The main finding here is clearly the very different views expressed across the sample as a whole, with similar proportions claiming to be strongly interested and strongly disinterested. However, overall the balance of opinion was slightly more positive than negative, as a higher proportion claimed to be fairly interested rather than fairly uninterested.

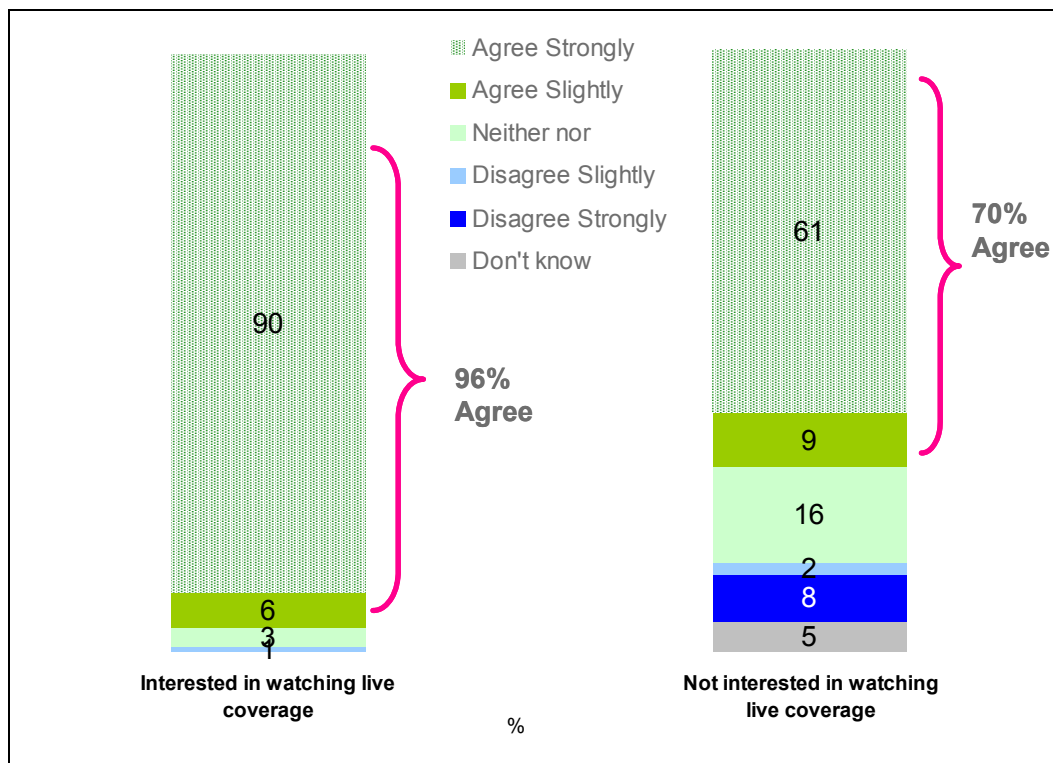
2.70 As expected views were significantly affected by gender: 71% of males claimed to be interested compared to 37% of females. Age differences on the other hand were far less pronounced. The most widespread interest was recorded amongst the 35-44 year old age group (60%), especially in comparison to those 65 years and above, who expressed the least interest (49%). No significant differences were recorded by SEG on this measure.

2.71 Having ascertained the level of interest in watching live Scotland football matches on TV generally, all respondents were asked to agree or disagree (using a five point rating scale) with the following statement: “Competitive matches played by Scotland’s national football team should be shown live on free terrestrial television rather than only on Pay TV channels.”

2.72 Figure 2.21 below shows the results separately for those who claimed to be interested in watching Scotland matches and those who were uninterested.

Figure 2.21: Agreement that Scottish national football matches should be shown free on terrestrial TV according to whether interested or uninterested in watching national Scottish football

Base: All respondents interested (529); all respondents uninterested (410)



2.73 Undoubtedly, and expectedly, the vast majority of those who have an interest in watching the national team generally were strongly in agreement with the statement. More importantly though amongst those who expressed a lack of interest in watching Scotland playing international football, a sizeable majority also agreed (70%) that national matches should be shown live on terrestrial TV. Furthermore, almost two thirds of this group (61%) held this opinion strongly.

CHAPTER THREE CONCLUSIONS

3.1 The way in which Scotland is portrayed by television broadcasting is of relevance to the majority of respondents, and it matters considerably to many of them. The evidence suggests that most attention should be paid to *including everyone living in Scotland*, reflecting Scotland's character and *informing/teaching about Scotland*, whereas, comparatively, *representing Scotland at a local level* is of least concern, although it is by no means unimportant. More importantly, perhaps, there is a significant gap between expectation and performance across all the dimensions researched, indicating that much improvement could be made in many areas when broadcasting for people in Scotland. In terms of prioritising actions though consideration should clearly be given to improving the educational and information providing role of broadcasting in relation to Scotland, because this is an element that has high relevance and yet performance is relatively weak at present.

3.2 The strength of feeling towards the role of broadcasting in portraying Scotland informatively underlies many of the other findings that have emerged; not least those that indicate an appetite for strengthening Scottish coverage in history/heritage and other factual programmes. The performance of all 5 main terrestrial channels in portraying Scotland is broadly similar, although ITV emerges as slightly better than the rest, and significantly better than Channel 5.

3.3 The findings in relation to the news are more complex. On the one hand the majority are content with the amount of Scottish coverage; there is no desire for more, and yet, on the other hand, there is widespread interest in a new Scottish news programme. However, given that satisfactions levels with how Scotland is reported in the UK news are less than 50%, the support shown for a new Scottish news programme is perhaps not surprising.

3.4 Currently reporting of Scotland in the UK news is considered weakest with regard to coverage of social, and entertainment/the arts/music news and best in terms of weather stories. Other improvements to the news that would be beneficial include, firstly, increasing the regularity with which items are identified as relating to Scotland: this matters to people and needs to be put into practice more consistently. Secondly, there is a strong and widespread demand for local Scottish news coverage across most parts of Scotland. In the Lothians this demand is less obvious, presumably as Edinburgh is the capital and home of the Parliament, and is therefore featured more regularly on the national Scottish news than other regions of Scotland.

3.5 On balance, local news should be reported at the level of 'region' though this will not satisfy everyone. For example, those living close to or in Glasgow/Edinburgh are more interested in local city news. Residents in the Highlands & Islands, and the South, on the other hand, are possibly conditioned to, or simply accepting of, the fact that their local news is generally at the wider 'area' level, reflecting low population densities even at a regional level.

3.6 The good support for a new Scottish news programme on a new channel reflects the fact that many TV viewers watch the news on different channels. Whilst a substantial proportion (around a third) do watch the news regularly on the same channel, over half select their news from different channels depending on time of day or the actual news coverage. Moreover many, even amongst those who are loyal, regard having a choice of channel to be important.

3.7 The research also indicates that the majority of the sample (just over 80%) expressed an interest in a new channel for people living in Scotland. Undoubtedly, recording positive reactions to new proposals is not uncommon in survey research therefore there is a need for some caution in interpreting this result. Fortunately, on this occasion we can utilise the data from other measures to check the validity of the result. Firstly, for example, there is an appetite for more Scottish coverage across several different types of programme, and secondly most are only moderately satisfied, or are dissatisfied, with the current portrayal of Scotland by television broadcasting. Also, we have noted that there is considerable room for improvement in the reporting of news in Scotland. Taking all these factors together, plus the fact that a substantial proportion (around four in ten) opted to indicate that they were very, not just fairly, interested in a new channel, suggests that there is a real interest in a new channel.

3.8 However whilst a new channel is of interest in principle, designing a mix of programmes to suit everyone is likely as always to be challenging. At the total level the findings suggest that there is a stronger preference for factual and news type programmes rather than comedy or drama. Unfortunately this pattern holds true only for a particular age range – an older one. Younger people, particularly the 16-24 age group, would prefer a lighter touch for the new channel, with the emphasis on comedy and drama, and less focus on the news. Certainly, 16-24 year olds are less likely to watch the news and they have consistently expressed less interest in news programmes. SEG also has a strong influence on programming choice therefore the preferred programmes amongst those in the highest social grade are very different from those in the lowest.

3.9 The issue of the ‘Scottish Six’ (where Scotland would have its own one hour long programme produced and presented from Scotland as opposed to the current arrangement where the news is split between a half hour of UK produced/presented news and a half hour of Scottish produced/presented news) remains somewhat divided in terms of public opinion. The research highlights that more adults (53%) would prefer one programme produced/presented in Scotland to the current structure, but that the size of the minority preferring the status quo is substantial, at just over a third (36%). The split is roughly 60/40 if one discounts those who have no preference - so while change would be welcomed by many, there would also be significant opposition – particularly amongst those in the higher social grades, who do tend to be the heaviest viewers of the news. In the digital age, perhaps this is one issue that can be resolved by making both options available and providing audiences with the choice.

3.10 The findings with regard to the broadcasting of live Scottish national football coverage on terrestrial rather than on pay TV were much less ambiguous. Whilst it perhaps seems obvious that adults with an interest in sport would choose to watch sport for free rather than have to watch it on pay-to-view channels, the interesting point to make is that amongst the sample many who claimed not to be interested in watching live national football on TV (39% of the total) were also largely, and strongly, supportive of these matches being shown free on terrestrial TV rather than on pay TV channels.

APPENDIX 1 QUESTIONNAIRE

SECTION B

VIEWS ON BROADCASTING

TNS FINAL version – 18 Feb 2008

JN:174936 SOS – Monthly Omnibus (February)

The next section of the questionnaire is about television.

SHOW SCREEN

Q1. How important is it to you that television programmes in Scotland... READ OUT a) to g).

(ROTATE ORDER OF STATEMENTS)

- a) represent the way people in Scotland live their lives today?
- b) reflect Scotland's character in terms of its history, customs, geography, wildlife, business, etc.?
- c) inform and teach you about Scotland?
- d) reflect Scotland's arts (e.g. festivals, cultural events, concerts, etc.)?
- e) include everybody living in Scotland no matter their race, religion, age, disability, etc.?
- f) do not stereotype Scotland, in terms of the characters, presenters, settings, etc, shown?
- g) represent your local area?

RESPONSES:

Very important

Fairly important

Neither important nor unimportant

Fairly unimportant

Very unimportant

(Don't know – DO NOT SHOWN ON SCREEN)

SHOW SCREEN

Q2. And how satisfied are you with the way television programmes in Scotland... READ OUT a) to g).

(ROTATE ORDER OF STATEMENTS)

- a) represent the way people in Scotland live their lives today?
- b) reflect Scotland's character in terms of its history, customs, geography, wildlife, business, etc.?
- c) inform and teach you about Scotland?
- d) reflect Scotland's arts (e.g. festivals, cultural events, concerts, etc.)?
- e) include everybody living in Scotland no matter their race, religion, age, disability, etc.?
- f) do not stereotype Scotland, in terms of the characters, presenters, settings, etc, shown on television?
- g) represent your local area?

RESPONSES

Very satisfied

Fairly satisfied

Neither satisfied nor dissatisfied

Fairly dissatisfied

Very dissatisfied

(Don't know – DO NOT SHOW ON SCREEN)

SHOW SCREEN

Q3. Thinking now about all of the issues just mentioned, generally how satisfied are you with the television programmes on...

READ OUT a) to e)

- a) BBC1
- b) BBC2
- c) ITV/Channel 3
- d) CHANNEL 4
- e) CHANNEL 5

RESPONSES

Very satisfied

Fairly satisfied

Neither satisfied nor dissatisfied

Fairly dissatisfied

Very dissatisfied

(Don't know – DO NOT SHOW ON SCREEN)

Q4. Do you feel that there is too much, too little or about the right amount of Scottish coverage, i.e. Scottish issues, characters, presenters, settings, etc., in each of the following types of programme.

READ OUT a) to e)

- a) News Programmes
- b) Drama Programmes including soaps
- c) Comedy programmes/sitcoms
- d) History/heritage programmes
- e) Other factual/documentary programmes
- f) Sports programmes
- g) Programmes on music, books, art or dance

RESPONSES

Too much,

Too little or

About the right amount

(Don't know – DO NOT SHOW ON SCREEN)

Thinking now about **news** programmes on television

SHOW SCREEN

Q5. Overall how satisfied are you with the way Scotland is reported in UK news programmes, that is news programmes shown throughout the UK?

RESPONSES

Very satisfied

Fairly satisfied

Neither satisfied nor dissatisfied

Fairly dissatisfied

Very dissatisfied

(Don't know – DO NOT SHOW ON SCREEN)

SHOW SCREEN

Q6. And how satisfied are you with the way Scottish stories are reported in different aspects of UK news programmes. Aspects such as READ OUT. . a) to d)?

INTERVIEWER IF ASKED: Weather news refers to news stories about weather rather than the actual weather forecast.

- a) Political news
- b) Sports news
- c) Social issues like health and education
- d) Entertainment, the arts and music
- e) Crime stories
- f) Weather news

RESPONSES;

Very satisfied

Fairly satisfied

Neither satisfied nor dissatisfied

Fairly dissatisfied

Very dissatisfied

(Don't know – DO NOT SHOW ON SCREEN)

SHOW SCREEN

Q7. How important is it that UK news programmes make it clear which items relate to Scotland and which do not?

RESPONSES:

Very important

Fairly important

Neither important nor unimportant

Fairly unimportant

Very unimportant

(Don't know – DO NOT SHOWN ON SCREEN)

READ OUT

Q8. When watching reports on the UK news programmes, how often do you find it clear whether or not they relate to Scotland?

RESPONSES

Always

Usually

Sometimes

Rarely

Never

(Don't know – DO NOT SHOWN ON SCREEN)

SHOW SCREEN

Q9. How interested are you in seeing local Scottish news on television, i.e. news from your local area rather than Scotland-wide issues and stories?

RESPONSES

Very interested

Fairly interested

Neither interested nor uninterested

Fairly uninterested

Very uninterested

(Don't know – DO NOT SHOW ON SCREEN)

IF VERY OR FAIRLY INTERESTED ASK Q10, OTHERS SKIP TO Q11
--

SHOW SCREEN

Q10. And how 'local' would you like this coverage to be?

Your city/town/village

Your region e.g. Lothian, Tayside, Grampian, Borders, Strathclyde

Your area of Scotland e.g. North, South, East or West of Scotland

Other (please specify)

(Don't know – DO NOT SHOW ON SCREEN)

ASK ALL

SHOW SCREEN

Q11. How important is it to you that you have a choice of television channels from which you can get your Scottish news?

RESPONSES:

Very important

Fairly important

Neither important nor unimportant

Fairly unimportant

Very unimportant

(Don't know – DO NOT SHOWN ON SCREEN)

SHOW SCREEN SINGLE CODE ONLY

Q12. Which of these statements best describes how you currently watch the news on television?

01. I regularly watch the news on the same television channel
02. I watch the news on a number of channels, depending on what news is on at that time I am watching television
03. I watch the news on a number of channels, choosing whichever has the best coverage of the stories that interest me
04. I don't watch television news
05. Other (please specify)
06. (Don't know – DO NOT SHOW ON SCREEN)

IF DO NOT WATCH TELEVISION NEWS (CODE 04 AT Q12) SKIP TO Q14
--

SHOW SCREEN

Q13. How interested would you be in watching a new Scottish News programme if it was available on a channel other than the usual channel on which you watch the news?

RESPONSES

Very interested

Fairly interested

Neither interested nor uninterested

Fairly uninterested

Very uninterested

(Don't know – DO NOT SHOW ON SCREEN)

ASK ALL SHOWSCREEN

Q14. Here are two options for the main early evening news programmes in Scotland. Which would you prefer?

ROTATE OPTIONS 1&2

1. One programme running from 6-7pm that is produced and presented from Scotland which covers both the main news from Scotland as well as the main UK and international news edited to reflect a Scottish perspective.
2. Two programmes between 6 and 7pm, where one ½ hour programme is produced and presented for the whole of the UK (from London) and the other ½ hour programme is produced and presented in Scotland for Scotland.
3. [Neither/no preference]
4. [Don't know]

SHOW SCREEN

**Q15. Which of these sources, if any, do you regularly use to find out about...
READ OUT a) to d)?**

- a) International News?
- b) UK News?
- c) Scottish national News?
- d) Local News about your area?

RESPONSES

Television
Newspapers
Internet on mobile phone
Internet on computer
Radio
Magazines

SHOW SCREEN

Q16. And which of these do you use to find out about different types of news such as..... READ OUT

- a) Political news
- b) Sports news
- c) Social issues
- d) Entertainment/arts/music

RESPONSES

Television
Newspapers
Internet on mobile phone
Internet on computer
Radio
Magazines

SHOW SCREEN

Q17. In addition to the news programmes, how important is it that television broadcasting in Scotland includes programmes in which topical Scottish issues are debated and discussed as well as reported?

RESPONSES:

Very important
Fairly important
Neither important nor unimportant
Fairly unimportant
Very unimportant
(Don't know – DO NOT SHOWN ON SCREEN)

Q18. If there was a new channel broadcast on television made for people living in Scotland how interested would you be in watching it?

INTERVIEWER: Note this is a 'new' channel not a 'news' channel – please read out as such

RESPONSES

Very interested
Fairly interested
Neither interested nor uninterested
Fairly uninterested
Very uninterested
(Don't know – DO NOT SHOW ON SCREEN)

SHOW SCREEN

Q19. Which three types of programmes would you be most interested in seeing on a new Scottish channel? Please select up to 3 from this list.

RESPONSES

News Programmes

Drama Programmes including soaps

Comedy programmes/sitcoms

History/heritage programmes

Other factual/documentary programmes

Feature films

Other (specify)

None/ not interested in any – DO NOT SHOW ON SCREEN

Don't know – DO NOT SHOW ON SCREEN

Q20. How interested are you in watching live coverage of football matches involving the Scottish national team?

RESPONSES

Very interested

Fairly interested

Neither interested nor uninterested

Fairly uninterested

Very uninterested

(Don't know – DO NOT SHOW ON SCREEN)

SHOW SCREEN

Q21. Finally, how much do you agree or disagree with this statement?

READ OUT.

Competitive matches played by Scotland's national football team should be shown live on free terrestrial television rather than only on Pay TV television channels?

RESPONSES

Agree strongly

Agree slightly

Neither agree nor disagree

Disagree slightly

Disagree strongly

Don't know – DO NOT SHOW ON SCREEN

APPENDIX 2 GLOSSARY OF TERMS

CAPI - Computer Assisted Personal Interviewing is conducted face-to-face, employing flat screen monitors similar to laptop computers. The questions appear on screen for the interviewer to ask the question and the appropriate response codes are keyed in directly according to the respondent's answers. Questions can also be filtered depending on answers to previous questions.

Coding - The process of allocating codes to open-ended responses given by respondents – by then grouping responses together, this facilitates the analysis of data.

Fieldwork - The collection of primary data from respondents by means of a survey.

Probing - Following up a respondent's answer or comment in order to find out more about it, for example, by asking: "Why is that?" or "In what way?".

Quota - The specification to which respondents for interviews are recruited. This involves specifying the number of interviews required within certain groups – e.g. the number of males and females, those who use the internet versus those who don't etc.

Sample - A part or subset of a population taken to be representative of the population as a whole for the investigative purposes of research.

Sample points – number of specific areas where the research took place – these are selected via our sampling unit to enable us to find respondents within the target audience.

SEG - Social Economic Group. The standard six social grades, commonly used in research, are based on the current or previous occupation of the chief income earner in the household. ABC1 includes professional, managerial and non-manual occupations, while C2DE includes manual and unskilled occupations and the long-term unemployed. Most market research uses the classification called "social grade", originally developed in the advertising industry. Social grade classifies everybody on the basis of the chief income earner in their household, into one of six categories, A, B C1, C2, D or E. There is a detailed manual classifying every possible occupation into one of these categories, but broadly the groups are divided as follows:

- A Higher managerial/administrative/professional
- B Intermediate managerial/administrative/professional
- C1 Supervisory, clerical, junior managerial/administrative/professional
- C2 Skilled manual workers
- D Semi-skilled and unskilled manual workers
- E On state benefit, unemployed, lowest grade workers

We usually group the ABC1s as they are professional/non-manual occupations and the C2DEs as they are manual/unskilled occupations. The social grade classification is important in reporting our survey results, but it is often also integral to the survey design - we check the social grade profiles of our samples to ensure that they are representative of the whole population, and often use it as a basis for quotas and weighting.

Weighting – Weighted data analyses adjust the raw survey data to represent the population from which the sample is drawn.

APPENDIX 3: LIST OF SAMPLING POINTS IN EACH REGION

CONSTITUENCY: Sampling Point	AREA	REGION
Aberdeen Central	North	North East
Aberdeen North	North	North East
Argyll & Bute	West	Highlands & Islands
Ayr	West	South
Banff & Buchan	North	North East
Caithness, Sutherland & Easter Ross	North	Highlands & Islands
Carrick, Cumnock & Doon valley	West	South
Clydebank & Milngavie	West	West
Clydesdale	West	South
Coatbridge & Chryston	West	Central
Cumbernauld & Kilsyth	West	Central
Cunninghame North	West	West
Dumfries	South	South
Dundee West	North	North East
Dunfermline East	East	Mid Scotland and Fife
Eastwood	West	West
Edinburgh East	East	Lothians
Edinburgh North & Leith	East	Lothians
Edinburgh Pentlands	East	Lothians
Edinburgh South	East	Lothians
Falkirk East	East	Central
Fife Central	East	Mid Scotland and Fife
Fife North East	East	Mid Scotland and Fife
Glasgow Baillieston	West	Glasgow
Glasgow Cathcart	West	Glasgow
Glasgow Govan	West	Glasgow
Glasgow Pollok	West	Glasgow
Glasgow Rutherglen	West	Glasgow
Glasgow Shettleston	West	Glasgow
Gordon	North	North East
Hamilton South	West	Central
Kirkcaldy	East	Mid Scotland and Fife
Linlithgow	East	Lothians
Moray	North	Highlands & Islands
Motherwell & Wishaw	West	Central
Orkney	North	Highlands & Islands
Paisley South	West	West
Perth	North	Mid Scotland and Fife
Ross, Skye & Inverness West	North	Highlands & Islands
Roxburgh & Berwickshire	South	South
Stirling	East	Mid Scotland and Fife
Strathkelvin & Bearsden	West	West
Tweeddale, Ettrick & Lauderdale	South	South

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