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Snapshot: regional and local television in the United Kingdom

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About the brief

This brief was prepared by the European Audiovisual Observatory for the European Commission, DG COMM and DG REGIO in September 2014. The analysis provided in this report is under the editorial responsibility of the European Audiovisual Observatory and does not imply editorial liability of the European Commission. An update was carried out in relation to local television in March 2015.

The original report contained audience data purchased from EurodataTV Worldwide and their relevant partners. These data have been removed for copyright reasons.

Additional data was sourced from the public reports of the regulator Ofcom, and reproduced with their permission, according to Ofcom Intellectual Property Rights Guidelines.

Please note that the report here was based on a requested brief and completed in a very short time. It could hence not cover all aspects of regional television in the UK. Any errors are the responsibility of the author. The decision to publish this brief was based on recurring requests from the network of the European Audiovisual Observatory for information on regional television.

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Summary

Regions and Nations in the UK and the regional services

- The UK regional television system combines the regions which coincide with the devolved nations of Northern Ireland, Scotland and Wales, and the government administrative regions in England. There are two major networks: BBC 1 and ITV/STV/UTV that serve these regions.
- BBC1 is a networked channel throughout the regions and currently has 15 regional windows in England plus BBC Wales, BBC Scotland and BBC Northern Ireland.
- In the case of the BBC English regional channels, the main distinction between these are the news programmes that are broadcast twice per day, and usually a weekly current affairs programme. (These regional studios also produce radio but that is not examined here).
- The second major network is the ITV/channel 3 licences. Of these 15 regional licences, all but three belong to ITV Plc after many years of consolidation. STV (Scottish Television) has licences for two Scottish regions) and UTV (Ulster Television) has the licence for Northern Ireland.

Audiences for the main regional networks vary widely across the UK

- The national regulator, Ofcom, provides audience data (2013) for the main channels by region (including ITV channels and BBC1). The national figure of 21% for BBC1 is surpassed (for the BBC1 regional version) in several regions: Meridian (25%), the Southwest (26%) and the West (25%). In contrast, the channel's share is weaker in London (19%) and in Northern Ireland (17%), and parts of the North East and North West.
- For the ITV audiences, there are higher levels of viewership (than the UK average of 15.3% for ITV1) in the Border region (North of England, South of Scotland, with 20%), in the North East (19%) and North West regions (19%), and in Northern Ireland with 18%.
- In fact the channel three in Northern Ireland - UTV - is more popular than BBC Northern Ireland (with 18% share compared with 17% for BBC1). This is the only region where this is the case.

Regional News has a high level of significance

- The Ofcom¹ provides data for the regional viewing of regional news. In general the lowest shares for regional news broadcasts (on both BBC and ITV channels) are in London, the North East, the North West and the Midlands, although these figures are close to a UK average.
- There are significant audiences for the BBC regional news in in the South West and the West, the East of England, Meridian and Yorkshire – in both cases shares of 40% and above as compared to the UK average of 29%. The audiences in Scotland and Wales are also above the UK average.
- The ITV regional news broadcasts have lowest audience scores in London and in the West and South West. Audiences for the ITV regional news broadcasts surpass those of the BBC regional news broadcasts in the Border region (north of England, south of Scotland) and in Northern Ireland. In Northern Ireland the viewership for regional news (on UTV) is almost twice the national average (for ITV news). The shares in Scotland (STV) are also significantly higher than the UK average.
- Additional audience data acquired from EurodataTV provided information about regional audiences for national TV news broadcasts on BBC1 and ITV1. The data (which cannot be provided in detail in this report) show that the audience shares (region by region) are higher for regional news than those for national news broadcasts in most regions.

¹ For example : Ofcom (2014) Communications Market Report 2014: Scotland:
http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr14/2014_CMV_Scotland.pdf

Minority language channels that are aligned with regions

- The brief also contains information on two television channels that are not part of these networks. BBC Alba (although part of the BBC) and S4C are distinctive in being specific language services. BBC Alba broadcasts in Scottish Gaelic and S4C in Welsh. Hence they can be considered also as part of the regional landscape as the majority of their viewers come from specific regions (namely Scotland and Wales). Both of these channels have a great deal of original programming. BBC Alba co-operates with BBC Scotland and shares programming, while BBC Wales also co-operates with S4C.

The new local DTT channels

- Regarding the new local DTT channels that have recently been licensed, by March 2015 sixteen had been launched. The licences for these channels include programming requirements. Specifically, they are expected to “engage with the local democratic process” and propose programming that should “facilitate civic understanding and fair and well-informed debate through coverage of local news and current affairs”.

Programming and programmes covering European issues

- The brief looked at the types of programmes produced by the regional channels and windows. BBC Scotland, BBC Wales and BBC Northern Ireland appear to have more locally produced programmes than the windows in the BBC (English) regions.
- Regarding the ITV network, the networking and sharing of programming is more complex to assess as previously these regional licences were all independent companies and all contributed a range of programming to the network. From the obligations outlined in the licences with the regulator Ofcom (see section 2.4), there is clearly a minimum number of local hours of news and other local programmes required.
- The minority language channels are more autonomous and tend to have a wide range of distinctive programming. It is also true that BBC Alba co-operates quite extensively with BBC Scotland, and that S4C has agreements and co-operation with BBC Wales, and ITV in Wales.
- The brief makes reference to previous research (carried out by the European Audiovisual Observatory) regarding specific programmes about Europe. Here, one additional programme was identified that focused on Europe and is broadcast on BBC2 Scotland and also on the Gaelic language service BBC Alba. *Eòrpa* (Scottish Gaelic for *Europe*) has been running since 1993, and has covered political and social issues affecting Europe and Europeans, including European issues affecting the Scottish Western Isles.

Funding and financing

- Regional public service media in the UK is financed via the TV licence fee (for BBC services, S4C). S4C was formerly funded partly by advertising revenue, and via a direct grant from the government. Since 2013, the government grant has been replaced by an agreement with the BBC Trust who allocates a portion of the TV licence fee to S4C.
- The ITV network is funded by advertising revenue. The ITV licensees are what are known as “commercial public broadcasters”. They have revenue models which are commercial based, but retain some public service obligations (see for example the obligations under 2.4). Regional windows of the network also have regional advertising inserts.
- The overview of the new local channels licensed on DTT show that they are varied with regard to funding and sources. Some are linked to important media groups such as the Scottish Television Group, or publishing group Archant. Others launched with the help of crowd-funding, for example Sheffield Live! It is too early to judge whether these channels will survive, in particular given their different strengths in terms of backers. As one media commentator has noted: *The landscape is mixed: some of them will work and some won't.*
- The BBC contributes to the financing of the start-up of the local DTT channels. As agreed in the 2010 licence fee settlement, the BBC has committed to provide up to £40m for the purposes of supporting the Government’s objectives for local TV. This is comprised of up to £25m in 2013/2014 towards capital costs and up to £5m per year for three years to acquire content from the local TV services for use on the BBC’s own services.

1 Introduction

The purpose of this brief was to provide an overview of the television landscape at the regional level in the UK. This included, as far as data was available, information on: the most popular channels; viewing figures for regional versus national news; news and current affairs programming; and programming that looks at European issues.

1.1 Nations and regions in the United Kingdom

The United Kingdom comprises four countries, or “nations”: England, Scotland, Wales and Northern Ireland. The histories of these countries within the UK, and the various historical conflicts between these nations vary widely.

For example, Scotland has been part of the United Kingdom since the Act of Union in 1707. There have been various attempts since to gain independence, although the Scottish people are quite divided on this issue. The Scotland Act (1998) introduced devolution in Scotland. The referendum on September 18th 2014² offered a vote on full independence from the UK.

Following the election of the Labour government in 1997, plans moved ahead to introduce devolution (the devolving of powers) to Scotland and Wales and the establishment of Parliaments in each.

The Scotland Act 1998 created the Scottish Parliament, setting out how Members of the Scottish Parliament were to be elected, the internal operation of the Parliament, and setting out the process for the Parliament to consider and pass Bills, which become Acts of the Scottish Parliament once they receive Royal Assent. The Act specifically asserts the continued power of the UK Parliament to legislate in respect of Scotland. The Act devolves all powers except over matter it specifies as reserved matters

Devolved areas include: agriculture, forestry and fisheries; education and training; environment; health and social services; housing; law and order (including the licensing of air weapons); local government; sport and the arts; tourism and economic development; many aspects of transport. The issues that remain as competences of the UK government in Westminster include: benefits and social security; immigration; defence; foreign policy; employment; broadcasting; trade and industry; nuclear energy, oil, coal, gas and electricity; consumer rights; data protection; the Constitution. It should be noted that before devolution, Scotland has always had education and legal systems that were separate and distinct from the rest of the UK.

In the case of Wales (conquered by the Edwardians in the 13th century), a 1536 Act of Union united the country with England. Following devolution in 1998, the competences devolved to the Welsh parliament include: agriculture, fisheries, forestry and rural development, ancient monuments and historic buildings, culture, economic development, education and training, environment, fire and rescue services and promotion of fire safety, food, health and health services, highways and transport, housing, local government, public administration, social welfare, sport and recreation, tourism, town and country planning, water and flood defence, and the Welsh language.

With regard to Northern Ireland, which perhaps has the most painful and complex history of the nations, the current Assembly was established after the Belfast/ Good Friday Agreement (1998).

This history is reflected in the various attempts at devolved governance throughout the years of the “troubles”. A Parliament of Northern Ireland existed from 1921 to 1972. A new parliament established in 1973 was abolished in 1974. A Northern Ireland Assembly established in 1982 was dissolved in 1986.

The current Northern Ireland Assembly was first elected in 1998. It has been suspended four times (2000, twice in 2001, and from 2002 to 2007), indicating the on-going enmity between the two main parties. Eventually following the Northern Ireland (St Andrews Agreement) Act 2006 and an election in 2007, these two par-

² In the referendum, the people of Scotland voted 55.3% against independence and 44.7% for independence.

ties, the Democratic Unionist Party (DUP) and Sinn Féin, agreed to enter a power-sharing government.

The UK parliament still legislates for Northern Ireland in UK-wide or international matters, such as defence, foreign affairs or raising taxes (known as excepted and reserved matters).³ While there is no list of devolved issues available on the website of the Northern Ireland government, the ministers cover the following issues: Agriculture and Rural Development, Culture, Arts & Leisure, Education, Employment and Learning, Enterprise, Trade and Investment, Environment, Finance, Health, Social Services & Public Safety, Justice, Regional Development, and Social Development.

While the new political systems of the UK since the devolution of powers to the nations may be considered to have an impact on the media landscapes, it is in fact the case that Scotland, Wales and Northern Ireland, have always had distinct media spaces, in particular with regard to the press. In the case of Northern Ireland, the role of channels from the Republic of Ireland in the market is also significant (see under chapter 3).

Scottish media are described as being not regional but “national” in the eyes of the Scottish people as they are *'located in Scotland, within a UK framework of ownership, control, finance and regulation. The semi-autonomous status of the Scottish media thus parallels that of other features of Scottish political and economic life'*.⁴ Scottish media *“have their own distinctive characteristics and can be said to contribute, particularly in the case of the press, to Scotland's self-perception as a nation”*.⁵

The audiovisual media is regulated at the UK level by the Ofcom (Office of Communications), which has four advisory committees, one each for England, Northern Ireland, Scotland and Wales.

The regional television landscape also includes those “regions within the nations”. There are nine government administrative regions in England: North East, North West, Yorkshire and the Humber, East Midlands, West Midlands, East of England, London, South East, South West. These can be seen more clearly in the description of the UK regional television landscape (see 2.1 below), in particular with regard to the BBC channels and windows, and the Channel 3 licensees (ITV network).

Administrative regions within Northern Ireland, Scotland and Wales are not reflected in the regional television landscape in the UK.⁶

³ Website of the Northern Ireland Assembly :

http://education.niassembly.gov.uk/post_16/the_work_of_the_assembly/making_legislation/power

⁴ Schlesinger, Philip (1998): *Scotland's Parliament: Devolution, the Media and Political Culture*. ARENA Working Papers WP 98/3. http://www.sv.uio.no/arena/english/research/publications/arena-publications/workingpapers/working-papers1998/wp98_3.htm#noye13+14

⁵ Peter Meech and Richard Kilborn, *'Media and Identity in a Stateless Nation: the Case of Scotland'*, *Media, Culture and Society*, 1993, pp. 245-259, quotations from p.258.

⁶ However, in the case of Scotland there are three Channel 3 licences that cover Scotland: STV North and STV South, and also the ITV Border channel (see table 2).

2 Overview of the UK television landscape

In the United Kingdom there is a very high reach of multichannel television, which is available in 98% of homes. Despite this, the public service channel BBC1 still had a daily audience share in 2013 of 21%, a figure that has remained stable over the last five years. The second most important channel is ITV1. These are followed by BBC2, Channel 4 and Channel 5 in terms of audience share.⁷ BBC1 and ITV1 are the channels that provide regional versions throughout the UK. The BBC services are funded by the television licence fee.

In 2011, ITV PLC took over Channel Television, and aside from the channels STV and UTV, the ITV PLC now holds all the Channel 3 licences (see more detail under section 2.2 below). The channel 3 licensees are funded mainly via advertising and other commercial revenues.

In 2011, the Government announced its intention to launch a total of 28 local metropolitan channels on the DTT network. By March 2015, 16 local channels had been launched (see more under section 2.4 below). Previously, there had been practically no tradition of local television in the UK with very few examples of local channels. One example was the regional channel for the Manchester area, Channel M which closed down in April 2012.

A range of research and parliamentary and government proposals have examined the nature of the viability of local media and the provision of local news, information and programming. Ofcom (2009)⁸ provided an in-depth report on the state of local and regional media and the challenges it faced.

The Ofcom report and other analyses were addressed in a Parliamentary report in 2009/2010.⁹ These publications offer a deeper insight into the development of UK local media including publishing and radio. Ultimately, the Department for Culture, Media and Sport developed a framework in 2011¹⁰ for the development of local television.

2.1 BBC remit: regional and local news and services

In the United Kingdom, the main legislation for the media sector is the **Communications Act of 2003**.¹¹ This act established the converged regulator Ofcom which has a duty to 'maintain and strengthen' public service broadcasting under the Communications Act and it does so by carrying out a review of public service media every 5 years or so focusing on various themes such as financing, digitisation, programming, production.¹² The Act also set out the "public service remit" of the broadcasters (section 264). Ofcom is to report on the extent to which the overall remit is met. The remit covers a range of issues, outlined under section 264, paragraph 6 relevant to regional and local services and programming:

A manner of fulfilling the purposes of public service television broadcasting in the United Kingdom is compatible with this subsection if it ensures—

*(a) that the relevant television services (taken together) comprise a public service for the **dissemination of information and for the provision of education and entertainment;***

*(b) that cultural activity in the United Kingdom, **and its diversity**, are reflected, supported and stimulated*

⁷ Audience data source: *Yearbook of the European Audiovisual Observatory* from EurodataTV Worldwide / BARB / TNS UK

⁸ Ofcom (2009): **Local and regional media in the UK**. <http://stakeholders.ofcom.org.uk/binaries/research/tv-research/lrmuk.pdf>

⁹ House of Commons Culture, Media and Sport Committee: **Future for local and regional media Volume I** Fourth Report of Session 2009–10. <http://www.publications.parliament.uk/pa/cm200910/cmselect/cmcomeds/43/43i.pdf>

¹⁰ UK Government, Department for Culture, Media and Sport (2011): A new framework for local TV in the UK July 2011. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/72920/Local-TV-Framework_July2011.pdf

¹¹ Communications Act 2003 : Available here: <http://www.legislation.gov.uk/ukpga/2003/21/contents>

¹² Ofcom Public Service Reviews: <http://stakeholders.ofcom.org.uk/broadcasting/reviews-investigations/public-service-broadcasting/>

by the representation in those services (taken together) of drama, comedy and music, by the inclusion of feature films in those services and by the treatment of other visual and performing arts;

(c) that those services (taken together) provide, to the extent that is appropriate for facilitating **civic understanding and fair and well-informed debate on news and current affairs, a comprehensive and authoritative coverage of news and current affairs in, and in the different parts of, the United Kingdom and from around the world;**

(i) that those services (taken together) include what appears to Ofcom to be a sufficient quantity of programmes that **reflect the lives and concerns of different communities and cultural interests and traditions within the United Kingdom, and locally in different parts of the United Kingdom;**

(j) that those services (taken together), so far as they include programmes made in the United Kingdom, include what appears to Ofcom to be an **appropriate range and proportion of programmes made outside the M25 area.....**”

The BBC works under an agreement with the Government in the **Royal Charter and Agreement**¹³. The current Royal Charter was granted to the BBC on 19 September 2006. It sets out **the public purposes** of the BBC, guarantees its independence, and outlines the duties of the Trust and the Executive Board. The public purposes of the BBC most relevant for the provision of news and information, and for the regional and local services are: “sustaining civil society” (a), “representing the UK, its nations, regions and communities” (d); and “bringing the UK to the world and the world to the UK” (e).

2.2 The BBC and the UK regions

BBC 1 is the main generalist channel of the public broadcaster and still the channel with the highest daily audience share in the UK. BBC1 is a networked channel and has various regional windows. The BBC 1 channel in Scotland, Northern Ireland and Wales have programming opt-outs and their own continuity announcements. These three regional versions are more distinctive as they have a larger range of regional programming than the English regional windows. In addition, there are also regional versions for BBC2 (BBC2 Scotland, BBC2 Northern Ireland and BBC2 Wales) and HD versions of the channels.

In England each region has its own individual regional news and current affairs programme opt-out as well as a limited amount of continuity. Some of the programming produced at the regional level is also re-distributed throughout the network. Figure 1 below helps to illustrate this in a geographical sense (and indicates the regional news programmes).

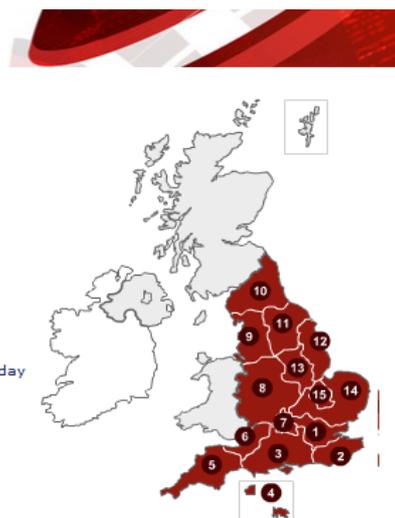
Figure 1 Regional map of BBC channels and windows in England (Source: BBC website)

REGIONAL TELEVISION

Select your English BBC Regional TV Station

For the latest news stories presenter profiles and more...

LONDON	WEST	YORKSHIRE
1. BBC London	6. BBC Points West	11. BBC Look North
SOUTH EAST	OXFORD	EAST YORKS & LINCS
2. BBC South East Today	7. BBC Oxford News	12. BBC Look North
SOUTH	WEST MIDLANDS	EAST MIDLANDS
3. BBC South Today	8. BBC Midlands Today	13. BBC East Midlands Today
CHANNEL ISLANDS	NORTH WEST	EAST
4. BBC Channel Islands	9. BBC North West Tonight	14. Look East - East
SOUTH WEST	NORTH EAST & CUMBRIA	CAMBRIDGE
5. BBC Spotlight	10. BBC Look North	15. Look East - West



Source: BBC Website

¹³ BBC Royal Charter: http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/about/how_we_govern/charter.pdf

In England, the BBC has eleven separate regional TV, Radio and Online services: BBC North-West (Manchester), BBC North (Leeds), BBC North-East and Cumbria (Newcastle) BBC West Midlands (Birmingham), BBC East Midlands (Nottingham), BBC East (Norwich), BBC South (Southampton), BBC West (Bristol), BBC South-West (Plymouth), BBC London (Elstree), BBC South-East (Tunbridge Wells). Information on contact details for the BBC regional channels is available on the website of the CIRCOM (European Association of Regional Television).¹⁴

Table 1 outlines the BBC network, the nations and regions, and the main programming from the regional variations. This table also includes BBC Alba, a specific service in Scottish Gaelic.

Table 1 The regional channels and windows of the BBC (Public Service Broadcasting)

Channel	Broadcaster	Programmes	Info on regions
NATIONS			
BBC1 Northern Ireland (and HD version)	BBC	<i>BBC Newsline</i>	Population of 1.8 million
BBC2 Northern Ireland (and HD version)		<i>Spotlight, (current affairs)</i> <i>Hearts and Minds (current affairs)</i> <i>Stormont Today</i> <i>Let's Talk; (current affairs)</i> <i>Féilte is fleadh (music)</i> <i>Give My Head Peace, (comedy)</i> <i>and others</i>	
BBC1 Scotland (and HD version)	BBC	<i>Reporting Scotland</i>	Population of 5.3 million
BBC2 Scotland (and HD version)		<i>River City</i> <i>Sportscene</i> <i>BBC Scotland Investigates</i> <i>Sunday Politics Scotland</i> <i>A gu U: na Thadhail Thu</i>	
BBC ALBA	BBC/ MG Alba	Almost all of the programmes are original and made in Scotland.	Launched in 2008, the first multigenre channel to come entirely from Scotland, BBC Alba is a joint venture between the BBC and MG Alba and broadcasts in Scottish Gaelic
BBC1 Wales/ Cymru (and HD version)	BBC	<i>BBC Wales Today</i>	Population of 3 million
BBC2 Wales (and HD version)		<i>Newyddion</i> <i>Pawb a'i Farn</i> <i>Pobol y Cym (drama)</i> <i>Pawb a'i Farn</i>	
REGIONS			
BBC1 East BBC Cambridgeshire	BBC	<i>Look East (east and west)</i> News and Weather	Region serving Norfolk, Suffolk, Essex, Cambridgeshire, Northamptonshire, Bedfordshire, Hertfordshire and northern Buckinghamshire.
BBC1 East Midlands	BBC	<i>East Midlands Today</i> News and Weather	Region covering Derbyshire (except High Peak, North East Derbyshire and the northern areas of the Derbyshire Dales), Leicestershire, Nottinghamshire (except Bassetlaw), Rutland and South Kesteven in Lincolnshire.
BBC1 West Midlands	BBC	<i>Midlands Today –</i> News and Weather	Producing local television, radio, web and teletext content for Herefordshire, Shropshire, Staffordshire, Warwickshire, the West Midlands, and Worcestershire.
BBC1 East Yorkshire and Lincolnshire	BBC	<i>Look North - News and Weather</i>	Region covers East Yorkshire, Lincolnshire and north west Norfolk.

¹⁴ Information on contact details from CIRCOM: <http://www.circom-regional.eu/member-stations/48-member-stations-united-kingdom>

Channel	Broadcaster	Programmes	Info on regions
BBC1 Yorkshire	BBC	<i>Look North</i> (Yorkshire) News and Weather	Leeds, South Yorkshire West Yorkshire North Yorkshire (parts) North Midlands (excluding Lincs.)
BBC1 London	BBC	<i>BBC London News</i>	Producing local radio, television, teletext and online services in London and parts of the surrounding area.
BBC1 North East and Cumbria	BBC	<i>Look North</i> (North East and Cumbria) News and Weather	Region covering County Durham, Northumberland, Teesside, Tyne and Wear, northern Cumbria and parts of North Yorkshire.
BBC1 North West	BBC	<i>North West Today</i> <i>North West Tonight</i> news	Region serving Cheshire, Greater Manchester, Lancashire, Merseyside, North Yorkshire (western Craven), West Yorkshire (Walsden), Derbyshire (western High Peak), Cumbria (Barrow-in-Furness and South Lakeland) and the Isle of Man.
BBC1 South BBC Oxford	BBC	<i>South Today</i> News and weather	Region serving Hampshire, Isle of Wight, the majority of West Sussex, Brighton and Hove, eastern Dorset, eastern Gloucestershire, southern and eastern Oxfordshire, southern Northamptonshire, western Berkshire and parts of Buckinghamshire, Surrey and Wiltshire.
BBC1 South East	BBC	<i>South East Today</i> News and weather	Region serving Kent, East Sussex (including Brighton and Hove), parts of West Sussex and parts of Surrey.
BBC1 South West BBC1 South West (Channel Islands)	BBC	<i>Spotlight</i> - News and weather <i>BBC Channel Island News</i>	Region serving Cornwall, Devon, Isles of Scilly, southern and western Somerset, western Dorset and Channel Islands.
BBC1 West	BBC	<i>BBC Points West</i>	Region serving Bristol, the majority of Wiltshire, northern and eastern Somerset, the majority of Gloucestershire and northern Dorset.

Sources: Websites and schedules of regional services

2.2.1 BBC Northern Ireland

BBC Northern Ireland produces a range of programming including the current affairs programmes outlined below. According to the BBC Trust Annual Review, BBC Northern Ireland's programmes regularly feature in the most popular programmes for BBC One and BBC Two in Northern Ireland and include high quality and distinctive programmes such as *The Disappeared*, *Five Fables* and *True North*.

Important programming on BBC Northern Ireland includes the main news broadcast *BBC Newsline* and several current affairs programmes such as *Spotlight*, *Hearts and Minds*, *Stormont Today* (coverage of the assembly), and *Let's Talk*.

2.2.2 BBC Scotland

The main regional news programme on BBC Scotland is *Reporting Scotland*.

According to the Annual Review of BBC Scotland,¹⁵ in March 2013 an average audience of 586,000 viewers tuned in each evening for the 18:30 *Reporting Scotland* news broadcast, its highest March viewing figures in over 10 years. Whilst generally following the schedules of the UK-wide BBC One, BBC One Scotland offers programming specific to Scotland, such as the soap opera *River City* and football programme

¹⁵ BBC Scotland Annual Review:
http://www.bbc.co.uk/bbctrust/who_we_are/audience_councils/scotland/annual_review.html

Sportscene.

Recent examples of BBC One Scotland programmes include: *BBC Scotland Investigates*; *The Beechgrove Garden*; *Gary: Tank Commander*; *The Scheme*; *24/7*; *Still Game*.

On BBC Two Scotland, *Newsnight Scotland* was replaced with *Scotland 2014*, a new 30 - minute week-night current affairs programme, launched in May 2014¹⁶ with a specific focus on the referendum debate.

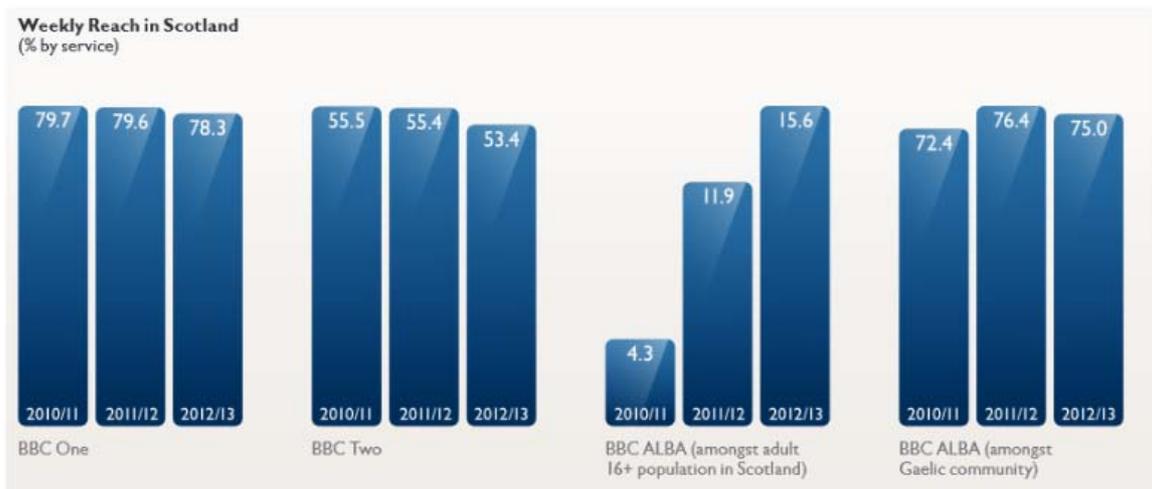
2.2.3 BBC ALBA

BBC Alba¹⁷ was launched in 2008, the first multigenre channel to come entirely from Scotland. It is a joint venture between the BBC and MG Alba and broadcasts in Scottish Gaelic. According to its website, the BBC Alba has an average viewership of 637,000 adults over the age of 16 in Scotland each week. BBC Alba had 4.1 million views on BBC iPlayer in 2012-2013.

It produces a wide range of its own programming and shares or receives some programmes from BBC Scotland. It has many programmes for children and also programmes focused on music, culture and history.¹⁸ BBC Alba produces a news programme on national and international news - *An Lá* (the Day), and a weekly news programme *Seachd Lá* (Seven days).

The figure 2 provides an overview of the weekly reach of the Scottish services. The reach of BBC ALBA in the Gaelic community is particularly strong. However, the data below suggests an increasing reach for BBC ALBA of the overall Scottish population between 2010 and 2013.

Figure 2 Weekly reach of BBC Scottish services



Management Review 2012/13 – Scotland

02

Source: BBC Scotland Annual Review

2.2.4 BBC Wales

BBC Wales (BBC Cymru Wales)¹⁹ based in Cardiff, produces a wide range of local programmes transmitted as "opt out" services on BBC1. These include news, current affairs, sport, arts and entertainment, drama, and children's programmes.

¹⁶ Herald Scotland, February 2014: Newsnight Scotland to be axed ahead of referendum:

<http://www.heraldsotland.com/news/home-news/newspnight-scotland-to-be-axed-ahead-of-referendum.23367915>

¹⁷ Alba is the Gaelic name for Scotland

¹⁸ BBC Alba programmes: <http://www.bbc.co.uk/bbc Alba/programmes>

¹⁹ Cymru is the Welsh name of Wales

BBC Wales also supplies programmes to the separate Welsh language channel, S4C. Important programmes include *BBC Wales Today*, *Newyddion* (news broadcast in Welsh) and *Pawb a'i Farn* (a current affairs programme: People and Opinion).

2.3 S4C

Although available nationally in the UK, S4C (the public service channel in the Welsh language) has a regional (national in Wales) focus, and its purpose is to produce programming in the Welsh language.

According to the Programme Guidelines²⁰ S4C's corporate aim is to provide a comprehensive Welsh language television service, of high quality, which reflects and enhances life in Wales. It is governed by the S4C Authority. S4C was formerly funded by partly advertising revenue, and via a direct grant from the government. The broadcaster's public funding and the use of the television licence fee are now (since 2013) supervised by the BBC Trust. This arrangement is laid out in an Operating Agreement²¹ regarding the use of funds.

According to its website, the channel broadcasts each week more than 115 hours of Welsh language programmes "across a range of platforms, including online". It commissions independent producers from across Wales to make the majority of its programmes. Programmes are also produced by ITV Cymru/Wales. BBC Cymru/Wales provides around 10 hours of programming per week for S4C, including the news and daily soap *Pobol y Cwm*, funded from the licence fee.

In its annual report²², S4C outlines some figures relating to its audiences and programming: 6.5 million people viewed S4C throughout the UK in 2013 (2012: 5.3m); 5.2 million online viewing sessions (2013: 4m, 2012: 2.8m); 1.4 million people tuning in to S4C on average each month (3-min reach) (2012: 1.3m); 578,000 is the number of viewers throughout the UK in an average week (2012: 599,000); 194,000 Welsh-speaking viewers in Wales in an average week (2012: 216,000); 224,000 visits to the S4C website each month (2012: 201,000); 2,472 hours of original programmes broadcast.

The S4C is obliged under the Communications Act 2003 to produce annually a Content Policy Statement.²³ In doing this, they must consider any guidance or reports of the Ofcom. In the 2013 Statement under the section on news and current affairs the document states: "*We will continue to provide a comprehensive range of current affairs programmes and series that will include investigative journalism and treatment of political affairs which are relevant to Wales and locally, along with the latest developments in Cardiff Bay, Westminster and Brussels.*"

²⁰ S4C Programme Guidelines : <http://www.s4c.co.uk/production/downloads/guidelines/S4C-programme-guidelines-10-03-10.pdf>

²¹ BBC Trust and S4C Operating Agreement 2011: http://www.bbc.co.uk/bbctrust/assets/files/pdf/our_work/s4c_governance/s4c_governance.pdf

²² S4C Annual Report 2013-2014 : <http://www.s4c.co.uk/abouts4c/annualreport/acrobats/s4c-annual-report-2013-2014.pdf>

²³ S4C Content Policy Statement, 2013: http://www.s4c.co.uk/abouts4c/authority/pdf/e_datganiad_polisi_cynnwys_2013.pdf

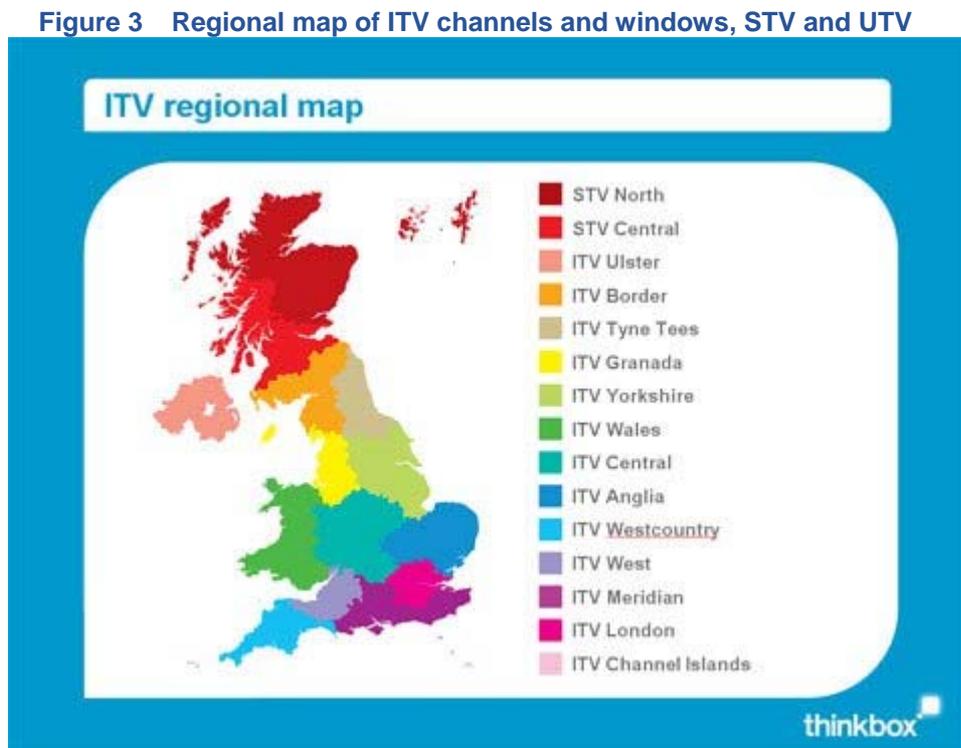
2.4 Channel 3 licensees: ITV, UTV, STV

ITV1 is the UK's main free-to-air commercial public service broadcaster. It is also the UK's regional channel (also known as Channel 3 licensees).

The ITV network is not formally a national TV broadcaster, as it is made up of 15 regional licensees. The ITV Group provides a large part of the common schedule of the regional broadcasters.

ITN is the organisation currently 'nominated' by the Ofcom to provide a high quality national and international news service to Channel 3 licensees. The programmes supplied by ITN must be transmitted live and simultaneously by the regional ITV licensees.

Figure 3, below, provides a geographic perspective on the 15 regions covered by licences under “channel three.”



Source ThinkBox TV: <http://www.thinkbox.tv>

ITV is not owned by one single company. Twelve of the regional licences are held by the ITV group²⁴, two by the Scottish Media Group, and one by Ulster Television UTV. General addresses²⁵ for ITV regional licence holders Anglia, Border, London, Central, Granada, Wales and West, Meridian, Tyne Tees, West Country, Yorkshire are available from the Ofcom website.

Originally (from the 1950s and 1960s) there were seventeen different companies operating ITV licences. The relaxation of regulatory rules, starting in the Thatcher era, has gradually led to the consolidation of almost all into one company. The last important merger was between Carlton and Granada in 2004.

The major franchises (such as Thames, LWT, Central, Granada and Yorkshire) produced in the past some of the most successful ITV programming. Following the complete merger, production facilities were closed in several regions. As a result of the merger, ITV Plc was faced with a surplus of facilities it no longer needed.

²⁴ Website: www.itv.com

²⁵ Sourced from Ofcom : <http://licensing.ofcom.org.uk/tv-broadcast-licences/current-licensees/channel-3/>

Studio and production facilities were replicated many times over, many of which were becoming costly to maintain due to age and difficult to justify following technological advancements. As a result, regional news moved into smaller offices and studio facilities were sold off. Anglia's separate studio facility was sold off as an independent studio, as was HTV's main studio in Cardiff. However, Tyne Tees' Newcastle studios and Meridian's Southampton studio complex were closed completely and demolished, both broadcasters moving to smaller regional news bureaux. The reduction in the size of the organisation and in the number of transmission centres resulted in a large number of job cuts.²⁶

The ITV network is funded by advertising revenue; The ITV licensees are what are known as “commercial public broadcasters”. They have revenue models which are commercial based, but retain some public service obligations (see for example the obligations under 2.4). Regional windows of the network also have regional advertising inserts.

The channels with channel 3 licences (all the ITV channels) have the same daily schedules. There are certain times when local programming is inserted. There are two channels whose licences are not held by ITV PLC: and these are UTV and STV. These also have similar schedules but more local programming.

For example at 6pm on UTV (in Northern Ireland), you can watch *UTV Live – news and weather*, while in Scotland at the same time on STV, the *STV news at 6* is viewed. Both are followed by ITV News and Weather. (All over the country there are different regional news reports at 6 such as *ITV News London*, etc.).

Table 2 below provides details of the channel 3 licensees. Where possible, information on programming is added, although this is not always easy to find. Where possible, at least the information on news programmes has been sourced.

Table 2 The regional channels and windows of the channel 3 licences (ITV Plc, STV and UTV)

Channel	Broadcaster	Programmes	Data for advertisers ²⁷
ITV1 Anglia ITV1 Anglia North ITV1 Anglia South ITV1 Anglia West	ITV PLC	<i>ITV News Anglia</i> <i>Good Morning Britain</i> (news programmes)	Cambridge, Norwich, Luton and Northampton Total adult population of 3.7m
ITV1 Border ITV1 Border North England ITV1 Border South Scotland	ITV PLC	<i>Lookaround</i> <i>Representing Border</i>	Agricultural area with just 317,000 homes. The local population includes 143,000 of the UK's 12.7m ABC1 women and 128,000 of the UK's 11.8m ABC1 men.
ITV1 Central ITV1 Central East ITV1 Central South West ITV1 Central West	ITV PLC	Home of a very wide range of ITV programming past and present.	This is the second-biggest franchise with more than 7.3m adults and 3.9m homes. It covers: Birmingham, Nottingham and Oxford. Central south covers Hereford to Oxford; Central East takes in Derby, Nottingham and Peterborough while Central West ranges from Stratford-upon-Avon through Birmingham to Crewe.
ITV1 Granada	ITV PLC	Home of a very wide range of ITV programming past and present.	Granada includes Liverpool and Manchester and has a total population of 5.4m adults living in 2.9m homes...
ITV1 London	ITV PLC	Home of a very wide range of ITV programming past and present.	ITV London and LWT represent the two biggest ITV franchises, the London weekday and London Weekend operations respectively. The capital and its surrounds include nearly five million homes and 9.4m adults.

²⁶ Sourced from Wikipedia : http://en.wikipedia.org/wiki/History_of_ITV#2002.E2.80.93present

²⁷ Data from Thinkbox the marketing body for commercial TV in the UK: <http://www.thinkbox.tv/>

Specific reports by region, regarding populations, reach and advertising are also available. See here for example : <http://www.itvmedia.co.uk/new-to-itv/itv-regions/anglia>

Channel	Broadcaster	Programmes	Data for advertisers ²⁷
ITV1 Meridian ITV1 Meridian South ITV1 Meridian South East ITV1 Meridian Sussex ITV1 Thames Valley TV North ITV1 Thames Valley TV South	ITV PLC	ITV News Meridian	This covers the south coast of England, a region that includes Southampton, Brighton and Dover as well as Basingstoke and Dorchester. There are 4.7m adults in this region as well as 839,000 children. Meridian includes four regions. Meridian Kent and Meridian Sussex cover the counties in their names while the Thames Valley region takes in Andover and Basingstoke and the South Coast ranges from Salisbury to Portsmouth via Dorchester and Southampton.
ITV1 Tyne Tees ITV1 Tyne Tees North ITV1 Tyne Tees South	ITV PLC	Home of a very wide range of ITV programming past and present.	This region contains 1.3m homes and includes Newcastle, Durham and Sunderland. The 2.3m adults in this region include 340,000 men aged 16-34 and 327,000 women in the same age group.
ITV1 Wales ITV1 West ²⁸	ITV PLC	<i>Newsweek Wales</i> (weekly news) <i>Coast & Country</i> (factual series) (produces Welsh language programmes S4C)	ITV Wales and ITV West cover the principality as well as Bristol and parts of the Severn estuary coastline. There are 4m adults in this area.
ITV1 Westcountry ITV1 Westcountry South	ITV PLC		This is one of the smaller ITV regions with 1.4m adults living in 794,000 homes. The key towns include Exeter, Plymouth and Truro.
ITV1 Yorkshire ITV1 Yorkshire East ITV1 Yorkshire North	ITV PLC		Another of the larger franchises and includes York and Leeds as well as 4.8m adults.
STV (Central) STV Scottish TV East STV Scottish TV West	Scottish Media Group	<i>STV News</i> <i>Scotland Tonight</i>	This covers the main population centres in central Scotland including Glasgow and Edinburgh and 1.6m homes.
STV (North)	STV NORTH LIMITED/ Scottish Media Group	<i>STV News</i> <i>Scotland Tonight</i>	This covers the main population centres of northern Scotland.
Channel Television	CHANNEL TELEVISION HOLDINGS LIMITED/ ITV PLC	The channel produces, on average, 5 hours and 38 minutes of regional programming every week. Its flagship news magazine <i>Channel Report</i> is broadcast each weekday night at 6pm.	It is the smallest ITV regional company, broadcasting to 150,000 people in 58,000 homes across the Channel Islands Jersey, Guernsey, Alderney and Sark,
UTV UTV HD	UTV LIMITED		UTV is owned by UTV Group and available in both Northern Ireland and many Republic of Ireland homes. Its UK audience is 1.3m adults and 283,000 children.

Sources: Websites and schedules of regional services/ and Thinkboxtv: <http://www.thinkbox.tv>

²⁸ According to the Ofcom agreement for the new licences from 2015: West of England is to be separated from the Wales licence and added to the South West licence from the start of the new licence period, See below under (2.5)

2.4.2 STV - Scottish Television

According to its website, “STV reaches over 3.6 million viewers each month. It includes the main ITV programming: *Emmerdale* and *Coronation Street*, big drama productions, entertainment hits *The X Factor* and *Britain’s Got Talent*, and also strong home-grown productions and the most comprehensive local news service in the UK”.²⁹ STV’s digital business incorporates Scotland’s most popular commercial media website, stv.tv, home to the STV Player and comprehensive news, sport and entertainment services.

STV recently launched brand new digital services providing all the latest news, events, offers, pictures and videos for consumers in Scotland’s biggest cities. STV Glasgow, STV Edinburgh, STV Aberdeen and STV Dundee are available as apps, free to download and use on iOS and Android devices, and accompanied by desktop and mobile sites. STV content is available across multi platforms including iOS, Android, PS3, Windows 8; YouView and Samsung Smart TV.

STV won two local DTT licences to deliver TV for Glasgow and Edinburgh. STV Glasgow launched in June 2014 with STV Edinburgh to follow (see also section 2.5). The Scottish TV Group also received licences for three more services in Aberdeen, Ayr and Dundee, which are not yet launched.

Current affairs programmes include: *Scotland Tonight*, which tackles the issues behind the headlines from a Scottish perspective, with live studio debate and analysis of all the top stories.

2.4.3 UTV - Ulster Television

The UTV website describes the channel as the most “watched channel in Northern Ireland delivering high quality popular home produced programmes backed up by the best of the ITV Network. UTV first went on air in 1959 as part of the ITV Network and has held the Channel 3 public service broadcasting licence ever since. UTV was also the first commercial television operator on the island of Ireland.”³⁰

According to the UTV Programme Statement and Performance Review 2013/2014³¹, the traffic to UTV’s website more than doubled in 2013 reaching a record 1.2 million unique users in December with growth driven by increasing mobile and social media traffic throughout the year.

UTV had a 2.8% daily audience share in the Republic of Ireland in 2013 (behind BBC 1 with 4%). UTV Media launched a new TV service, UTV Ireland, in the Republic of Ireland in 2015. The company will replicate the ITV/ UTV format with the addition of locally - produced news and current affairs programmes.

UTV Ireland will be based in Dublin, backed up by additional newsgathering and reporting presence in Cork, Galway, Waterford and Limerick.

²⁹ Web site: www.scottishtv.co.uk

³⁰ Website of UTV : <http://www.utvmedia.com/pages/About-UTV/Television>

³¹ UTV Programme Statement and Performance Review 2013/ 2014:
<http://www.utvmedia.com/resources/documents/FI/N/FINALSTATEMENT-2013.pdf>

2.5 News and programming obligations for Channel 3

Several UK channels have traditionally had public service obligations, due to their access to the restricted public resource of the frequencies of the former analogue terrestrial system. These are the 15 channels that make up the ITV Network (Channel 3 licensees) and Channel 5. The Communications Act 2003 set out the obligations for Channel 3 and Channel 5 licensees regarding programming. Channel 3 licensees are the ITV network of 15 channels that operate regional television services as well as sharing programmes between each other to be displayed on the entire network.

Channel 3 licensees have to meet positive requirements covering, for example, original productions/commissions, independent productions, news, regional production, provision for the deaf or hearing impaired and blind or partially sighted, etc. These licences will be renewed with Ofcom (communications regulator) from January 2015. In July 2013, Ofcom published the updated licence requirements for the next ten year period. The entire details can be found in the document at the Ofcom website.³² According to news reports the overall obligations for producing news were reduced:

*The amount of regional news ITV is required to broadcast in most of England will shrink by a third under the terms of the broadcaster's new licence from Ofcom. The media regulator said the cut would be offset by a requirement to produce a more localised regional news service, with the number of ITV regions in England increasing from eight to 14.*³³

Below is a brief overview of the obligations of these regional licensees, implying minimum requirements regarding news etc.

Table 3 News and regional programming obligations for channel 3 licensees

Licence region	Hours, minutes per week
ITV Wales	News 4:00 Other 1:30 (of which current affairs is 0:47) Total 5:30
UTV (Northern Ireland)	News 4:00 Other 2:00 (of which current affairs is 0:26) Total 6:00
STV (Central Scotland)	News 4:00 Other 1:30 (of which current affairs 0:33) Total 5:30
STV (Northern Scotland)	News 4:00 Other 1:30 (of which current affairs 0:33) Total 5:30
Obligations for each of the following: East of England (Anglia TV), North East England (Tyne Tees), East and West Midlands (Central TV), Yorkshire (ITV Yorkshire), South and South East of England (ITV Meridian), South West of England (ITV Westcountry), West sub-region.	News 2:15 Other 0:15 Total 2:30
Obligations for each of the following: North West England and Isle of Man (Granada) and London (ITV London Weekday and Weekend),	News 3:05 Other 0:15 Total 3:20
Border TV	News 3:05 Other 0:15 Total 3:20

Source: Ofcom 2013

³² Ofcom (July, 2013): Channel 3 and Channel 5: Statement of Programming Obligations. Amendments to obligations for Channel 3 and Channel 5 ahead of a new licensing period:

<http://stakeholders.ofcom.org.uk/binaries/consultations/c3-c5-obligations/statement/statement.pdf>

³³ Guardian (23 July, 2013): ITV licence requires less regional news

<http://www.theguardian.com/media/2013/jul/23/itv-regional-news-shrink-ofcom>

2.6 The new local DTT channels

Analogue terrestrial switch-off took place in the UK in October 2012. In 2011, the Government announced its intention to launch a total of 28 local channels on the DTT network. The financing of the start-up of the local DTT channels is partly financed by the BBC. 'As agreed in the 2010 licence fee settlement, the BBC has committed to provide up to £40m for the purposes of supporting the Government's objectives for local TV. This is comprised of up to £25m in 2013/2014 towards capital costs and up to £5m per year for three years to acquire content from the local TV services for use on the BBC's own services'.³⁴

By September 2014 (when this brief was written), 5 local channels had been launched: Estuary TV (Grimsby), London Live (London), Mustard (Norwich), Notts TV (Nottingham) and STV Glasgow (Glasgow). By March 2015 a total of 16 had launched.

The table below outlines the programming requirements for the licensees of the new local DTT channels as outlined by Ofcom. As is apparent in the table, the local channels are expected to engage with "local democracy" and are specifically supposed to provide local news and current affairs, and "facilitate civic understanding and fair and well-informed debate through coverage of local news and current affairs".

Table 4 Licensing requirements for local DTT channels (Ofcom, 2012)

Licensing requirements for local DTT channels (Ofcom) Licensing Local Television - Statement
How Ofcom will exercise its new powers and duties to license new local television services Statement published 10 05 12, updated 15 05 12 Executive Summary
Local services will have specific content obligations, alongside general obligations that apply to all television broadcasters.
1.30 In usual circumstances the studio from which the service will be broadcast, and/or the main production base of the service, should be located within the licensed area.
1.31 L-DTPS licence applicants will need to describe their programming output and how it will satisfy the statutory criteria. They will summarise their local output in Programming Commitments, drafted as part of the licence application process. These will be written into the L-DTPS licence of the successful applicant and licensees will be held to these commitments.
1.32 Local services will be required to carry Party Political Broadcasts , and Ofcom will be consulting on its guidance on this obligation with a view to publishing a new set of guidance that includes guidance for local licensees, by the time any local services are broadcasting.
1.33 More broadly, <i>we expect local TV services to engage with the local democratic process</i> . The licence application form invites applicants specifically to consider what programming they propose in order to facilitate civic understanding and fair and well-informed debate through coverage of local news and current affairs .
1.34 L-DTPS licensees will have to comply with Ofcom's Broadcasting Code, Ofcom's Code on the Scheduling of Advertising, and the UK Code of Broadcast Advertising. They will need to comply with Ofcom's Code on Television Access Services setting out the requirements on subtitling, sign language and audio description (although we anticipate that most may be exempt from these requirements due to their audience share).
1.35 L-DTPS licensees will be specifically prohibited from broadcasting pornographic material and longer advertisements for a chat service made available for purchase by means of a premium rate service.
1.36 Any L-DTPSs not receivable outside the UK will be exempt from the advertising minutage restrictions set out in the AVMS directive (but not from advertising scheduling rules).
1.37 The Government has signalled its intention to lay new legislation to remove the requirement for local services to commission 10% of their output from independent production companies. This is an obligation on all broadcasters, and if not removed by a change in the law, will apply.
1.38 The L-DTPS licensee will need to make the service available to the local multiplex licensee at all times, at an interface point and in a specified technical format.
1.39 All Phase 1 services must be broadcasting within two years of award, unless coverage is not built-out at their

³⁴ UK Government, Department for Culture, Media and Sport (2011): **A new framework for local TV in the UK July 2011**. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/72920/Local-TV-Framework_July2011.pdf

location. In the period after licence award a launch date within this two year period will be agreed. We hope some services can begin broadcasting earlier.

1.40 Licences will be granted for a period such that they are coterminous with the local multiplex licence, because of their mutual interdependence. So the first 21 L-DTPS licences will be for up to 12 years, depending upon their exact launch date in relation to the local multiplex licence term. Any L-DTPS licence subsequently advertised will be granted for a shorter period.

1.41 L-DTPS licensees will be required to keep full recordings of their output for 60 days, and to complete a short annual return so that Ofcom can meet its statutory obligations to report on this emerging sector.

1.42 L-DTPS licensees must co-operate with each other, and with the local multiplex licensee, to facilitate the provision of local TV, and to participate in the formation of a legal entity which is intended to facilitate that provision. They are required to seek to measure the number of viewers of the service in co-operation with the legal entity, and to encourage that entity to apply or negotiate for a local multiplex licence, should one be advertised or become available.

L-DTPS licensing process

1.43 Ofcom will first establish that any applicant is eligible to hold a licence, then we will distinguish between applicants on the basis of how they compare to each other on the statutory criteria.

1.44 Applicants will need to present their programming proposition and also their business plan so that we can assess their ability to maintain the proposed service. We ask for a clear business plan and strategy for the duration of the licence, including financial information - budgets and funding - for set-up and the first three years of operation.

1.45 ***We invite applicants to set out aspects of their proposed local programming and scheduling as part of their application, including how much local programming will be in 'peak time', and how much broadcast material may be produced by a different organisation.***

1.46 ***We are not setting quantitative requirements but we consider news to be the most important type of local television content. Applicants should propose a reasonable provision of news and current affairs, bearing in mind the public subsidy and public purposes of local TV.***

1.47 As a guide, we will be unlikely to consider less than seven hours in total of broadcast news per week to be too burdensome for even the smallest L-DTPS licensee. This refers to duration of broadcast output, and we are open to proposals on how it may be scheduled, so long as a substantial proportion is during peak time. We will judge proposals in the context of the scale of operation, and resources available. We have taken on board comments on our news guidance, and sought to clarify it: we intend to be flexible but nonetheless to prioritise journalism-led news.

1.48 We ask applicants to propose a specific launch date. The proposed build-out schedule, when the local multiplex licence is awarded, will be compared with proposed L-DTPS launch dates and, as far as possible, these will be aligned following discussion between the parties.

Source: Ofcom 2012 (emphasis author)

2.6.2 Estuary TV

On 26th November 2013 Estuary TV³⁵, started to broadcast to over 350,000 homes across North Lincolnshire and East Yorkshire. The main metropolitan centre is Grimsby. The broadcaster is Channel 7 Television Community Interest Company/ Grimsby Institute.

According to its website:

Estuary is a commercial public service broadcaster and will provide local news every day, combined with a varied schedule including current affairs, business, environmental, historical, documentary, films and entertainment programming. Formerly cable-only station Channel 7, and proudly having the accolade of being the UK's longest-running local television station, Estuary TV was the first local TV station to launch, on November 26th 2013, as Grimsby was one of 19 selected for the first phase of the Local TV licence.

From the information on the website, all of their programming appears to be locally made. This content is also produced by students, volunteers and freelancers. Alongside news programmes, there are youth programmes, sports programmes, features from the region and geographical and heritage programmes.

See for example: *Discover Our Coastline*³⁶

³⁵ The home page of Estuary TV: <http://www.estuary.tv/>

³⁶ Discover Our coastline: <http://estuary.tv/video/featured4>

2.6.3 London Live

The local London channel, London Live³⁷ launched in March 2014. London Live is owned by ESTV, part of Lebedev Holdings Ltd (also owners of two important press titles: *the Independent* and *London Evening Standard*). The channel transmits local news, current affairs, sports, arts, events and entertainment. The audience of the channel is being measured by BARB, and according to a report by the Guardian the figures had been very low three weeks after launch. However, the chief executive responded to this:

London Live chief executive, Andrew Mullins, is unconvinced by the Barb figures. "If you launch a new 'London only' focused TV channel, with a youth bias, where you expect viewing to be linear and non-linear, you are aware that Barb is not going to be very helpful,"³⁸

2.6.4 Mustard TV

The local channel Mustard TV³⁹ launched in March 2014 on the DTT platform, and online. It is owned by Archant (a publishing company). The local region includes Norfolk and the city of Norwich. According to its website:

Mustard Online brings you the latest local video news and features about Norfolk and Norwich; its people, places and communities. Video stories you probably won't find anywhere else created by our own talented team of producers, presenters and videographers and by local contributors. We want to bring you the best in Norfolk news and sport, give you the latest travel and weather updates, to showcase the best property on offer and feature places to go and things to do across the county.

2.6.5 Notts TV

The consortium running Notts TV is the Nottingham Post, Nottingham Trent University, Confetti Media Group and Inclusive Digital. The channel launched in May 2014. The information below is from their website.

Notts TV will produce quality content that is directly relevant to the people who live, work and study in Nottingham and surrounding areas. We aim to build a TV channel that covers local news and produces an ambitious range of general programmes. Notts TV News has a broad agenda, covering politics, business, sport, consumer news, the arts, weather and travel.

The news is produced by a team of Notts TV video journalists, is broadcast from a studio at Nottingham Trent University, and has news headlines and interviews from the Nottingham Post newsroom.⁴⁰

Their programming includes: arts programmes, produced by Confetti Media Group; a twice-weekly sports round up - *The Boot Room*; regular documentaries on local issues; programmes on local politics, business, community activities, history and events; a debate programme - *The Channel 8 Debate*.

2.6.6 STV Glasgow and STV Edinburgh

STV Glasgow⁴¹ is owned by the Scottish TV Group (holders of the Scottish channel 3 licences), and was launched in June 2014. Not much information is available on the website regarding programming. The following is taken from Wikipedia:

³⁷ Website of London Live : <http://www.londonlive.co.uk/>

³⁸ Guardian (April, 2014): London Live TV suffers terrible Barb ratings three weeks on from launch <http://www.theguardian.com/media/greenslade/2014/apr/24/london-live-tvratings>

³⁹ Homepage of Mustard TV: <http://www.mustardtv.co.uk/>

⁴⁰ The website of Notts TV: <http://www.nottstv.com/>

⁴¹ Website of STV Glasgow: <http://glasgow.stv.tv/>

Programmes include *The Riverside Show*, a two hour-long topical magazine show airing at 6.30pm each weeknight. *STV Glasgow News* includes a nightly half-hour programme at 10pm and extended daytime bulletins as well as simulcasts of the West edition of *STV News at Six* and *Scotland Tonight*. Other programming for the channel includes *Peter and Roughie's Football Show* (a replay of a radio phone-in broadcast on Central FM and Your Radio), interview series *My Life in Ten Pictures* and entertainment shows including *Glas-Roots Music* and *The Blether*. STV Glasgow also airs archived drama series including *Taggart*, *Take the High Road* and *Rebus* alongside the acclaimed Polish World War II drama *Czas honoru (Days of Honour)* and the comedy drama series *High Times*. The station has pledged to broadcast at least an hour a week of non-English language programming.

STV Edinburgh⁴² launched in January 2015, with the director claiming they “are committed to delivering locally relevant content for our consumers across Scotland and the launch of STV Edinburgh today further cements our position as Scotland’s leading media brand.”⁴³

Programmes include: the magazine show, *The Fountainbridge Show*; *Animal 999*; *Edinburgh’s Murder Mysteries*; *STV Edinburgh News*; other popular programmes from the STV’s archive, including *Take the High Road*. There were also plans for STV Edinburgh to broadcast one hour of non-English speaking content per week, for example the subtitled Polish drama *Czas Honoru (Days of Honour)*.

The Scottish TV Group also received licences for three more services in Aberdeen, Ayr and Dundee, which are not yet launched.

2.6.7 Bay TV Liverpool

Bay TV Liverpool⁴⁴ was formerly an internet channel and was granted a local TV licence by Ofcom. Broadcast by Bay TV Liverpool Limited (in consortium with AIMES Grid Services and the government’s Technology Strategy Board), the channel launched on DTT in December 2014. The service covers a region including more than as 930,000 homes and describes its mission as: “to bring the view from Liverpool to the city, the region and the world.”

2.6.8 Latest TV

Latest TV (Brighton and Hove)⁴⁵ was launched in August 2014 by Latest TV Limited. Programming covers news, politics, culture, lifestyle, music etc.

2.6.9 Made in Television: Bristol, Cardiff, Leeds, and Tyne and Wear

Made in Bristol⁴⁶ (Made in Bristol TV Limited) is one of four channels from the Made Television company.⁴⁷ The channel was launched in October 2014: “We’re going to do city TV our way. With local news you actually care about, lifestyle programmes that reflect true Bristol life and many more hours of local programmes every week.”

The channels Made in Cardiff⁴⁸ and Made in Leeds⁴⁹ and also launched in October 2014. Made in Tyne and Wear launched in November 2014.⁵⁰ The channels appear to share some programming, such as *Deci-*

⁴² Website of STV Edinburgh: <http://edinburgh.stv.tv/>

⁴³ <http://news.stv.tv/scotland/306300-stv-edinburgh-launches-with-the-fountainbridge-show/>

⁴⁴ Website of Bay TV Liverpool: <http://www.baytvliverpool.com/>

⁴⁵ Website of Latest TV : <http://thelatest.tv/>

⁴⁶ Website of Made in Bristol : <http://www.madeinbristol.tv/>

⁴⁷ <http://www.madetelevision.com/>

⁴⁸ Website of Made in Cardiff : <http://www.madeincardiff.tv/>

⁴⁹ Website of Made in Leeds: <http://www.madeinleeds.tv/>

⁵⁰ Made in Tyne and Wear website: <http://www.madeintyneandwear.tv/>

sion Made, focusing on election debates.

2.6.10 NVTV

NVTV⁵¹ (originally an analogue channel) was granted in October 2012 a 12-year local TV licence to broadcast on digital terrestrial television by Ofcom. The channel was relaunched on 29 September 2014 through the Freeview and Virgin Media platforms. The channel is broadcast by Northern Visions Ltd (a non-profit distributing company limited by guarantee.)

Programmes include two local news broadcasts per day, Focal Point, and other music (Kick Out the Jams and SERC MAPA), chat shows (Alan in Belfast), arts (Collapse the Box), heritage and history programmes (Discover the Archives) (heritage and history shows). The channel shares programming with local TV in Edinburgh and also with Latest TV in Brighton.⁵²

2.6.11 Sheffield Live!

The channel Sheffield Live! (Sheffield Local Television Limited)⁵³ was launched in September 2014 after raising money through a crowdfunding initiative. Sheffield Live! is a public access community broadcaster and all programmes are made by volunteer producers, presenters and reporters.

Programming includes a mix of news, events, culture, sport, community affairs, music, short films, and international news.

2.6.12 That's Solent

That's Solent⁵⁴ is focused on Southampton. It is the first channel of several licensed to the That's Media Group. Further That's TV local station launches are planned in 2015 and 2016 including in Oxford. Programming currently consists of news, talk shows and music.

2.6.13 Big Centre TV

Big Centre TV⁵⁵ is the local TV channel for Birmingham, Walsall, Wolverhampton, Solihull and The Black Country. The channel launched in February 2015 and is owned by Kaleidoscope TV Ltd.⁵⁶ The channel's potential reach is 2.3m viewers on Freeview. According to its website, it "offers a wide range of genuinely local content featuring live news, sport, entertainment and children's' programming".

2.6.14 Other channels

Additional channels that have been licensed but not yet launched include: That's Oxford; and three more

⁵¹ Website of NVTV : <http://www.nvtv.co.uk/>

⁵² In addition, NVTV is one of three channels on the channel Today's Ireland (TI) broadcast weekly across America via MHz Networks to over 40 million households. The channel connects American viewers with contemporary Ireland, blending news, business reports, cultural programmes and entertainment from Irish broadcasters, including RTE, TG4 and NVTV, as the first all-island channel.

⁵³ Website of Sheffield Live!: <http://www.sheffieldlive.org/>

⁵⁴ Website of That's Solent : <http://www.thatssolent.com/> <http://www.thatstv.com/>

⁵⁵ Website of Big centre TV : <http://www.bigcentre.tv/>

⁵⁶ The headquarters of the channel is linked to the Walsall Studio School, where 14-19 year olds are trained and receive industry-recognised qualifications, build relationships with employers and get into employment or university. Big Centre TV utilises the school's state-of-the-art technical facilities and students train alongside experienced TV professionals.

services to be run by STV (Scottish TV) in Aberdeen, Ayr and Dundee.

Table 5 Local DTT channels in the UK

Channel	Owner	Related media	Region/ city	Launch date
Estuary TV	Channel 7 Television Community Interest Company/ Grimsby Institute.		Grimsby.	November 2013
London Live	ESTV/ Lebedev Holdings Ltd	<i>The Independent</i> , <i>London Evening Standard</i>	London	March 2014
Mustard TV	Mustard TV Limited (Archant)	59 regional newspapers	Norfolk	March 2014
Notts TV	Nottingham Post/ Nottingham Trent University/ Confetti Media Group/ Inclusive Digital.	<i>Nottingham Post</i> , Confetti Media Group	Nottingham	May 2014
STV Glasgow	Scottish television (STV)/ STV Group Plc	STV STV Edinburgh	Glasgow	June 2014
Bay TV Liverpool	Bay TV Liverpool Ltd/ AIMES Grid Services / Technology Strategy Board		Liverpool	December 2014
Latest TV (Brighton and Hove)	Latest TV Limited		Brighton	August 2014
Made in Bristol	Made in Bristol TV Limited/ Made Television	Made in Cardiff Made in Leeds Made in Tyne and Wear	Bristol	October 2014
Made in Cardiff	Made Television	Made in Bristol Made in Leeds Made in Tyne and Wear	Cardiff	October 2014
Made in Leeds	Made Television	Made in Cardiff Made in Bristol Made in Tyne and Wear	Leeds	October 2014
Made in Tyne and Wear	Made Television	Made in Cardiff Made in Bristol Made in Leeds	Newcastle	November 2014
NVTV	Northern Visions Limited		Belfast	September 2014
STV Edinburgh	Scottish television (STV)/ STV Group Plc	STV STV Glasgow	Edinburgh	January 2015
Sheffield Live!	Sheffield Local Television Limited		Sheffield	September 2014
That's Solent	That's Solent Limited/ That's Media Group/ Six TV Ltd	Agreements with signed with Newsquest (Daily Echo, Hampshire Chronicle etc.); Johnston Press (Portsmouth News) and the Isle of Wight County Press,"	Southampton	November 2014
Big Centre TV	Kaleidoscope TV Ltd		Birmingham	February 2015

Source: Ofcom/ websites of the local channels

3 Audiences: channels and news

Research carried out by the UK regulator Ofcom in 2009 indicated the importance of local news and information.⁵⁷

Nine out of ten UK adults regularly consume some form of local news, information or other content through television, radio, newspapers or the internet. Each of these platforms plays a complementary role in providing relevant news and information and enables people to keep in touch with their local community. Regional TV news is watched at least once a day by four fifths of adults; about half listen to local radio or read a free paper at least weekly; two fifths read a paid for paper at least weekly while around one in five use commercial news websites.

Consumers and citizens value the role local and regional content plays in their lives; local and regional news in particular helps to inform people about what is going on in their local community, while news and other types of local content contribute towards reflecting UK cultural identity and representing diversity and alternative viewpoints.

3.1 Audiences in the UK regions and nations

Some of the data in the following section has been reduced. In order to allow publication of this report, data purchased from EurodataTV has been removed. As noted in the introduction, the main channels, (also known as the 5 PSB channels due to their PSB obligations)⁵⁸ still have the top audience shares nationwide. These top channels are (in order of the size of audience share) BBC1, ITV1, BBC2, Channel 4 and Channel 5.⁵⁹ Data outlined in Figure 1, shows the data for audiences for these main channels by region.

Figure 1 Audience share for 5 PSB channels by region, 2013



Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

Source: Ofcom - The Communications Market 2014

⁵⁷ Ofcom (2009): Local and regional media in the UK. <http://stakeholders.ofcom.org.uk/binaries/research/tv-research/lrmuk.pdf>

⁵⁸ Channel 4 and Channel 5 do not have obligations to provide local programming or news but DO have obligations regarding commissioning programmes produced in Northern Ireland, Scotland and Wales, and the English regions. The quota for Channel 4 for programmes produced in the devolved nations will increase from the current level of 3% of volume and spend to 9% in 2020.

⁵⁹ Yearbook of the European Audiovisual Observatory 2014 based on: EurodataTV Worldwide / BARB / TNS UK

These data are reproduced from the Ofcom Communications Market Reports.⁶⁰ The national (audience share) figure of 21% for BBC1 is surpassed in several regions: Meridian (25%), the Southwest (26%) and the West (25%). In contrast, the channel's share is weaker in London (19%) and in Northern Ireland (17%), and parts of the North East and North West. This pattern is replicated for BBC2.

For the ITV audiences, there are higher levels of viewership (than the UK average of 15.3%) in the Border region (North of England, South of Scotland, with 20%), in the North East (19%) and North West regions (19%), and in Northern Ireland with 18%. In fact the channel three in Northern Ireland – UTV - is more popular than BBC Northern Ireland (with 18% share compared with 17% of BBC). This is the only region where this is the case. (Further detail is provided under section 3.1. with regard to audiences for news).

3.2 Audiences for other regional channels

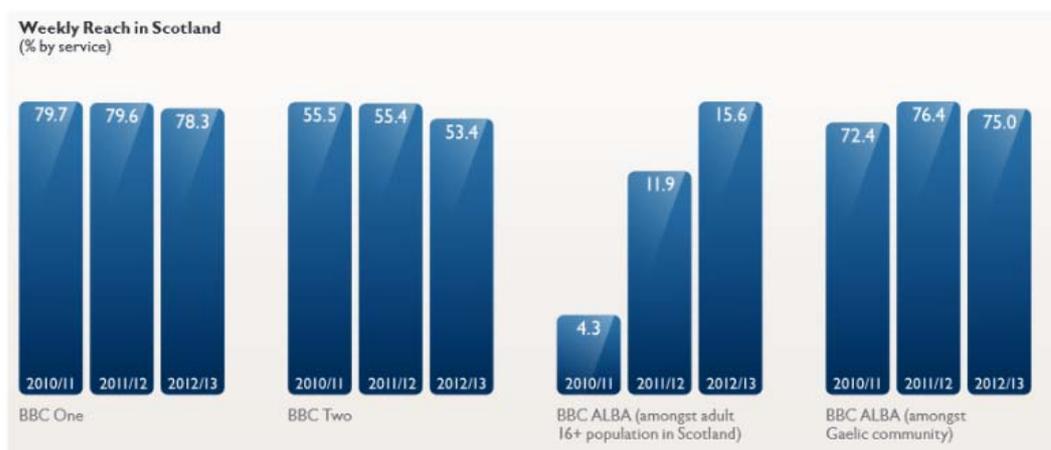
3.2.1 S4C

In its annual report⁶¹, S4C outlines some figures relating to its audiences and programming: 6.5 million people viewed S4C throughout the UK in 2013 (2012: 5.3m); 5.2 million online viewing sessions (2013: 4m, 2012: 2.8m); 1.4 million people tuning in to S4C on average each month (3-min reach) (2012: 1.3m); 578,000 is the number of viewers throughout the UK in an average week (2012: 599,000); 194,000 Welsh-speaking viewers in Wales in an average week (2012: 216,000); 224,000 visits to the S4C website each month (2012: 201,000); 2,472 hours of original programmes broadcast.

3.2.2 BBC ALBA

According to its website, the BBC Alba has an average viewership of 637,000 adults over the age of 16 in Scotland each week. BBC Alba had 4.1 million views on BBC iPlayer in 2012-2013. As apparent in Fig 2 below, the BBC Alba services are important for the Gaelic community. However, the data below suggests an increasing reach for BBC ALBA of the overall Scottish population between 2010 and 2013. Please note that these figures are NOT the equivalent of audience share.

Figure 2 Weekly reach of BBC Scottish services (BBC Annual Review 2013)



Management Review 2012/13 – Scotland

02

⁶⁰ Ofcom (2014) Communications Market Report 2014: <http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr14/>

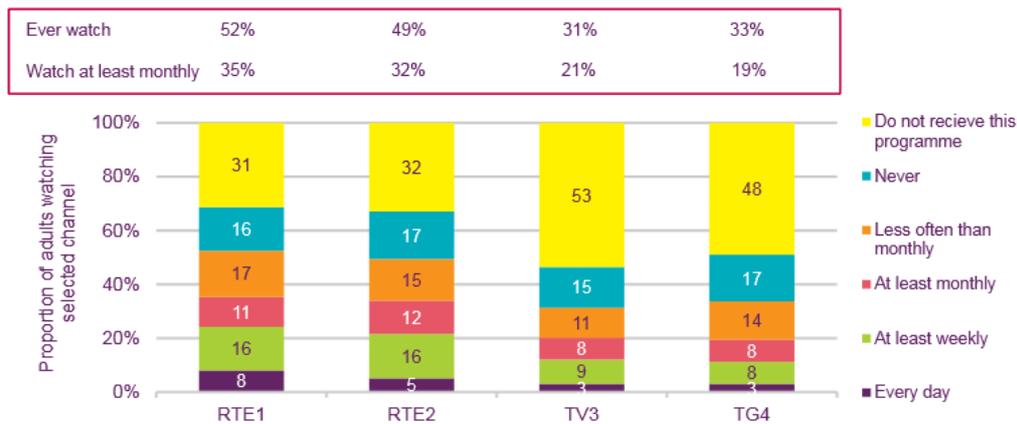
⁶¹ S4C Annual Report 2013-2014: <http://www.s4c.co.uk/abouts4c/annualreport/acrobats/s4c-annual-report-2013-2014.pdf>

3.2.3 Regional audiences for specific foreign channels

It is also worth noting the significance of channels based in the Republic of Ireland for audiences in Northern Ireland. For historic, cultural, linguistic (and perhaps political reasons) a significant portion of the population of Northern Ireland are regular viewers of Irish television.

In 2010 the Irish and UK ministries responsible for communication signed an MOU (Memorandum of Understanding) to provide for North-South co-operation on the transition to Digital Terrestrial Television (DTT) and analogue switch off. The MOU: “commits the two Governments to facilitating the widespread availability of RTÉ services in Northern Ireland on a free-to-air basis and BBC services in Ireland on a paid for basis. The provision of BBC throughout Ireland is a commercial decision for BBC as, unlike RTÉ, BBC does not have a mandate to provide its services throughout the Island of Ireland. The Memorandum also ensures the continuing widespread availability of TG4 in Northern Ireland following the digital switchover.”⁶²

Figure 3 Claimed viewing of Republic of Ireland channels in Northern Ireland (Source Ofcom)



Source: Ofcom research, Q1 2014
 Base: All adults aged 16+ in Northern Ireland with a TV in household (n = 488)
 QH18/19. Which of these TV channels can you receive on your television/ How frequently, if at all, do you watch each of these channels?

Source: Ofcom - The Communications Market 2014

No specific audience data exists for this type of viewing (although this may change with the presence of these channels on the DTT platform in Northern Ireland). Data from Ofcom, which is based on surveys show that 35% of people in Northern Ireland claim to watch RTE 1 at least monthly, 32% to watch RTE 2, 21% to watch TV3, and 19% claim to watch the Irish language channel TG4. Please note that these figures are NOT the equivalent of audience share.

3.3 Local TV audiences

It remains to be seen how well the new local channels will survive, given also the variety of ways in which they are being developed, and the different strengths of the backing groups of these channels. The overview of the new local channels licensed on DTT show that they are varied with regard to funding and sources. Some are linked to important media groups such as the Scottish Television Group, or publishing group Archant. Others launched with the help of crowd-funding, for example Sheffield Live!

The audience of London Live is being measured by BARB, and according to a report by the Guardian the figures had been very low three weeks after launch. However, the chief executive responded to this:

⁶² From the website of the Irish Department of Communications, Energy and Natural Resources: <http://www.dcenr.gov.ie/Broadcasting/Digital+Television/>

*London Live chief executive, Andrew Mullins, is unconvinced by the Barb figures. "If you launch a new 'London only' focused TV channel, with a youth bias, where you expect viewing to be linear and non-linear, you are aware that Barb is not going to be very helpful,"*⁶³

Other reports (Hayward, 2014) provide additional data regarding the channels in their first months.

*At the end of August 2014, Notts TV released its first figures: a weekly audience of 189,000. STV Glasgow reported more than 572,000 viewers in the first month, and the statistics for Mustard TV in Norwich show nearly 100,000 people have watched. It's unclear what these figures definitively mean: the stations are in still very much in their infancy but arguably they demonstrate that there is a significant audience for local TV. Jamie Conway also points out that the figures most quoted for London Live, the ones where it has no audience, are from April. The station viewing figures have been growing for the past 11 consecutive weeks.*⁶⁴

According to Hayward (2014): The landscape is mixed: some of them will work and some won't.

Further discussion in the Guardian⁶⁵ pointed to the fact that there is a genuine interest from people to have local content: *our research shows that there is an appetite for truly local content, with 70% of potential viewers saying they are most interested in watching local news programmes, followed by over half (52%) wanting to see documentaries about their local areas and almost a third (30%) keen to be shown the latest on their local sports teams.*

3.4 Online viewing data

There is very little pertinent data regarding online viewing of regional channels, regional news or regional programming. As can be seen below (section 3.2), the availability of this information is dependent on what the channels themselves provide. For example, S4C claimed 5.2 million online viewing sessions in the last year. BBC Alba had 4.1 million views on BBC iPlayer in 2012-2013.

For this brief, the data provided by audience measurement or online audience measurement companies was examined. In this case the comScore analytics for TV and video viewing online in the UK were accessed. The data revealed that BBC iPlayer ranks number 2 in the list, but the data are not broken down either with regard to regional programming or to regional viewing of the BBC iPlayer. STV.TV, the online site and access to catch-up of the Scottish channel 3 licence STV, appears at number 15 in the top 90. The Welsh channel's site S4C.co.uk appears at number 59.

⁶³ Guardian (April, 2014): **London Live TV suffers terrible Barb ratings three weeks on from launch**
<http://www.theguardian.com/media/greenslade/2014/apr/24/london-live-tvratings>

⁶⁴ Hayward, D (2014): **The death of local TV has been greatly exaggerated.** BBC Blogs. Monday 06 October 2014.
<http://www.bbc.co.uk/blogs/collegeofjournalism/entries/9f847ec0-f9e2-30c8-bafe-53badd3d904b>

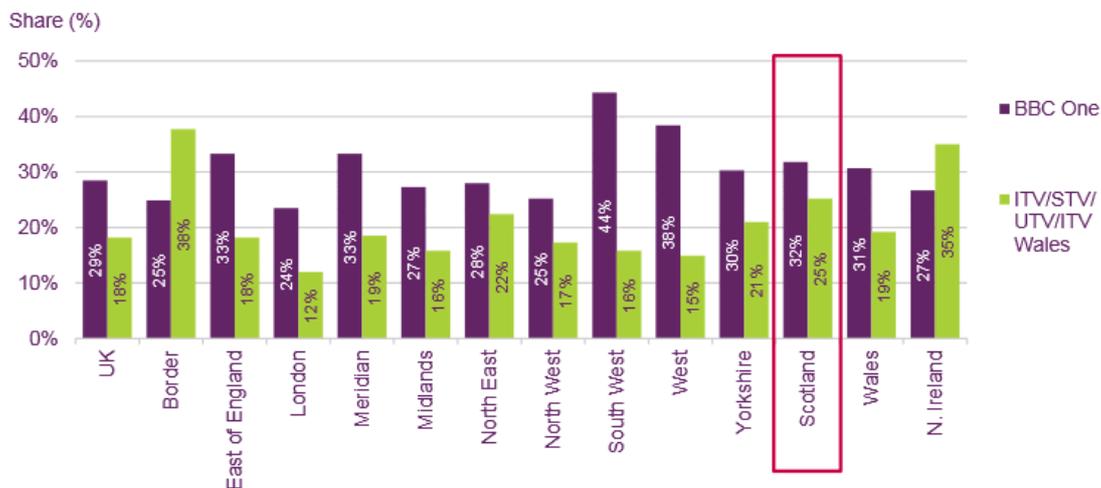
⁶⁵ Errington, Mark (Guardian Media, Thursday 23 October 2014): **Local TV: the demand is there but will it survive?**
<http://www.theguardian.com/media-network/media-network-blog/2014/oct/23/london-live-local-tv-demand-survive>

3.5 News audiences

3.5.1 News and current affairs

Regarding news broadcasts, as outlined in section 2, all the BBC regional windows and the ITV regional licences feature specific regional news programmes. Figure 2 (reproduced from the Ofcom Communications Market Reports - in this case the Scotland report) shows the regional daily average audience shares for the regional news programmes from both the BBC and the ITV networks.

Figure 4 Audiences for regional News BBC 1 and ITV/ STV/UTV by region, 2013 (Source Ofcom)



Source: BARB, Individuals (4+)

Notes: i) Based on regional news programmes, start time range 17:55-18:35, 10mins+ duration, BBC One and ITV (exc.HD), weekdays. BBC One's news bulletin is transmitted between 18:30-19:00 and STV's is transmitted between 18:00-18:30. ITV HD is excluded from regional news analysis because the channel is not reported against the ITV Ulster panel in BARB. There may also be some anomalies in the reporting of regional news feeds more generally for the ITV HD channel ii) In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre- and post-panel change data should be compared with some caution.

Source: Ofcom - The Communications Market 2014

It can be noted that, in general, the lowest shares for these regional news broadcasts are in London, the North East, the North West and the Midlands, although these figures are close to a UK average.

There are significant audiences for the BBC regional news in in the South West and the West, the East of England, Meridian and Yorkshire – in both cases 40% and more as compared to the UK average of 29%. The audiences in Scotland and Wales are also above the UK average.

BBC 1 early evening news bulletins attracted 31% share in Wales In 2013, BBC One's early evening nations news bulletin attracted an average 31% share of TV viewing in Wales; marginally higher than the UK average for the same slot at 29%. ITV Wales' counterpart bulletin attracted a lower average share (19%), the lowest among the devolved nations but marginally higher than the UK average.⁶⁶

BBC 1 and STV's early evening news bulletins attracted greater share in Scotland than UK average In 2013. BBC One's early - evening nation's news bulletin, Reporting Scotland, attracted an average 32 % share of TV viewing in Scotland – higher than the UK average for the same slot at 29 %. STV's counterpart

⁶⁶ Extract from the Ofcom (2014): Communications Market Report – Wales:
http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr14/2014_CMW_Wales.pdf

*bulletin, STV News at Six, attracted a lower average share (25%), although considerably higher than the Channel 3 UK average (18%).*⁶⁷

Considering the audiences for the ITV regional news broadcasts, these are lowest in London and in the west and south west (in the case of the last two the BBC scores much higher). Audiences for the ITV regional news surpass those of the BBC in the Border region (north of England, south of Scotland) and in Northern Ireland. In Northern Ireland the viewership for ITV regional news is almost twice the national average. The shares in Scotland are also significantly higher than the UK average.

*UTV's early evening news bulletin performed strongly, attracting an average 35% share. In 2013, BBC Northern Ireland's early evening nations news bulletin (BBC Newslite) attracted an average 27 % share of TV viewing in Northern Ireland. UTV's counterpart bulletin (UTV Live) attracted a higher share average (35 %), nearly double Channel 3's UK average. This was markedly higher than all the other nations and regions, with the exception of Border which achieved a 38% viewing share.*⁶⁸

Regarding the regional news in the English regions, the 6.30pm BBC regional news programmes are watched by around 30% of adults in England, compared with the ITV regional news, at 6.00pm, which reaches around 20%. This is explained, according to the Annual Review of BBC England Services:⁶⁹

We consider that there is a great deal of high-quality journalism in regional news and current affairs programmes, much of which is significantly different from that available on the national news.

Inside Out, BBC One's regional current affairs television magazine programme in England gets an average audience of 2.7 million. Our panel members have told us that they value the programme and consider it offers something unavailable elsewhere. They particularly enjoyed the editions which focused on a single topic, looking at the issue from an England-wide and regional perspective. We hope that the programme will continue to offer high-quality, relevant investigative journalism.

For the purpose of comparison, we also acquired additional data from EurodataTV regarding the audiences per region of the main national news bulletins. Both sets of audience data originate from the national audience measurement organisation BARB. The categories of regions are not exactly the same as those used in the Ofcom data. The following provides just an overview of the data as the actual data has been removed from this brief for copyright reasons.

With both sets of data, we were able to consider both the data for regional audiences for regional news and the data for regional audiences for national news.

Surprisingly the audience data showed that the regional news broadcasts had a higher average audience than the national broadcasts that follow (audiences in regions). Regional news is more important.

This was the case in both Northern Ireland and Scotland where the regional broadcasts had higher audience shares than the national news broadcasts that followed them (at 6pm), with the difference being most significant in Northern Ireland.

In general the audiences for the ITV national news bulletins were also lower than those of the ITV regional bulletins; an exception was London where the national bulletin achieved a slightly higher audience share.

3.6 Programmes about Europe

A previous study carried out in 2013/2014 for the DG COMM by the European Audiovisual Observatory found that the only programmes on the main British TV channels dealing with a special focus on Europe

⁶⁷ Extract from the Ofcom (2014): Communications Market Report – Scotland:

http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr14/2014_CMRS_Scotland.pdf

⁶⁸ Extract from the Ofcom (2014): Communications Market Report – Wales:

http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr14/2014_CMRS_Wales.pdf

⁶⁹ BBC Annual Review/ England:

http://www.bbc.co.uk/bbctrust/who_we_are/audience_councils/england/annual_review.html

were those on BBC Parliament. In the UK, the channel BBC Parliament has a specific remit is to make accessible all the work of the UK's parliamentary and legislative bodies and the European Parliament.⁷⁰ The channel broadcasts the European programmes *Politics Europe* and *European Parliament*. The programmes are also broadcast on BBC World. *Politics Europe* replaced *Record Europe* in 2012, which had been running since 2007.

Of course, there is no easy way of assessing the extent to which other programmes touch on EU issues (news, current affairs, documentary, magazine ...). This would require a content analysis of the programmes that are specifically broadcast by the regional channels.

As we know that the majority of the schedules are based on BBC1 and ITV1, the earlier research done on these channels is also relevant here. There is no doubt that many types of programming deal with the issue of Europe.

The BBC Trust decided in summer 2012 to launch a review of the breadth of opinion reflected in BBC output. This resulted in the report: "A BBC Trust Review of the Breadth of Opinion Reflected in the BBC's Output July 2013"⁷¹ and covered three areas of focus: religion, immigration and the UK relationship to the European Union. The study concluded that: there is a wide and comprehensive range of information and viewpoints on the EU in various BBC on air and online services. The content analysis of BBC output suggested that: in coverage of the UK's relationship to Europe, the EU was frequently framed as a problem, and from the vantage point of British national interests.⁷²

In addition to requirements for the BBC (noted above), the Welsh regional channel S4C Wales includes in its 2013 Content Policy Statement⁷³ under the section on news and current affairs: "*We will continue to provide a comprehensive range of current affairs programmes and series that will include investigative journalism and treatment of political affairs which are relevant to Wales and locally, along with the latest developments in Cardiff Bay, Westminster and Brussels.*"

A similar study would need to be carried out regarding a content analysis of the regional programmes in order to see which programmes deal with this issue. This was not possible in the remit of this brief.

Instead this report has made reference to the main news and current affairs programmes on the regional TV (see 3.1.1 and 3.1.2 above), and provides additional information on any regional programmes focused on Europe.

One example of a programme focused on Europe was identified. It is broadcast on BBC2 Scotland and also on the Gaelic language service BBC Alba. *Eòrpa* (Scottish Gaelic for *Europe*) has been running since 1993, and has covered political and social issues affecting Europe and Europeans over that time including issues affecting the Western Isles. It is broadcast weekly in Scottish Gaelic with English subtitles. The programme has also been credited with awards, including Scottish BAFTAs. It is funded by the Gaelic Media Service and produced by BBC Gàidhlig.

It brings "new European stories and new perspectives to the audience. Visiting the Norwegian island of Utoya and meeting survivors of the shootings, the programme explored the personal and political legacy of those events particularly amongst the younger generation; a special edition of the programme examined the relationship between France and its Muslim community and, closer to home, questioned why so few women stand in local and national elections for the Western Isles".⁷⁴

⁷⁰ http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/regulatory_framework/service_licences/tv/2013/bbc_parliament.pdf

⁷¹ See the full report on the BBC Trust website:

http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/our_work/breadth_opinion/breadth_opinion.pdf

⁷² See the content analysis on the BBC Trust website:

http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/our_work/breadth_opinion/content_analysis.pdf

⁷³ S4C Content Policy Statement, 2013:

http://www.s4c.co.uk/abouts4c/authority/pdf/e_datganiad_polisi_cynnwys_2013.pdf

⁷⁴ Annual Review BBC Scotland:

http://downloads.bbc.co.uk/scotland/aboutus/management_review_2012_2013.pdf

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http://www.bbc.co.uk/bbctrust/who_we_are/audience_councils/england/annual_review.html

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<http://www.theguardian.com/media/2013/jul/23/itv-regional-news-shrink-ofcom>

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ITV Plc website: www.itv.com

Latest TV website : <http://thelatest.tv/>

London Live Website : <http://www.londonlive.co.uk/>

Made in Bristol website: <http://www.madeinbristol.tv/>

Made in Cardiff website: <http://www.madeincardiff.tv/>

Made in Leeds website: <http://www.madeinleeds.tv/>

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http://education.niassembly.gov.uk/post_16/the_work_of_the_assembly/making_legislation/power

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