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Television in Scotland
An assessment of the broadcasting landscape: past, present and potential futures.

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Abstract

This thesis provides an assessment of the Scottish television broadcasting landscape within a previously unexamined contemporary context. In particular, the work explores the impact of developments that have occurred since the Scottish Broadcasting Commission in 2007. Through a critical realist lens, it does so by using a combination of desk research, elite interviews and an online audience survey to answer the main research questions: how well does the current broadcasting landscape serve the television industry in Scotland; how well does the current broadcasting landscape serve the television audience in Scotland; to what extent is there an appetite for a new television service for Scotland and what type of service might be viable? By mapping the historical, political and economic terrain, the research also analyses the themes and theoretical concepts that underpin the specificity of the experience of Scottish television within the UK context. It demonstrates the way in which these dynamics interrelate creates a curious environment, whereby Scotland's position in the UK-wide broadcasting framework is perceived to produce both indispensable advantages and debilitating disadvantages. Findings show there is a certainly a *perception* that the television broadcasting landscape currently falls short in serving both the industry and audience satisfactorily, and a latent demand was found for a supplementary television service for Scotland. This finding is now particularly significant due to the BBC's recent announcement that a new television channel for Scotland will be launched in the Autumn of 2018.

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Author's Declaration

This thesis represents the original work of Nicola Elizabeth Johnson unless otherwise stated in the text. The research on which it was based was carried out at the University of Glasgow under the academic supervision of Professor Philip Schlesinger and Professor Gillian Doyle during the periods October 2013 – September 2015 and October 2016 – September 2017.

Chapter One

Introduction

Debates about Scottish television broadcasting experienced increased attention in the run up to the recent 2014 referendum on Scottish independence. However, for all the exchanges and discussions regarding the SNP's plans for broadcasting post-independence, little note was paid to the fact that many of the points raised were indicative of long-standing issues pertaining to culture and communications policy in Scotland.

As a stateless nation, Scotland's inherently complex situation vis-à-vis broadcasting has provided a rich topic of research over the years. For instance, the history of tensions over autonomy and attitude between the BBC and BBC Scotland has been a fairly well travelled line of enquiry. Subsequently, devolution offered a new political reality within which to investigate the broadcasting landscape in Scotland and to evaluate Scotland's position within the UK-wide framework. We are now approaching twenty years since devolution, with numerous political, socio-economic and technological changes occurring in the intervening years. It is timely, therefore, to embark on a contemporary assessment of the broadcasting landscape in Scotland within this new context.

1.1 A note on the new BBC channel for Scotland

As is the risk when researching a live, present day topic, an unexpected but significant development occurred during the writing up period of this PhD. On the 22nd of February 2017 it was announced that a new BBC channel for Scotland would begin broadcasting in the Autumn of 2018. The new channel (which still needs to be approved by Ofcom) is to be funded with a budget of £30 million per annum and will broadcast from 7pm to midnight every evening, including a Scottish news hour at 9pm that will broadcast stories from Scotland, the UK and the world (BBC News, 2017).

Whilst it is important to stress that this announcement was made *after* the field research was conducted, the obvious relevance of this development has necessitated giving some brief consideration to how the findings of this study apply to the new plan. More details about the channel will likely follow in the months to come, and the impact of this new service after its launch will provide ample scope for future research.

1.2 Context

To set the scene, it is useful to provide a brief overview of the organizations and services currently occupying the Scottish television broadcasting landscape. Audiences in Scotland have access to UK-wide provisions, some partly tailored to those north of the border. For instance, both BBC1 and BBC2 have 'Scotland' added to their titles, which signifies that the channels occasionally 'opt-out' of the UK-wide network programming. However the network provides most of the content and notably, the main news bulletin is shared with the rest of the UK. With regards to channel 3 services, the STV Group plc owns the two commercial franchises of central and northern Scotland and uses the brand STV for the service it provides. Despite not being owned by ITV plc, most of STV's output is again provided by the main UK-wide network, including an ITV network news provision from London. An anomaly in this set up is Carlisle-based Border Television, which is part of ITV and continues to service the south of Scotland (Blain and Hutchison, 2016, p.21).

More recent additions to the landscape have been BBC Alba, established in 2008, which provides a Gaelic-medium television service financed jointly by the BBC and the Scottish government. Whilst its mandate is to serve Gaelic speakers and promote interest in the language, the channel regularly attracts audience numbers that far exceed the number of Scots who speak the language. However, this is largely due to sports coverage, and its ability to transcend language barriers. Another recent addition has been local television. In 2013 Ofcom (the UK communications regulator) awarded the first two local licences for Glasgow and Edinburgh to STV. STV Glasgow and STV Edinburgh began broadcasting in June 2014 and January 2015 respectively, providing programming such as the daily magazine show *Live at Five,* an expanded STV News service and archived STV content. In March 2015, STV won three further local TV licences for the Aberdeen, Dundee and Ayr areas under the working titles of *Around Aberdeen*, *View from the Bridges* and *Ayrshire Today*. Yet, these services were never launched as separate channels. On Monday 24 April 2017, the network of local services was merged and relaunched as STV2.

As with the rest of the UK, Scottish audiences also have access to an abundance of content via satellite and digital terrestrial television, along with an increasing array of online

providers such as Netflix and Amazon Prime. However, throughout the history of television broadcasting in Scotland there has been a continued absence of a service (bar BBC Alba), which offers audiences content beyond the limitations of the opt-out channel (Blain and Hutchison, 2016, p.22). As was phrased by the Scottish Broadcasting Commission: 'Scotland has never had a universally available television channel of its own, one with not only a strong sense of public service to Scotland but also a strong sense of public ownership by Scotland' (Scottish Broadcasting Commission, 2008, p. 4). As this thesis outlines, this absence has received varying levels of criticism periodically throughout the years, and it is the aim of this research to provide a contemporary exploration into the appetite for, and viability of, a new service dedicated for Scotland.

The research takes place during an interesting juncture for television broadcasting in Scotland. Field research was conducted only a short while after the independence referendum, which inspired a period of renewed and enlivened discussions regarding Scottish national identity and belonging (Bechhofer and McCrone, 2015; Rosie, 2014; Bond, 2015), and debates about how the referendum was represented on television (Robertson, 2014; Tumber and Ayton, 2014; Dekavalla and Jelen-Sanchez, 2016). Negotiations were also about to commence for the 2017 BBC Charter renewal; therefore interested parties were well primed for discussions pertaining to the future of broadcasting in Scotland. Another relevant and prevalent issue was the exponential technological advancement of recent years. The challenges faced by broadcasters as audiences consume content in an increasingly multiplatform and non-linear way were ever-present in the background of deliberations.

There had also recently been a commitment to increasing network spend in Scotland. As is detailed further in subsequent chapters, following the Television Network Supply Review in 2008 the BBC committed to sourcing more network television from the nations and regions. Mark Thompson, Director-General at the time, argued that the BBC should source a proportion of network programmes from Scotland equivalent to Scotland's share of the UK population (8.3%). In 2007 only 3.3% of the Network budget was spent in Scotland, but by 2010 this had more than doubled to 7.4%, which was ahead of the 2012 target of 6.2% (BBC News, 2011). In 2013 spend reached a record level of 10.9% (BBC Annual Report, 2014, p.64). The most recent figures show that despite announcing that BBC Scotland was to endure budget cuts of 16%, maintaining network spend remained a priority as 10.3% was achieved in 2016 (BBC Annual Report, 2017, p.97). Given this commitment, it is a pertinent

time to embark on an evaluation of television provision in Scotland, to gauge the impact this significant increase in network investment has had.

1.3 Aims of the Research

This research adopts a 'critical realist' approach, which aims to contextualize understandings and interpretations within broader social and political structures (Alvesson, 2011). Through this lens, the aims of the research are to investigate the efficacy of the current television broadcasting landscape and to explore the appetite for and viability of a new service for Scotland. It was deemed important to gather evidence from both an industry and audience perspective, to paint as broad a picture as possible in research of this size and scope.

A combination of elite semi-structured interviews, online audience survey and desk research were used to investigate the three main research questions of this thesis:

1.) How well does the current broadcasting landscape serve the television industry in Scotland?

2.) How well does the current broadcasting landscape serve the television audience in Scotland?

3.) To what extent is there an appetite for a new television service for Scotland and what type of service might be viable?

The nature of the investigation into the first two questions differed from the last. With regard to the existing landscape, it was possible to collect data relating to specific policies, trends and programmes. However, the nature of the third question necessitated a more exploratory investigation. At the time of research there were no specific proposals for a new service for Scotland on the table, therefore the musings, opinions and ideas gathered and analysed in this thesis were hypothetical and speculative in nature. As shall be addressed shortly, with a proposed new BBC channel for Scotland announced in February 2017, the observations made throughout this aspect of the research can now be applied to a more specific concept.

Along with the research into the perceived adequacy of the current landscape, another aim of the research was to use an extensive period of desk research to investigate the key arguments and issues prevalent throughout the history of television broadcasting in Scotland. This side of the research facilitated a more nuanced understanding of the underlying themes, and a discovery of the theoretical concepts that underpin the debates about the past, present and potential futures of television in Scotland.

1.4 Thesis Structure

After this introductory chapter, chapter two provides an account of the evolution of broadcasting in Scotland, which has unfolded amidst considerable political, socioeconomic and technological change. Whilst a comprehensive history is beyond the scope of this research, significant periods and events are outlined which have shaped the context we arrive at today. Namely, the chapter will explore the very beginnings of broadcasting, devolution, the Scottish Broadcasting Commission, organizational changes within the ITV network and the 2014 independence referendum. A note is also made on the technological advances which have occurred in recent years, and how changes in audience behaviour adds another level of complexity and debate to an already complex picture. By exploring this background literature, a number of themes are uncovered, such as the challenges of peripherality, constitutional debate, representation, scale and the unequal balance of power within the politics of broadcasting policy. As the thesis unfolds, it becomes clear these issues are the heart of the debate, and are still prevalent today.

Chapter three frames the research by engaging with the theoretical concepts that underpin the debate, and presents what this thesis argues is the pivotal conceptual discord underlying many of the arguments and tensions surrounding broadcasting in Scotland. The chapter aims to demonstrate that by following the logic purported by social communication theories of national identity, one could argue that ideally, Scotland would have its own dedicated television broadcaster, which would allow for the freedom to explore multifaceted and progressive representations within its own communicative space. However, in conflict with this line of thought are economic concepts relating to broadcasting in countries with small populations. Numerous authors have outlined the advantages of scale, and argued that smaller countries tend to struggle to produce a significant amount of representational,

original content. This raises questions about whether a new service dedicated to Scotland could afford to produce enough content to improve the exploration of its national culture. What we are left with is a rather curious scenario whereby Scotland's position within the UK-wide broadcasting framework can be seen to produce both debilitating disadvantages and indispensable advantages.

Chapter four, the methodology chapter, provides a justification of the methodological choices made when conducting the research. The chapter outlines why a critical realist approach was deemed the most appropriate, and explains the rationale behind using a combination of desk research, elite interviews and an online audience survey whilst identifying both the strengths and weaknesses of using these methods. Through this process various limitations of the research discussed, along with how this affected the critical interpretation of the findings.

Chapter five marks the beginning of the findings and analysis stage of the thesis, and addresses the first research question, namely: how well does the current television broadcasting landscape serve the television industry in Scotland? The chapter provides an analysis of evidence collated from interviews with industry players (the majority of whom being broadcasting executives or owners or founders of production companies) alongside economic reports, policy documents and institutional literature. A distinction is made between long-term structural issues, and those that are the result of more short-term policies. Whilst presenting reoccurring themes and drawing conclusions, a critical awareness of the rent-seeking and self-interested lobbying position of many of the research participants is maintained. The chapter investigates the experiences of the industry within the current broadcasting landscape critically, without merely accepting the narrative projected by interviewees.

The thesis then turns to audiences, with chapter six addressing the second research question: how well does the current television broadcasting landscape serve the Scottish television audience? Findings generated by the online audience survey are presented, which outline satisfaction levels with regards to different genres along with patterns and correlations found in relation to demographics such as geographical location and opinions on Scottish independence. The chapter uncovers some significant findings about audience opinions on

the level and nature of representational content provided by the current television broadcasting framework.

Chapter seven, the final findings chapter, addresses the last research question: to what extent is there an appetite for a new television service for Scotland, and what type of service might be viable? By analysing findings collected from interviewees and the online survey, this chapter tests the mood amongst the audience and industry players regarding the idea of a television service dedicated to Scotland. As this side to the research is exploratory and investigates what was at the time a hypothetical venture, this chapter does not provide detailed scrutiny of a variety of different specific models. Rather the aim of this chapter is to rather provide a more general insight into the issues and arguments that are dominant within discussions regarding a new television service for Scotland in the present-day context. However, in light of the recent announcement that a new BBC channel for Scotland will begin broadcasting in the Autumn of 2018, this chapter also includes an acknowledgement of the significance of this new development.

Chapter eight provides a conclusion to the thesis by presenting a summary of key findings and pulling together the main themes identified in the background and conceptual chapters whilst exploring how they pertain to the findings of the main research questions. In doing so it takes stock of the significance of the main findings, the limitations, and speculates how this research might be expanded or developed by further study.

Having now given an overview of the context and structure of this thesis, along with the research questions that drive it, the following chapter presents an historical frame of reference in which the television broadcasting landscape sits in Scotland.

Chapter Two

Broadcasting in Scotland

Broadcasting in Scotland began on the 6th of March 1923, when the BBC transmitted a three-hour-long radio broadcast from the new Glasgow Station. In these humble beginnings, the BBC was the sole broadcaster in Scotland, and the Glasgow Station had only five members of staff (Walker, 2011, p.24). As one might expect, the scene has changed considerably over the years. BBC Scotland and STV now operate large headquarters at Pacific Quay in Glasgow, and when combined employ over 2000 people (BBC Scotland, 2013: STV, 2017). In addition, Scotland now boosts a fairly sizable original production market reportedly worth £190 million a year (Pact, 2015, p.7).

Of course, this transformation has not occurred in isolation. The evolution of broadcasting in Scotland has unfolded amidst considerable political, socioeconomic and technological changes which have had a significant impact on the issues and debates that have occurred throughout the years. It is the task of this chapter to provide an overview of this background, in order to contextualize the research and to aid the critical interpretation of findings presented in subsequent chapters. In doing so, it shall uncover a number of complex and interrelated themes that recur throughout, such as peripherality, constitutional debate, representation, scale and the unequal balance of power within the politics of broadcasting policy in Scotland.

Whilst this is not a comprehensive history, the chapter explores significant periods and events which have shaped the context we arrive at today, such as the very beginnings of broadcasting, devolution, the Scottish Broadcasting Commission, organizational changes within the ITV network and the 2014 independence referendum. A note is then made on the considerable technological changes that have occurred exponentially throughout recent years, and how this adds another element to an already complex picture. Finally, the chapter concludes by identifying the themes that exist throughout, and establishes why this research is particularly pertinent at this time.

2.1 Broadcasting Beginnings

It was not long after its birth in the early 1920s that broadcasting was considered as one of the most significant influences on everyday living, and was thought to contribute significantly to the cultural fabric of the nation (Cardiff and Scannell, 1991). By observing day-to-day routines and important traditions, it was thought that broadcasting helped to establish a world-in-common amongst populations and construct an element of cultural cohesion (Scannell, 1988: Cardiff and Scannell, 1991).

However, by focusing on commonality, many argue that early output failed to reflect the diverse range of local and regional cultures in any significant way (Sweeney, 2008, p.89). In fact, the most prominent accounts of Scotland's early broadcasting focus on the limitations of policies of centralization. For instance, McDowell (1992), Scullion (1994) and Sweeney (2008) all argue to a greater or lesser degree that Scotland was considerably marginalised and underrepresented in the beginnings of broadcasting, with there being a disproportionate amount of focus on London. Moreover, they also argue that any attempts to improve representation and move towards a decentralization of responsibilities were met with considerable resistance (Sweeny, 2008, p.90).

For instance, one of the earliest examples of the seemingly stubborn nature of centralised thinking was the launch of the BBC's first Regional Scheme in 1929. The scheme was introduced in response to calls for more local output and was intended to enable listeners who wished to receive the Scottish programming to be able to do so without being interrupted by the National Programme from London, and vice versa. However, rather than use this as an opportunity to call for more production north of the border, powerful voices in both London and Scotland were sceptical and the scheme resulted in less programmes made in Scottish studios.

A week after the scheme came into force the Scottish Regional Director (David Cleghorn Thomson) gave a talk, broadcast from all Scottish stations, outlining the new programme policy in Scotland. He reasoned that Scotland was not expected to duplicate programmes which he though could be produced better in London and specifically remarked that many of the programmes currently broadcast in Scotland did not have any distinctive national character and was of an inferior quality. McDowell argues that these perceptions contributed

to the reinforcement of the corporation's justification in maintaining a policy of centralisation (McDowell, 1992, p.24).

The debate surrounding centralisation continued throughout these early years of the BBC. In a report submitted to the Corporation in January 1936 the Director of Regional Relations Charles Siepmann stated:

> Centralisation represents a short-sighted policy. The provinces are the seed ground and the ultimate source of our supply for London programmes. Therefore, the existence and development of our regional work provides an effective insurance policy against the drying up of resources of supply for our programmes (cited in McDowell, 1992, p.35).

Siepmann then specifically called for provisions to be made for an expansion of regional output, a recommendation that was also echoed in the Ullswater Report of 1936 and supported by the government (Sweeny, 2008, p.91). However, despite these recommendations the BBC appeared determined to maintain centralised control and responded with no significant changes, stating that it had 'no desire to replace the metropolitan by regional centralisation' (McDowell, 1992, p. 38).

There was undoubtedly a political dimension to even these earliest debates about BBC policy. For instance Eldridge (1996) argues that there was a clear 'one nation' motif throughout the early years of broadcasting in the UK. Reith was documented as being close to what might be seen presently as the Unionist position. So for him, broadcasting, co-ordinated within one national institution, reaching out to the whole nation, could help promote social consensus, political unity and perhaps discourage nationalist tendencies in Scotland (Eldridge, 1996, p.271).

On the other side of the constitutional debate the SNP and groups such as the Saltire Society lobbied hard for Scotland to be given more broadcasting prominence. They complained that the BBC was treating Scotland literally as a region, rather than as a nation, and that there should be more Scottish perspective on both local and national events. Right from the earliest days of broadcasting the SNP called for a separate corporation for Scotland. They claimed that 'if Scotland is not to be submerged in a stream of Anglo-American ideas and

culture, it is imperative that a Scottish Broadcasting Corporation be formed to control the services at present provided by the BBC' (cited in Briggs, 1995, p.674).

The outbreak of war in 1939 presented a further blow to moves against the policy of centralisation for technological and security reasons. Transmitting on synchronized transmitters was considered necessary for defence, so subsequently regional broadcasting was suspended altogether. The fear was that German aircraft, when entering British airspace, might use separate transmission frequencies as navigational aids. The BBC therefore closed the existing National and Regional Programmes, combining the two to form The Home Service. Significantly, the proportion of Scottish items on the Home Service was initially considerably reduced to a weekly 'Scottish Half-Hour' (Sweeny, 2008, p.91). The lack of regional programming was considered to have negative consequences for Scottish culture. Wartime Scottish Regional Director Melville Dinwiddie warned that 'wartime restrictions on broadcasting have resulted in many Scottish listeners becoming more anglicised and, due to films, more Americanised in their tastes' (cited in Walker, 2011, p.152).

Yet throughout the war, BBC Scotland and its staff did fight determinedly to make sure the unified Home Service considered Scottish interests. For instance, there were many complaints north of the border about the Home Service using the word 'England' when referring to Britain. The cover of the first edition of the *Radio Times* to appear after the declaration of war pictured an elderly man outside a thatched-roof cottage with the caption "There'll always be an England." A programme of the same title was broadcast on the Home Service the next week (Hajkowski, 2010, p.156-157). Dinwiddie expressed his concerns to London about the misuse of these terms. He warned that it could 'provide a serious stimulus for dissatisfaction and the evidence for Scottish Nationalists' arguments of English domination' (Hajkowski, 2010, p.156).

The immediate post-war years led to organizational changes in the BBC to re-establish regional broadcasting. The introduction of the Scottish Home Service in July 1945 began what many have labeled a 'golden-era' in Scottish Radio Broadcasting. In January 1947, the Scottish Advisory Council was formed, one of a number of Regional Advisory Councils charged with the responsibility of providing advice on Regional programme policy (McDowell, 1992, p.55). Sir William Haley, BBC Director-General, commented on the front cover of the Radio Times about the return to regional broadcasting: 'It will be the BBC's

aim to make its six regionalised Home Services alert, living things; steadily developing in strength and character … leading to rivalry both of creativeness and of craft, and to the fostering of those national and local cultures' (Radio Times, 1945, p.1).

In the post-war period Melville Dinwiddie remarked: '… only the best of its type, wherever it is to be found, is good enough for our Scottish audience'. This attitude was reflected in the calibre of programmes filling the Scottish schedule, and Scottish listeners returned from the national to the Scottish Home Service in droves (cited in Walker, 2012, p.156-9).

Yet even when broadcasting in Scotland was seen to be enjoying a period of prosperity, there were still those that argued there was something fundamentally problematic with the landscape. For instance the Saltire Society condemned the BBC for what it called 'timidity neurosis'. They questioned why Scottish news treated as an appendage to BBC news and why Scotland didn't have a proper integration of Scottish news with world news (*The Scotsman*, 1945 – cited in Briggs, 1979, p.90). However, criticisms did not solely come from those pursuing a nationalist agenda. Both the Conservative MP for Perth and Kinross and the Labour MP for Coatbridge made similar complaints regarding news provision in 1945 (Briggs, 1979, p.90).

In any case, the advent of television soon brought this 'golden era' to an end, as Scotland was placed at a significant technological disadvantage. Demonstrations of television took place in Selfridges as early as 1925, and the BBC Television Service finally went on air on 2nd November 1936. However, throughout its infancy the service was primarily available in the London region, and travelled very gradually across the UK. The new medium only arrived in Scotland sixteen years later, with the opening of the Kirk O'Shotts transmitter in 1952 (Sweeny, 2008, p.92).

The broadcasting scene was to change considerably in October 1951 when just seven months after a new Conservative government was elected, a White Paper on Broadcasting was published. The paper argued that a degree of competition would be beneficial to both audiences and the industry and the result was a Television Act in 1954, which gave the green light for commercial broadcasting and the launch of the Independent Television Network (ITV) in 1955. This new network was made up of numerous companies providing a

regional television service and who would also provide programmes to the network as a whole.

Each individual company was responsible for providing a local service, including daily news bulletins and local documentaries, and for selling advertising space on their channel. However, national news was not provided by the individual companies and was instead provided by Independent Television News (ITN). With regard to the structure of ITV franchises, rather than a single company dedicated to broadcasting to Scotland, licences were issued to Scottish Television in 1957 to serve Central Scotland, Grampian Television for the North East and Border Television for the English-Scottish Border and the Isle of Man in 1961. The organisation of these ITV franchises was largely based on the location of transmitters, rather than on an assessment of cultural regions or nations (Johnson and Turnock, 2005, p.20). As will be explored later in the chapter, Border Television has proven to be the most contentious of the three, with many criticizing the boundary for bearing little relationship to community identities.

Scotland's experience of the early years of the new ITV network was mixed. Commercially speaking, the regional companies, particularly STV, were considerably successful. Roy Thomson, the Canadian founding chairman of Scottish Television famously described the ownership of the franchise as a 'licence to print money.' STV also developed a number of innovative programmes that were popular with audiences such as *Here and Now, Scotsport* and *The One O'Clock Gang*. However, whilst these programmes met with audience approval the publication of the Pilkington Report in 1962 was largely critical of ITV's regional output. In Scotland it was claimed that much of what was produced failed to reflect local culture in any detail and was screened outwith peak viewing times (Sweeny, 2008, p.95).

In sum, it is clear that certain elements of these early broadcasting years helped set the tone for Scotland's experience for years to come. Particularly in that from the outset, broadcasting in Scotland was established as peripheral to the main national network that was heavily centralised in London. This had several implications, many of which appear to have placed limitations on the development of output north of the border. For instance, from a technological perspective Scotland was placed at a significant disadvantage, often being at the back of the queue for new advancements. From a representational perspective, there

appears to have been a reluctance to embrace output from Scotland, with a concern that it would compare unfavourably to that from London, which was considered the main hub of talent. This led to a perception that Scotland's national identity and culture was marginalised, and that broadcasting in these early years was overly Anglicised. As the rest of this chapter, and thesis, demonstrates, this is a perception that has prevailed.

It is also clear that the politicisation of debates about Scottish broadcasting occurred from the beginning. Whilst unionists were often found to be lobbying for maintaining the status quo, and those pursuing a nationalist agenda often called for more autonomy, opinions didn't neatly fall into this binary. As the remainder of this thesis demonstrates, this is a false dichotomy that still resonates today. Arguments for change did not solely emerge from the nationalist camp. Numerous government reports and papers, along with several broadcasting executives in Scotland, concluded that early provisions did not adequately meet the needs of Scottish audiences. Yet, in most instances these concerns did not inspire change. The early years of broadcasting in Scotland did not establish the audience as a powerful stakeholder, another issue that would remain prevalent in years to come.

2.2 Devolution

Undoubtedly one of the most significant political moments in recent Scottish history has been devolution. In 1997 the new Labour government held a referendum on devolving the nations of Scotland and Wales in the United Kingdom. The resulting yes vote provided the basis for creating the Scottish Parliament and the National Assembly for Wales in 1999. The Scotland Act (1998) outlined the structure for the new Scottish Parliament at Holyrood and created the Scottish Executive (later named the Scottish Government by the SNP in 2007), which was to be semi-autonomous from the UK. The Act specified the difference between reserved and devolved powers. Devolved matters are presided over by Scottish Members of Parliament (MSPs) and include education, health, agriculture and justice. Reserved matters, such as foreign affairs, defence and national security remain under the control of Westminster, and are issues on which the Scottish Parliament cannot pass legislation. Crucially for this research, broadcasting was also an area reserved to Westminster.

Some have claimed that broadcasting was originally going to be devolved when the first Scotland Bill went through in 1998, but that this plan was abandoned at the last moment

because a few very powerful voices raised concerns about the implications for the United Kingdom. For instance, Pete Wishart (SNP MP for Perth and North Perthshire) argued that senior politicians in London thought 'to devolve broadcasting to the Scottish Parliament would be almost akin to independence itself' (Wishart, 2012). However, other key broadcasting and political figures (particularly north of the border) were of the view that leaving broadcasting unchanged would lead to an awkward contrast between other creative and cultural matters, nearly all of which are devolved. Nigel Smith, who chaired the 'Scotland FORward' campaign for devolution, advised that it in light of devolution, the concept of the BBC as a necessary 'glue of the nation' should be made defunct (Smith, 1997, p.7).

Despite the increase in political autonomy for Scotland, devolution did not lead to any significant alteration to the organisation of the broadcasting landscape, and the BBC remained much the same way as it had always done, with only small changes being made to programming, such as the addition of *Newsnight Scotland* in 1999. Consequently, there was an increase in antagonism between the BBC and BBC Scotland throughout this period, and the BBC's role in the cultural and creative infrastructure of the nation came under increasing scrutiny (Hibberd, 2008, p.56).

The most prominent dispute over this period was whether Scotland should opt-out of the BBC six o'clock news bulletin. A proposal made by BBC Scotland in 1998 was for a Scottish produced version of the news to be broadcast on BBC1 in the 6-7pm slot. This 'Scottish Six' was to entail an opt-out from network news, and to broadcast instead a news agenda ordered according to Glasgow's priorities (Schlesinger, 2004, p.5). The proposal was made to respond to claims that news bulletins relating to matters such as 'cricket' and 'education' were jarring to the Scottish audience, and did not fit within Scottish identity nor the nation's frame of reference post-devolution (Hibberd, 2007 and Kiely et al., 2006). Supporters argued that this service would provide Scottish viewers with information on domestic matters, without swamping them with stories that since devolution, were only applicable in England (Keating, 2010, p. 106).

Yet despite these perceived advantages, it soon became clear that powerful voices in London were strongly against the prospect. The conflict over the issue was viewed by former Director General of the BBC John Birt as 'a bitter battle to prevent the BBC being split apart

by the fissiparous forces of devolution.' He added: 'I was deeply resistant to the proposal. It could have dire consequences for the BBC and unintended consequences for the United Kingdom … The end of a single common experience of UK news would encourage separatist tendencies' (Birt, 2002, pp.479-484). Senior Labour politicians in London were also convinced by this viewpoint, and the idea was obstructed (Schlesinger, 2005, p.219).

The nationalists utilized the 'Scottish Six' debate and ensured it transcended broadcasting into a national political issue, one of having 'our' news denied to us by 'them' (Schlesinger, 2005, p.219). However, consumer research at the time appeared to suggest that audience opinion was in favour of change. For instance, the Scottish Consumer Council (SCC) published a report into satisfaction with BBC news reporting in March 2004. Results of the survey circulated by the SCC suggested that 69% were in favour of the creation of a 'Scottish Six' and that a large minority was of the view that BBC news provided poor value for money (Scottish Consumer Council, 2004). Yet despite this research, BBC Governors remained adamant that the six o'clock news hour was more successful in Scotland than ever (Hibberd, 2007, p.109).

More calls for change came when culture minister Frank McAveety launched the Cultural Commission in 2004 as part of 'a generational opportunity – to look seriously and maturely at our culture and decide the framework for its support in the future' (Scottish Executive, 2004). The final report of the Commission acknowledged that while as an institution the BBC played a central role in Scottish culture, the structure of the television industry had not changed sufficiently since devolution and as such, was 'not calibrated in line against the changes in Scottish society but instead in line with BBC corporate policies' (Cultural Commission, 2005, p.323). The report also called for 'an element of devolution in broadcasting' and establishing at least one channel in Scotland in order to increase the possibility of a strong indigenous television production industry (p.326).

Yet, despite the Commission's recommendations, the Scottish Government declined to consider the possibility of a devolved broadcasting regime, or for the current broadcasting landscape to undergo any real evaluation. Their response *Scotland's Culture* simply commented that 'broadcasting is a reserved matter and is the responsibility of the Department for Culture, Media and Sport … we consider that our efforts and resources

would be better spent on continuing to improve coverage of Scottish issues on existing channels rather than to set up a new one' (Scottish Executive, 2006, p.43).

The debate about Scottish broadcasting post-devolution gained momentum once again after the SNP formed a minority government in 2007. In fact, Alex Salmond decided to raise the now long-standing debate about news provision in his first ever speech as First Minister. He claimed that the 'Scottish Six' issue represented "a shorthand for the much broader debate we need to have in Scotland about achieving a more relevant and informing blend of television" (Salmond, 2007). Yet, these criticisms did not solely come from the nationalist camp. For instance, former *The Scotsman* editor John McLellan (now the media chief for the Scottish Conservative Party) summed up his frustrations by highlighting that: '…someone with satellite or cable TV in Stornoway can watch the local news from East Anglia but not a full Scottish news programme, which puts national, UK and international stories in the correct context' (cited in Maddox, 2012).

In sum, post-devolution period saw the continued frustrations regarding the peripheral nature of broadcasting in Scotland, and the heavily centralised nature of the UK network. However, these frustrations were now heightened, as the lack of independence of BBC Scotland now seemed at odds with Scotland's newly increased political autonomy. In particular, this perceived idiosyncrasy manifests itself as a period of tension with regards to the issue of a 'Scottish Six.' Yet despite numerous and persistent calls for change, the structure of broadcasting in Scotland remained largely unchanged.

The reason for this lack of adjustment was that policy was left in the hands of powerful individuals with polarized positions (Schlesinger, 2005, p.227). For instance, those against greater devolution in broadcasting typically adhered to the longstanding argument that more output and autonomy would inevitably lead to parochialism and poor quality, 'kailyard' broadcasting (Brown, 2007). Those in favour of a more devolved structure argued that it was necessary to reflect the greater political autonomy Scotland now possessed. Once again, the debate was more often than not framed in unionist and nationalist terms, with the assumption that a move towards devolved broadcasting would necessarily mean a Scottish, rather than a British Broadcasting Corporation. With the discussion politically tainted (especially given that debates on broadcasting reached a zenith following the Scottish elections of 2007), the result was a stalemate (Hibberd, 2008, p.66).

Yet the framing of these discussions as purely unionist and nationalist is to minimize the complexity of the issue. As this section highlighted, calls for change (particularly with regards to news provision) did not just emerge from those embroiled in constitutional debate. Broadcasting as a non-devolved matter, sits in an awkward contrast to other creative and cultural matters, which are nearly all devolved. The Scottish Sports Council handles sport; tourism is handled by Visit Scotland, and film and the arts by 'Creative Scotland' (formerly Scottish Screen and Scottish Arts Council.) The Cabinet Secretary for Culture, Tourism and External Affairs can exercise power over film, but largely ignore broadcasting which is many times bigger in budgets and effects, and has strong operating links to film (Smith, 1997, p.35).

Indeed if one considers more recent events, it is clear that the difficulties involved in devolving broadcasting powers were not exclusive to this immediate post-devolution period. For instance, the Smith Commission, born from the independence referendum, was created in 2014 to investigate further potential powers for Holyrood. It has been reported that the Commission, which resulted in the Scotland Act 2016, initially involved a proposal to strengthen Scottish influence on the BBC. However, this plan was apparently axed 'at the eleventh hour' due to lobbying from powerful individuals (Gordon, 2014).

Without the ability to address issues with one coherent creative industries policy, it can be argued that Scotland is at a distinct disadvantage by having an 'asymmetrical' framework (Schlesinger, 2009b, p. 137). As Hibberd (2008) argues, this curious positioning of broadcasting within the UK's legislature post-devolution means that 'Scottish solutions for Scottish problems' (Dewar, 1999) were not always possible within this context (Hibberd, 2008, p.114). Indeed, throughout this contentious period it was powerful individuals (often based in London) who made key decisions and had the defining influence over the debate. Notably, the Scottish audience proved to be a stakeholder without any significant say once again.

2.3 The Scottish Broadcasting Commission

A significant moment in the more recent history of television in Scotland was the creation of the Scottish Broadcasting Commission in 2007. As the last section highlighted, devolution did not inspire a boost in Scottish television broadcasting. In fact, the years following devolution actually saw the industry in Scotland much depleted. Particularly, with regards to BBC network spend. In its nations and regions Communications Market Report in 2006, Ofcom reported that broadcasting spend had become increasingly concentrated in England, and investment in Scotland had halved from 6% in 2004 to a mere 3% in 2006 (Ofcom, 2007, p.83, fig. 3.29). This 3% spend represents a significant deficit, or gap between investment, and Scotland's share of the population which is closer to 9% (Schlesinger, 2009, p.3).

After forming a minority government in 2007, the SNP made addressing this situation a priority. In the same initial speech whereby an argument for a devolution of broadcasting was made, Alex Salmond announced the establishment of a Scottish Broadcasting Commission to look into the state of Scottish broadcasting, and propose a strategic way forward (Salmond, 2007).

After conducting an investigation into the current state of the broadcasting industry in Scotland, the Scottish Broadcasting Commission, chaired by Blair Jenkins, offered two central recommendations in its final report *Platform for Success* in 2008. First, the commission acknowledged that Scotland had always been 'marginalised within a generally successful UK framework' and therefore called for a 'substantial increase in investment in Scotland by the public service broadcasters', particularly by the BBC and Channel Four (Scottish Broadcasting Commission, 2008, p.3). The other proposal was for the creation of a new dedicated service for Scotland, namely the Scottish Digital Network.

The Commission recommended that the channel should function 'as part of a wider and deeper network of Scottish content, with rich online services complementing and enhancing the programmes in the linear broadcast channel'. The report argued that the network would provide audiences with high quality Scottish programming, create opportunities for emerging talent on and off screen, help enhance the economy of Scotland's creative sector and give Scottish producers and their content access to global markets (Scottish Broadcasting Commission, 2008, pp. 3-4). The report suggested a licence fee, on a non-

profit basis, should fund the network to ensure that the maximum percentage of public money ends up making content. (Scottish Broadcasting Commission, 2008, p.4).

The Commission largely based its recommendations on its audience research, which showed that public opinion was in favour of changing early evening television news to provide one integrated programme from Scotland covering international, UK and Scottish news. 54% of 1000 survey respondents claimed to be only sometimes or rarely clear about whether or not items in UK news programmes apply to Scotland. In addition, the research showed a strong appetite for a new service for Scotland, with 81% saying they would be interested in watching a new television channel made for people living in Scotland (Scottish Broadcasting Commission, 2008, p.27). These results suggest that there was a fairly strong public demand for changing the status quo. However (as will be explored in chapters four and seven) it is important to note that there are elements of the Commission and its research methodology that give cause for caution when interpreting its findings.

The Commission's report did have a fairly significant impact on the landscape, particularly with regards to investment. Following a Network Supply Review, the BBC in particular increased its network spend in Scotland relatively quickly from 3.3% in 2007 to 7.4% in 2010 (The Scottish Government, 2011, p.2). By 2011 the network spend was 9%, ahead of their target of 8.6% by 2016. In 2012 the percentage did fall to 7.6%, but spend reached 10% in 2013 (BBC Scotland, 2013). Channel Four also increased its production in Scotland, with network commissions nearly tripling from 1.4% in 2008 to 4.1% in 2010 (The Scottish Government, 2011, p.2).

Improvements were also reported in the subsequent Economic and Social Development Market Assessment reports of the Broadcast and Television Production Sector in Scotland. The report for 2010/2011 found that within the industry, feelings about the general business environment had significantly improved. Companies felt that there were growing opportunities from markets beyond Scotland, and an increase in commissioning meant that in general companies felt more optimistic about the future (EKOS, 2012, p. 30). The 2011/2012 report concluded that although many smaller indigenous independents are still finding it difficult to secure network commissions in an increasingly competitive market, the sector as a whole had grown, and the genre mix had broadened. The BBC's ongoing

dedication to reach and exceed targets was identified as a positive driver for the health of the sector (EKOS, 2013, p.33).

Although the Commission's call for more network investment in Scotland arguably had a significant impact, its second main proposal, for the creation of a Scottish Digital Network did not come into fruition. This is despite the Scottish Government maintaining that establishing the project was a 'central priority' for several years afterwards (The Scottish Government, 2011, p.3). The greatest obstacle to establishing a Scottish Digital Network appeared to be the question of funding, made particularly difficult given the post-recession economic climate at the time. Therefore, the Scottish Government convened a Scottish Digital Network Panel in 2010 to investigate various funding models and by doing so; ensure constructive and credible proposals could be presented as to how a network could be sustainable (The Scottish Government, 2010, p.2). The panel submitted a comprehensive report outlining how a Scottish Digital Network could be funded to the Scottish Government in January 2011 (The Scottish Digital Network Panel, 2011). However, interestingly, by the time of its submission the political reception of the proposed new channel had become more charged. Responses now tended to be polarized along either 'nationalist' or 'unionist' party lines.

Another notable development was that whilst the Scottish Government discussed the possibility of a Scottish Digital Network, the UK government was outlining its own vision for the future of television. In 2010, Secretary of State for Media, Culture and Sport at the time, Jeremy Hunt, announced plans for companies to run local TV stations across the UK. Phase one would involve Ofcom inviting bidders for licences to run services in major cities and towns such as London, Manchester, Birmingham, Glasgow and Edinburgh (Deans, 2012). Phase two saw another thirty areas selected to invite bids for local television, such as Middlesbrough, Cambridge, Carlisle and Dundee (Ofcom, 2013).

On the 9th September 2011 Hunt came to speak at Glasgow's City Halls to address Scottish broadcasting interests. He explained his rationale for his project, which in his view would help strengthen communities and provide a boost for local businesses that could use the service to implement targeted advertising. When asked about the concept of a Scottish Digital Network, Hunt replied that he saw no incompatibility between the two, and was pleased that the SDN was still under discussion (Schlesinger, 2011).

However, the Scottish Cabinet Secretary for Culture and External Affairs Fiona Hyslop, responded to the DMCS's plans for Local Television, claiming that although 'Local TV services have the potential to bring benefits to viewers across Scotland', however the 'UK Government's plans fall short of the mark'. Speaking in Galloway, Hyslop expressed her concerns that Jeremy Hunt's proposals would leave gaping holes in provision, particularly in rural areas. She claimed: "we firmly believe that a publicly-funded Scottish Digital Network is the best way to sustain and support local television services in Scotland. Our vision for a national network would serve viewers the length and breadth of the country – not just the largest centres of population which are commercially attractive – as well as meeting the need for choice in public service broadcasting in Scotland" (Hyslop – cited in Sweney, 2011a).

These two visions for the future of broadcasting are illustrative of the frustrations resulting from a confusing cultural infrastructure post-devolution. Despite Jeremy Hunt's assertion that both Local Television and the Scottish Digital Network could exist simultaneously, it was ultimately only the plans for Local TV that came into fruition. Whilst there was arguably nothing concrete stopping the Scottish government pursuing their goal, Local TV was the initiative that gained the most media attention therefore subsequently, the UK's plans cut across conceptions of television's future coming from Scotland (Schlesinger, 2011).

The proposal for a Scottish Digital Network represents the first substantive gesture towards the creation of a dedicated Scottish service. The ways in which the proposal stalled and failed to actualize are indicative of the issues that are central to the Scottish broadcasting debate. For instance, despite the perceived benefits of a new service, a major obstacle was funding. In order to provide the 'high quality of Scottish programming' recommended by the Commission, a sum (estimated at £76 million) was required which proved problematic to fund. The difficulty in acquiring the funds to create a service of sufficient scale is a prevalent theme throughout this research, and shall be discussed at length in subsequent chapters.

However with regard to calls for more investment, the Scottish Broadcasting Commission had a significant impact; particularly vis-à-vis BBC network spend. The BBC acknowledged

the deficiencies highlighted by the report and have since committed to ensuring Scotland's share of network output is at least proportionate to population share. However, there have recently been numerous criticisms regarding the way in which the BBC have fulfilled this new targets for Scotland. Many industry players have argued that by 'lifting and shifting' programmes (such as *Waterloo Road*) the increase in network spend has actually led to no real sustainable or long-term benefits to the Scottish industry. This subject will be explored in great detail in chapter five.

2.4 STV Organizational and Policy Changes

Thus far much of this chapter has been concerned with the BBC and the various key issues with regards to Scotland that have occurred throughout the years. Yet whilst BBC Scotland is undoubtedly the biggest player in the Scottish broadcasting landscape, the policies and strategies employed by the ITV network and STV also have had a significant impact.

As aforementioned, the network of franchises dating back to the start of independent television in 1955 had fairly tenuous links to the various cultural regions of the UK, with the ITV Border region proving to the be the most contentious. However, it was not until 2007 that a reshuffle of any sort was explored. In 2007, speaking at Ofcom's nations and regions conference in Cardiff, ITV executive chairman Michael Grade commented that the existence of some smaller regions such as Border and Anglia made little sense relative to the audiences they served (Welsh, 2007).

However, rather than a plan to unite the Scottish borders with the rest of the country, the proposed restructure involved merging ITV Border with ITV Tyne Tees. The plans involved ITV Border's news and current affairs programme *Lookaround* being moved from Carlisle to Gateshead, along with its Tyne Tees counterpart North East Tonight. Instead of a half-hour standalone programme, *Lookaround* and *North East Tonight* would now be comprised of 15 minutes of dedicated local news at the start of the programme, followed by shared output from both regions.

This proposed move proved fairly controversial, with around 14,000 postcards from *Lookaround* viewers sent to Ofcom calling for the full version of *Lookaround* to be saved (Conlan, 2008). It was reported that residents of the rural ITV Border region feared the

second half will be dominated by news from the more urbanised north-east (Fitzsimmons, 2009). However despite these objections, in September 2008, Ofcom gave ITV the go ahead for this merger, and the new ITV Tyne Tees & Border service launched in February 2009 (Broadcast, 2009).

In the following few years these changes led to numerous complaints, with many arguing that the 2009 merger had resulted in unsatisfactory news coverage. Scottish Border Chamber of Commerce director Andrew Collier said 'It is unsatisfactory that our local news comes from Gateshead and is more likely to cover events in Kendal or Keswick than Kelso … This area is not "our region", as the Border news programme presenters often call it' (BBC News, 2013). Culture Secretary at the time Maria Miller asked Ofcom to carefully consider the new proposals which she believed would be specifically detrimental for the Border region, leaving Southern Scotland viewers with a significant deficit of Scottish programming compared with viewers elsewhere in the country (statement cited in Plunkett, 2012).

In response to concerns, Ofcom set out potential options that they felt might meet the aspirations of viewers in the South of Scotland for coverage of both regional and national matters. Audience research was then carried out by an independent agency in September 2012 to gauge the preferences of Border viewers regarding these options (Ofcom, 2013, pp. 25-26). The research showed that that viewers in the Border region wanted to see the return of the dedicated Border regional news they had before 2009, rather than continue with the status quo. It was found that generally, respondents would prefer a return to a service covering a smaller area, in the belief it would lead to more coverage of each of the localities surveyed. Although a service aimed at both central and southern Scotland received some support, many expressed concerns that, in such a scenario, coverage would focus on the major population centres further north at the expense of news about their area (Ofcom, 2013a, p.26). The research findings also largely echoed the qualitative and deliberative research commissioned separately by ITV in 2011 (TWResearch, 2011).

Despite audience preferences appearing to be relatively clear, press reports indicated a political split in opinion on the issue. Two members of the UK Government - Scottish Secretary of State Michael Moore and his deputy David Mundell (both MPs in the Border region) backed the proposal for a Border current affairs programme. However, the Scottish Government and the Scottish Borders Council disagreed. Scottish Borders Council leader

David Parker remarked that he doubted reverting back to a thirty minute ITV Border news programme would be a great deal better than the status quo. He claimed: '…much of the Border news isn't relevant to the Scottish Borders. What is happening on the council in Carlisle isn't of interest to someone in Galashiels' (Peebleshire News, 2013). The Scottish Government called for more STV programming, arguing 'viewers in the Scottish portion of the franchise are short-changed by being denied access to programming on news and current affairs on a range of issues such as health, education and local government that are decided on in Scotland at the Scottish Parliament' (BBC News, 2013).

This argument gained momentum on the 16th of May 2013 when the first televised Scottish independence debate was broadcast on STV's *Scotland Tonight*. The programme was viewed across northern and central Scotland, however viewers in the south of the country were unable to see it as ITV Border took the decision not to broadcast it, leading to further political pressure from nationalist MSP's for the creation of an all-Scotland service on Channel 3. SNP MSP Joan McAlpine claimed: 'The decision by ITV Border not to broadcast Thursday's debate is shocking – but not surprising … This is exactly why in my response to the recent Ofcom consultation on Channel 3 I pushed for an all-Scotland licence, or, failing that, an obligation on ITV to purchase programming from STV, as well as improving the output from this region' (cited in Dalziel, 2013).

Despite political pressure for Scotland to be united under one ITV region, on 23rd July 2013 proposals to reintroduce a full service of news and regional programmes for the ITV Border region were approved by Ofcom. Subsequently, in September 2013 *Lookaround* was restored as a full half-hour programme on weekdays with shorter daytime and weekend bulletins reintroduced during the month. The programme continues to be broadcast from Gateshead with extra journalists recruited for newsgathering in the Border region including a Scottish political editor in Edinburgh, sports correspondent and district reporters. The opt-out service was launched on Monday 6th January 2014 and broadcasts on Freeview only, with programmes also available on the ITV Border website (Ofcom, 2013b).

Another contentious issue around this time that concerned Scotland's relationship with the ITV network was STV's opt-out strategy. In 2009, STV announced that it was to withdraw from some of the ITV networks high profile programmes that performed badly in Scotland such as *The Bill*, *Doc Martin*, *Midsomer Murders* and *Poirot* in order to concentrate on

programming made in Scotland. Bobby Hain, STV's director of broadcast services explained: 'Our programme strategy is to create space in the schedule for material that we are making ourselves, for original Scottish content and for alternative acquisitions … we want to grow our own production base and grow our audience in Scotland, and we are freeing up some funds from our network contribution to invest in other content' (Cited in Tryhorn, 2009).

On paper, this strategy would seem like a welcome move, given the continued criticisms about the lack of Scottish output on television highlighted by this chapter. With longstanding demands for more autonomy in Scottish broadcasting, and then chief executive Rob Woodward arguing that STV should move towards operating as a 'sovereign broadcaster', this arguably could have been just what the landscape needed (cited in McMahon, 2010). However in reality this decision proved to be highly controversial and ultimately unsuccessful as STV were accused of not honouring their network agreement and were sued by ITV for the sum of £38 million. Eventually, a sum of £18 million was agreed upon (Sweney, 2011b). In addition, much of their alternative content proved to be repeats rather than new, original Scottish content, and they often attracted a poor audience share. Perhaps most famously, STV initially decided against showing *Downton Abbey*, which subsequently became one of the most successful period dramas of all time. This resulted in many Scots choosing to watch ITV through satellite television. For instance, according to the figures from ratings consultancy Attentional, of those Scots with access to satellite 152,000 watched the first episode of *Downton Abbey*, while 88,000 watched Billy Connolly's 1990s documentary *A Scot In the Arctic,* shown on STV (BBC News, 2010).

The strategies and organizational changes made by the ITV network are further evidence of the often-complex relationship Scotland has with the UK-wide broadcasting framework. Providing news for Scotland as a nation with several distinct regions continuously proves to be a logistical challenge, as well as balancing the demand for more Scottish content along with the demand for access to the popular high-budget network output. These issues resurface throughout the field research, and are explored further in chapters five and six.

The recent shifts outlined in this section were announced as a way of improving regional coherence and creating more original Scottish output. However, in reality, they resulted in changes that did neither of these things, and were not well received by Scottish audiences.

For instance, as Executive Chairman of ITV plc at the time Michael Grade acknowledged, the decision to merge ITV Border with ITV Tyne and Tees was largely down to the fact 'that larger regions performed more strongly with ratings' (cited in Welsh, 2007). Consultation with audience opinion only occurred after a considerable backlash against the news provision for those living in the Scottish borders. Moreover, the decision to opt out of prime time ITV programmes did not lead to the plethora of new Scottish content promised by STV, begging the question of whether this strategy was perhaps more to do with cost savings than an investment in Scottish content.

2.5 The 2014 Independence Referendum

A recent important political milestone for Scotland was the 2014 referendum on Scottish independence. The outcome was a 55.3% victory for the 'No' campaign, and the referendum had a significant impact on the debates about Scottish broadcasting in two main respects. Firstly, the SNP's plans for broadcasting post-independence renewed discussion and debate about the demand for and viability of a dedicated Scottish service. Secondly, the criticisms levelled at the BBC regarding impartiality highlighted once again the complexities of news broadcasting in a nation embroiled in constitutional debate.

The SNP announced their intention to hold the 2014 referendum on January 10th 2012. This announcement was soon followed by much debate about the potential repercussions for broadcasting in Scotland, particularly as the largest player (BBC Scotland) is part of a British institution. From the offset, the SNP indicated their preferred outcome was the creation of an autonomous Scottish Broadcasting Service (SBS) to replace BBC Scotland. As early as 2009 the SNP proclaimed that this would be their intention post-independence. In the document entitled *Your Scotland, Your Voice: A National Conversation* the party claimed that a new 'national public service broadcaster would be created based on the existing staff and assets of BBC Scotland' (The Scottish Government, 2009). In 2012, spokesman for culture, media and sport Pete Wishart MP proposed the creation of an SBS at the Nations and Regions conference (Wishart, 2012). Later on that year, Alex Salmond made a speech outlining the same plans at the Edinburgh International Television Festival in August (Salmond, 2012).

The SNP claimed this plan would result in more money to spend on broadcasting in Scotland. They argued that the difference between the £325 million raised by licence fee payers in Scotland and the £225 million spent in Scotland at the time would mean that an independent Scotland with its own independent broadcaster would have an extra £100 million to spend (Wishart, 2012). This logic was highly criticised by politicians and the press, many claimed that the sums were too simplistic and didn't take into account the economies of scale enjoyed by the BBC as a large UK-wide institution. For instance, in *The Guardian*, Jane Graham questioned the assumption that the SBS would have 'identical overheads' to BBC Scotland (Graham, 2012). Harriet Harman warned that the plan did not take into account additional overheads currently centralised in London such as a regulatory and governance body (Sabbagh, 2012).

The initial plans laid out by the SNP provided more questions than answers; therefore there was much anticipation for the SNP's White Paper on independence released in November 2013. The document, entitled *Scotland's Future: Your Guide to an Independent Scotland* outlined three principles for broadcasting in an independent Scotland. Firstly, that there would have been an increase in production opportunities for Scottish producers and an increase in productions that reflect life in Scotland and of Scots, secondly, that Scottish viewers and listeners would have had continued access to all their current channels and finally, that there would have been no additional cost to viewers and listeners (The Scottish Government, 2013, p.316-317). The document also claimed that the new organisation would have been founded on the staff and assets of BBC Scotland; would have been independent of government and have its own charter created by an expert panel. It would have also taken on the responsibility for BBC Alba (p.318).

According to the White Paper, the new SBS would have worked in a joint venture with the BBC where the SBS would continue to supply the BBC network with the same level of programming that BBC Scotland did, in return for ongoing access to BBC services in Scotland. This would assure access to popular shows the Scottish public is accustomed to (The Scottish Government, 2013, p.319). The plans also proposed that the SBS would inherit a proportionate share of the BBC's commercial ventures, and that Scotland's population share of those profits ranges from around £13 million to £19 million per year. This money, along with licence fee revenue and £12 million from the government for Gaelic broadcasting, would hypothetically provide a combined total for public service broadcasting

in Scotland of £345 million. The SNP argued that this sum would mean a large increase in the current amount spent on broadcasting in Scotland, and that the SBS would not need to raise any money from advertising (The Scottish Government, 2013, p. 318).

Although the White Paper provided more clarity concerning the SNP's plans for broadcasting after independence, it was noted by many that the document read more like a proposition than a pledge, and many argued that the sought "joint venture" with the BBC was particularly unrealistic (Kettle, 2013). For instance, research firm Enders Analysis provided a fairly comprehensive critique of the assumption that the SBS would obtain free-to-airs terms for BBC One and BBC Two. They pointed out that at the time of the referendum BBC Scotland fed 939 hours of programming to the network, much of it commissioned from independent production companies located in Scotland. In return the BBC makes available some 50,000 hours of network programming to Scotland through all TV network services (Enders Analysis, 2013, p.4). For BBC One and BBC Two alone, the BBC spends £2 billion annually in programming and distribution (81% of total TV programming), plus a proportionate share of staffing costs (£540 million), financed by UK TV household licence fees and BBC Worldwide. This content is supplied free-to-air to UK licence fee payers because they have paid the fee (Enders Analysis, 2013, p.4).

However, under the plans made by the SNP the people of Scotland would have been paying their licence fee to the SBS. So, in order to meet the pledge that there would have been no extra cost to Scots, the SNP proposed that the BBC give the Scots the benefit of BBC programming which is produced at a significant cost for its home audience. It is hard to imagine that this arrangement wouldn't have provoked protest from licence fee payers in the rest of the UK, as they would have essentially been subsiding households north of the border. Moreover, the BBC's current policy is to apply commercial terms to foreign countries, therefore why should Scotland have received BBC One and Two on free-to-air terms when Ireland, for example, has to pay (Enders Analysis, 2013, p. 5).

As argued by Schlesinger (2014), the reason for this much-criticised proposed 'joint venture' was that the SBS would undoubtedly be much smaller in scale than the BBC, and its indigenously produced content could not match the range of the BBC as a whole (Schlesinger, 2014). This predicament encapsulates one of the key issues with arguments for autonomous broadcasting in Scotland. As the next chapter details in more depth, due to the

non-rivalrous consumption nature of broadcasting, smaller nations and countries struggle to produce large volumes of expensive original content. For Scotland, this potential disadvantage is made all the more unappealing considering it has thus far enjoyed output afforded by large UK-wide broadcasting institutions. Ensuring that Scottish audiences do not suffer a decline in the quantity or quality of original content is a continuing headache for those who argue television broadcasting in Scotland should be wholly autonomous.

Another controversial aspect of the referendum build-up were the questions surrounding the neutrality of coverage during this period, particularly coverage broadcast by the BBC. Impartiality lies at the heart of public service broadcasting and is one of the core commitments the BBC has to its audiences. The agreement accompanying the BBC Charter requires the institution to do all it can to ensure controversial subjects are treated with due impartiality in news and other output dealing with matters of public policy or political or industrial controversy (BBC Editorial Guidelines, 2014). However despite this, numerous accusations of bias towards the 'No' campaign were made against the BBC.

The most fervent criticism of the referendum coverage came in January 2014, when Professor John Robertson of the University of the West of Scotland published a report on broadcasting bias during the first year of the referendum countdown. The research was done using a quantitative content analysis approach, and found that *Reporting Scotland* had used a preponderance of anti-independence statements, a majority of anti-independence evidence and a heavy personalisation of the debate around the character of Alex Salmond with him often portrayed as selfish and undemocratic (Robertson, 2014, p. 11). Unsurprisingly the BBC responded by rejecting these claims and questioned the validity of the research. Subsequently, this led to a rather scathing exchange between Professor Robertson and BBC Scotland (Macnab, 2014).

Although the BBC obviously had a vested interest in dismissing the research, a consideration of the methodology does raise questions about the study. Particularly, that such a subjective, complex political matter was coded and categorized in a purely qualitative way. Moreover, subsequent research produced very different results. For instance, whilst researching the prominence of different types of sources in the referendum coverage, Dekavalla and Jelen-Sanchez (2016) found that 37.3% of all sources favoured a Yes vote, 37.5 per cent were for a No vote, while the remaining quarter were neutral (Dekavalla and

Jelen-Sanchez, 2016, p.16). Their conclusion was that although the composition of sources speaking for the two sides were different, this was in line with the different strategies employed by the campaigns, and therefore *Reporting Scotland* was balanced in that it provided equal space for both campaigns to express their views (p.19).

Despite this, amongst the audience there was a continuous level of discontent regarding the BBC's coverage of the referendum, particularly amongst those who were pro-independence. This culminated in a protest on the 29th June 2014 where hundreds of protesters gathered at BBC Scotland's headquarters in Glasgow to object to what they perceived to be an 'unhealthy bias' in favour of the pro-Union campaign (BBC News, 2014c). As detailed in chapter six, an audience survey conducted as part of this research revealed that complaints about the coverage did not subside in the immediate aftermath of the referendum. Many respondents cited the perceived bias as another example of the BBC failing to adequately serve the audience in Scotland.

It is not within the scope of this research to investigate the extent to which this bias may have actually existed. Yet, the debate surrounding the coverage does demonstrate the complexity of news and current affairs provision in a nation embroiled in constitutional debate. The very nature of the existence of BBC Scotland, as part of a British institution, which is heavily centralised in London, is irksome to some in Scotland, and therefore criticism of the BBC has long been 'almost a national pastime' (Briggs, 1979, p.90). The referendum was particularly controversial as many pro-independence Scots felt that coverage was in effect broadcast from a pro-union communicative space.

2.6 Technological Changes

Many of the key moments and issues explored throughout this chapter have occurred in a world where television was largely broadcast and consumed through linear channels. However, the recent rapid advances in digital technologies have initiated the decline of this form of distributing content. Whilst this is not an issue particular to Scotland, the challenges posed by technological changes, and the increased convergence and audience fragmentation it has caused, are now undeniably relevant in any broadcasting context.

For instance, in the UK the period between 2000-2010 saw the launch of interactive digital television, widespread broadband availability, wireless Internet connections, MP3 music, film and television downloads, free-to-air digital terrestrial television (Freeview) and social networking sites. The main five public service broadcasters also launched on-demand services, with BBC iPlayer proving to be particularly popular and almost immediately surpassing its user targets (Sweney, 2008).

More recently, the landscape has changed significantly due to the growth of online US content providers. Audiences in the UK have gravitated towards streaming content online, using services such as Netflix and Amazon at a rapid rate, particularly since they have invested heavily in commissioning their own content. For instance, during the time of this research, the number of households subscribed to online streaming service Netflix doubled. 2.5 million households were reported to be subscribed in 2013, and the total is now said to exceed 5 million. This represents a remarkable 24% of all UK households (Jackson, 2016).

The success of online-only services such as Netflix have led some to predict the imminent demise of broadcast television, and the linear channel as a method of distribution. In 2014, Netflix's CEO Reed Hastings argued that broadcast television would be fully obsolete by 2030. To illustrate, he claimed that conventional television was 'like a horse' and 'the horse was good until we had the car' (cited in McCarthy, 2014). Despite referring to no particular data when making this declaration, Hastings is not alone in his speculation. Research conducted by technology conglomerate Cisco also claimed that experts expected channels to disappear by 2030 (Cisco IBSG, 2011).

However, recent academic literature analysing the impact of digital distribution platforms suggest that linear channels may prove to be more resilient than Hastings predicts. Meikle and Young (2008) and Doyle (2010: 2016) paint a far more gradual picture, whereby competition from the growth of online platforms poses challenges to conventional television, but that traditional broadcasters will still dominate for some time to come. They explore how broadcasters are adopting multiplatform strategies in order to adjust to the changing technologies for content distribution. Meikle and Young (2008) argue that traditional television is being reshaped, reimagined and reinvented, but will arguably remain displaced, rather than replaced for the foreseeable future (pp.67-68).

Recent audience data provided by Ofcom supports these conclusions, and suggests that television consumption is still very much dominated by linear channels and live television. In its Communications Market Report of 2016 Ofcom revealed that 63% of all viewing minutes in 2016 were spent watching live television. This figure represents only a slight decline from the 69% recorded in 2014. Recorded TV accounted for 17% of all adults viewing time, whilst an equal proportion of time was spent viewing free on-demand and paid-for on-demand services (both 6%) (Ofcom, 2016, p.57). With services such as Netflix and Amazon representing only 6% of viewing time for adults living in the UK, it is difficult to see how conventional television channels will altogether disappear in just 14 years time.

However, it is important to recognise audience behaviour varies widely across different age groups. For instance, if one only looks at the pattern amongst those aged 16-24 then the story is quite different. In fact, 16-24s watched more recorded, on-demand and online content than live television in 2016 (59% vs 36%). The time spent watching live TV among the 16-24s has fallen by 14% since 2014. By contrast, viewing of paid-for on-demand services had increased 14%, and accounted for 20% of this age groups total viewing time in 2014 (Ofcom, 2016, p.57).

Therefore, although conventional television channels still remain prevalent today, audience behaviour amongst younger demographics suggests that further decline is inevitable in the future. Whilst there is disagreement regarding the speed and eventual outcome of this process, the trend has undeniably posed several challenges to public service broadcasters. In order to remain relevant within this changing landscape, they have had to reconfigure themselves as cross-platform media providers, and negotiate new territory with regards to their audience, content and their status in the marketplace (Debrett, 2010, p.185). As a result, the complexities of digital innovation by traditional broadcasters have become a fairly large area of study (Ward, 2004; Nissen, 2006; Lowe and Bardoel 2007; Iosifidis 2008, 2010; Doyle, 2010, 2015, 2016).

These complexities add another dimension to the issues pertaining to television broadcasting in Scotland. The growth in competition has led to increased conflict between obligations to safeguard public service principles (such as to represent and serve the nations and regions) whilst also ensuring a strong enough performance to justify public funding. Moreover, the increasing international nature of television consumption provides opportunities to access

wider markets. Therefore, as will be discussed in chapter seven, some producers are increasingly reluctant to make local, representational content. Furthermore, on a more general level, the new transnational orientation of media has arguably brought into question the very legitimacy of national identities and communities (Iosifidis, 2010, p. 1). This will be discussed in more depth in chapter three.

In sum, with regards to potential futures, it is increasingly difficult to formulate strategies or policies that meet the needs of the present but would remain relevant in years to come. Thus far, debates about Scottish broadcasting have been overwhelmingly focused on the BBC and television channels. As Schlesinger (2016) argues, discussions need to broaden to take in the challenges of the digital age. This research endeavours to do just that.

2.8 Conclusions

This background chapter has explored various significant periods and events which demonstrate the complex relationship that exists between Scotland and the UK-wide broadcasting framework. This stems from the fact that right from the start, Scottish broadcasting was established as peripheral to the main network, and many of the issues outlined here are manifestations of the challenges this peripherality presents.

Throughout the years there has been a continual perception amongst a variety of different interested parties that television broadcasting in Scotland is disadvantaged by limited investment, a marked lack of representational output and in particular, unsatisfactory news provision. This perception has led to a longstanding demand for more autonomy and has at times led to considerable tension, often between two arms of the same institution, such as the BBC and BBC Scotland and STV and the ITV network.

Since devolution, frustrations have intensified, especially with regards to the debate about news provision and proposals for a 'Scottish Six.' With Scotland now largely politically autonomous, the idea that its broadcasting policy is controlled, and arguably marginalised, by the UK-wide framework is increasingly perceived as problematic. Yet despite this, no significant changes to the way in which broadcasting in Scotland was structured were made in the following years, and the landscape has remained much the same as it ever was.

This chapter has highlighted how the same barriers to change have recurred throughout the years. One major obstacle is the tendency to see the debate simply through the lens of constitutional debate, which has led to issues often being framed in either nationalist or unionist terms. Nationalists have always been vocal with their criticisms of how the landscape serves Scotland, their desire for more autonomy, or indeed for a complete separation. This has been a prevalent theme throughout the history of broadcasting in Scotland, from pre-war lobbying to the SNP's 2012 White Paper on independence.

Consequently, however, proposals for intervention or changing the status quo were often tarred with the brush of nationalism and dismissed. The result is a policy stalemate, which was particularly evident throughout the 'Scottish Six' debate (Schlesinger, 2005, p.219). This impasse is detrimental because, as this chapter has demonstrated, to divide these issues into either a nationalist or unionist agenda is an oversimplification. Disputes about how Scottish culture and national identity are represented on television transcend constitutional debate. Numerous people and organisations within different political camps have questioned the way in which the broadcasting landscape is structured. Moreover, the little audience research that has been conducted throughout the years has shown a consistent appetite for more representation and calls for change.

However, another recurring theme throughout this background research has been just how little power the audience has had, despite obviously being an incredibly important stakeholder, within this debate. As Freedman (2008) notes, the public remains a largely peripheral force when it comes to influencing the media policymaking agenda. This certainly seems to be the case here, with audiences playing a very small role, if any, in decision-making processes. Transmitter locations, technological convenience, funding concerns, and the judgment of a few powerful individuals all appear to have had more influence in shaping the landscape than the Scottish audience.

Indeed, the events and significant periods explored within this chapter appear to support Freedman's critique of the pluralist understanding of policy making. When debates and periods of disagreements have taken place, resolution in the form of policy has been drawn up, not by members of a dispersed policy 'network' but by a small decision-making elite (Freedman, 2008, p.7). Throughout this chapter it has been clear that decisions were often

made at a micro level, and were the result of the deliberations and opinions of very few senior politicians or broadcasting executives, rather than a more open process involving a variety of stakeholders.

The result is a landscape skewed by an imbalance in influence between powerful elites and other interest groups that have varying levels of access to these individuals (Davis, 2003, p.684). Notably, these decision makers have often been London based, which has led to periods of frustration where it was perceived that the future of Scottish television broadcasting was determined outside of Scotland. It appears as though the exclusivity of this process has often presented a barrier to changing the landscape in a way that would best serve Scotland.

There is certainly a complex array of contextual factors to consider as we draw our attention to the present day and ask what type of policy intervention, if any, would benefit the television broadcasting landscape in Scotland now? As aforementioned, the BBC has recently increased its network spend in Scotland, ensuring it is at least in line with Scotland's share of the population. It is a pertinent time, therefore, to examine what impact this has had from an industry and audience perspective, and whether it has abated the perception of marginalization that has prevailed throughout the years.

This chapter has also shown how the idea of dedicated service for Scotland has resurfaced periodically throughout the years, either as an addition to the current landscape such as the Scottish Digital Network, or as an alternative, such as the SNP's plans for a Scottish Broadcasting Service. As the next conceptual chapter shall explore, there are theoretical understandings of national identity, which suggest that ideally, Scotland would have its own dedicated broadcaster, as this would provide the freedom to explore different representations within its own communicative space.

However, scepticism regarding funding and scale have thus far plagued proposals for Scotland's own service, with many questioning the quality and quantity of content that could potentially be achieved. Yet despite this, there has been a very recent announcement of a new BBC channel for Scotland launching in the Autumn of 2018. It is therefore particularly timely to consider the appetite for and viability of this type of intervention, and consider the impact it might have on the Scottish television broadcasting landscape.

Chapter Three

Political and Economic Dimensions to Broadcasting in Small Countries

The last chapter explored the Scottish broadcasting story so far, identifying recurring issues that dominate the narrative. It is now the task of this chapter to provide an overview of the wealth of theoretical literature that underpins these issues, providing a conceptual basis for the research.

Thus far it has been demonstrated how broadcasting in Scotland has of been a topic of contention, with several powerful individuals attributing to it significant political importance. For example, it was no coincidence that one of Alex Salmond's very first moves as First Minister in 2007 was to denounce the current state of Scottish broadcasting and set up the Scottish Broadcasting Commission (Salmond, 2007). This chapter endeavors to establish why such significance is placed on debates surrounding broadcasting in Scotland, by outlining the perceived theoretical relationship between the media and the development of national culture and national identity.

For instance, following the logic of social communication theorists of national identity, cultural institutions such as broadcasters are attributed with a significant power to contribute to the formation and preservation of feelings of national belonging. In light of this, one could argue that ideally, Scotland would have its own dedicated broadcaster, which would allow for a plethora of representations within its own communicative space. However, in conflict with this line of thought are economic concepts pertaining to broadcasting in countries with small populations. Numerous theorists have argued that smaller countries typically struggle to make large quantities of high quality, original output, which begs the question: by going-it-alone would Scotland be able to produce enough content to improve the exploration of its national culture? It is this discord, between national identity and scale, which creates the curious situation whereby Scotland's position in the UK-wide broadcasting framework can be seen to produce both debilitating disadvantages and indispensible advantages.

The chapter will unfold as follows. Part one will outline social communication theories of

national identity, demonstrating how broadcasting can be seen to play a crucial role in constructing discourses of national culture and identity. It will also argue that this role has not lessened despite the forces and pressures of globalisation and transnational media flows. With a theoretical link between broadcasting and the nation established, part two will then consider how Scotland, as a stateless nation, finds itself in a complex situation where it is exposed to dual spheres of belonging. Part three shall examine literature discussing the portrayal of Scotland on screen, focusing on the dominant discourse which suggests that representations have thus far largely been constrained to subversive 'myths' and stereotypes. It will contemplate whether these misrepresentations are linked to the limited capacity available for Scotland to produce its own television, and consequently the limited space within which to construct its own three-dimensional national culture. Lastly, part four will explore the economic concepts related to broadcasting with small populations and consider whether by going it alone, Scotland would be able to afford the production of enough high quality original content. By drawing comparisons with other countries it aims to highlight that Scotland has the distinct disadvantage of sharing a language with a large broadcasting neighbour.

3.1 Broadcasting and the Nation

It has long been argued that national identity is not an objective essence, it is not an a priori fact waiting to be discovered or awoken; it is to a large extent a social construct. That is not to say that it isn't deeply rooted, or that it does not bring about real and sometimes devastating consequences, but it is for the most part a cultural phenomenon (Souday and Kunda, 2003, p.1075). There is a consistent theme within the bulk of writing in the 20th century on national identity, where it is argued that communication and cultural cohesion are central to how the nation should be understood. Prominent scholars of nationalism such as Deutsch (1953), Gellner (1983), Anderson (1991) and Billig (1995) all describe how different key processes of social communication have allowed for a self contained mutual culture to develop amongst societies, evoking a sense of collective identity; namely, national identity (Schlesinger, 2000).

Karl Deutsch, in his work *Nationalism and Social Communication*, argued the first explicit social communication theory of nationalism (1953). According to his theory people are held

together 'from within' by communication. This communication is enabled by standardized systems of symbols such as languages and alphabets, and facilitated by the storage of information such as libraries etc. The existence of such facilities of communication provides the single most important basis for the formation of 'a people', which he defines as 'a larger group of persons linked by such complementary habits and facilities of communication' (Deutsch, 1953, p.70). This group of people becomes a fully-fledged nation when a measure of effective control over the behaviour of its members' exists, notably through social, political or economic institutions (p.78). Deutsch's ideas on nationalism and social communication are drawn upon in a number of subsequent theories of nationalism.

Ernest Gellner contested that nationalism became dominant under certain social conditions that prevailed after the emergence of the industrial age. Namely, homogeneity, literacy and anonymity being the key conditions he specified (Gellner, 1983, p.138). Previously, culture and literacy were seen to be a minority accomplishment afforded only by privileged specialists. However, the birth and maintenance of the industrial age required literacy to be a precondition of most societal roles. Therefore, equal access to education was provided to create and sustain a standardized literate culture. Feelings of national identity are constructed from this education system, through which the large anonymous population pass through and adopt a similar cultural style. This cultural style gave societies something in common to adore and revere, enabling nations to worship themselves directly, rather than through the medium of religion (Gellner, 1983, p.140-142).

Perhaps the most cited theorist regarding communications and the nation is Benedict Anderson. Anderson's definition of the nation is that it is an 'imagined political community –and imagined as both inherently limited and sovereign' (Anderson, 1991, p.6). Although technically anonymous, members of the nation hold in their minds a sense of their affinity. He explains that 'even members of the smallest nation will never know most of their fellow-members, meet them, or even hear of them, yet in the minds of each lives the image of their communion' (Anderson, 1991, p.6). It is important to note that by arguing that nations are products of imagination and construction Anderson is not implying that they do not have the power to structure the world we live in. They can become embedded in a variety of routines and expressions, and acquire deep emotional legitimacy. As such, they inevitably also impose restrictions on any subsequent attempts at identity contraction (Mihelj, 2011, p.15).

The notion of 'print capitalism' and 'national print languages' are central to his argument. According to Anderson, the emergence of books and newspapers circulated in the vernacular allowed for a common discourse to emerge. For instance when citizens privately read the newspaper in the morning they are aware that this ritual is also being undertaken by thousands of others, despite not knowing all these citizens specifically. Moreover, they will also witness exact replicas of the newspapers being read by those they encounter day-to-day, further creating confidence in a community despite anonymity (Anderson, 1991, p.18). The legacy of this theory has been unrivalled. The understanding of nations as cultural constructs inspired a plethora of authors to look into how nations have been imagined and formed through different art forms (e.g Hayes 2000; Hjort and Mackenzie 2000; Askew 2002; Ryan 2002; Wilmer 2002).

Michael Billig (1995) argued that it was endemic, everyday symbols that society is exposed to that sustains a nation and a sense of national identity. To describe this process he coined the term 'Banal Nationalism' to differentiate from more extreme and impassioned variants. The use of 'flags' in everyday contexts, sporting events, symbols on money and popular expressions all serve as reminders of one's nation and one's national identity. However this reminding or 'flagging' is often so familiar and continual that is not consciously registered. Billig credits the mass media as helping to bring these 'flags' into everyday life by. For example, when the national press and national broadcasters use phrases such as *the* prime minister, *the* weather, and *our* team, they are reinforcing a sense of nationhood (Billig, 1995, p.108). This nationalism is so subtle it melts into the background, unconsciously portraying our world as the world. However, Billig reminds us that banality does not mean benign. Just because these flags are presented as a reassuring familiarity does not mean that they are somehow impotent. By noticing these continuous 'flaggings' of nationhood we are noticing something about our identity. The homeland is made to look friendly, beyond questioning and something that may need sacrificing for (Billig, 1995, p.7).

Although they differ in what they identify as the key process, all these influential theorists contend that through consuming mediated communication a sense of national belonging is constructed and sustained. Gellner's education enables us to read Anderson's newspapers and participate in the day-to-day activities through which we are exposed to Billig's national flags. It is also clear from the works of these authors that the media is central to this social communication theory of identity. Of course this is not to say that national identity in all its

aspects and complexity is not a wider process than the part played by the media (Blain and Burnett, 1994, p.7). However, the ways in which the media allows nations to talk to each other helps to develop a standardized culture and culture undeniably informs our conception of national identity and helps hold us together (Schlesinger, 2003, p.125).

Broadcasting has always been considered an important medium with regards to the relationship between nation and the media. Many have observed its apparent unparalleled ability to produce cultural cohesion. Paddy Scannell (1988) argued:

> Radio and later television unobtrusively restored (or perhaps created for the first time) the possibilities of a knowable world, a world-in-common, for whole populations…Broadcasting brought together for a radically new kind of general public the elements of a culture-in-common for all (Scannell, 1988, p.29).

Broadcasting constructs feelings of 'commonality' by observing the recursive nature of life for whole populations, both day-to-day routines and more infrequent traditions (Moores, 2005, p.33). For instance daily news programmes and coverage of annual events helped to create a "national public sphere" for listeners and viewers.

Public service broadcasting (PSB) is particularly relevant in this regard. According to McQuail et al (1992), these institutions were designed to service the public within national boundaries, and project national language, culture and interest as their raison d'etre (McQuail et al, 1992, p.9). Within the context of the UK, the BBC was given the task to contribute, create and develop national identity. Its initial mission statement to educate, inform and entertain can be easily understood within the framework of the theorists examined above. The BBC's charge to educate can be seen as an extension of the state education system, its aim to inform helps sustain a national context and its entertainment objective helps to articulate a national culture (Van den Bulck, 2001, p. 57). In this way it is clear that PSBs have contributed to the creation of a 'imagined community' for the modern nation state.

In most of the literature on national identity and communication explored thus far, commentators have focused on processes associated with modernity and the modern age. In which case it is important to historicize the debate and consider how relevant the discourse

is now that we exist in a supposed postmodern world? How relevant are debates about national identity in a globalised age? The general phenomena of postmodernity have been described throughout the human sciences in several different ways. The terms 'globalisation' 'post-industrialisation', 'late capitalism', 'late modernity' or 'radical modernity' have all been used to suggest varying degrees of disruptive change in the late 20th and early 21st Century. Many have argued that these changes undermine or marginalize the nation state (Harvey, 1989; Featherstone, 1990; Taylor, 1996; Lash and Urry, 1996; Hall, 1997). According to Stuart Hall (1997), the trend towards the greater internationalization of the economy, migration of the workforce, greater international interdependence and the emergence of a homogeneous global mass culture all contribute to national identity losing its potency (1997, pp. 175-187).

Some authors have called for an abandonment of nation-state centered analysis in communications, and instead urged us to embrace 'methodological cosmopolitanism' (Beck, 2000), replacing the nation-state as the basic unit of analysis with that of the 'global system' (Robinson, 1998), and focus on the examination of 'networked connections' and 'the space of flows' (Castells, 2010). In a transnational world typified by the global circulation of images and sounds, the media now impacts complexly on national identity and communal belonging. By facilitating a mediated engagement with distant places, the media can now be said to deterritorialize the process of imagining communities (Shohat and Stam, 1996, p.145). It is important, therefore, to consider the relevance of the social communication theories of national identities in this postmodern, globalised world. Can broadcasting still be central to the development of national culture in the age of transnational media flows, where the importance of the nation state has supposedly declined?

The answer to this is simply that despite this fairly brief scholarly trend of prophesising that national attachments would become remnants of the past, in reality this shift in values has failed to materialise. Perhaps amongst cosmopolitan elites and diasporic communities, allegiances to a specific nation might be in decline. Yet, this represents only a narrow circle of people. As very recent political events suggest, it seems that we are now in fact amidst a new populist wave of nationalism (Gutherson, 2017). As Eriksen (2016) and Shore (2016) argue, the vote for Brexit in the UK and the election of Donald Trump in the US are both characteristic of a distrust of transnational organizations such as the European Union, NATO, and United Nations along with a disparagement for cosmopolitan elites.

Just as the nation has failed to fade away into irrelevance, PSB has remained important in the postmodern age. That is not to say that globalisation and digitisation has not posed a threat to these institutions. As was touched upon in the previous chapter, numerous authors have explored the way in which finding a balance between remaining competitive and serving public interest has proved a significant challenge (Ward, 2004; Nissen, 2006; Lowe and Bardoel 2007; Iosifidis 2008, 2010; Doyle, 2010, 2015, 2016). However, despite this daunting challenge, public service broadcasting has arguably become more important than ever before. Banerjee and Seneviratne (2006) argue that the 21st century the role of PSB's should be to bring public interest issues back to the foreground, and to address viewers and listeners as citizens rather than consumers (2006, p.4).

Nations and national identities show little signs of fading in significance. Within the Scottish context, the continued relevance of national identity is abundantly clear. If the nation were a defunct concept there would have been no call for an independence referendum in the Autumn of 2014. Moreover, if globalisation has severed the relationship between the media and national identity, there would be no controversy over the devolution of broadcasting powers. It appears that in spite of the intensification of transnational communications, national identity continues to be of vital importance to media production and consumption, particularly for public service broadcasters. The route to cosmopolitan communication does not appear to lead past the nation-state and national spaces of communication, but through them (Mihelj, 2011, p.187).

3.2 Broadcasting and Stateless Nations

Scotland's position as a stateless nation makes the relationship between the media, cultural cohesion and nationhood particularly complicated. As Schlesinger (2009a) argues, stateless nations exist within a distinctive socio-cultural space, in that they are usually situated in a dual sphere of publics, that of the nation and that of the state. Although there is the opportunity for convergence between the two, there is also space for contradiction, and displacement (Schlesinger, 2009a, pp. 9-14). As was detailed in the previous chapter, the UK has devolved a wide range of powers to the Scottish Parliament, and yet in everyday political life it is often still assumed that the UK is bound by a shared national agenda,

communicated by a national media (Schlesinger, 2000, p.124).

In reality the media landscape in Scotland forms a fairly complex communicative space, with both spheres of publics represented to certain degrees. For instance this becomes clear when considering the structure of broadcasting in Scotland. Three of the most watched television stations are regional variants of British television channels, namely BBC One Scotland, BBC Two Scotland and STV. Some output is broadcast specifically for Scotland, such as the Glasgow-based soap opera *River City* and Scottish sports programme *Sportscene*, but the majority of the schedule is extremely similar to rest of the UK.

In Scotland, therefore, audiences are routinely exposed to different spheres of belonging: the national, the local and more often than not: the wider state itself. As is widely known, Scots identify with these different spheres to varying extents. For instance, recent research suggests that 62% identify as Scottish only, 8% identify as British only, and 18% identify as both (Simpson and Smith, 2014, p.3). This adds another level of complexity to the relationship between broadcasting, cultural cohesion and national identity in Scotland. The extent to which audiences feel represented by British, rather than purely Scottish content varies according to these affiliations.

For instance, Alex Law (2001) argues that the aforementioned 'banal nationalism' theory purported by Michael Billig requires revision for the context of Scotland. According to Law, Billig's focus on the nationalism of 'big states' such as the UK and the USA does not translate straightforwardly to a 'stateless nation' like Scotland. He argues that due to the semi-autonomous media that serves Scotland and the different affiliations that exist amongst the population, national identity tends to be self-reflexive in the media, not as banal. After conducting a study examining the national 'flags' in newspapers sold in Scotland, Law argues that because the UK state and Westminster government are arenas of contention, a quiet banal British nationalism in Scotland is impossible (Law, 2001, p.314).

Literature examining the media systems of stateless nations is fairly limited, with much of the work focusing on cases where a strong minority language plays a significant role. For instance in their work comparing Catalan and Welsh radio, Fernandez-Quijada et al. (2013) argue that language is the cornerstone for designing media systems in stateless nations (p.13). The example of Catalan is demonstrative of the importance of language. During the

period of democratic transition after the death of Franco, Spain's broadcasting system underwent a series of major changes, which meant that each political-administrative level (state, autonomous community and local) could develop its own media system. On May 1983 the Catalan Parliament passed a law creating the Catalan Broadcasting Corporation (Corporació Catalana de Ràdio i Televisió, CCRTV) as a public corporation. The promotion of Catalan language was explicitly defined as one of the CCRTV's guiding principles, whereas prior to this the Catalan language had a fairly small media presence (Piulats, 2007, pp.173-5).

Along with CCRTV, the 1980s saw the creation of several other minority language broadcasters. Sianel Pedwar Cymru (S4C) the Welsh television channel in the United Kingdom began broadcasting in 1982; Euskal Telebista (EITB) began in the Basque Country in 1982, and Television de Galicia (TVG) was formed in Galicia in 1985. All of these services linked their broadcasting goals to the promotion of minority languages. As another stateless nation within the UK context, it is interesting to look at the experience of Wales. Andrews (2006) argues that compared to Scotland, Wales has historically been able to win additional resources for broadcasting because of its strong minority language. The Welsh language is spoken by over 20% of the population (The Welsh Government, 2015), and as a result audiences have access to an impressive array of broadcasting services. Wales is served by BBC Wales Cymru (broadcasting some opted-out TV services), two radio stations, (one in Welsh, and one in English), along with online services in both languages, Sianel Pedwar Cymru (S4C), (broadcasting a Welsh language service in peak times), ITV Wales (which provides some dedicated Welsh programming), and a relay of the BBC's national Assembly coverage on a separate channel (Andrews, 2006, p. 193).

Of course, minority language broadcasting does also exist in Scotland. The BBC, together with the Gaelic Media Service, provide a Gaelic language television channel BBC Alba, which has an annual budget of around £15 million and broadcasts on most days between 5pm and 12am. In addition, the BBC also operates BBC Radio nan Gàidheal, a radio station broadcasting over 90 hours a week of Gaelic programming. However, unlike Catalonia or Wales, language plays a much more subordinate role as an indicator of national identity in Scotland. In fact recent statistics show that Gaelic is spoken by only 1.1% of the population (National Records of Scotland, 2013). Therefore, due to the small community it represents, minority language broadcasting in Scotland is limited in its ability to help represent a

national agenda or culture.

Schlesinger (2009) argues that ideally; a stateless nation would have its own cultural institutions, media and a language that differs from the official language of the state (p.13). Within the Scottish context, for the most part Scotland shares the official language of the UK. With regards to cultural institutions, the landscape is a curious one, with a complex mix of devolved and reserved issues, and both Scottish and UK-wide institutions. Scotland has its own national theatre, library, opera and creative industries development agency (Creative Scotland.) It also has an indigenous press, with national newspapers such as *The Scotsman*, *The Herald* and the *Daily Record*. Yet, crucially for this research, there has been no dedicated national broadcaster thus far. This section has explored how theoretically, broadcasting can be seen as important for developing and sustaining feelings of national identity and cultural cohesion. Now, it shall look more specifically to literature on Scottish representations on Screen, and assess the perceived impact of the absence of a broadcaster.

3. 3 Scotland on Screen

Much of the literature concerning the representation of Scotland on screen has focused on the film industry rather than television. However, as will become clear, many of the themes discussed in relation to film are also very relevant to broadcasting. Interestingly, those commenting on the representation of Scotland on screen tend to adopt one of two very different standpoints. Surface level observations tend to enthuse about the amount of representation Scotland experiences on the international stage. For instance, 'punching above its weight' is the phrase frequently used to describe Scotland's contribution to the world of film: particularly with regards to talent. On the other hand, the way in which Scotland's national culture has been projected by film and television has been criticized by a number of authors.

In an article outlining Scotland's 'illustrious' film heritage, film critic and screenwriter Eddie Harrison (2013) paints a very positive picture. He argues that Scotland has proved to have the talent to compete successfully with the international film industry, and that the dominance of Scottish filmmakers is impressive in relation to the size of the country. He refers to the success of producers such as Iain Smith with his notable works such as *The*

Fifth Element and *Children of Men*, directors such as Alexander Mackendrick, Bill Forsyth, Michael Caton-Jones, Paul McGuigan, Lynne Ramsey, David Mackenzie, Brian Kirk and writers such as Allan Scott and Paul Laverty (Harrison, 2013). Along a similar vein, journalist Brian Pendreigh (2000) celebrated the proliferation of Scottish talent on screen. According to Pendreigh, beginning with the success of the film *Shallow Grave* directed by Danny Boyle in 1994, a phase of international recognition for Scottish actors and actresses began, with talent such as Robert Carlyle, Ewan McGregor, John Hannah and Dougray Scott appearing in major international hits (Pendreigh, 2000). Indeed, since this observation Scottish acting talent has continued to find success, with James McAvoy and Gerard Butler as notable cases of those that have found international stardom recently.

In addition to Scottish talent, Scotland itself has been the star of many successful international films. Mel Gibson's Oscar winning epic *Braveheart* (1995) is often cited in discussions about Scotland on screen. Despite criticism regarding historical accuracy, it has been widely reported that the success of the film helped generate worldwide interest in Scotland and gave a significant boost to tourism. To give one example, in the year following the cinema release the Scottish Tourism Board calculated that 26% of those who visited Scotland in 1996 came because of *Braveheart*. In the same year visitors to the Wallace Monument in Stirling increased from 66,000 to 167,000 (McArthur, 2003, p. 131). A more modern representation of Scotland was offered by Danny Boyle's *Trainspotting* (1996), an energetic picture of individuals in Edinburgh wrestling with drug-culture that garnered almost universal praise from critics internationally. In addition, Ken Loach's six poignant social realist films set in Scotland have received widespread acclaim, for instance his latest picture *The Angels' Share* won the Jury Prize at Cannes in 2012.

However, a review of the more scholarly literature on Scottish representation on screen does not paint such a positive picture. Authors such as Beveridge and Turnbull (1989), Nairn (1977) McCrone (1992) argue that Scotland suffers from a kind of cultural subordination when depicted on screen. They outline ways in which Scots have been portrayed as parochial and backwards. Therefore, through a 'deformed' sense of national identity, Scots are made to feel inferior to the apparently 'more articulate' English (Cusick, 1994). The main culprits for this distortion are thought to be a number of 'myths' that permeate Scotland's image on screen. The original articulation of these arguments was in *Scotch Reels*, a collection of essays on the representation of Scotland published to coincide with the

Scotch Reels event at the 1982 Edinburgh film festival. They claim that these mythical formations misrepresent Scottish national identity, and have affected both how Scots perceive themselves and how they are presented to the world. In his book *Understanding Scotland*, David McCrone (1992) summaries three of these 'myths' as 'tartanry', 'kailyardism' and 'clydesidism' (pp.131-140).

Perceptions of tartan as a cultural phenomenon, and the subsequent concept of 'tartanry' have been discussed by numerous authors (Nairn, 1977; Chapman, 1978; McArthur, 1982). Broadly, it is described as the appropriation of Highland motifs such as tartan, clan and regimentation by Lowland Scotland in the 19th Century. These symbols have now more recently become commodified to stand for tourist knick-knackery, sporting kits for football and rugby supporters, and the Edinburgh Tattoo (McCrone, 1992, p.132). Over the years contemporary cultural commentators have voiced their criticisms and frustrations with the way in which 'tartanry' has become such a prolific aspect of representations of Scotland on screen (Brown, 2010, pp. 95-112). They look to the history of clan tartan and argue that its significance to the history of the Scottish Highlands is exaggerated. For instance, McArthur (2003) has described the attachment of tartan to clans or families as a 'delusion', a 'grotesque act of mythmaking' (p.49). In *Scotch Reels*, it was argued that films such as *Bonnie Prince Charlie* (1948), *The Master of Ballantrae* (1953), *Rob Roy – The Highland Rogue* (1953), *Brigadoon* (1954) and *Kidnapped* (1960 and 1971) were the cinematic manifestations of the subversive 'tartanry' discourse. More recently, the Disney Pixar movie *Brave* (2012) and elements of the Bond movie *Skyfall* (2012) has also been accused of giving this 'myth' a fresh outing, by portraying reductive Scottish stereotypes and symbols of land, clan and honour (Petrie, 2014, p. 226).

McArthur also claims that 'tartanry' constructs Scotland as a 'a mist-shrouded land of lochs, mountains, shaggy cattle and warlike natives' (2003, p.18). This predominately rural representation of Scotland leads us to the second of the 'myths' identified by McCrone, that of 'Kailyardism'. 'Kailyardism' is usually described as a popular literary style celebrating Scottish rural quaintness, at its height from about 1880 until 1914. The name is derived from Ian Maclaren's 1894 book *Bonnie Brier Bush* whose title alludes to the Jacobite song: 'There grows a bonnie brier bush in out Kailyard' (Macdonald, 1972, p.716). Although this literary movement did not continue past World War One, its influence was long lasting and impacted on subsequent cultural patterns (Nash, 2007, p. 244). However, just as 'tartanry'

was criticized, many commentators also condemn 'kailyardism'. The movement is charged with fostering romanticism and presenting an unrealistic image 'of a Scottish society as a rural idyll remote from strife or class conflict' (Young, 1979, p.168). An example of this determination to portray an unrealistic Scotland is the infamous story of when Hollywood producer Arthur Freed came to Scotland, to search for locations for the shooting of *Brigadoon* (1954). Despite visiting many picturesque places there was reportedly no village or glen in Scotland that looked 'Scottish enough' for him. In the end, he decided to shoot the film in a Hollywood studio where a highly misty, romanticized version of Scotland could be created (Forsyth, 1990, p.1).

The third dominant discourse outlined by McCrone is 'clydesidism', a discourse that is characterized by its realist images of working-class life. At first, 'clydesidism' was seen to be extremely refreshing in the Scottish context. For instance in his chapter in *Scotch Reels*, John Caughie argued that the work 'based on working class experiences, since the twenties, has seemed to offer the only real and consistence basis for a Scottish national culture' (Caughie, 1982, p.121). However, despite being initially seen as an antidote to 'tartanry' and 'kailyardism' it was soon acknowledged that it was merely another 'myth', albeit a modern one. Almost ten years after *Scotch Reels*, Caughie (1990) then argued that in most of its forms, 'clydesidism' has turned out to be a 'twentieth century myth of male industrial labour…portraying the gritty hardness of urban life' (Caughie, 1990, p.16). Depictions of urban poverty and bleak postindustrial city landscapes began to be seen as quintessential images of Scotland. Films such as Peter McDougall's *Just Your Luck* (1972), *Just a Boy's Game*, (1979) and *Down Where the Buffalo Go* (1988) can be seen to exhibit characteristics of 'clydesidism', and more recently Ken Loach's *Sweet Sixteen* (2002).

In *Scotch Reels*, McArthur notes that often, Scottish film-makers have been powerless to oppose the dominance of 'tartanry', 'kailyardism' and 'clydesidism' because they were deployed within production structures fashioned outside of Scotland (McArthur, 2003, p.66). This is a complaint that resonates with the experience of television broadcasting. The body of literature investigating the representation of Scotland on the small screen is modest in comparison to that on cinema; however there is evidence of the same 'myths' dominating Scottish television broadcasting output.

For instance, Scottish soap operas *Dr Finlay's Casebook* (1962), *Take the High Road* (1980)

and *Strathblair* (1992) have all been criticized as programmes evoking 'kailyardist' imagery, by portraying a 'twee' and ruralized version of Scotland (Blaikie, 2010, p.120). Moreover, Scullion (2003) observed that even devolution failed to challenge the preferred images and identities of Scotland on television. The first new Scottish drama broadcast post-devolution was the BBC's *Monarch of the Glen* (2000), which arguably did nothing to reflect upon the important historical moment in time. It was a series that portrayed Scotland with the same old imagery: idyllic scenery, grand houses and cosy story lines. The fictional estate of Glenbogle was filled with broadly drawn stereotypes and quirkly named characters such as Laird Hector MacDonald, Duncan the kilt-wearing ranger and Golly the gamekeeper. Monarch of the Glen imagined Scotland in a classic 'kailyard' fashion, presenting Scotland as a beautiful and mythical space, populated by the fey, the romantic and the eccentric (Scullion, 2003, p.54).

'Clydesidism' also appears to have permeated Scottish television. It has been observed by many that the STV creation *Taggart* (1983) drew upon this discourse, with its iconography of 'hard men' bleak city landscapes, decaying heavy industries and crime in a deprived and under-privileged Glasgow (Blaikie, 2010; Edensor, 1997; Haider, 2002; Petrie, 2010). More recently in 2011, BBC Scotland's documentary series *The Scheme* was criticized for portraying 'shameless stereotypes' of urban Scotland, portraying the 'very worse and damaging clichés about working-class Scots' (Graham, 2011). The series followed six families in the Onthank and Knockinlaw housing schemes in Kilmarnock and portrayed images of desperate urban poverty and crime. Onthank's residents and politicians were very concerned about the move to show *The Scheme* on the UK-wide network, local MP Cathy Jamieson spearheaded a statement claiming that the programme and its 'misrepresentation of the community' had already had a 'devastating impact' on the local people (cited in Graham, 2011).

Of course Scotland it not the only nation, region or culture to suffer from stereotypes of distorted representations. It is not necessarily the case that *Monarch of the Glen's* version of Scotland was any more regressive than *Emmerdale Farm's* representation of Yorkshire. Or that *The Scheme* portrays any more stereotypes of Scots than *The Only Way is Essex* does of those from Essex. The point being made isn't even that any of these programmes are dreadful in themselves. As John Caughie phrases, 'more fundamentally for television the problem is in the absence of a consistently alternative discourse' (Caughie, 1982, p.120). Within the current UK-wide framework there is a limited amount of space within schedules and budgets for the

production of Scottish discourse, and as a result there is a restricted range of images available to represent and reflect on Scottish culture and Scottish national identity. *Emmerdale Farm* may project stereotypes of English rural life, but these stereotypes take their place within a range of other images and representations from a range of programmes. Scottish broadcasting, being far more rare, are usually the only consistent and recurrent images of Scottishness available at the time (Caughie, 1982 p. 120-121).

In something of a catch-22 situation, not only can Scotland's limited broadcasting opportunities be said to have contributed to the establishment of these 'mythical' discourses; arguably the acknowledgement of these discourses in turn limit the opportunities for Scottish broadcasting. As argued by Blain (2009), whilst *Scotch Reels* did open up a long overdue debate about Scottish representation, perhaps it was unlikely that even small country's screen culture could be squeezed into two or three discursive categories (Blain, 2009, p.773). For instance, in 1998, Donald Dewar, then Secretary of State for Scotland, participated in a debate about the likely cultural effects of devolution and spoke of his fears that a devolved structure for Scottish radio and television might lead to the production of 'Kailyard' broadcasting. Reporting on the debate for *Scotland on Sunday*, Magnus Linklater summed up the import of Dewar's use of the word:

> Kailyard. The dread of the word floated in the BBC air like a bad smell…an audible hiss of in-drawn breath ran round the Broadcasting House. The K word had been uttered, and by the Scottish Secretary himself. Of course he retrieved it at once. But just saying it was bad enough (cited in Nash, 2007, p. 11).

Donald Dewar (a campaigner for devolution who would go on to be First Minister) implied that Scotland would be unable to move forward from 'Kailyardism' if it were in charge of its own broadcasting. This assumption, and the offence it caused, is evidence of the detrimental effect of these subversive 'mythical' narratives.

Some have attributed the problem to the limited capacity Scotland has to produce its own film and television, resulting in many depictions of Scotland originating in Hollywood or London. McArthur (1993) claimed that: 'we tend to be written within dominant Scottish narratives rather than ourselves writing stories about Scotland' (p.102). Although, one cannot make assumptions regarding the content produced by a hypothetical entity, arguably

with its own national broadcaster, Scotland would have more space within which to portray different concurrent representations, which would perhaps result in a more comprehensive, three-dimensional discourse of national culture. Yet, as the next section will outline, this potential solution would likely come at a price.

3.4 Economic Considerations

Whilst the creation of a dedicated national broadcaster might theoretically provide Scotland with space to explore its culture and identity, its financial viability, however, is a matter of greater contention. It is widely argued that small countries are known to face considerable challenges with regards to financing domestic broadcasting systems; particularly, small countries with comparatively large and successful neighbours. Definitions as to what constitutes a small country varies, however for the purposes of this research population size has been chosen as the appropriate measurement, as it directly influences the size of audiences. With a population of 5.3 million Scotland would most certainly qualify as small. The body of literature exploring issues regarding smallness and broadcasting is fairly extensive, and although Scotland would prove to be a unique case in many ways; it is useful to consider the research on other comparable countries and markets.

3.5 Broadcasting Economics, Challenges of Scale and Country Size

Many have acknowledged that the relationship between state size and the economics of broadcasting is due to the economic characteristics of the medium itself. As is even suggested by its name, broadcasting is specifically designed to reach audiences on a mass scale. Importantly, it does not involve the distribution of a physical product; therefore the cost structures of broadcasting create efficiencies that are directly related to scale. For broadcasters, fixed costs include facilities, equipment, infrastructure costs, personnel and operating costs necessary to maintain basic operations and high programme production costs. Generally, these fixed costs do not change regardless of the size of the audience served. Moreover, broadcasting is relatively unique because of non-rivalrous consumption. Content used by one media consumer does not impede its use by others. Therefore, as there is no additional cost per extra person, the average cost of providing for viewers decreases as

audience size rises, and crucially for Scotland and other small countries, costs per viewer increases as population size decreases (Noll et al. 1973; Owen Beebe and Manning Jr. 1974; Owen and Wildman 1992; Doyle, 2002; Picard, 2011).

High production costs and poor economies of scale generally produce unfavourable consequences for small countries. For instance, Robert Picard (2011) surmises that in terms of provision one should expect that 'countries with smaller populations will on average be expected to broadcast fewer hours, produce less original programming and avoid expensive genres' (Picard, 2011, p.49). These difficulties make these small markets vulnerable to infiltration from foreign broadcasters endowed with a higher budgets and the ability to produce higher quality programming. This is a particular problem for small countries with bigger neighbours that share the same language (Puppis, 2009, pp.11-12: Siegert, 2006, pp. 200, 204). Language can protect small states from foreign influence or degrade them to being part of a larger foreign media market. For instance in their research on television in small European states Puppis and Kunzler (2013) found that within countries like Austria or Switzerland, foreign channels achieve high market shares. In contrast, within states that use an exclusive language: the presence of foreign channels is negligible (Puppis and Kunzler, 2013, p.87).

It is easy to see why these observations would be a concern for Scotland. As a country with a small population, affording the production of high quality original programming could prove a significant challenge. As many commentators noted in the run up to the 2014 referendum, a Scottish broadcaster would most definitely be much smaller in scale than the BBC and would likely be unable to create comparable quantities of quality original output (Sabbagh, 2012; Graham, 2012; Schlesinger, 2014). Therefore, without the advantage of a different language, a dedicated Scottish broadcaster might struggle to achieve a high share of the market.

However, that is not to say there is no possibility of success. Although size does indeed play an important role on the economics of broadcasting, it is by no means the only variable factor. For instance, Berg (2011) argues that smaller market countries are able to sidestep the typical difficulties associated with smallness through public subsiding and appropriate regulating measures. According to Berg there are two types of small markets. Type one refers to those with smaller populations and a poorer economy, whilst type two refers to

markets with smaller populations but richer economic conditions. The crucial difference between the two is market leverage. Type one has the lowest potential leverage because, as discussed above, small populations limit potential for spreading costs and with poor conditions there is less opportunity to afford the expense of original content. Whereas Type 2, despite having the same small country characteristics, has the commercial market potential is greater due to wealthier economic conditional overall. Moreover there is the increased likelihood of political intervention in the provision of government subsidy and higher licence fees (Berg, 2011, p.75).

Berg's research on a sample of European countries demonstrates the advantages of richer economies and higher subsidies. Whilst looking at the total expenditure on originated content in 2007, Germany and the UK were found to spend the most: £512 million and £140 million respectively. In fact they were each shown to have a level of spending roughly as great as the expenditure on originated programming for all the 21 smaller markets in aggregate. However, what is perhaps surprising is that is that less populous countries such as Denmark, Norway and Sweden made the top then. Denmark, with an annual expenditure of £69 million greatly surpassed countries with populations more than triple its own, such as Poland with a spend of £34 million and Romania spending £25m (Figures sourced from Oliver and Ohlbaum, 2009, cited in Berg, 2011, p.73).

3.6 Denmark and Ireland

Despite its small status, Denmark's favourable economic conditions allow for a relatively high expenditure on domestic, original content. Whilst examining the same sample of European countries, Berg (2011) found that Denmark had the highest expenditure on content per capita, higher than both Germany and the UK (Berg, 2011, p.74). With a licence fee of £250 a year (compared with the BBC's £145.50) Denmark is able to fund it's public service broadcaster Danmarks Radio (DR) which currently operates 10 radio stations and 6 television channels. In addition, publicly owned TV2 and its six subsidiary stations are funded by advertising sales.

In recent years the original drama produced by DR such as *The Killing* and *Borgen* has proved to be extremely successful both with domestic and international audiences. Typically

screened at 8pm on Sundays, *The Killing* peaked at 2 million viewers, which is 60% of the available television audience in Denmark, while the second series of *Borgen* peaked at 1.6 million. Both series have subsequently been transmitted in numerous overseas territories (including US remakes) and have developed a significant global fanbase (Khalsa, 2012).

Of course, the triumph of a few specific programmes does not tell the whole story for Denmark. Despite its comparatively large licence fee, due to Denmark's small population the annual sum raised is an eighth of the BBC's, at £450 million. In addition, despite the success of *The Killing* and *Borgen*, in fact the drama genre only commands 4% of the broadcasters output. Day-to-day DR channels screen a lot of acquired programmes, mainly from the UK (Broadcast, 2012). However, by charging a high licence fee and putting an emphasis on innovation, DR has managed to produce the little content it can afford to a very high standard (Redvall, 2013, pp.227-234). This example of a small public service broadcaster producing programmes with such a global appeal is certainly inspiring to other small countries. Indeed, those advocating the creation of a dedicated Scottish broadcaster have often cited the recent Danish successes.

In his speech at the Edinburgh International Television Festival in 2012, Alex Salmond spoke of the recent success of DR, specifically the international following of *The Killing* and *Borgen*. He points out that the Danish population stands at just over 5.5 million, only slightly higher than Scotland's own population of 5.3 million. He also spoke of Norway, a country with a population of 5 million (less than that of Scotland) and remarked how the Norwegian Broadcasting Corporation runs three public service channels, together with a number of digital channels (Salmond, 2012). Earlier in the same year, Pete Wishart MP also pointed to Scandinavia, arguing that recent successes prove that quality broadcasting is possible in smaller countries with small audiences, and that this is would certainly preferable to the current "minimal" output from Scotland as part of a UK-wide broadcasting framework (Wishart, 2012).

However, despite the similar population size there is a crucial difference between Denmark and Scotland. As aforementioned, language is a significant factor with regards to the potential for broadcasting success. An exclusive language provides a small country with a natural protection from foreign markets. In Denmark, the demand for programming made in the native language helps Danish content achieve high domestic audiences. Of course, this

protection would not exist in Scotland, a detail often overlooked by those alluding to Danish success as an argument for a Scottish broadcaster. Although Scottish Gaelic is classed as an indigenous language it is only spoken by 1.1% of the population (National Records of Scotland, 2013). English is spoken by the vast majority of the population and is the official language. Consequently, Scotland not only shares a common language with its large neighbour but also the largest most successful broadcasting exporter in the world, the USA.

Therefore, perhaps it is more apt to look at the experience of Ireland when considering the economic conditions Scotland would face. The Republic of Ireland has a small population of 4.7 million and although the official language is Gaeilge, the country is predominately English-speaking with Irish only spoken as an everyday language by a small number of communities (Central Statistics Office, 2011). Despite its proximity to the UK, Ireland arguably retains a fairly prosperous broadcasting market. Funded with a combination of an annual licence fee of €160 and commercial advertising, Ireland's pubic service broadcaster, Radio Telifis Eireann (RTE) has dominated broadcasting in Ireland since the 1920s and even in todays more competitive environment continues to do so (Truetzschler, 2007, pp.35-36).

RTE raises approximately €337 million by combining licence fee and commercial revenue (RTÉ Annual Report, 2016). With this they are able to fund five television channels, four terrestrial and eight digital-only radio stations, along with a live streaming and catch-up Internet service. It is true that the RTÉ schedule does include many UK and USA imports, however there have been some notable successful domestic creations such as *Love/Hate* (a drama which has been bought by STV along with TV markets in Brazil, Israel, Singapore, Australia, New Zealand and South Korea), and comedy BBC collaboration *Mrs Brown's Boys* (Butler, 2013). The example of RTE has been used by those who argue for the creation of a separate, dedicated broadcaster for Scotland. For instance, the SNP's White Paper on Scottish independence claimed that in 2011/12 Scotland contributed a licence fee income of £386 million to the BBC (The Scottish Government, 2013). Therefore according to their calculations, for nearly £50 million less than Scotland's contribution to the licence fee, RTE provides a comprehensive public service broadcasting service.

As is the case within Denmark, the example of Ireland also further reiterates the vital importance of the public service broadcaster within the context of small states. For instance, although RTÉ has proved successful in retaining a large proportion of the domestic

audience, private broadcasters in Ireland have found it much harder to rival British channels. Private broadcasting was introduced in Ireland with the Radio and Television Act (RTVA) of 1988. At the time the Irish government and its majority in parliament assumed that a new commercial Irish television industry could help rival British channels. One senator argued: 'It is vitally important that we should move now to protect our identity and that we should have a further television option in that context I welcome the setting up of a new TV station' (Cited in Puppis and Kunzler, 2013, p.92). In an attempt to strengthen the domestic private broadcasters and allow them a larger share of the market, the advertising revenues of the public broadcaster RTÉ were limited in the Broadcasting Act of 1990. However, this did not work as intended. RTÉ faced financial problems and the advertising money formerly spent on the public channel did not go to Irish but to overspill commercial channels in Britain. This development caused a rethinking of broadcasting policy. RTÉ was now seen as central to the promotion of Irish culture and identity and to the safeguarding of quality programming. Subsequently the advertising limit was abolished in 1993 (Puppis and Kunzler, 2012, p.92).

The decision to focus on maintaining a strong public service broadcaster is one implemented by many small countries. A study by Trappel (2011), found that as well as in Ireland, neither Austria, Denmark nor Switzerland have any domestic private television channels with a market share of more than 10% (Trappel, 2011, p.112). In Switzerland a strategy was adopted to prioritize maintaining a strong national public service broadcaster that could compete with German, French and Italian stations. Politicians acknowledged that the domestic broadcasting market was too small to establish a dual system with strong commercial stations. While commercial channels are allowed on the national level, most operate on the local and regional level. A focus on supporting the public service broadcaster is also evident in Austria. In Austria the introduction of private television broadcasting was delayed until 1997 and via cable and satellite only, it was not until 2001 that terrestrial private television and radio was finally allowed on the national level. This delay was to ensure the strong market position of the Austrian Broadcasting Corporation (ORF) (Trappel, 2007, pp. 65- 66).

3.7 Scotland

There are certainly examples of smaller countries being to develop and maintain fairly prosperous broadcasters by implementing appropriate media policy measures. For instance, by providing sufficient level of financial resources, along with governance that prioritizes public service corporations; smaller countries are capable of sustaining a fairly large audience share for their domestic broadcasters. As argued by Burgelman and Pauwels (1992), 'a small country can viably affirm its audiovisual identity and produce quality programming by defending the role of public service' (p.174). With regards to Scotland, Ireland arguably provides the most helpful comparable example, due to its shared language with the UK. However, Scotland's situation still involves one major difference.

Unlike Scotland, Ireland has always had its own dedicated broadcaster. Radio Éireann was established in 1926, followed by the creation of RTÉ in 1960. From the very beginnings of broadcasting, Ireland has had its own domestic broadcaster dominating the media landscape. Therefore, perhaps unsurprisingly, RTÉ has grown to play a major role in the way Irish people construct their identity, which is reflected by its large audience share (Corcoran, 2004, p.1). However, since the advent of broadcasting Scotland has been served by a UK wide framework. The BBC first broadcast in Scotland in 1923, and has undoubtedly been a large part of the lives of Scottish people ever since. Therefore, a new dedicated Scottish broadcaster would emerge in a market where the audience already has a strong association to an existing public service broadcaster, with many long running programmes achieving high ratings north of the border. Moreover, the increased availability of satellite and online services means it would be easy for the Scottish audience to continue to access the broadcaster they have become accustomed to.

This was an issue prevalent throughout the run up to the 2014 referendum after the SNP publicized their plans to replace BBC Scotland with an SBS. The SNP's white paper on independence claimed that the SBS would enter into a formal arrangement with the BBC, in which the SBS would supply the BBC network with original programming in return for the right to broadcast BBC services. Audiences were reassured that 'current programming like *Eastenders, Doctor Who* and *Strictly Come* Dancing… would still be available in Scotland' (The Scottish Government, 2013, p.319). If this arrangement had been possible then it would perhaps reduce the need for audiences to go elsewhere to watch the programmes they have grown to enjoy on the BBC. However, if such an arrangement was not successfully negotiated the SBS might have been forced to buy programmes from BBC Worldwide,

thereby reducing the potential spend on original content.

The popularity, familiarity and loyalty to the BBC and ITV network and its content would likely be an issue for any dedicated national broadcaster for Scotland, whether it was to replace BBC Scotland or to act as an addition to the current landscape. Any new service would have to attract audiences who also have access to expensive, high quality content from other channels, much of which they may already be familiar with and enjoy on a regular basis.

That is not to say that the presence of the BBC would necessarily prove nothing but a hindrance to a dedicated national broadcaster in Scotland. Thus far this chapter has only explored the ways in which sharing a language with a nearby large broadcasting neighbour can make a market vulnerable to foreign content. However, sharing a cultural proximity with another national broadcaster - what Sinclair, Jack and Cunningham (1996) call a 'geolinguistic regions' may also be an advantage for trade. The size of the a country does not necessarily impact on the ability of creatives to come up with good ideas, and by existing within a 'geolinguistic region' there appears to be greater opportunity to export formats successfully. For instance within Scandinavia there is cultural proximity, a geolinguistic region, and a tradition of working co-operatively that provides a platform for exchanging formats there (Frapa, 2009, p. 91). Moreover, according to Fremantle Media Chief Executive Tony Cohen 'the prejudices about where things come from are all melting away. "Is it good or is it not good?" Is the only question now, not "Where did it come from?"' (cited in Rushton, 2010).

3.8 Conclusion

In sum, this chapter has explored theoretical literature that underpins the prominent issues in the debates about broadcasting in Scotland. There is a conceptual conflict between theories of national identity that stress the importance of the media, and economic theories of broadcasting and scale. For instance, following the logic purported by social communication theories of national identity, one could argue that ideally, Scotland would have its own dedicated broadcaster to explore different representations within a wealth of original content. However, the particular economic conditions of broadcasting mean that practically,

a small country like Scotland would likely struggle to produce exactly that.

That is not to say that the debates about television broadcasting in Scotland can be reduced entirely to an identity/economies of scale binary. Many different factors play an important role. For instance, producer lobbying, the unequal balance of power in media policymaking, constitutional debate and technological advancement all help to create the complex environment investigated by this thesis. However, it is clear that the discord between theories of media and identity and the economics of broadcasting is at the root of this research.

It is argued that broadcasting helps to construct feelings of a culture-in-common for communities and populations. Daily news programmes, coverage of annual events and fictional representations in entertainment create a national public sphere for viewers to reflect on their identity. This argument problematizes the position of television in Scotland as largely peripheral to the main UK-wide network. As the last chapter demonstrated, throughout the years there has been a continual perception that television broadcasting in Scotland is disadvantaged by a marked lack of representational output and in particular, unsatisfactory news provision. Indeed, the debate surrounding proposals for a 'Scottish Six' is easily understood through this conceptual framework. Those who are in favour of change argue that since devolution, the UK-wide news bulletin did not adequately reflect or represent the Scottish national sphere.

This chapter has also explored arguments that suggest that the lack of a multitude of representations has allowed for 'mythical' discourses to emerge that subversively claim to reflect Scotland and its culture. There are of course no guarantees that given the autonomy and communicative space to create more output, Scottish creatives would move beyond these stereotypical representations. However, one could argue that this would at least present more of an opportunity. These themes and concepts relating to representation are prevalent throughout chapters six and seven, as the research investigates the audience's perspective on how they are served by the current landscape, and their appetite for a new dedicated television service for Scotland.

It has also been demonstrated how the particular economic conditions of broadcasting can mean that small countries struggle to finance a significant amount of original,

representational content. This is particularly problematic as a deficiency in representational output is one of the major arguments for the creation of a dedicated service for Scotland. There are examples of small countries that sustain viable and even at times internationally successful television broadcasting, and this is usually the result of a strategy committed to the protection of language and strong financial investment in public service broadcasting. However, Scotland's context presents as a fairly unique set of circumstances, whereby there is no prolific minority language, and any new broadcaster would have to compete with large scale UK-wide broadcasters which Scottish audiences are accustomed to.

As outlined in the previous chapter, issues of funding, size and scale have dominated discussions regarding the creation of a dedicated Scottish broadcaster thus far. Chapters five and seven demonstrate that these are still prevalent themes, as the current landscape is assessed and industry players consider the viability of a new Scottish service. Although the relationship between Scotland and the UK-wide broadcasting framework has often been fraught with tension, the access it provides to a large market is a benefit which is much coveted by the industry north of the border. This leaves a curious scenario whereby Scotland's position in the UK-wide broadcasting framework can be seen to produce both debilitating disadvantages and indispensible advantages. This complex conceptual discord underpins this entire research, and shapes how subsequent findings are understood and analysed.

Chapter Four

Methodology and Research Design

A variety of methods and strategies were used to investigate the three main questions of this research, which are:

- How well does the current broadcasting landscape serve the television industry in Scotland?
- How well does the current broadcasting landscape serve the television audience in Scotland?
- To what extent is there an appetite for a new television service for Scotland and what type of service might be viable?

Methods included desk research of academic works, policy documents and journalistic materials, semi-structured interviews with key individuals from the television sector in Scotland and an online audience survey which integrated both quantitative and qualitative questions. Although each of these methods posed both advantages and disadvantages (as shall be explored later), the use of a variety of strategies was largely beneficial. As argued by Denzin and Lincoln (1994) the combination of multiple methods, empirical materials, perspectives and observations in a single study is best understood as a strategy that adds rigour, breadth and depth to any investigation (Flick, 1994, p.2).

The aim of this research was to understand the complexities of the debates surrounding television broadcasting in Scotland, which entailed an investigation into the perspective of the industry and audience. As such, the task required a search for an interpretative understanding of meaning, rather than an excavation or uncovering of absolute fact. As Geertz (1973) describes:

> … man is a social animal suspended in webs of significance he himself has spun, I take culture to be those webs, and the analysis of it to be therefore not an experimental science in search of law but an interpretive one in search of meaning (Geertz, 1973, p.5).

The difficulty with the argument that realities should be interpreted in the form of social constructions is that, followed to its logical conclusion, research may degenerate into nihilism, where we do nothing but engage in endless deconstruction of meaning and knowledge (Schwandt, 1998, p.249). This is why this research adopts a critical realist approach, which holds that it is possible for research to refine and improve knowledge about the real world over time, and to make claims about reality, which are relatively justified whilst still being historical, contingent, and changing (Archer et al., 2016).

In order to make these justifiable claims it is important to exercise a reflexive approach. For instance, throughout the research findings have been contextualised within the various social structures that are intertwined with the debate, such as national identity, political factions and the power dynamics amongst media policy in Scotland and the UK. Moreover, not only did the research involve an awareness of the socially constructed nature of the issues at play, but also of the research process itself, through both the desk and field research and the analysis of findings. This chapter shall outline how this was achieved and examine the multiple methods used, exploring both their strengths and weaknesses.

Project Background

The proposal for this PhD was designed following a dissertation submitted as partial fulfilment of an MSc in Media Management at The University of Glasgow in 2012. The dissertation consisted of a small-scale exploration into the SNP's plans to replace BBC Scotland with a Scottish Broadcasting Corporation. Throughout the research it became clear that this issue touched upon a much wider debate about Scottish television broadcasting, which was certainly not limited to the referendum or the SNP's specific plans. It was also clear that academic research on the efficacy of the Scottish television broadcasting landscape, or questions pertaining to the potential for a dedicated Scottish service had not been conducted for a number of years. Therefore this PhD was proposed to fill this gap in the literature.

The project is funded by the University's own College of Arts PhD Scholarship. Therefore the research questions are entirely my own, and not governed by the prescribed research objectives by an external funding body. Supervised by Professor Gillian Doyle and

Professor Philip Schlesinger at the Centre for Cultural Policy Research, the PhD benefited from the department's excellent network of contacts with the broadcasting industry in Scotland.

Project Timeline

This project formally commenced in October 2013 and concluded in the autumn of 2017 with a yearlong period of suspended studies due to maternity leave during the 2015/16 academic year.

The timing the field research is particularly important to note due to the evolving nature of the landscape being researched. As this was research investigating the present day, many developments unfolded during the course of the project. For instance, one such major event was the referendum on Scottish independence, which took place on September 18th 2014. Although the scope of this project extends beyond that of the referendum, the result of the vote would have greatly affected the context within which data was to be collected. Therefore, it was decided that fieldwork would not begin until the autumn of 2014, after the result of the vote was known. Broadly, the research timeline consisted of:

Desk research and field research planning: October 2013- September 2014
Interviews with producers, broadcasters and other key industry figures: October 2014 – April 2015
Online survey for audience members across Scotland: April 2015 – September 2015

After the field research had concluded, and in the middle of the writing up period, the BBC announced that it would be launching a new TV channel for Scotland in the autumn of 2018, with an annual budget of £30m. This is obviously an extremely relevant development and changes the way in which the findings of the third research question in particular are viewed. The interviews and online survey were used to conduct an exploratory investigation into appetite for and viability for a dedicated Scottish service, which was, at the time, a hypothetical entity. Now, with a specific plan on the table, it is interesting to see how the findings pertain to this proposed additional service.

Desk research

The starting point for this thesis was an extensive period of desk research. This included examining policy documents, academic publications, consultancy reports, organisational annual reports and reviews, research papers and histories. Whilst the majority was analysed at the beginning of the project, it should be stressed that this process has been on going, and some element of desk research continued throughout the research from the initial scoping of the debate through to the cross checking of data obtain from field research. Although the focus of the research questions is on the present day, it was important to establish a historical context to the issues. Therefore, the literature explored originated from a wide range of periods, from the beginnings of broadcasting in the early 20th century to work published in 2017.

Examples of literature that proved particularly pivotal included historical accounts of broadcasting in Scotland (Briggs, 1979, 1995; McDowell, 1992; Blain and Hutchison, 2008; Hajkowski, 2010; Walker, 2012), Schlesinger's analysis of broadcasting within Scotland as a stateless nation (Schlesinger 2000; 2004; 2009), works commenting on the relationship between the nation and communications (Deutsch, 1953; Gellner, 1983; Anderson, 1991), and analysis of representations of Scotland on screen (Nairn, 1977; Beveridge and Turnball, 1979; McArthur, 1982; McCrone, 1992). In addition, for comparative purposes some literature pertaining to broadcasting in other small and stateless nations was also studied (Andrews, 2006; Frenandez-Quijada et al, 2013). Important non-academic literature included BBC annual reports and managerial reviews, the final report of the Scottish Broadcasting Commission, speeches and EKOS market reports.

The strength of desk research (particularly in the digital era) is the sheer wealth of useful literature and information that can be accessed with ease. However, any source (whether an official publication or a personal blog) is a social construct, and must be subject to the same methodological principles as any other research source. Therefore, potential questions of reliability, validity and bias and should therefore be approached with the same critical reflexivity (Deacon et al, 2010, pp.33-34; Bryman, 2008, p. 534). Among the measures proposed to assist a critical approach are that a researcher should always cross check a document against other sources, and ask questions about the nature and status of any document.

For example, a source used frequently throughout this research were the findings made by the Scottish Broadcasting Commission, published in their final report *Platform for Success* in 2008. However, a critical analysis into the methodology and potential for bias within this research led to a level of caution regarding to reliability of the data. For instance, Hibberd (2008) observed one public consultation run by the Commission and found that only eight members of the public were in attendance. Despite these low numbers, responses to the questions were collated and fed back as percentages. This raises questions over the validity of the Commission's findings, particularly as attendance figures for these consultations were not published in their findings report. Hibberd also recalled that audience responses were often guided towards a national agenda, even when the initial observation or complaint was not framed in this way (Hibberd, 2008, p.170-2).

Interviews

In order to assess how well the broadcasting landscape serves the Scottish broadcasting industry desk research of the most recent market reports and commentary was combined with a series of semi-structured interviews with independent producers, broadcasters and other industry professionals, which were recorded and subsequently transcribed. The interviews were largely exploratory and were used to help interpret the way in which events, policies and procedures had impacted the industry. A semi-structured format proved most appropriate as it offered some consistency across interviews, allowing for useful comparisons, however it also gave the respondents opportunity to digress and expand on their own particular knowledge and experience (Denscombe, 2007; Robson, 2002). An outline of the structured questions, along with a list of interviewees may be found in Appendices 1 and 2.

There are certainly both strengths and weaknesses to the semi-structured interview. A clear strength of using the approach in this instance is that it was ideally suited to the exploratory nature of the research. It allowed a thorough investigation into how the subjects made sense of the current situation and gathered rich and in-depth information. By allowing the interviewees to 'talk about the research topic in their own terms, there own vocabulary and frame of reference' the research benefited from uncovering unexpected answers and lines of thought (Deacon et al., 2010, p.294). For instance, it became clear from the earliest

interviews that the significance of the 'lift and shift' strategy by the BBC had not been anticipated. In subsequent interviews, questions were altered accordingly to ensure this issue was explored from all possible angles.

However there are several potential pitfalls with interviewing as a research method, particularly as an interview is a social interaction with many elements at play (Edwards and Holland, 2013, p. 92). These include location and context, the physical and social space within which the interview takes place, power relations at the social and individual levels and a wide range of characteristics, assumptions, understandings and emotions of interviewer and interviewee. (Crow and Pope, 2008). There are several consequences to this complex social relationship, not least the possibility of interviewer bias, whether in terms of potential leading the interviewee, or the danger of failing to question assumptions shared with the informant. There are then issues with the reliability of the interview subject, what is their agenda? Is their narrative to be taken at face value? Is it selective and self-serving? (Brewerton and Milward, 2001, p.73; Bryman, 2008, p.465).

As has been highlighted by the preceding chapters, it is impossible to remove the debate regarding Scottish broadcasting from feelings of national identity and political opinions on Scotland's relationship with the rest of the UK. The concern was that participants might respond according to their political persuasions rather than genuine observations made from their position within the broadcasting industry. For instance, as this interviewee admits:

> I am slightly torn about a Scottish only network, and to be honest it is because I am from Kent and I remember thinking…even when I was young enough to watch things like Children in Need, when they used to say… "lets go to our local stations and see what they're up to" I remember thinking nooo, I want to stay in London, and I want to feel like I am part of a bigger thing (Paul Tucker, Interview, October 2014).

This is clearly less of a problem when the participant identifies his/her own bias; the issue is when it remains unsaid or perhaps even in the subconscious.

As Bourdieu et al. (1999) argue, in order to address these issues of bias (of both the researcher and subject) the interviewer must seek to make the research process as transparent

as possible, being both rigorous and systematic, and most importantly practice reflexivity in taking into account the potential and actual effects of all of the other factors that are involved (Bourdieu et al., 1999, p. 607-8). In order to adopt this essential critical reflexivity a number of techniques were employed during both the interviews themselves, and the subsequent analysis.

For instance during the interviews, in order to help determine the veracity of attitudes and opinions, any generalised statements made by interviewees were followed up with requests for specific examples and justification. In addition, to further ensure that the potential bias of the interviewee was discovered and acknowledged, during face-to-face interviews any significant non-verbal communication was made a note of. Fontana and Frey (1994) note the importance of proxemic communication (the use of interpersonal space to communicate attitudes), chronemics (the use of pacing speech and length of silence in conversation) and kinesic (any body movements or postures and paralinguistic communication including all the variations in volume, pitch and quality of voice) in providing a more scrupulous analysis of interview material (Fontana and Frey, 1994, p.371). In this case, non-verbal communication such as eye rolls, raised eyebrows and gestures often said more about the subjects opinion about a certain event or policy than their verbal response, and was therefore duly noted.

With regards to the analysis of the interview material it was important to maintain this attitude of critical reflexivity. For instance, although it was the task of this part of the research to determine how the Scottish television industry looked from the perspective of the interviewees, it was important not to simply reproduce the narrative they shared. Therefore, it was crucial to be aware of any possible agenda that respondents brought to the interview and when possible check accounts against other primary and secondary sources (Deacon et al., 2010, p.305).

As is explored in Chapter 5, a particularly stark case of this was the complaint made by numerous independent producers who claimed that a prejudice against Scottish content existed at the UK commissioning level, which led to their work often being turned down for the network. This is obviously a much more palatable narrative for the producers than their work simply not being of high enough quality, so great caution was taken when interpreting the extent to which this represented a credible finding.

For instance, when Founder of TVI Vision Maurice Smith complained of this perceived prejudice when his programme *The Entrepreneurs,* which followed the fate of group business start-ups in a post-industrialist Scotland still in the midst of the recession, was rejected by the network and was broadcast on BBC Scotland only. Only a few weeks later the programme *Bradford: City of Dreams* was broadcast on the network on BBC Two, which followed a group of businesses struggling in a post-industrial Bradford in the midst of the recession. Smith contended that this was a clear case of prejudice against Scottish content, as the programmes did not differ in themes, issues or quality. Rather than take this claim at face value, both programmes were instead sourced and analysed in order to critically review this example.

An element of critical reflection was also needed with regards to which the extent the sample of interview participants could be said to represent the Scottish television industry as a whole. Interviewees were predominantly made up of senior broadcasting executives and senior producers (i.e. Managing Directors or CEOs) however, there are obviously many others who have a stake in the television broadcasting industry. Due to time and resource limitations, it was not possible to interview a wide range of writers, actors, and technicians, etc. and perhaps their experiences and opinions would have been different. The logic behind focusing on more senior individuals was an assumption that given the circumstances this would be the best way to achieve an extensive investigation of the industry. It was assumed that possessing a comprehensive understanding of the industry as a whole was an important part of their job.

Access to interviewees was occasionally problematic. For instance, amongst the 16 interviewees there were representatives from neither Creative Scotland nor Scottish Enterprise, due to a lack of response. Non-respondents were chased up, but time restraints meant that this could only be done to a certain extent and research inevitably reaches a point where it can only represent the voices of those who are prepared to be part of it. The strategies used to address this issue were twofold. Firstly, a focus was placed on ensuring that the sample of elite industry players was as representative as possible. For instance, an effort was made to pursue and include companies of various different sizes and companies that produced a variety of different content. Secondly, interview findings were combined

with numerous other sources of industry opinion such as market reports, annual reviews and written submissions to parliament.

Online Audience Survey

In order to conduct the audience side to this research an online survey including both closed and open-ended questions was used. The biggest concern was collecting a large enough sample to provide findings of any real meaning. Whilst a series of focus groups would have perhaps provided rich detail as to the attitudes and opinions of a select few, it would have been unrealistic with regards to time constraints and financial resources to host enough groups to obtain a large enough sample whereby useful deductions could be made about the Scottish television audience as a whole.

However, it was also important to consider the complexity and multifaceted nature of the research questions, and recognise that audience opinion could not be deciphered merely from closed responses to quantitative questions. For instance, if one considers the question 'How satisfied are you with Scottish drama on Television?' a closed-ended response option would not suffice. This is because the concept of 'satisfaction' in this instance is not one-dimensional, and could apply to quantity, quality or a whole host of different elements. Designing several different questions to account for all possible dimensions to satisfaction would have made the survey too long and would have likely been dismissed by potential participants. Instead, respondents were given the option to expand on their answer by typing their own comments.

The survey was designed and collected using the Smart Survey software, which also provided tools for cross tab analysis and the creation of graphs. A print screen of the survey, as seen by the respondents, can be found in Appendices 3. Email and social media sites (particularly Twitter) were used to distribute the survey and 174 completed responses were yielded. There was no possible way for this research to extract a purely random sample of the Scottish television audience; therefore this self-selection approach was used. Despite being the best fit for this particularly study there are, however, numerous limitations associated with this approach, which shall be discussed later in this section.

The use of an online survey (rather mail or telephone) was decided upon because as Kraut et al. (2004) and Reips (2002) argue, Internet surveys tend to achieve sample sizes that exceed more traditional methods. One of the reasons for this is that they are far more cost effective than other techniques, as the cost is not dependent on the number of participants solicited. Moreover, they also provide access to populations, which may have otherwise been difficult. For instance, in this case, it was possible to collect surveys from audience members living across Scotland, from the Borders to the Highlands and Islands. This was variety in geographical location was deemed essential, particularly as a long standing criticism of television broadcasting in Scotland has an overemphasis on the central belt.

Another reason why larger samples are more easily obtained by online surveys is the minimal inconvenience caused to the participants, and the time efficient way in which the survey can be completed. This was particularly pertinent for this research as respondents were also being asked to answer open-ended, qualitative style questions. Matsuo et al. (2004) observed that online surveys tended to yield much more qualitative data than traditional mail surveys due to the ease of typing up comments instead of writing with a pen (Matsuo et al., 2004, p.3). This appeared to be the case in this instance, as 71% of the responded to all three of the open-ended only questions. In addition, just over half opted to expand on their answers to questions where open-ended responses were an optional extra.

Another major advantage of using an online survey and software to collate responses was that potential human errors were eliminated, and results were available instantaneously (Nardi, 2015, p.98). This was particularly useful with regards to the open-ended questions, whereby responses could be easily pasted onto Word files for analysis (Matsuo et al., 2004,p.3). From the respondent's perspective, using software facilitated a smooth and clear navigation through the three pages of the questionnaire and provided useful features such as visual information regarding how much of the survey has been completed and how much is left to go (Nardi, 2015, p.98).

Despite the clear advantages, there were also disadvantages and limitations to the use of the online survey methodology. For instance, multiple submissions and nonserious responses are especially problematic in web-based designs, due to the ease of completion and the lack of control over who responds (Porter & Whitcomb, 2003; Reips, 2002). This was a concern during this research, particularly due to the recent zealous nature of some criticisms

regarding the television coverage of the 2014 referendum. There was a danger than the survey might be hijacked by the motivations of a small but angry portion of the population. In order to address this issue, Gosling et al. (2004) suggests a strategy of searching of submissions for strings of identical responses and examining the internal consistency of responses. This strategy led to the identification of four responses, which appeared to be both multiple submissions and nonserious. The participant had typed almost identical unconstructive critical rants about the bias they perceived to be within BBC news coverage as the open-ended response to every possible question, even those pertaining to different genres. This was prevalent throughout four different submissions completed within the same hour. These submissions were therefore disregarded.

Different issues pertaining to sample representativeness constitute the majority of disadvantages to online surveys and the limitations of this particular study. For instance, as argued by Khazaal et al. (2014) online self-selection surveys are particularly subject to coverage and selection bias and therefore caution is need when interpreting results.

The most obvious coverage bias associated with web-based surveys is that it excludes the portion of the population who do not have computers or access to the Internet. Whilst Internet access and e-mail use are becoming more common, access is still not universal and cannot ensure representatives of the population (Mesch, 2012, p. 319). This is a particular limitation for this research as one of the lines of enquiry was the appetite for a new online-only Scottish television service. One would assume that amongst respondents who are clearly already active online, this result would be skewed in favour of such a service. This probable bias had to be taken into account when interpreting results. On reflection, it may have been wise to adopt a combined online and traditional mail approach to audience surveying to have avoided this issue. However, the focus placed on a potentially online-only service was a somewhat unanticipated finding of the interviews with industry figures. It was subsequently included in the audience side to the research late in the research design process.

Kayam (2012) argues that social media networks should be seen as a natural extension for communication between researchers and their prospective participants, as it is where people spend their time and where they can be reached (Kayam, 2012, p.58). However, participants reached via certain channels make them part of a specific group, and these groups are not representative of the population. For instance, in this research Twitter was used as a major

platform for distributing the survey. However, the demographics for Twitter users are not representative of the Scottish television audience. For instance, latest analytics suggest that 65% of UK Twitter users are under the age of 34, which suggests that a coverage bias in favour of the younger demographic would be highly likely (thinkdigitalfirst, 2017).

Interestingly, however, amongst the survey respondents who accessed the survey by Twitter, the vast majority (69%) were over the age of 30. This was slightly unexpected, but on reflection is likely to be due to a greater interest in the research topic amongst potential participants in the slightly older age bracket. This brings us to another potential pitfall, that the self-selection nature of the online survey means that potential participants who chose to respond may be especially motived or interested in the research topic, which in turn exacerbates the problem of sample representativeness (Matsuo et al., 2004, p.3).

The existence of a voluntary response/non response bias is somewhat unavoidable with the audience side to this research. However, it would have perhaps existed to a greater extent using a methodology (such as focus groups, mail surveys etc.), whereby subjects were required to give up more time to participate. As with all the aforementioned issues with sample representativeness, it was essential to adopt an element of critical awareness of these potential biases when interpreting data. When possible, findings were compared and contrasted with other available audience research, such as that conducted by the BBC's Audience Council for Scotland and the Scottish Broadcasting Commission. However, it is important to note that very little television audience research has been conducted in Scotland recently, or indeed in the past. This significant deficit is why, despite the limitations of the methodology, it was important to give the audience a voice within in this research.

Ethics and confidentiality

Formal ethical procedures prescribed by the University of Glasgow help to establish clear boundaries for research as well as protecting the rights of those participating. For instance each interview participant signed 'consent for the use of data' form, (a copy of which can be found in Appendices 4), with the understanding that the session would be recorded. Interviewees were given the option to remain anonymous in the thesis, and five opted to do so. In addition, even within the interviews whereby the participant waved anonymity, at times certain responses were flagged as 'off the record.' This did occasionally restrict the

richness of meaning that might have been gained from attributing specific contributions to specific individuals or roles within the industry.

With regards to the survey, as the nature of the topic posed minimal risk to participants a simple consent paragraph was included in place of a spate consent form (as seen in Appendices 3). Consent was therefore obtained by virtue of completion. Whilst participants were not asked to provide their name, the survey could not be categorized as completely anonymous because other information, such as gender, location, age and IP address could potentially be used to identify individuals. As such the survey was described as 'confidential' and that the research would maintain the confidentiality of participant data.

Conclusions

This chapter has outlined the methodology for this research, which used a combination of desk research, interviews and an online survey in order to analyse both the industry and audience perspective on the television broadcasting landscape. It discussed the rationale behind the critical realist approach, and offered examples of how adopting constant reflexivity helped to acknowledge how data might be influenced by various contextual factors and the weaknesses of the various methods. This acknowledgement inspired a level of rigour whilst interpreting findings.

As this chapter has highlighted, there are undeniably limitations to the methodology undertaken by this project. However, it is important not to lean too far towards a highly restrictive model for research, which prevents the exploration of complex social realities that are not always amenable to strict scientific methods. As Punch (1994) argues, there comes a point where one must simply 'get out and do it' (p. 84). This is not in the sense that a carefree, amateur and naïve approach to research should be supported, but that essentially all field research is political in nature and affected by a certain level of bias (Clarke, 1975, p.104). As Fielding (1982) explains, we have to accept much of research as being in good faith, providing the researchers come clean about their 'muddy boots' (Fielding, 1982, p.96). Which is in effect, what this chapter has endeavoured to achieve.

Chapter Five

An investigation into how the current broadcasting landscape serves the Scottish television broadcasting industry

With specific reference to interviews conducted with those working within the Scottish television broadcasting industry (the majority of whom were producers and broadcasting executives), this chapter will investigate how well the current broadcasting landscape serves the Scottish television industry. Evidence was also collated from economic reports, policy documents and institutional literature in order to assess whether the current set up is effectively providing an optimal environment for the production of Scottish content.

The chapter will begin by examining the impact of initiatives specifically designed to enhance the television sector north of the border, such as the BBC's Network Supply Review and Ofcom's Out-of-London Quotas. In doing so, it shall explore the current relationship Scotland has with the UK-wide broadcasting network, outlining the issues identified pertaining to network access for Scottish content; particularly drama. It shall also discuss the implementation of quotas known as the 'lift and shift' policy, presenting the recent example of *Waterloo Road* as a case study.

It will then examine how the current structure of the television broadcasting industry in Scotland appears to affect the ability of independent companies to win commissions. It shall first explore the significance of the geographical location of commissioning power, before discussing the impact of public bodies Creative Scotland and Scottish Enterprise, along with the positioning of STV Productions, the production arm of the STV Group plc.

Lastly, the chapter will discuss the role played by lobbying and rent seeking, and consider the extent to which the narrative projected by the industry in these findings should be accepted before outlining the conclusions drawn.

5.1 Network Access for Scottish Content

As part of the Television Network Supply Review in 2008 the BBC committed to sourcing more network television from the nations and regions over the course of the last seven years. Citing an overarching concern to secure strong creative output and value for money for audiences, they set themselves a number of challenges. Mark Thompson, Director-General

at the time, argued that the BBC should source a proportion of network programmes from Scotland, equivalent to Scotland's share of the UK population (8.3%). The BBC Trust recommended a comparable approach in relation to Wales and Northern Ireland and pledged to monitor delivery carefully to ensure that the BBC is helping to build strong and sustainable network production in all three nations (BBC Trust, 2008).

The subsequent industry reports and statements from the BBC suggest that these new commitments were successful. The percentage of network TV production spent in London and parts of England reduced, and spend on TV production in Scotland as a proportion of the overall total network TV expanded. Significant progress was made fairly promptly, and targets were met ahead of schedule. In 2007 only 3.3% of the Network TV budget was spent in Scotland, but by 2010 this had more than doubled to 7.4% ahead of the 2012 target of 6.2% (BBC News, 2011). In 2013 spend reached a record level of 10.9% (BBC Annual Report, 2014, p.64). Moreover, despite announcing that BBC Scotland was to endure budget cuts of 16%, maintaining network spend remained a priority and 10.3% was achieved in 2016 (BBC Annual Report, 2017, p.97).

However, despite numbers suggesting a vast improvement in recent years, difficulty in gaining network commissions on the BBC was by far the most common issue raised by respondents to this research. Although spending was on the increase, many within the industry suggested that problematic attitudes with regards to what were perceived as 'Scottish stories' were a significant barrier to accessing the network. Respondents spoke of how it seemed as though BBC Scotland's 'national region' status has often led restrictive approach when scheduling network output. For instance, Founder and Chairman of TVI Vision Maurice Smith argued:

> BBC Scotland is seen within the BBC to be relatively strong. It commissions its own programming more than an English region, yet it means that some Scottish programmes are only seen in Scotland when actually, to my mind, they justify being seen across the UK…you know it is a pleasant surprise when our Forth Road Bridge programme is subsequently broadcast by BBC Four, but, you know, to me, it should have been broadcast on BBC Four anyway. I see programmes commissioned on BBC Three and Four which are very English and very good…and I think there are programmes that are just as good as that are going out in Scotland that aren't being seen outside Scotland because of the

assumption that, oh that's Scottish…they can look after themselves (Maurice Smith, Interview, November 2014).

'Human interest' was a term repeatedly used by respondents to describe content they felt should have been broadcast on the network. Many examples of programmes were given, which were questioned or simply dismissed due to their Scottish context but appeared to have universal appeal. For example, Barbara Orton, founder of True TV, spoke of an upcoming project about Scotland's system of youth justice.

> Surely it would be great for people in England to know what was going on in Scotland with regards to youth justice, I mean, yes it has got its flaws but my goodness it is so unique and brings in local accountability and civic duties and all those Scottish things we hold so dear, and why wouldn't England be interested in that? Surely this is a network show? But you get told that because it is a Scottish subject, it won't resonate with an English audience or in Wales or in Northern Ireland because the hearing system is different… So I have to go back to the drawing board and think how I broaden out the children's hearing thing to make it resonate with audiences in the rest of the UK …because otherwise apparently it is just a Scottish subject with Scottish people…but in reality the children are going through an ordeal, human emotions that everyone goes through…it is a human interest story (Barbara Orton, Interview, November 2014).

Whilst respondents gave numerous examples like these, it is of course imperative to recognise the limitations of these observations. It is perhaps unsurprising that producers were convinced that their own work was worthy of a bigger audience, when often months and even years may have been spent developing their idea. It was also not possible to gain insight into decisions made by commissioners with regards to these particular instances. For example, it is not known what other content may have been in contention for specific schedule slots, and how they might have compared with regards to quality and universal appeal. It is therefore important not to interpret every complaint as further evidence of an exclusion conspiracy. Yet, the sheer prevalence of this complaint amongst (both producers and broadcasters) perhaps suggests that this is an issue too widespread to be solely attributed to vanity.

For instance, Alan Clements, Director of Content at STV Productions, spoke about the struggle he faced to ensure the documentary *Piper Alpha: Fire in the Night* was shown network-wide. Piper Alpha was a North Sea oil production platform and the documentary chronicled the tragic explosion and resulting oil and gas fires which destroyed it on 6th of July 1988, killing 167 men. Despite this being Britain's biggest industrial accident, Clements described how commissioners were inclined to dismiss it as a 'Scottish story':

> I know certainly when we were talking to broadcasters about Piper Alpha people were saying... 'Isn't that a Scottish story?', and I was going 'it is Britain's biggest industrial accident.' Piper Alpha was a real eye opener for me, I was thinking 167 people died, and Channel 4 has made at least two documentaries on the Marchioness disaster which was a terrible tragedy but whereby 45 people died, but it happened a mile and a half from Channel 4's headquarters. It was an insight into just how metropolitan some commissioners are (Alan Clements, Interview, February 2015).

Interacting with commissioners who were seemingly unwilling to broadcast Scottish content on the network was a frustration echoed by Ian Small, Head of Public Policy and Corporate Affairs at BBC Scotland. He explained:

> I think one of the greatest frustrations amongst programme makers and amongst the BBC Scotland executives is that constant fight to get things on the network. Well actually one of the reasons the Network Supply Review really took off was because Mark Thompson, the Director General at the time, had previously been Director of Nations and Regions and he *got* it.

> The big challenge for the BBC, particular in Scotland, Northern Ireland and Wales is to hope that somehow there is someone who is commissioning, most of them in London, but that there is someone down there that gets it, and that is not always the case (Ian Small, Interview, January 2015).

One example illustrative of this issue involved two programmes about entrepreneurs broadcast on the BBC in 2013. The first, entitled *The Entrepreneurs* was a two part observational documentary made by Scottish production company TVI Vision. The programme followed the fate of group business start-ups in a post-industrial Scotland still in

the midst of the recession (*The Entrepreneurs,* 2013). A few weeks later a programme entitled *Bradford: City of Dreams* was broadcast on the network on BBC Two, which followed a group of businesses struggling in a post-industrialist Bradford in the midst of the recession (*Bradford: City of Dreams, 2013*). TVI Vision's Founder and Chairman Maurice Smith expressed his disappointment and confusion that the network rejected his programme, when a remarkably similar show was broadcast so soon afterwards:

> This other programme was basically just our show based Bradford and I thought well… it certainly wasn't any better than our programme and you couldn't argue that Scotland is so culturally different and full of Scots that nowhere else in the UK would be interested, I mean you could say the same about Bradford (Maurice Smith, Interview, November 2015).

Indeed, upon watching and analysing both programmes it becomes clear that they explore remarkably similar themes and issues, and (although this is obviously a subjective matter) it does not appear as though either portrayed a markedly different production value. There was nothing featured in the programme *The Entrepreneurs* which would mean that it was only relatable to Scots. For instance, there were no mentions of business laws applicable to Scotland nor were any colloquialisms used that are typically only understood north of the border. Similarly there appeared to be nothing in the content of *Bradford: City of Dreams* that restricted its appeal to just Bradfordians.

It certainly seems curious that in this instance BBC commissioners decided to overlook Scottish content to then spend money commissioning an entirely new and extremely similar programme located somewhere else. Due to the sheer number of examples given, and the widespread agreement amongst both broadcasters and production companies of all sizes and specialities there seems to be sufficient evidence to suggest that some decision makers, notably in London, appear to perceive Scottish stories as foreign or 'other.' However, without having access to the decision-making processes from the commissioner's perspective, it is impossible to ascertain the *extent* to which this acts as a barrier for content makers in Scotland.

5.2 Returnable Drama

Another network that issue that was a source of widespread dissatisfaction amongst the industry was the current lack of returnable drama series produced by Scotland. In this respect, many felt as though Scottish position was in a worse situation than it had been in years. Many held the view that returnable drama was an essential element to growth within the industry. For instance, Cofounder of Black Camel Pictures Arabella Croft recently argued in a submission to the Scottish Parliament's Economy, Energy and Tourism Commitee:

> I don't think any Scottish indies are currently producing returnable television drama and this is a key area for building sustainable, successful businesses. Companies in Scotland are under-resourced and understaffed so have little financial capacity to try and develop drama with Londoncentric commissioners. But we simply need more drama production. It is the simplest way of retaining talent and developing our skills base (Arabella Croft, Written Submission, January 2015).

Alan Clements of STV Productions argued that securing a returnable drama to be based in Scotland once more should be an absolute priority. He explained how he believed commissioner's attitudes were in part to blame for the current situation:

> There is a few three or four parters coming through but it's not enough to sustain a production base. There is no *Taggart*, no *Rebus*, no *Monarch of the Glen*, no *2000 Acres of Sky*. Part of it is cyclical, but part of it is also commissioners seeing Scotland with a sense of 'foreignness' and an aversion to Scottish accents (Alan Clements, Interview, February 2015).

There was also an agreement amongst participants that not allowing Glasgow based soap *River City* a chance to be broadcast on the network was a missed opportunity to provide a larger sustainable production base for drama. Ian Small of BBC Scotland explained how suggesting the idea is met with resistance:

> One of our frustrations is not getting *River City* on the network. But the problem is you're contesting over so many other things, you are contesting against long established things such as *Eastenders*, *Casualty*, *Holby* and whatever else is there. It is not necessarily an easy thing to do. We don't buy the argument we get given which is, well… it is been on the air for ten years and you can't suddenly

break into a soap. Actually you can, and lots of people do (Ian Small, Interview, January 2015).

River City is already acknowledged as acting as a sustainable base for production and a training facility for both on and off screen talent. As Hibberd (2007) noted, having continuous production help equip staff with necessary skills and provide a 'training slope' for a host of actors, writers and production crew (Hibberd, 2007, p.119). By moving on to the network and perhaps increasing its audience and budget, *River City* would have the potential to further benefit the local industry. However, due to the reluctance of commissioners this was an outcome that participants felt was unlikely to be realised. For instance Maurice Smith of TVI Vision argued:

Commissioners put *River City* in a Catch 22. You get told that it can't go on the network because it is too low budget. But it's low budget because it is not a network soap (Maurice Smith, Interview, November 2014).

A recent development with regards to Scottish drama, which was discussed by some participants, was the production of US Fantasy Television series *Outlander*. The series is based on the historical time travel novels *Outlander* by author Diana Gabaldon, and is produced by LA based production company Left Bank Pictures for the US cable channel Starz. The principle photography, which began in October 2013, takes place in Scotland and has reportedly provided a significant boost for the industry. For instance Natalie Usher, Director of Film at Creative Scotland reported: 'In terms of production spend, the figure was £33.6 million in 2013, the highest ever in Scotland so far. This is because it included part of the first season of *Outlander,* which is spending big money and engaging with crews. It has been incredibly significant for Scotland' (Ferguson, 2015).

With a second full season commissioned before the first run of 16 episodes was even shown, it is clear these apparently lucrative benefits are set to continue in the coming years. Attitudes towards *Outlander* were mixed amongst participants. It was acknowledged that the employment opportunities for production crew would likely be highly beneficial for the retention of local talent in Scotland, and could perhaps establish a production base that would hopefully attract more drama production. However many were cautious in their optimism, highlighting that as the programme was produced by a combination of three US based companies and one London based company, revenue remained outwith Scotland.

Moreover, there was a frustration with regards to Amazon Prime winning the rights to broadcast the programme to the UK. As this producer lamented:

> Maybe *Outlander* can help things out with regards to drama production, provide some long-term contracts etc… But its not really a Scottish programme, its made by Sony. What's more, why did it take Amazon to pick it up? Why didn't any of our network broadcasters win the rights? So we have this Scottish story, showcasing Scottish locations making money for people in America, and Scottish people can't even watch it unless they subscribe to Amazon Prime (Anon, Interview, February 2015).

The lack of any returnable drama on the network made by Scotland is clearly of great concern to those working within the industry. It is difficult to draw any concrete conclusions as to the exact cause of this recent deficit. Although, once again, many alluded to an aversion to Scottish stories amongst network commissioners, it is of course possible that there has also been a scarcity of good ideas pitched in the first place. However, it does seem provide further evidence of the limitations of the Network Supply Initiative. Despite the BBC trebling network spend Scotland since 2007, it appears as though during this time drama production in Scotland has suffered a decline.

5.3 'Lift and Shift' Policies and *Waterloo Road*

Along with a commitment to source a proportion of network programmes from Scotland equivalent to its share of the UK population, as part of the Network Supply Review the BBC also set the following specific commitments to growing regional production outside of London. Targets were set to ensure that 50% of network spend would be made outside London by 2016 and 17% of network spend would come from the Nations by 2016 (BBC, 2015). The BBC used Ofcom's definition to determine what qualifies as an out-of-London production. Accordingly, network programmes must meet at least two of the following three criteria that relate to the location, spend and crew: a) the production company must have a substantive business and production based in the UK outside the M25; b) at least 70% of the production budget (excluding the cost of on-screen talent, and certain pre-production costs) must be spent in the UK outside the M25; and c) at least 50% of the production staff (i.e. not

on-screen talent) by cost must have their usual place of employment in the UK outside the M25. (Ofcom, 2010)

There existed widespread agreement amongst interviewees that this commitment was encouraging, and that intent to ensure a decentralization of broadcasting was in general a position sign. However, participants argued that the ways in which these out-of- London targets had been implemented in Scotland had largely resulted in a failure to produce the intended benefits. In particular, there was a concern regarding what participants referred to as 'lift and shift' policies. The term was used to describe how, in order to meet the out-of-London quota, Public Service Broadcasters enabled TV production companies to move to Scotland temporarily in order to meet targets; rather than commissioning from companies that are permanently based north of the border.

A recent example that is highly illustrative of this issue is the BBC's television drama series *Waterloo Road*. At the time of research the drama had been recently cancelled, three years after the show had been moved from its original home in Rochdale, Lancashire to Greenock in Scotland. As such a recent and prominent example, *Waterloo Road* was cited by the majority of interview participants when discussing the Scottish broadcasting industry. There appeared to be a strong consensus (even amongst those directly involved in the production), that the programme demonstrated how meeting targets for spending in Scotland did not necessarily lead to sustainable benefits for the production industry. However, the level of criticism aimed at *Waterloo Road,* and the decision to relocate to Scotland, did vary significantly.

School based drama *Waterloo Road,* produced by Shed Productions, first broadcast on BBC One on the 8pm Wednesday slot in 2006 and was both filmed and set in Rochdale, England. The show proved to be very successful and was watched by close to five million viewers for seven series (BARB, 2006-2012). At the beginning of series eight, the show relocated to Greenock, Scotland following a dramatic storyline. In order to facilitate the move, Shed Media Productions expanded their previously very small-scale base in Scotland with the help of a Regional Selective Assistance grant from Scottish Enterprise (Shed Media Scotland, 2011).

However, the subsequent series based in Scotland failed to draw the same ratings, and it was announced on 2 April 2014 that series 10 would be the final series of the show (BBC News, 2014). On 11 December 2014, it was announced that *Waterloo Road* would lose its prime time slot and that the final 10 episodes would be aired on BBC Three on a Monday evening, with a repeat aired on BBC One later that night. The final episode of *Waterloo Road*, was aired on 9 March 2015 on BBC Three and BBC One (Kilkelly, 2014).

The relocation of *Waterloo Road* was initially hailed publicly as a positive venture. In a press release the BBC confirmed that the production was moving to Greenock from Rochdale as part of their move to increase network programming from Scotland and the other nations of the UK. They anticipated that filming an initial 50 one-hour episodes over two years would provide a significant boost to the Scottish creative sector worth an estimated £20 million, whilst creating up to 200 jobs (BBC Press Office, 2011). The EKOS Market Assessment of the Broadcast and Television Production Sector in Scotland 2010/11 noted optimism amongst respondent as the relocation of Waterloo Road was expected to bring drama expertise to Scotland (a genre that was under-represented) and increase employment and skills in this area (EKOS, 2012).

Both the BBC and Shed Media also appeared confident with regards to the sustainable benefits *Waterloo Road* would bring to Scotland. Donalda Mackinnon, Head of Programmes and Services at BBC Scotland said at the time:

> This is excellent news for BBC Scotland and for the wider creative sector in the country. We have a strong track record of productions with Shed and we are delighted they can bring Waterloo Road to Scotland. It is another milestone in the development of BBC Scotland as a significant and sustainable centre of distinctive drama production and is a welcome addition to our portfolio of programming for the network (BBC Press Office, 2011).

In addition, Shed Media's move also helped to establish a TV fiction scriptwriting postgraduate course at Glasgow Caledonian University and the company also expressed their intention to greenlight a number of production training programmes in Scotland to tie in with the arrival of *Waterloo Road* (BBC Press Office, 2011).

However, despite the original optimism there was widespread agreement amongst participants in this research that relocating *Waterloo Road* ultimately failed to provide sustainable benefits for Scottish television broadcasting. Yet amongst the dissatisfaction about this particular case, criticisms tended to fall into two different camps. There were those that criticized the decision to relocate the programme in the first place, expressing the view that 'lift and shift' policies were categorically inappropriate. Others maintained that the move did provide great opportunities for the industry, but that these potential gains were forfeited due to poor implementation.

Amongst those that rejected the idea in principle, a discernible amount of anger at the situation was articulated. Some producers suggested they thought the intentions behind the decision were cynical. For instance Paul Tucker, Founder of Monkey Puzzle Productions expressed his frustrations and referred to the relocation of quiz show *The Weakest Link* a few years previously:

> I think this is part of a pattern, for instance with *The Weakest Link*, it was moved up to Glasgow as well in the tail end of its career, and you know the rumours are that Anne Robinson wasn't happy about being moved up to Glasgow, why would she? And I think the programme lasted two series after that. So what you have got, its almost as if Scotland is being set up to fail with these programmes and I am sure there are others. You know now they can say, well we tried moving up *The Weakest Link* and it didn't work and we moved *Waterloo Road* up and that didn't work… you know, what are they doing up there? These are programmes that have probably run their time and it's a bit if you'll excuse the expression arse-about-face. You know the point of this whole process is supposed to be that commissions are born out of Scotland and are made in Scotland because they are strong propositions for programmes (Paul Tucker, Interview, October 2014).

In addition, many producers expressed an irritation at Shed Media Scotland receiving investment from Scottish Enterprise to then provide little benefit to more indigenous companies. Maurice Smith, CEO of TVI Vision spoke of this frustration, and also referred to the accompanying storyline as one of the major problems with the move and explained how this led him to question the commitment of the commissioner:

Well I found the whole thing completely baffling, I thought the story line when they moved the school to Greenock lacked credibility to say the least … so if I were a viewer of *Waterloo Road* for several years I would find that storyline development ridiculous and I suspect they have lost viewers through that. So you think, what is the gain here … I know that Shed got grants from Scottish Enterprise for some of their activities up here and you think… do indigenous companies not qualify for these grants? You think how firm was the commitment of the commissioner? If they accepted a storyline like that then how did they think that was going to work? (Maurice Smith, Interview, November 2015).

The doubts amongst some industry members surrounding the intentions in moving the programme must be interpreted as speculation. There is no hard evidence to suggest that the intentions of the BBC and Shed Media were anything other than to provide the benefits to Scotland they had initially predicted. It is nonetheless interesting to observe how this case study has led to a rather despondent and suspicious attitude amongst some producers.

Others, particularly those involved in *Waterloo Road,* maintained that the decision to move the show in first place was well intended and had the potential to generate lasting benefits for Scottish production. For instance Margaret Scott, Production Executive at Shed Media Scotland, explained why relocating an existing programme had the potential to be successful strategy:

By moving an established programme you are able to commit to much more investment initially. We were able to commit to 50 episodes of *Waterloo Road* up here, there is no way that any new commission would get anywhere near that at the beginning (Margaret Scott, Interview, December 2014).

According to Scott, it was the way in which the decommissioning was handled which led to the venture failing to provide sustainable benefits:

I mean we were asked to move this show, obviously the BBC filled a large part of the quota in doing that so it made it so much easier for people up here to fill a

quota and of course this had tremendous benefits for Scotland. I mean we take a huge amount of pride in the amount of training and development and the things that we did that was massive investment, a lot of work for a lot of people, big long contracts and lots of training and development through it, a lot was achieved. But it has now been decommissioned, now what is replacing it? I don't see anything replacing it…and that is 70 hours of drama over three years and the upsetting thing is what else is there?

They should have been looking for that next thing, they should have said lets move Waterloo Road up, its coming to the end of its career (although I believe they should have given it five years to settle down) meanwhile we'll be developing our drama from Scotland that is going to be big and returnable to sustain that production base and that's what they didn't do (Margaret Scott, Interview, December 2014).

Similarly Ian Small, Head of Public Policy and Corporate Affairs at BBC Scotland, argued that previous successful examples of relocations proved that the decision was not flawed in principle, and that there is always an element of uncertainty regarding the success of a project. However, he also acknowledged that more should have been done to ensure *Waterloo Road* provided sustainable benefits to the Scottish industry.

If you think about what happened in Cardiff you know they moved *Doctor Who*, which worked very well. You can argue that its days were numbered, problems with broadcasting is that you never know what is going to work, going back to the same team that made *Waterloo Road* made *Hope Springs,* great writers, great cast, strong storyline a complete flop. All the ingredients are there but sometimes it doesn't all come together. It's that magical chemistry, if we knew what it was we would inject it into everything we do.

I think *Waterloo Road* is a classic example of yes it came up the road, yes we did get the money for it, it did give the industry a bit of a boost but we didn't get certain elements right. I think dramatically it was a problematic transition, slightly odd that the entire school should move, and Shed, even though it started by two Scots, effectively was fairly quickly bought over by Warner Brothers so

it was about making content for audiences not for Scotland. But the money has come to Scotland, it undoubtedly did. Some might not have got it, but you can't argue that the money hasn't come here. What it didn't do is it didn't bring sustainability in the industry and it didn't bring representational portrayal in terms of on screen or on air product (Ian Small, Interview, January 2015).

Here, Small also alluded to another criticism of the *Waterloo Road* example; the lack of representational portrayal. By choosing to relocate a programme rather than commission something new, writers had the task of creating a plotline that explained the change in location. This arguably prevented them from focusing on creating characters and storylines which represented Scotland. For instance, this production executive provides a cutting critique:

Dramatically… the show's moving was so awkward. To make the move more palatable they moved half the cast up from Rochdale and thought up this bizarre idea that a random millionaire would want to open a free independent school in Greenock. How does this represent Scotland?

...instead of spending the money on something that could have been a great, coherent drama representing Scotland, we got a successful programme that lost all credibility when the writers understandably failed to smoothly explain the change in location (Anon, Interview, Febraury 2015).

Interestingly, further evidence of the lack of representational portrayal in *Waterloo Road* was uncovered during the audience research and will be explored further in the next chapter.

The problematic aspects of the *Waterloo Road* example have led to many key industry players publicly acknowledging a need to rethink the 'lift and shift' policy. Ewan Angus, Head of Commissioning for BBC Scotland, recognized the limitations of 'lift in shift' in a recent report on the creative industries by the Scottish Parliament's Economy, Energy and Tourism Committee. He explained that the BBC had adopted this strategy as a short-term mechanism to accelerate investment in pursuit of its production targets and that whilst it had

some benefits, other approaches were now required. He told the Committee 'we now need to ensure that the companies that are based in Scotland are winning entirely new business and are drawing from the local population and talent base' (Economy, Energy and Tourism Committee, 2015, p. 25).

In fact, many of the sentiments portrayed by participants were echoed in the recent Economy, Energy and Tourism Committee report on the impact of the film, TV and video game industries. Although the document does not mention the *Waterloo Road* case specifically, it identified criticisms with regards to 'lift and shift' policies. The Committee heard similar criticisms from a range of industry players, which echoed the sentiments of participants in this research. For instance Jane Muirhead, Managing Director of Raise the Roof Productions and Scotland Representative for PACT, argued that simply relocating programmes and companies 'frustrates the whole idea of building sustainable businesses, because the intellectual property and the revenue remain outwith Scotland'. Moreover Cabinet Secretary for Culture, Fiona Hyslop told the Committee that the 'lift and shift' policy of the PSBs remains a concern, in particular whether the increase in regional commissions is reaching Scottish independent TV companies to the extent that it should (Economy, Energy and Tourism Committee, 2015, p.25).

The report concluded (as did many respondents to this research) that the policy of relocating production companies to Scotland and transplanting existing programmes impacted on the ability to create a sustainable, independent TV industry in Scotland. It also concluded that it provided little employment opportunity for the local production talent (Economy, Energy and Tourism Committee, 2015, p.25). However, it is important to note that this committee only heard from broadcasting executives, politicians and production company directors. As part of the fieldwork for this thesis a sample of production crewmembers that worked on *Waterloo Road* in Scotland were contacted in order to learn of how careers and employment opportunities were affected in more specific instances. Interestingly, respondents principally spoke of their gratitude for the opportunity to work on the programme. For instance Production Runner Murray Alford explained:

> The show helped a lot of people step up in the roles they had been in and gave a lot of people their first chance. This was a big show and one of the biggest Scotland had seen in a while. Waterloo Road was also the shiny new kid on the

block which made a lot of crew leave River City and let a new wave of crew come in for the first time in a long time, at least in the lower down roles (Murray Alford, Email Correspondence, March 2015).

Moreover, the research also heard from a sound assistant and focus puller who had previously worked on *Waterloo Road,* and they both spoke of how the programme provided a great opportunity to develop their careers and how they still use skills learnt on the programme on an every day basis. Yet interestingly, none of the respondents reported to be still located in and working in Scotland since the cancellation.

It cannot be known what sustainable benefits might have been felt amongst the industry if the programme hadn't been cancelled, or indeed if another returnable network commission had replaced it. However, as measures were not taken to ensure that either of these potential outcomes were actualised, this case study portrays a rather condemning account of spending strategies in Scotland. The evidence presented in this section suggests that despite the significant investment, the Scottish production industry hasn't felt any real long-term benefits from the move of *Waterloo Road*. The value of the commission from the BBC, and the Regional Selective Assistance grant from Scottish Enterprise was given to Shed Media Scotland, which has now shut up shop in Scotland. It did not lead to an established production base for drama from which other production companies could benefit from, or that local talent could find employment opportunities from long-term.

Although there are differing opinions on whether the programme's relocation was doomed from the offset, this case study clearly identifies that *Waterloo Road* has led to a perception amongst the industry that current strategies for increasing investment for Scottish production need re-examining. The BBC has acknowledged that it must now focus on meeting targets by working with companies based permanently in Scotland whilst ensuring that the revenue remains north of the border. It also appears they may be tasked with the challenge of rebuilding trust within a disillusioned independent sector that perceived the *Waterloo Road* example as evidence of insincerity with regards to increasing production in the Nations and Regions.

5.4 The Geographical Location of Commissioning Power

Thus far, much evidence has been explored relating to network commissioning. However, whilst interviewing various industry players it became clear that getting ideas commissioned at all, was a problem cited by many. Participants (particularly those operating small production companies) spoke of how it was exceedingly difficult to build relationships with commissioners, and that gaining access to pitch ideas was a constant struggle. This was blamed on a poor response to phone calls, emails and requests for meetings along with the lack of an informal network of contacts. Producers identified the lack of a 'corridor culture' as a big disadvantage of being based in Scotland, and argued that geographical proximity to commissioners was key.

For instance Paul Tucker, Company Director at Monkey Puzzle Productions, compared the 'corridor culture' in London to what he called the '£150 cup of coffee' in Scotland:

> London commissioners often don't pay attention to ideas from Scotland because of the corridor culture of wherever they walk around they bump into someone like 'oh hey Steve lets get together and make a drama programme, lets meet over coffee.' Up here you have the culture of a £150 cup of coffee when you fly all the way down south to go and see someone and have a cup of coffee and its like 'oh sorry Dave I haven't got as much time as I thought', it's a very, very frustrating process (Paul Tucker, Interview, October 2014).

John Archer, founder of Hopscotch Films, also argued that 'bumping' into decision makers was pivotal in realising projects.

> When you bump into people things happen … and there is more of a chance – if you live in London- of bumping into the people that make the decisions. I am currently making 2 projects for a commissioner I have known for 20 years, because I recently met up with him at a BAFTA screening. In 20 years this is the first thing I have made for him. I have no doubt that this would have happened easier if I had been bumping into him more regularly in London (John Archer, Interview, October 2014).

These observations imply that producers in Scotland clearly feel that they are at a

disadvantage with regards to their geographical distance from commissioners based in London. This is certainly not a sentiment felt exclusively by those in Scotland. Other Nations and Regions in the UK also experience the drawbacks of operating at a distance from commissioners. For instance in research analysing the move of the BBC's Religion and Ethics production unit from London to Manchester, Caitriona Noonan (2011) identified the loss of a 'corridor culture' to be a significant disadvantage. Noonan explained that as commissioners and controllers were no longer in the next corridor, or indeed using the same lift or eating in the same canteen, producers argued that they did not get the opportunity to pitch ideas informally and make themselves as known to senior staff as their counterparts in other London-based departments did. Meetings to discuss projects had to be pre-arranged, sometimes months in advance (Noonan, 2011, p. 368).

Participants agreed that instances where commissioners were based locally demonstrated clearly how beneficial geographical proximity was. Many pointed to what was perceived to be the recent success of Daytime and Factual programming in Scotland and the location of the relevant commissioners for the BBC. For instance Ian Small of BBC Scotland, explained:

> Factual has been a particular strength over the last few years. Now this is where it gets interesting. One of the reasons why factual has become so strong in Scotland is because the commissioner for Factual and Daytime, Natalie Humphries, sits in Scotland. In fact if I wasn't in here right now with you, she would be in here because she comes here on a regular basis.

> Likewise the Acting Commissioner for Daytime is Jo Street, Jo is also located here. The head of arts for the BBC, Jonty Claypole sits between Scotland and London. And the more that happens the better we can build relationships with decision makers and the more programmes we can make. You can really see the difference that has made to factual (Ian Small, Interview, January 2015).

Here Small argues that the presence of Jo Street, Natalie Humphries and Jonty Claypole in Scotland and the subsequent working relationships that ensued has enabled a strength in Daytime and Factual programming to develop. Alan Clements, Head of Content at STV Productions, also described how Jo Street's location in particular had benefited production:

> When you see a situation where commissioners don't live in London it definitely makes a difference to us. Jo Street from BBC DayTime has made a massive difference. She lives in Glasgow, with her husband and her very cute dog and she has enabled *Antiques Road Trip*, and *The Link* and she is doing a project for Raise the Roof (Alan Clements, Interview, February 2015).

Paul Tucker, who had worked as a guest editor for *Antiques Road Trip,* also recognised the advantageous consequences of Jo Street's location in Glasgow and argued that this demonstrated that more commissioning power is what is needed in Scotland:

> I know the reason Daytime and Factual is working so well is because the commissioning power is based in Glasgow with Jo Street working in BBC Scotland and when she needs to watch the Antiques Road Trip for example she just goes across the street with her dog sometimes … goes to STV watches the programme, that's lovely thanks very much. That is a relationship born out of the commissioning power in Scotland. There is definitely an argument for more commissioners to be based in Scotland (Paul Tucker, Interview, October 2014).

Others also agreed that having more commissioners based in Scotland was necessary to grow the industry here. For instance, Channel 4's Nations and Regions Manager Ian MacKenzie argues that forming good relationships with the commissioners was essential, claiming that 'the ability of the production companies to sell the source ideas is key. A lot of that is about building the relationship with the commissioner, which is easier when they are located nearby' (Economy, Energy and Tourism Committee, 2015, p. 26).

More commissioning power in Scotland may well improve access and relationships for some production companies, resulting in a greater focus on Scottish programmes. Yet, one must question whether this would necessarily mean huge benefits for smaller companies. For instance, although we have seen how BBC Daytime commissioner Jo Street's location in Glasgow has had clear benefits for production in Scotland generally; Daytime commissions such as *Antiques Road Trip, Homes Under the Hammer* and *Eggheads* have all been won by relatively large, established companies (STV Productions, Lion TV and 12 Yard respectively). Regardless of where decision makers are based, new small-scale

companies are likely to find obtaining commissions a challenge.

Issues raised by smaller production companies regarding a lack of response to phone calls, emails etc. is not necessarily indicative of an issue specific to Scotland, or a result of the geographic location of commissioners. The very nature of the television production industry provides challenges for small and newly emerging companies, regardless of where these companies are located. Minimising risk by maximising the likelihood of success prompts commissioners to prefer to hire the more highly reputed and better-known production teams, performers and post-production units. The market for small companies is therefore accordingly difficult (Ursell, 2000, p.817).

5.5 The Role of Public Bodies: Scottish Enterprise and Creative Scotland

One way to support small, newly emerging companies and their ability to win commissions is to provide grants and financial subsidy. Respondents argued that the public bodies charged with this task in Scotland (Scottish Enterprise and Creative Scotland) were not doing enough. There was a consensus amongst participants that currently, the different remits of the organisations were leading to confusion in the sector about the roles and responsibilities of both. Jane Muirhead, Managing Director of Raise the Roof and PACT's representative for Scotland argued that both bodies lacked all the elements necessarily to effectively support the growth of the television sector.

> Creative Scotland focuses on culture, which often means it does not look at the industrial aspects and their importance. With Scottish Enterprise, although it wants to get right it doesn't focus enough on cultural stuff. The range of products it has on offer is not fit for purpose for our industry (Jane Muirhead, Interview, March 2015).

It was argued that having two separate quangos responsible for the television sector had led to a lack of cohesive strategy to help production companies grow. Ian Mackenzie, Channel 4's Nations and Regions Manager, argued that there should be 'greater clarity on where and if television fits into Creative Scotland's priorities" (Economy, Energy and Tourism Committee, 2015, p. 20).

As aforementioned, there was also much criticism with regards to how financial support had been given by these bodies. For instance, Scottish Enterprise's decision to award Shed Media Scotland a Regional Selective Assistance grant worth more than £100,000 was regarded by many as unhelpful for the industry as a whole. The owner of a small production company based in Glasgow argued:

> I don't think these grants should be given to companies like Shed. I mean, they are owned by Warner Brothers, surely that is enough of a financial advantage. Sure, it provided them an incentive to come up…and we all know how that went…now they are gone. It would have been so much better for the industry if the money had gone to a company that was actually based in Scotland, that actually needed the help (Anon, Interview, March 2015).

It was also felt Creative Scotland somewhat neglects the TV industry, providing much more attention and funding to film. A look at recent awards listings seems to support this view. For instance in January 2014, nine separate awards were made to film makers or projects related to the film industry, compared to just one made to a television production company (Creative Scotland Awards Listing, January 2015). Cofounder of Black Camel Productions Arabella Croft described a recent incident whereby a lack of support from Creative Scotland had led to the loss of an important commission:

> We recently tried to attract a Belgian, Spanish, UK coproduction to shoot for four weeks in Scotland. We lost the production to Wales because Creative Scotland could not deliver on the finance we needed. My company was publically unsupported by its national agency and we ended up humiliated in our deal making with a seriously reduced position. We lost a pan European co-production opportunity, ownership stakes in the production, national spend, local employment opportunities, skills and career development opportunities for cast and crew, important international relationships were bruised and a potentially wonderful marketing opportunity for Scotland was lost. Furthermore our company lost its much needed production fee (Arabella Croft, Written Submission, January 2015).

In response to criticisms over lack of funding, Creative Scotland has acknowledged that whilst Creative Scotland has responsibility for the TV sector, it does not have the funding to fully support it. Natalie Usher, Director of Film and Media at the organisation, explained that due to limited resources Creative Scotland had prioritised funding for film over TV production, and had to limit its TV funding. She claimed: 'with our £4 million film and TV broadcast fund we have decided to focus on film … but we have invested in independent production alongside broadcasters' (Economy, Energy and Tourism Committee, 2015, p.20).

There is certainly a perception amongst the industry that public bodies Creative Scotland and Scottish Enterprise are not currently providing the support they should be to the television sector. Recommendations for improvement ranged from suggesting that both organisations clarify their respective and complementary roles to proposing the creation of an alternative agency. For instance Alan Clements, Head of Content at STV Productions, argued for an organisation similar to Northern Ireland Screen. He argued that a single body would allow for a more cohesive strategy for television and direct action more likely. In addition, greater levels of funding for Creative Scotland would allow them implement more of a focus on TV production, and help smaller companies win more commissions (Economy, Energy and Tourism Committee, 2015, pp. 20-21).

5.6 The Positioning of STV Productions

Another prevalent view amongst participants was that the positioning of STV Productions, the production arm of the STV Group Plc., disadvantaged the independent production sector in Scotland. In particular, there was a frustration that STV did not commission externally. For instance, founder of True TV and Film Barbara Orton claimed:

> In terms of making television in Scotland I think we are very, very limited by the pure fact that we haven't got enough outlet. Despite being just a major player in Scotland STV aren't really commissioning, they are not commissioning themselves.

In fact, someone said to me the other week 'why don't you pitch to STV?'… and I thought god I haven't thought of that in years (Barbara Orton, Interview, November 2014).

This criticism refers to the fact that STV commissions exclusively to its production arm. Many participants expressed the view that this was unfair and distorted competition. For instance Jane Muirhead, Managing Director of Raise the Roof and PACT's representative for Scotland went as far as to describes STV's closed doors as 'the biggest source of annoyance for indies in Scotland' (Interview, March 2015).

As well as making programmes for STV, STV Productions also makes content for other broadcasters such as the BBC, Channel 4, Channel 5, The History Channel and Sky (STV Productions, 2015). For the BBC in particular, STV Productions is attractive due to the 50% out-of-London target it is required to meet. This has led to high profile network commissions such as *Antiques Road Trip* and successful quiz show *The Link* (BBC News, 2014b). Along with large ITV network commissions such as *Catchphrase* and *Fake Reaction,* STV Productions has established itself as a successful company in Scotland, producing 164 hours of content with an annual turnover of £12.7 million, according to the latest financial results (STV News, 2017). Indeed, it is one of only two production companies in Scotland with a turnover in excess of £10 million, the other company being IWC Media (Economy, Energy and Tourism Committee, 2015, p. 23).

Unlike other independent producers, STV productions are not entirely dependent on income won from third parties for their cashflow. By virtue of production, post-production and broadcast being within one organisation they are able to self-commission with both the rights and profits staying inhouse. They are also able to cross subsidise by diverting income derived from their licence to broadcast to support the expansion of their development and production teams (PACT, 2010, pp. 21-22). Participants expressed a clear sense of injustice with regards to these benefits, arguing that it unfairly put STV in an advantageous position with regards to winning commissions.

Moreover, producers also referred to the independent quotas specified by the 2003 Communications Act, as legislation that they felt should prevent these unfair advantages. The Act stipulates that UK's public service broadcasters are required under UK legislation

to commission 25% of its original output from the independent sector (Communications Act, 2003, c.21). David Smith, Managing Director of Matchlight Productions, explained why he believed STV's commissioning behaviour was not in keeping with the spirit of independent quotas in written submission to the DCMS:

> Prevention of this kind of distortion of competition was the whole point of the independent quotas under both UK and European legislation. The 2003 Communications Act created something of a level playing field in England, and Wales but it just doesn't seem to apply in Scotland (David Smith, Written Submission, 2010).

Indeed, by commissioning solely from STV Productions, STV itself does not currently meet the requirements set out in the Communications Act. It instead relies upon ITV to meet them on behalf of all of the UK's Channel 3 licencees. It is able to do this as current legislation provides that ITV commissions currently count as overall Channel 3 commissions absolving STV from any further responsibility under the independent quota.

It is interesting that STV enjoy this legal loophole by being a part of a single, cohesive UK-wide Channel 3. However, recent public statements by those in control seem to suggest that this is not the reality they are working towards. For instance, STV's Director of Content Alan Clements was quoted in 2009 as saying 'STV faced a crossroads over the last year as to whether to become simply ITV in Scotland or to take control of our own destiny. We chose the latter' (The Drum, 2009). Rob Woodward, STV's Chief Executive, was also quoted in 2009 as saying 'We're taking greater control of our schedule and are absolutely committed to maintaining a healthy creative industry in Scotland by investing in new, high quality Scottish productions and creating a diverse schedule for viewers' (Holmwood, 2009). Mr. Woodward clarified STV's position to *Digital Spy* in January 2010: 'we implemented our programming strategy mid-2009, with a view to making our schedule more distinctive and operating as a sovereign broadcaster' (McMahon, 2010).

Yet despite operating under two public service licences that cover the majority of Scotland, and despite Woodward's claim that STV was moving towards acting as a 'sovereign broadcaster', STV is able to let ITV meet their public service broadcasting obligations concerning the independent commissioning quota in Scotland. Of course, it is easy to understand why a

vertically integrated Scottish broadcaster like STV has every incentive to avoid external commissions and promote internal production. It enables them to keep all rights and revenue, to make long-term strategies and take advantage of economies of scale on the basis of guaranteed internal commissions. They are also able to cross subsidize between divisions. In this way they are able to benefit from anti-competitive behaviour that the independent quota was designed to prevent.

Participants argued that if STV were to commit to commissioning externally, discernible benefits would be felt in the industry in Scotland. For instance John Archer, CEO of Hopscotch films claimed:

> What would make an enormous difference to production here, in my opinion, would be if STV became a real commission base, which it really should be (John Archer, Interview, October 2014).

There was also concern amongst producers that STV would continue to build on its advantageous position with regards to its ambition to have STV Productions reclassified as an independent production company. Jane Muirhead, Managing Director of Raise the Roof and PACT's representative for Scotland explained:

> An ongoing concern for us is that STV productions continue to push for independent status. You can see why they want it, but it wouldn't be a good thing for other companies that are already struggling (Jane Muirhead, Interview, March 2015).

Reclassifying STV Productions as an independent television production company would be advantageous for them as it would allow them to compete for programme commissions under the 25% production quota reserved for independents by broadcasters such as the BBC and Channel 4 or Five. Currently, it can only compete for commissions amongst the remaining 75%.

STV formally applied for the reclassification of STV Productions in 2010, and before making a decision the DCMS called for consultative responses from existing independent production companies in Scotland. These consultative responses suggested unanimous agreement that the proposed reclassification would have adverse consequences for existing independent

companies. For instance La Belle Allée Productions considered that there would be 'a real and significant danger of STV displacing commissions from other Scottish companies' (Smyth, 2010). Whilst IWC Media believed that there is a 'significant risk' that the proposal 'would damage the Scottish production sector, by removing work from the companies that need it most' (Barbour, 2010, p.4).

PACT also echoed these sentiments, identifying their main concern as:

> STV will displace commissions not from London companies but from other, typically smaller Scottish independents, with the resulting damage to the Scottish production sector. The last five years have seen the growth of larger, typically London-based independent companies. However, with a few exceptions, Scotland remains characterised by small companies specialising in one or two genres. A 2008 report, for example, indicated that average turnover for an independent company in Scotland was just £1.33m per year (PACT, 2010, p.3).

As a result of these arguments the DCMS decided against the reclassification of STV Productions as an "independent producer." In a statement, the DCMS said: "The potential benefits of implementing the proposal do not outweigh the likely negative effects, particularly on the existing Scottish independent production sector" (DCMS, 2010). However, despite this decision being announced in 2010, the prospect of STV Productions gaining independent status and displacing commissions was still identified as a significant concern due to the continuing lobbying by STV and those who supported the proposal. For instance, in a debate in the House of Commons, now former MP for Glasgow Central Anas Sarwar argued against the decision. He claimed:

> STV Productions is one of the few businesses of scale in the Scottish television production sector. It is a hugely important part of the Scottish creative industries cluster and a key employer in Glasgow's thriving media hub on the banks of the River Clyde. The growth of a company of scale would have led to an increase in the competitiveness of the sector as a whole., and that increased competitiveness could have allowed independents with Scottish headquarters to compete against international production companies with a presence in Scotland (HC Deb, 3 February 2011, c1151).

Additionally, the BBC recently made public that they plan to overhaul their production quota strategy, particularly with regards to what they perceive to be a 'bust' Window of Creative Competition. As the list of non-qualifying independents (such as STV Productions) is growing, the BBC argued that this has led to an increasingly crowded WOCC. In a 2014 speech Director General Tony Hall implied that existing quotas would be scrapped, allowing for more opportunities for in-house production companies and larger consolidated indies (Kanter, 2014). These proposed changes would allow for STV to win additional commissions at the BBC, the consequences of which concerned many respondents of this research. For instance, as this producer argued:

> As it stands, this proposal solely benefits Indies like STV Productions - who don't require more help. True indies, which are arguably more creative, will lose out, competing with the better funded, crony-connected big boys. I fail to see how this proposal will benefit audiences, least of all a broadcaster with a PSB remit (Anon, Interview, December 2014).

Many participants also noted that STV Production's recent focus on the factual genre ran the risk of crowding out other Scottish companies. Factual programming is by far the most common genre for independent producers in Scotland. In fact, a market report for Scottish Enterprise found that 81% of commissions for Scottish Indies were factual programmes (PACT, 2010, p. 4). Examples of factual commissions for the network include *Question Time* produced by Mentorn Scotland, *Homes Under The Hammer* made by Lion TV at their Glasgow base and Channel 4's *Fifteen To One* made by Remedy Productions' Scottish division. With programmes such as quiz show *The Link* and *The Antiques Road Show,* STV productions have established the factual genre as a core area of production.

There was a frustration that rather than focus on genres that are lacking in Scotland, such as drama, STV Productions was encroaching on a genre that provided a backbone to independent sector in Scotland. A founder of a small independent production company based permanently in Glasgow argued:

> One of the only benefits of STV Productions benefitting from all that vertical integration and cross subsidising is that it should be able to have the capacity to

take on big drama commissions, which the industry here so desperately needs.

But recently it has produced nothing (Anon, Interview, December 2014).

Indeed, during the financial year wherein this research took place STV Productions failed to win any major drama commissions, which led to the company missing its revenue target by over £3 million (STV Annual Report and Accounts, 2014, p.14).

In sum, it seems clear that several elements of STV's current approach irritate independent production companies in Scotland. STV's policy of solely commissioning internally is seen as anti-competitive, and depriving the production industry in Scotland of a major source of businesses. However, the frustrations of producers are not necessarily suggestive of problems with the landscape. Whilst STV might not be acting in the 'spirit' of the independent quotas, they are not acting illegally. One could argue that the advantages they enjoy allows them to operate on a larger scale, resulting in the creation of jobs and a more stable production base in Scotland.

5.7 Producer Lobbying and Rent Seeking

These findings outline how industry players identify several problematic aspects with the current landscape, which they feel presents a barrier to growth. However, it is important to acknowledge the element of self-interest at play here. The voices most critical of the current landscape were owners of production companies, who stand to directly financially benefit from an increase in investment and commissions.

This can be categorized as rent seeking behaviour. Rent seeking is a concept originated by Gordon Tullock (1967), and refers to the phenomenon of stakeholders obtaining benefits (or seeking 'rent') for themselves through the political arena. Rent seeking is prevalent amongst the production industry in Scotland, and is particularly apparent through trade association PACT, who regularly submit responses to reports, contribute to committees and campaign on behalf of members.

Whilst some of the specific issues are new, the narrative that the Scottish television industry is in need of more investment and more commissioning opportunities has been told before. For instance, similar calls were made during the research conducted for the Scottish Broadcasting Commission (2008), in a report published by Scottish Enterprise (2010) and the Economy,

Energy and Tourism Committee (2015). Of course, these reoccurring concerns could be indicative of genuine on going problems with the television broadcasting landscape in Scotland, but it is also likely that they represent consistent rent seeking strategy from the industry. It is essential, therefore, that frustrations experienced by producers are not simply equated to problems with the landscape.

That is not to say that rent-seeking behaviour is necessarily harmful for television broadcasting in Scotland. As argued by Murray (1997), a seemingly inefficient rent seeking position may in fact be efficient if it satisfies public concerns on a controversial matter, thereby preventing a potentially greater inefficient outcome (Murray, 1997, p.204). As the next chapter explores at length, there is a perception amongst Scottish audiences that there is a deficit with regards to representational portrayal. If more investment and commissions led to the production of more content reflecting Scotland, then benefits would be felt by both industry and audiences.

However, recent research has highlighted how growth of the independent sector could potentially result in less content tailored for local audiences. An emphasis on size and scale and the importance of acquiring large, network commissions is identified as key to the industry in Scotland. However, large indies or 'super-indies' who acquire the scale necessary to compete for such commissions tend to interest large international buyers (Jean K Chalaby, 2010). A clear example of this is IWC Media, one of Scotland's biggest indies, which was the product of a 2004 merger between Ideal World and Wark Clements. A year later, the company was bought by international company RDF Media (now Zodiak) for £12m. As Robert Paterson (2017) highlights, there is a danger that over time this may result in a production sector dependent on the whim of foreign conglomerates whose focus is on making content for global audiences rather than domestic markets (p.20). Therefore, whilst drives to increase the scale of indies in Scotland has the potential to enhance production levels (and to make producers incredibly wealthy), there is also the risk that take-overs will lead to a reduction in the expression of national culture.

It is important, therefore, to adopt a critical reflexivity when considering the narrative projected by the industry in these findings, particularly by producers. Moreover, it is essential to combine these insights with contributions from the audience (as is explored in the following chapter), in order to gain a balanced picture of how the current television broadcasting landscape serves Scotland as a whole.

5.8 Conclusions

In sum, the findings outlined in this chapter suggest that there are several aspects with the current landscape that frustrate those amongst the industry, and there is certainly a perception that these aspects prevent an optimal environment for Scottish production to prosper. Similar to many of the historical issues outlined in chapter two, these frustrations are largely down to the challenges presented by being peripheral to the main network. Some of these challenges appear to be long-term structural issues, whereas some are indicative of the failings of particular policies.

For instance, the argument that Scotland was marginalized with regards to accessing commissioners is a symptom of a being part of a UK-wide structure that is largely centralised in London (and to a certain extent, Manchester.) A notable finding was the clear correlation between the geographical location of commissioners and the success of particular genres. More commissioning power based in Scotland was widely argued as potential solution to the difficulties in building relationships with commissioners who are based so far away.

Indeed, if one looks to the location of network commissioners for the BBC it is easy to see why an imbalance is perceived. Out of the 54 people employed by the BBC with network commissioning responsibility, only 4 are based in Scotland (Scottish Parliament, 2015). However, it is important to consider the extent to which much more network commissioning power would be realistic within an organization attempting to serve the UK as a whole. At first glance, the 4 BBC commissioners currently based in Scotland seems an inadequate number. However, this actually represents 7.5% of the total, which is in fact not far away from Scotland's population share of the UK.

An example of an issue caused by a specific policy failing is the recent 'lift and shift' strategy used by the BBC. This was most evidently demonstrated with the relocation of *Waterloo Road* and the opening of Shed Media Scotland. The presentation of this case study plainly showed how the strategy of moving production spend was ineffective in creating sustainable advantages to the industry. Despite being hailed as an exciting commitment to Scottish production and initially creating over 200 jobs, benefits were short lived, as after

two series the programme was cancelled, and Shed Media subsequently closed their Scottish branch. Crucially, there were no plans for another high budget returnable drama to take the place of *Waterloo Road,* leaving a genre deficit that interviewees felt was of particularly detriment the industry.

There seems to be an acceptance from the BBC and the industry as a whole that the 'lift and shift' approach has serious limitations, and that the focus now needs to shift towards supporting more indigenous production. It will be interesting, therefore, to see how this acknowledgment translates into actions in the months and years to come. However, whilst the particular issue of 'lift and shift' might be interpreted as a short-term policy error, if one considers the assumptions that must have been when deciding on this course of action, it seems suggestive of a deeper problem. The example of *Waterloo Road* illustrates how the BBC decided to relocate both an existing drama and production company from England, rather than commission an indigenous company to produce content that was more organically Scottish. Whether purposefully of not, by choosing this route the BBC displayed a lack of confidence in Scottish production, and a scepticism regarding the UK-wide appeal of Scottish stories.

Related to this scepticism were the numerous examples given by interviewees of how the myopic, metropolitan attitude of some commissioners led them to view Scottish stories with a sense of 'foreignness' and 'other'. Many interviewees were of the view that this led to resistance to Scottish content, and contributed to the current lack of returnable network drama. The sheer wealth of examples given, the level of detail provided, and the similar concerns voiced by both producers and broadcasters suggests that this is certainly perceived to be a serious problem facing the television industry in Scotland. However, the extent to which this perception is justified is harder to ascertain, as there is likely to be a strong element of bias here. Blaming an ingrained prejudice against Scottish culture is easier than admitting the inadequacy of a particular pitch. Moreover, in a highly competitive environment perhaps it is only natural for there to be gripes amongst local industry? To determine the extent to which the attitudes uncovered during this research represent an underlying problem would require and insight into the network commissioning process, and would be an apt topic for further research.

The findings outlined in this chapter are also manifestations of the conflict that underpins this debate. For instance, whilst numerous frustrations with Scotland's relationship with the UK-wide network were uncovered, the nature of these issues clearly demonstrates the perceived advantages to being part of this framework. The dominant narrative was that Scotland was not given enough access to network commissions, which is evidence of the advantages of bigger markets that can afford production on a much larger scale. From an industry perspective, the opportunity to access to the larger UK-wide network was deemed essential to the health of production in Scotland.

Chapter Six

An investigation into how the current broadcasting landscape serves the Scottish television audience

Whether it is with a view to fulfill public service broadcasting responsibilities, or to ensure revenue from advertisers, it is essential for broadcasters to satisfy the needs of audiences. This chapter will examine how well the current broadcasting landscape serves the Scottish television audience, and in particular how it meets the demand for representation. It shall do so by analysing the quantitative and qualitative results of the survey carried out as part of this research. As detailed in chapter four, the survey was distributed online, through email and social media and was open to respondents from April-September 2015.

Although previous investigations into Scottish audience opinion have been fairly few and far between, findings will be considered alongside available existing data. In particular, findings are often compared and contrasted with results to the survey created by the Scottish Broadcasting Commission in 2007, as this was the last significant research on audience opinion in Scotland. An element of caution is applied to these comparisons as the sample sizes differ significantly; the commission achieved a sample size of 1021, whereas this research collected 174 completed responses. However, useful insights could still be made with regards to stark changes in attitudes during the intervening years.

The majority of this chapter will examine reactions to different genres, deciphering which are performing well according to audiences and investigating those that appear to be lacking and in what way. Drama shall be explored first, followed by comedy, factual, news and current affairs and Gaelic programming. The chapter shall then explore more general trends and observations uncovered by the survey results, such as how respondents feel broadcasting in Scotland has changed, and the relationship between audience opinions and views about the constitution. Finally, the chapter shall consider the conclusions that may be drawn from the evidence discussed.

6.1 Drama

As outlined by the previous chapter, many industry players felt passionately that drama is a genre underperforming in Scotland. Concerns were raised by many about the lack of a large scale returning network drama based in Scotland, and the negative repercussions this had on Scottish broadcasting. The responses to the survey suggest that audiences in Scotland have more of a mixed view. The majority (70%) were either neutral or satisfied with the current offering. However, 30% of respondents reported to be either dissatisfied or very dissatisfied, and Scottish drama was in fact the only genre whereby nobody elected the 'very satisfied' option.
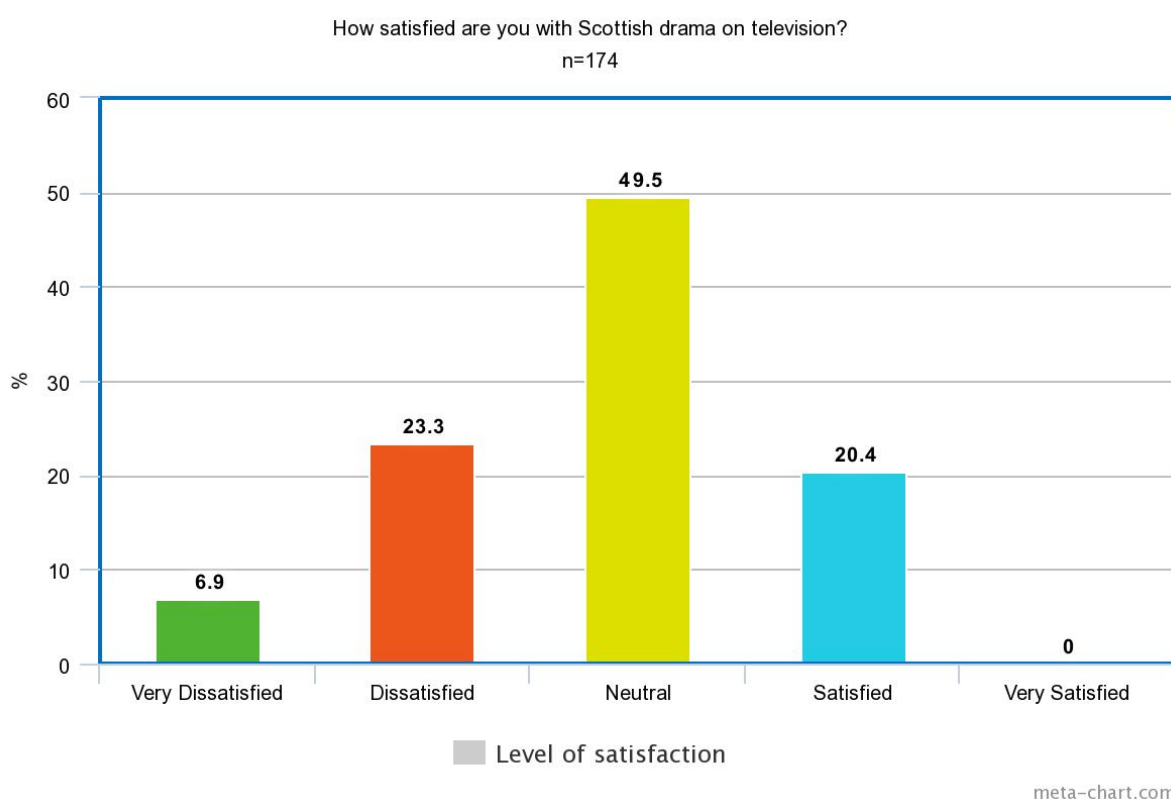
Figure 1 Audience satisfaction levels regarding Scottish television drama.

Amongst those who regarded Scottish drama in a positive light three programmes were mentioned most frequently: *River City, Outlander* and *Shetland.* For instance, despite facing criticism from a few regarding quality, BBC Scotland's Scottish soap opera *River City* received a fair amount of praise. Several respondents commented on how they felt the soap was an example of a programme that reflected Scotland well:

> I think it is good that Scotland has its own soap in River City. I only occasionally watch it but I like that it has its own programme like London has Eastenders and Manchester has Coronation Street.
> Respondent ID: 41715397

> … I feel like it is quite true to life in Glasgow and a fairly good programme. Better than Hollyoaks.
> Respondent ID: 39803224

> River City, it is over dramatic but definitely shows things that people go through.
> Respondent ID: 41416900

> … I like the characters, the families and the storylines.
> Respondent ID: 41713985

> It is definitely the most realistic programme about Scotland. Things like Monarch of the Glen was not.
> Respondent ID: 41864842

These replies support the view that *River City* is an important series with regards to representing a realistic facet of Scottish life. The role of *River City* in this respect has been explored by Hibberd (2007) who argues that due to its distinct Scottishness the soap has achieved a consistent and committed audience who are able to see a plausible and representative portrayal of themselves on screen (p.120). This is further supported by the BBC Audience Council for Scotland's recent submission to the BBC Trust, where it was recognised that *River City* was an important way of meeting the demand for portrayal (BBC Audience Council for Scotland, 2016a).

From realism to fantasy, historical time-travel epic *Outlander* evoked thought-provoking comments from respondents. The programme, primarily financed by US company Sony Pictures, is based on the novels by Diana Gabaldon. The plotline primarily portrays 18th Century Highland clans during the Jacobite risings. A significant part of *Outlander's* appeal

was its international audience. The fact that it was showcasing Scotland to the rest of the world was a large part of why they were compelled to praise the programme.

> I really like Outlander. More important to me is that a program is high quality and popular not just in Scotland. I like the thought of people all around the world watching something based on Scotland.
> Respondent ID: 41346089

> I like how it [Outlander] shows off Scotland, is romantic and dramatic.
> Respondent ID: 41862503

Viewers of *Outlander* were almost entirely complimentary, despite acknowledging that the fantasy programme was obviously not a true representation of Scotland today.

> Outlander obviously isn't a true representation but it is great to see people embrace Scotland worldwide through the programme.
> Respondent ID: 39717843

> I have been watching Outlander which is a fantasy themed programme. It paints a very beautiful picture of Scotland's landscape which I feel is representative. The people are mostly portrayed as friendly and passionate about their communities which I feel is quite accurate. It doesn't touch on more serious issues though, there are obviously historical events taking place so I think it's interesting to see those represented but I wouldn't say the themes are closely related to what we have today.
> Respondent ID: 22105402

This is interesting as a look to the subject matter and style suggests that *Outlander* could indeed be counted as one of the heavily criticised 'mythical' representations of Scotland. By drawing on the symbolism of land, clan and honour, the programme adheres to what has been described by several authors as the myth of 'tartanry' and 'kailyardism' (Nairn, 1977: Chapman, 1978: McCrone, 1992: McArthur, 1982). As explored in chapter three, these

'anti-tartan' scholars argue that portraying romanticised versions of Scotland subverts and distorts Scottish national identity on screen.

Colin McArthur (1982) noted that Scottish filmmakers have often been powerless to oppose the dominance of mythical representation because they were largely deployed within production structures fashioned outside of Scotland (McArthur, 1982, p.66). This again resonates with *Outlander,* a television series financed by an American production/distribution studio and based on novels written by an American author. However, it is clear from the replies that respondents to the survey did not object to the romanticised and exaggerated portrayal of Scotland in *Outlander*. Rather, they were simply pleased that a wider audience was celebrating a version of Scotland, even if said version wasn't necessarily true to life.

One respondent also expressed disappointment that *Outlander* was made available to the UK through the subscription service Amazon Prime.

> I would have liked to see Outlander be brought to terrestrial TV.
> Respondent ID: 36761880

This was a sentiment voiced by many at the time the decision was made. For instance Angela Sasso, of Outlandish UK (the primary fan site for the television series) said:

> Fans in the UK were looking forward to *Outlander* being on a standard television station such as Sky1 or E4 or BBC, we know the show is high quality drama with an incredible story … we wanted the whole of the UK to watch it together, to have those 'Monday-morning-water-cooler' chats when a television show is all the range. Showing on Amazon Prime, the audience will be limited and lots of geographic areas struggle with broadband (cited in Tweedie, 2015).

This argument about broadband limitations is particularly pertinent as many areas within the Highlands still do not have adequate access to broadband. In March 2016, The Highland Council made this statement: 'It is recognised that many communities across the Highlands are frustrated at the inadequate broadband and mobile coverage that currently exists and there is therefore an urgent need for information on future coverage plans for both

broadband and mobile services with clarity over timescales enhancing this coverage' (The Highland Council, 2016). It seems unfortunate that people living where the series is both set and filmed might struggle to view the programme.

Moreover, broadband access notwithstanding, many Scottish viewers would not have the funds or inclination to subscribe to Amazon Prime. With a positive response to *Outlander* amongst critics and the wider public (Metacritic, 2014), and indeed the respondents to the survey, it seems a shame that such a limited percentage of the Scottish population will have access to it. It is obviously impossible to calculate how many potential Scottish viewers might have been lost, or indeed how they might have responded to the programme, however this is arguably an opportunity missed to better serve Scottish audiences.

Although *River City* and *Outlander* were discussed by a significant number of qualitative respondents, it was BBC One's *Shetland* that was most often identified as a Scottish drama of note. The crime drama, set on the Shetland Islands, faced criticism from a few regarding quality, however most held it in good esteem:

> I enjoyed the crime series Shetland.
> Respondent ID: 22112065

> Would like to see more 'Nordic Noir' style dramas like Shetland.
> Respondent ID: 36773202

> Some really watchable dramas set in Scotland over the last few years such as Single Father and Shetland.
> Respondent ID: 39719208

> I think Shetland has been a good watch.
> Respondent ID: 39803338

> I enjoyed Shetland but I would like to see more set in other areas in Scotland.
> Respondent ID: 41863917

> Shetland was quite good but there only seemed to be very few episodes a series.

Moreover, when asked to talk about the last programme, that they felt represented Scotland in a satisfactory way, *Shetland* was also mentioned several times:

> Shetland was good for what it was, portrayed some stunning scenery, Scottish accents etc.
> Respondent ID: 41865231

> River City and Shetland. Two good programmes showing different aspects of Scottish life, rural and city.
> Respondent ID: 41864932

> Shetland was gripping and good for Shetland as a place. It is obviously not true to where I live but its good to see Scotland on TV.
> Respondent ID: 41863917

It can be deduced from the number of responses, and indeed their positive nature that the creation of a Scottish drama such as *Shetland* is certainly welcomed by audiences. There appears to be a strong appreciation of fictional television that is recognisably Scottish, despite perhaps not representing a locality they can directly relate to. Comments from the BBC's Audience Council for Scotland also support this. The 2014 Television Service Review states: 'the Council welcomes the development of a mainstream Scottish-based network drama in *Shetland* and believes therefore that there is a strong audience appetite for consistent provision of Scottish-based drama' (BBC Trust, 2014, p.6). The council therefore concluded that drama commissioners should work to ensure there is continuing supply of Scottish-based television drama on the BBC.

A notable absence from the survey responses was any mention of school-based drama *Waterloo Road*. *Waterloo Road* was not praised, criticised or even acknowledged by any of the respondents as a Scottish programme. Shed Media's *Waterloo Road* was an initially very successful programme set in Rochdale England, which at the beginning of series eight relocated to Greenock, Scotland. As detailed in the previous chapter, the move was at first

hailed as an extremely positive venture that would provide numerous beneficial outcomes for broadcasting in Scotland (BBC Press Office, 2011: Shed Media Scotland, 2011: EKOS, 2012). However, following a decline in ratings, cancellation and the dissolving of Shed Media's Scotland branch, the relocation has been criticized as short sighted, and a failure in providing any long-term boost to the broadcasting industry in Scotland (Economy, Energy and Tourism Committee, 2015, p.25).

The lack of any mention of *Waterloo Road* amongst the survey responses would seem to suggest that the two series set in Greenock also had very little impact on audiences in Scotland. Indeed several respondents made a point of acknowledging the existence of Scottish programmes, even though they had not personally seen them.

> The only recent show I can think of is Shetland, but to me it seemed poor quality. I have heard lots of people talk about Outlander but I haven't seen it.
> Respondent ID 39717521

> …I am only really aware of Shetland, but don't watch it myself.
> Respondent ID 41337707

> I can't say I watch enough to have an opinion. My children watch Outlander which they enjoy, and I know people that watch Shetland so I can only imagine it is fairly satisfactory.
> Respondent ID 41339451

However despite this, still no one alluded to *Waterloo Road*. This implies that not only was the relocation a failure in providing a sustainable boost to the Scottish industry, it also largely failed to permeate the consciousness of the Scottish audience and establish *Waterloo Road* as a Scottish programme.

This production executive offered an explanation for why this may have been:

> Dramatically… the show's moving was so awkward. To make the move more palatable they moved half the cast up from Rochdale and thought up this bizarre

idea that a random millionaire would want to open a free independent school in Greenock. How does this represent Scotland?

... instead of spending the money on something that could have been a great, coherent drama representing Scotland, we got a successful programme that lost all credibility when the writers understandably failed to smoothly explain the change in location (Anon, Interview, February 2015).

This is a rather cutting critique, however the results of the survey support the claim that a coherent drama originating in Scotland would have potentially made more of an impact. At the time of research *Shetland* had been on air for the same number of years that *Waterloo Road* had been set in Scotland. In contrast, 19 respondents specifically mentioned *Shetland*.

Amongst the respondents who reported dissatisfaction with drama, the most cited reason was a perceived shortage.

There doesn't seem to be much variety. I am only really aware of Shetland but don't watch it myself.
Respondent ID 41337707

Seems to be a shortage of Scottish drama.
Respondent ID 37056035

I don't think there is enough Scottish drama broadcast to influence my choice.
Respondent ID 36753214

There could be alot more - I find them few and far between!
Respondent ID 36752327

Not enough programming set in Scotland.
Respondent ID 21972876

In fact, a number of people claimed they struggled to think of a Scottish drama at all. For instance:

> The problem is I can't really think of any. There used to be popular, big programmes on like Taggart but if there any Scottish dramas on right now I haven't come across them.
> Respondent ID 41355719

> Apart from Shetland, is there any?
> Respondent ID 39717473

> There doesn't seem to be much on.
> Respondent ID 39803224

This complaint regarding the shortage of drama was also prolific amongst those within the broadcasting industry, as outlined by the previous chapter. Many of the key industry players interviewed as part of this research argued that consistent returnable drama was the key to sustaining and growing the broadcasting sector in Scotland. With the current low volume, many argued that retaining talent and developing a skills base was extremely difficult. It is clear from the responses above that the audience has also noted the lack of drama, and portrayed a sense of frustration by using language such as 'not enough' and 'shortage'. The findings pertaining to both industry and audience combined build a strong case for a significant problem with Scottish television drama.

It is clear that the Audience Council for Scotland has also recognised a shortfall with regards to Scottish drama. In a submission to the BBC Trust as part of the Charter Renewal discussions, the council made the following statement:

> … the volume has been very low, and in the context of what is an extensive BBC drama portfolio overall, Scottish writing remains seriously under-represented. There is no lack of writing talent in Scotland and the under-representation must stem from the centralised nature of commissioning and/or some cultural amnesia at the highest levels about Scotland's place in UK and global culture. We urge that the BBC consider repurposing cash from other

priorities. Alternatively, BBC Scotland management could be encouraged to explore external sources of funding for drama, although this does not seem appropriate for a fundamental PSB component such as drama (BBC Audience Council for Scotland, 2016).

6.2 Comedy

When asked about comedy, respondents were again more likely to be neutral or satisfied. However, this time only marginally so. 46% reported to be dissatisfied or very dissatisfied with the current offering, making comedy the worst performing genre of the survey.
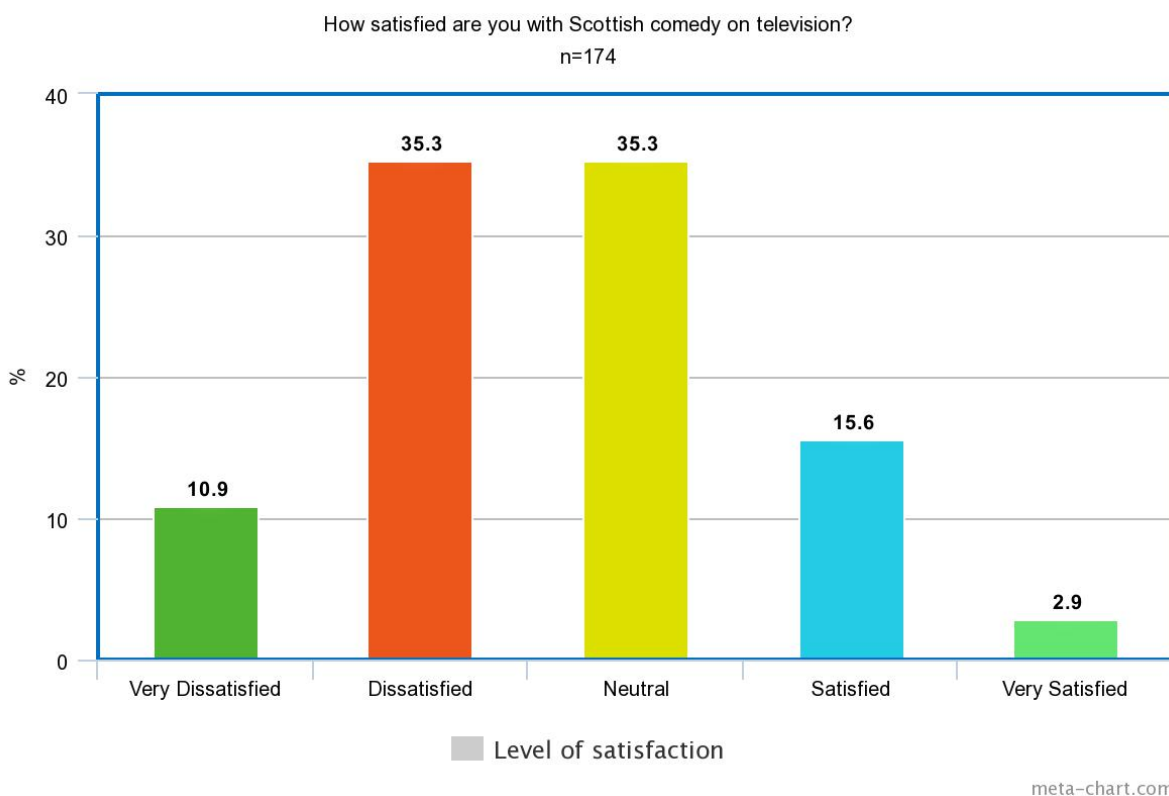
Figure 2 Audience satisfaction levels regarding Scottish television comedy.

An analysis of the qualitative replies showed that, once again it was the volume of programmes that provoked complaint, rather than the quality or content of that which was broadcast. Just as with drama, many of the respondents claimed they struggled to think of a current Scottish comedy:

Havent seen anything in ages.

Respondent ID: 41865032

I think as a nation we have a good sense of humour and produce good comedians. I havent seen any Scottish comedy programmes on since Gary: Tank Commander and that was years ago.

Respondent ID: 41715397

Not sure I know that any are on? I enjoyed Limmy's segment on Charlie Booker's Weekly Wipe but I don't think that happens any more?

Respondent ID: 41346089

I used to watch Limmy's Show but I don't think it is on anymore?

Respondent ID: 39963888

Are there even any Scottish comedies on television at the moment?

Respondent ID: 39803153

Again, can't think of anything that I have seen or even heard about.

Respondent ID: 39803040

I can't think of a Scottish comedy?

Respondent ID: 39717843

I'm not aware of much worth watching at the moment.

Respondent ID: 22102081

Many suggested that this shortfall has not always existed by referring to programmes that they had enjoyed in the past. Similar to way audience members felt about drama and the end

of *Taggart,* respondents implied that nothing they had seen lived up to be a credible to replacement to well loved shows such as *Still Game.*[1]

> All the big successful programs seemed to have finished. Still Game, Rab C Nesbitt etc and there isn't anything else that has started.
> Respondent ID: 39964196

> … there really hasn't been anything good since Still Game.
> Respondent ID: 39719208

> I have been watching Still Game Live on Netflix as I miss it on TV.
> Respondent ID: 41355719

In fact, those that were aware of recent Scottish comedies, such as BBC Three's *Badults, Mountain Goats* and police spoof comedy *Scots Squad*, were not complimentary.

> Programmes such as Mountain Goats are an embarrassment and not a true reflection of what we are capable of.
> Respondent ID: 36773202

> The current crop seems poor by comparison.
> Respondent ID: 22103636

> The only thing I have seen on recently has been Scot Squad but in my opinion it doesn't compare.
> Respondent ID: 41355719

This reoccurring theme of lamenting the loss of past programmes could simply be explained by a nostalgic bias. However, audience figures and critics tend to agree with the sentiments portrayed by survey respondents. For instance *Scot Squad*'s maximum audience share of 20% pales in comparison to *Still Game,* which could boast up to 60% of the Scottish

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[1] In the time since the field work was completed, *Still Game* returned for a seventh series in October 2016 and an eighth is planned for late 2017.

audience (Comedy Unit, 2016). Moreover, *Still Game* also commanded excellent critical appraisal. For instance British comedy guide *Chortle* described the programme as 'a thing of beauty, boasting elegant well honed writing and performances to cherish' (Chortle, 2009). *The Daily Record* called it 'Scotland's favourite comedy, a perfect mix of empathetic friendship and laugh out loud gags' (The Daily Record, 2014). More recent offerings have not had such complimentary reviews. Writing for *The Metro* Keith Watson commented that BBC Three's *Badults* was 'more exhausting than actually funny' (Watson, 2013). In *The Herald* Julie McDowall compared *Scot Squad* to 'a vast circus tent with one or two poles missing' (McDowall, 2014).

A number of respondents remarked on the number of Scottish comedians enjoying successful careers on television, most notably Glaswegian comic Kevin Bridges. Yet, there seemed to be a frustration that this talent did not translate to Scottish programming.

> BBC seems to be good at finding Scottish comedy talent but would be better if more of it made network broadcast rather than only going out in Scotland.
> Respondent ID: 22511439

> There are Scottish people on programs, chat shows and panel shows etc but tend to joke about Scotland in a negative way or play stereotypical characters. It would be good to have more actually Scottish programs.
> Respondent ID: 39964196

> Love Scottish comedians like Kevin Bridges etc but they don't usually have their own programmes.
> Respondent ID: 41337707

> Not much of a comedy fan apart from Kevin Bridges. He's great.
> Respondent ID: 22504464

> I would like to see more of the likes of kevin bridges and other local talent.
> Respondent ID: 36761880

> Its good to see Kevin Bridges flying the flag but he is usually just a token Scot.

> Respondent ID: 41865231

> There seems to be lots of comedy talent in Glasgow and Scotland but not a lot of Scottish programmes.
> Respondent ID: 39803224

These responses seem to suggest that rather than merely the presence of a Scottish comedian, it was important to audience members that they were represented by truly Scottish content, perhaps in the form of a sitcom or stand-up programme.

This resonates with dichotomy between the proliferations of Scottish talent as opposed to Scottish content highlighted by chapter three. For instance, Pendreigh (2000) argues that there is an abundance of Scottish talent on screen by referring to the international recognition for film actors such as Robert Carlyle, Ewan McGregor, John Hannah, James McAvoy and Gerald Butler (Pendreigh, 2000). When one considers television, there is also no shortage of Scottish on-screen talent. David Tennant, Peter Capaldi, Greg McHugh, Bill Paterson, Iain Glen, John Barrowman, Shirley Henderson, Rose Leslie and Ashley Jensen are just some of the Scottish performers to have starred in recent successful television programmes. However, as the replies regarding comedy signify the presence of Scottish on-screen talent does not equate to adequate representation. As this respondent argues:

> … there's a world of Scottish comics out there and they aren't getting enough exposure. With the success of Frankie Boyle and Kevin Bridges, we should have a stand up show on TV.
> Respondent ID: 34016764

It appears as though it is not enough to merely hear Scottish accents; the audience wants to see Scottish talent performing Scottish stories.

Interestingly, despite clearly being a major concern for audience members, comedy has not received nearly as much criticism from other Scottish broadcasting stakeholders. For instance, producers interviewed as part of this research did not consider comedy to be a genre in particular difficulty. Moreover, the BBC Audience Council Scotland Review of

2015/2016 did not mention comedy at all, nor indeed was it mentioned in the Council's submission as part of the BBC Charter Review (BBC Audience Council, 2016a: 2016b). BBC Scotland's annual management review did mention comedy, but by applauding *Mrs Brown's Boys'* continued success and prominent place in the Christmas television schedule. Co-produced by BBC Scotland, *Mrs Brown's Boys* and its excellent ratings are justifiably celebrated. However, as a sitcom depicting a Dublin matriarch and her family, it is understandable that the programme did not register with audiences as "Scottish."

6.3 Factual Programming

When asked about Scottish factual programming replies from respondents were generally very positive with 82% claiming to be neutral, satisfied or very satisfied. With only 18% reporting dissatisfaction it was by far the best performing genre in the survey.
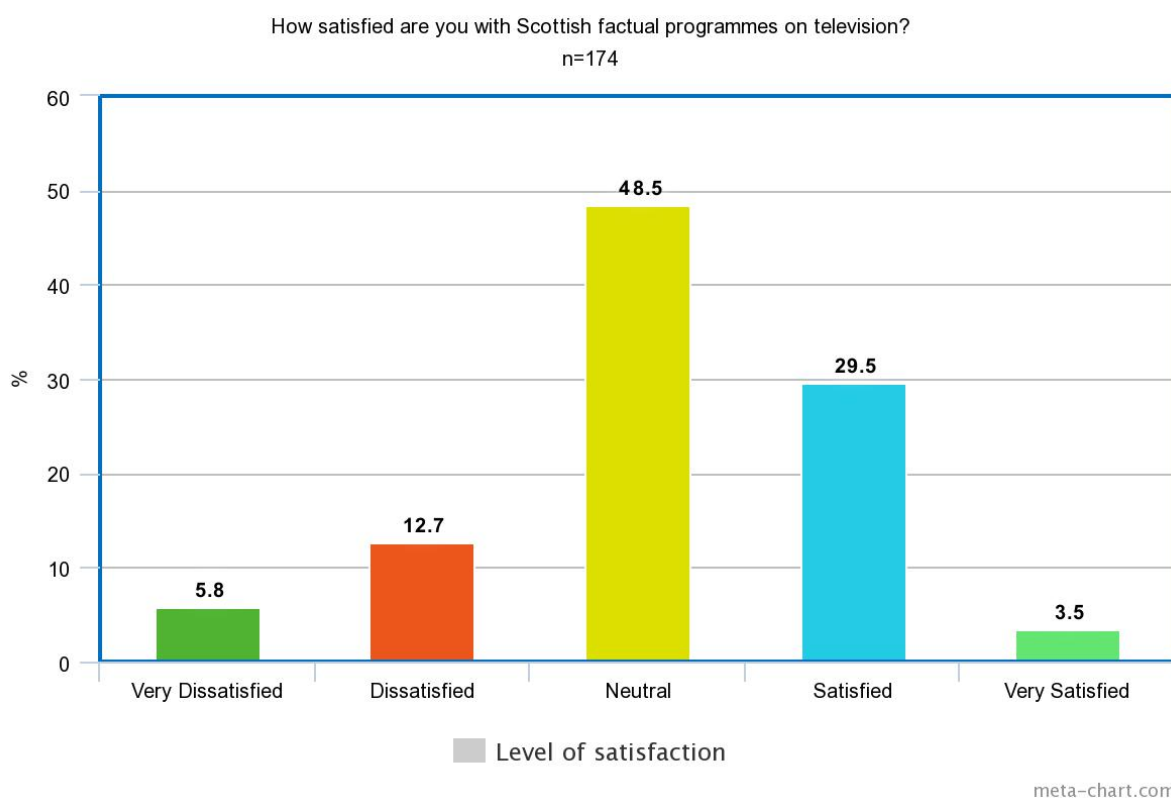

Figure 3 Audience satisfaction levels regarding factual television programmes.

An analysis of the qualitative answers revealed that audiences were largely happy with both the volume and quality of factual programming,

> Good Scottish documentaries -definitely notice plenty of these
> Respondent ID: 22511439

> There does seem to be a lot of factual programmes about or featuring Scotland. The documentary about the Piper Alpha fire on STV.
> Respondent ID: 41337707

> 'Landward' gives an accurate portrayal of modern Scottish life (although primarily rural issues) with out the use of Scottish cliches and deals with many serious issues affecting our society
> Respondent ID: 36773202

> I have been watching "This Farming Life" and love how it is following various farmers from different areas and different farming backgrounds. Like how it shows the rugged beauty of the area and feel it should add to tourism. Also highlights the struggle these people have to manage a living.
> Respondent ID: 34022025

In particular, it was Scottish nature documentaries that were especially well received:

> I enjoy programmes about Scottish wildlife, I remember one recently about the Hebrides narrated by Ewan Mcgreggor. Also, the documentary about building the Forth Road Bridge was good.
> Respondent ID: 41339451

> Scottish nature and history programmes are usually good and representative
> Respondent ID: 21972876

> Love the various Scottish natural history programmes
> Respondent ID: 36773202

Lots of good nature programmes.

Respondent ID: 39803338

The factual programmes about the Highlands, can't remember the name that is on right now. Although it is not hard to make the Highlands seem appealing, just point the camera!

Respondent ID: 39946814

Similar to many of the replies about dramas *Outlander* and *Shetland*, respondents made it clear that they took pleasure in seeing aspects of Scotland 'showcased' or 'shown off' by factual programmes.

Probably the factual programmes like nature programmes and the Forth Road Bridge documentary. I enjoy seeing genuinely fascinating parts of Scotland being shown off.

Respondent ID: 41339451

Hebrides - stunning scenery, beautifully shot, made Scotland global rather than just parochial programming.

Respondent ID: 41813869

Some of the recent arts programmes have been good. Edinburgh festival etc. Shows Scotland off well.

Respondent ID: 22301972

I like programmes such as Scotland's Wild Heart, I thought it shows off the natural beauty here very well.

Respondent ID: 39717264

Despite the majority of the programmes mentioned having a focus on rural settings (particularly the Highlands and Islands with the BBC's *Hebrides* and *Scotland's Wild Heart)* respondents seemed to appreciate the coverage of Scotland regardless of where they lived themselves. Results suggest that audience members based in more urban areas are just as likely to be satisfied with factual programming. In fact, 46% of respondents from Glasgow

and the West reported to be either satisfied or very satisfied compared to just 27% of those from the Highlands and Islands. It appears to be a reoccurring theme that audience members appear more concerned with television representing, or 'showing off' Scotland, regardless of how representative the particular programme is to their everyday lives.

By comparing the results of this survey to those collated by the Scottish Broadcasting Commission in 2007 it appears as though audience opinion regarding Scottish factual programming has greatly improved. Findings showed that at the time around half of respondents indicated that they weren't happy with Scottish coverage in history/heritage programmes (56%) or factual/documentary programmes (51%) (Scottish Broadcasting Commission, 2008). With only 18% of respondents to our survey reporting dissatisfaction, this clearly indicates a vast improvement. Interestingly, it is the only genre whereby audience opinion has undergone a significant shift.

As detailed by the previous chapter, those who work in the Scottish broadcasting industry have also reported a boost within the factual genre. It is argued that this is due to several key commissioners basing themselves north of the border. Natalie Humphreys (BBC controller of Factual and Daytime Production), Jo Street (Acting Controller of BBC Daytime) and Jonty Claypole (BBC Director of the Arts) were all based in Scotland at the time of research. The presence of these commissioners, and the subsequent working relationships has enabled strength in Daytime and Factual programming to develop. This has clearly affected both the industry and the audience in a positive way.

6.4 News and Current Affairs

Results of the survey suggest that news and current affairs is certainly the most polarising aspect of television in Scotland, with respondents much less likely to feel neutral than when asked about other genres.
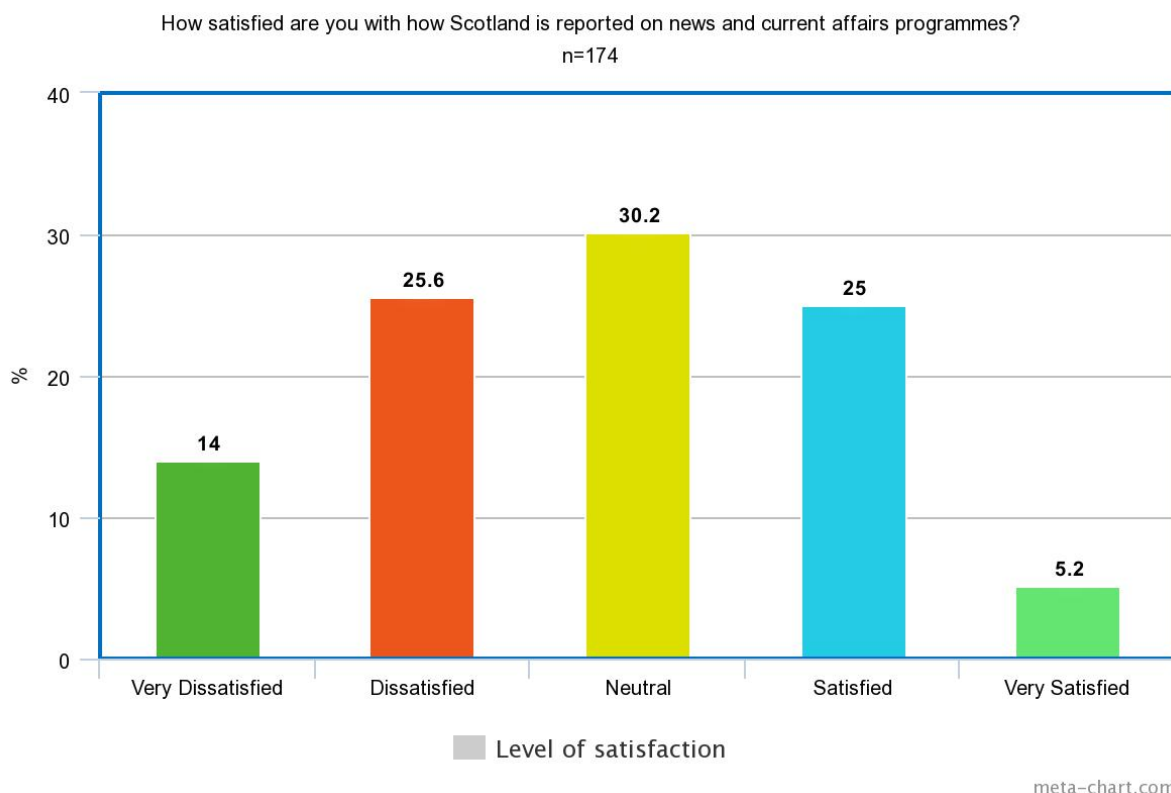
Figure 2 Audience satisfaction levels with regards to news and current affairs programmes.

This is perhaps unsurprising as news programming has been a continued source of discussion in Scotland in recent years. As detailed in chapter two, since devolution there has been an on-going debate about whether Scotland should opt-out of the BBC's six o'clock news bulletin, and broadcast news from its own perspective (a 'Scottish Six'). More recently coverage of the 2014 Independence Referendum was subject to much controversy, with some audience members accusing the BBC of adopting a bias in favour of the pro-Union Better Together campaign. Professor John Robertson of the University of the West of Scotland also published an article arguing that both *BBC Reporting Scotland* and *STV News* featured an anti-independence bias (Robertson, 2014).

Indeed, despite being asked about news and current affairs programming more generally, many respondents took this opportunity to express their opinion on the coverage of the referendum. Replies tended to either express anger at the perceived bias:

BBC bias against SNP and independence has destroyed their credibility. Not abiding by their charter to be impartial in politics.
Respondent ID: 22102096

Less "anti-SNP" broadcasting - their strong representation in Scottish politics is sharply contrasted by the angle of reporting from BBC heartlands in England where the SNP can do no good are only "the nationalists".
Respondent ID: 22191762

…I also have a gripe about media bias (Felt there was a very pro-Union stance on the BBC during the referendum).
Respondent ID: 34016764

The reporting is not balanced, BBC is a British nationalist mouthpiece, STV is beyond consideration. The U.K. media portrayal of Scottish politics fails to capture what the majority of people have as opinions.
Respondent ID: 34100430

Or comment that they did not believe that the 'bias' actually existed.

I know a lot of people are convinced the BBC are biased with their news coverage, I don't see it personally.
Respondent ID: 41355719

I don't buy into the argument that the BBC is bias against the SNP.
Respondent ID: 39803153

It is likely that many of the responses to this part of the survey were heavily influenced by the reaction to this particular issue, and it is difficult to speculate what the results may have been otherwise. However, there were respondents that talked more generally about news and current affairs. Many expressed a frustration with the existing set up, often citing confusion about relevance and repetition as the reasons for their dissatisfaction.

I would like news that doesn't include stories that are only applicable in England and Wales.
Respondent ID: 39717264

Too many stories about England and London that aren't relevant to us.
Respondent ID: 39964196

It is often confusing trying to figure out what news applies to Scotland. I find it frustrating having to wait half an hour for Reporting Scotland, when often it repeats much of what is said on the main news. Makes me not want to watch the news at all and just go online.
Respondent ID: 41339451

Less repetition from the news and Reporting Scotland.
Respondent ID: 39718323

A significant number called for change. Several respondents were aware of the proposals for an opt-out Scottish national news bulletin (a 'Scottish Six'), and expressed their support for the idea.

I would like Scotland to have its own news, as it is often talked about in the press
Respondent ID: 41864322

I think it is time for our own news, now that Scotland has so many powers. It is hard to follow which "domestic" stories apply to Scotland and if they do in what way. A lot of repetition with Reporting Scotland.
Respondent ID: 41865032

More coverage from the viewpoint of Scotland as a county rather than a region of the UK e.g. National Six
Respondent ID: 36773202

I would prefer a longer news which is from Scotland covering Scotland with an emphasis on my area with supplementary news from other Scottish areas and finally a section covering international news for matters out with Scotland.
Respondent ID: 36783865

A main news programme ie 6pm / 10 pm from Scotland with National and international news, sports etc.

Respondent ID: 36791081

Ditch the UK national news (6 o'clock news, specifically) in favour of national and international news from a Scottish perspective.

Respondent ID: 22102081

A comparison with previous audience research suggests that opinion on news coverage has remained unchanged for many years. For instance, in the research conducted by the Scottish Broadcasting Commission in 2008 36% of respondents expressed their dissatisfaction with how Scotland was reported on the news (The Scottish Government, 2008). This figure is remarkably similar to the 39% of respondents who reported to be either dissatisfied or very dissatisfied in 2015 (see Figure 4.) Moreover the qualitative replies quoted above echo sentiments portrayed by respondents to research conducted by the BBC in 2010. The BBC found that viewers in Scotland thought that content in the 6-7pm news hour was often 'squeezed' or duplicated, and that Scotland was not reflected adequately on the network bulletins. The research also indicated that there had been a move in opinion towards a news programme produced and presented in Scotland (BBC Audience Council Scotland, 2016b). Recognising the long-standing nature of these complaints the BBC Audience Council for Scotland has recently urged that the BBC should move quickly to evolve its news provision for Scotland. The Council's annual review 2015-16 argued that it is potentially misleading for audiences that some of the stories in the 6-7pm news hour are not relevant to devolved Scotland and that it was of vital importance that the format is updated to accurately represent contemporary Scotland to its citizens. They therefore concluded that news for audiences in Scotland (such as *Reporting Scotland*) should not consist of Scottish news alone, but should also carry UK and foreign stories according to their importance for audiences in Scotland (BBC Audience Council Scotland, 2016a).

The 2015-16 review also acknowledged that they had found some concern amongst the audience that proposals to change news provision in Scotland were in response to a specific political agenda (namely a pro-Independence stance.) Indeed, as explored in chapter two, the stalemate with regards to the 'Scottish Six' debate is largely attributed to the framing in nationalist and unionist terms. However, a cross tab analysis of results to the survey carried

out as part of this research, suggests that this isn't necessarily the case. It is certainly true that respondents who called for change (and disclosed their political leanings) were more likely to be pro-independence. However, 36% of those who called for the news to be more relevant to Scotland were pro-union, a minority but still a significant number. This implies the desire for reformatted news is not necessarily related to how audiences would prefer Scotland's political future to unfold, but rather an understanding of its current position as a nation with a large proportion of devolved power.

Another noteworthy observation concerning news and current affairs was with regards to regional coverage. Those living in Dumfries & Galloway and the Scottish Borders were far more likely to be dissatisfied with their regional coverage than residents of other areas. In fact a remarkable 80% reported to be dissatisfied or very dissatisfied. This is a vast difference to other areas of Scotland, whereby around 20-35% reported dissatisfaction.

Cross Tab Results

More specifically, how satisfied are you with how your region of Scotland is covered by news and cur...		Which best describes the region of Scotland you currently live in?						
		Dumfries & Galloway and the Scottish Borders	Glasgow and the West	Edinburgh, Lothian and Fife	Tayside and Central	Aberdeenshire	Highlands and Islands	Row Totals
	Very Dissatisfied	6 / 60%	4 / 5.3%	5 / 9.1%	0 / 0%	1 / 11.1%	3 / 27.3%	19 / 11.0%
	Dissatisfied	2 / 20%	11 / 14.7%	8 / 14.5%	4 / 33.3%	1 / 11.1%	1 / 9.1%	27 / 15.7%
	Neutral	1 / 10%	32 / 42.7%	22 / 40%	8 / 66.7%	3 / 33.3%	3 / 27.3%	69 / 40.1%
	Satisfied	1 / 10%	26 / 34.7%	17 / 30.9%	0 / 0%	4 / 44.4%	4 / 36.4%	52 / 30.2%
	Very Satisfied	0 / 0%	2 / 2.7%	3 / 5.5%	0 / 0%	0 / 0%	0 / 0%	5 / 2.9%
	Column Total	10 / 5.8%	75 / 43.6%	55 / 32.0%	12 / 7.0%	9 / 5.2%	11 / 6.4%	172 / 100%

Table 1 A cross tab analysis of regional news and current affairs satisfaction and region of residence.

The qualitative answers to this section of the survey shed some light on why audience members living in the south of Scotland claim to be frustrated. Viewers in the Scottish Borders felt strongly that their region was forgotten with regards to Scottish news, and in particular that their position within the ITV Network was unfair.

The Scottish Borders tends to be forgotten about.
Respondent ID 22254293

…in D&G we don't get STV at all. ITV does our news from Newcastle and the BBC does it from Glasgow. We need to scrap the entire system and have a channel that is for Scotland.
Respondent ID:36751983

It is very annoying to not get STV in the borders. Why are we sharing our news with Cumbria? Are we not part of Scotland?
Respondent ID:41764993

As explored in chapter two, the Scottish Borders and the ITV Network news have a somewhat complicated relationship, one that has been subject to criticism and dispute over the years. For instance, in 2009 ITV merged ITV Border and ITV Tyne Tees, which resulted in regional news being broadcast from Gateshead in County Durham. Some argued that this development was detrimental for viewers in Scotland. Scottish Border Chamber of Commerce director Andrew Collier argued, 'It is unsatisfactory that our local news comes from Gateshead and is more likely to cover events in Kendal or Keswick than Kelso… This area is not "our region", as the Border news programme presenters often call it' (BBC News, 2013). Culture Secretary at the time Maria Millar remarked that she believed the merger would be specifically detrimental for the Border region (statement cited in Plunkett, 2012).

However, efforts were recently made to address these concerns. Although the news programme continues to be broadcast from Gateshead, extra journalists have been recruited for newsgathering in the Border region including a Scottish political editor in Edinburgh, sports correspondent and district reporters. ITV Border was also required to reopen its former opt-out service for southern Scotland with a minimum of 90 minutes a week of bespoke local programming is now broadcast on ITV Border Scotland. However, these results imply that these updates have not done enough to abate the frustration amongst viewers in the south of Scotland. Being the only region of Scotland to be outwith the STV Group is clearly a source of irritation, leaving some viewers feeling displaced.

Its also appears as though audience opinion in the south of Scotland has worsened in recent years. In 2008 the Scottish Broadcasting Commission did find that those in the South were significantly less satisfied than those residing elsewhere. However, the proportion of those

who reported dissatisfaction was only 53%, a remarkable difference to the 80% measured 7 years later (The Scottish Government, 2008). The sheer extent of the difference may not be entirely reliable due to the fairly small sample size of Scottish Border residents who completed the survey. However it seems to support the view that the merger of ITV Border and ITV Tyne and Tees has certainly had a negative impact how audiences in the South of Scotland perceive the regional news output from the ITV network.

6.5 BBC Alba

The sample size of Gaelic speakers collected by the survey was far too small to draw any meaningful findings from the responses. However, audience research undertaken by other parties during recent years has predominately uncovered positive attitudes. For instance, research conducted by the Scottish Opinion Survey run by TNS BMRB on behalf of BBC Alba showed that the Gaelic speaking audience have consistently held the channel in high esteem.

Measure	2008	2009	2010	2011	2012	2013	2014 (Q1-Q3)
BBC ALBA maintains high standards of quality (High quality)	7.7	8.0	7.9	8.2	8.2	8.2	8.2
BBC ALBA is innovative and has lots of fresh ideas (Innovation)	7.0	7.1	7.0	7.3	7.2	7.4	7.5
I've learned new things from watching/listening to BBC ALBA	7.6	7.8	7.7	8.1	8.2	8.3	8.4
Gaelic language and culture are well reflected by BBC ALBA	7.5	8.1	8.0	8.5	8.5	8.6	8.7
BBC ALBA is a worthwhile thing for the BBC to be spending the licence fee on	9.2	9.2	9.2	9.2	9.4	9.4	9.5

Measures are averaged, scores from 1 – Strongly Disagree to 10 – Strongly Agree
Table 2 BBC Alba attitude statements amongst the Gaelic community 2008-2013 (Ofcom PSB Annual Report, 2014).

The Audience Council for Scotland (2016c) has also claimed that attitudes towards BBC Alba are largely positive. Audience members who attended Gaelic engagement events in in both Glasgow and Elgin regarded the channel as high quality, innovative and engaging. Viewers were quoted as saying:

It does pretty well given the resources – there's really good docs which I like

There's very innovative use of archive

Production values - people thought it'd be rubbish, but no – what could be better than Leugh Mi? It doesn't cost much, but it's excellent (BBC Audience Council Scotland, 2016c, p.15)

The Council also applauded BBC Alba's factual programming, noting that a wide range of topics were covered from a Gaelic perspective like the feature series Trusadh and observational documentaries like Balaich a'Bhiobaill which followed students training for ministry in the Free Church of Scotland (BBC Audience Council Scotland, 2016a). The channels first ever drama, *Bannan* (first broadcast in September 2014) has also been celebrated, particularly as it has proved to be the most popular series since the channel launched on Freeview in 2011 (BBC News, 2015).

Non-Gaelic speakers were also found to have been pleased with BBC Alba's programming, with music and sport proving to be the most popular.

My highlight of the week is the district rugby on ALBA

BBC ALBA is wonderful for traditional music (BBC Audience Council Scotland, 2016c, p.16)

There were some complaints from the core audience about programmes which 'imitate English formats' such as the baking programme *Fuine* and the motoring series *Air an* Rathad. Some viewers expressed their desire to seek inspiration from Gaelic life and create more original programming. (Audience Council Scotland, 2016c, p.16) However, on the whole measured audience response to BBC Alba tend to be overwhelmingly positive. In their submission to the BBC Trust as part of the Charter Review, the Audience Council for Scotland hailed BBC Alba as "one of the BBC's most signal successes in the current Charter period." (BBC Audience Council Scotland, 2016b, pg.11)

6.6 Past versus current satisfaction levels

When respondents were asked to consider how they felt about broadcasting now compared to the past, only 11% claimed to be more satisfied than they had been previously.
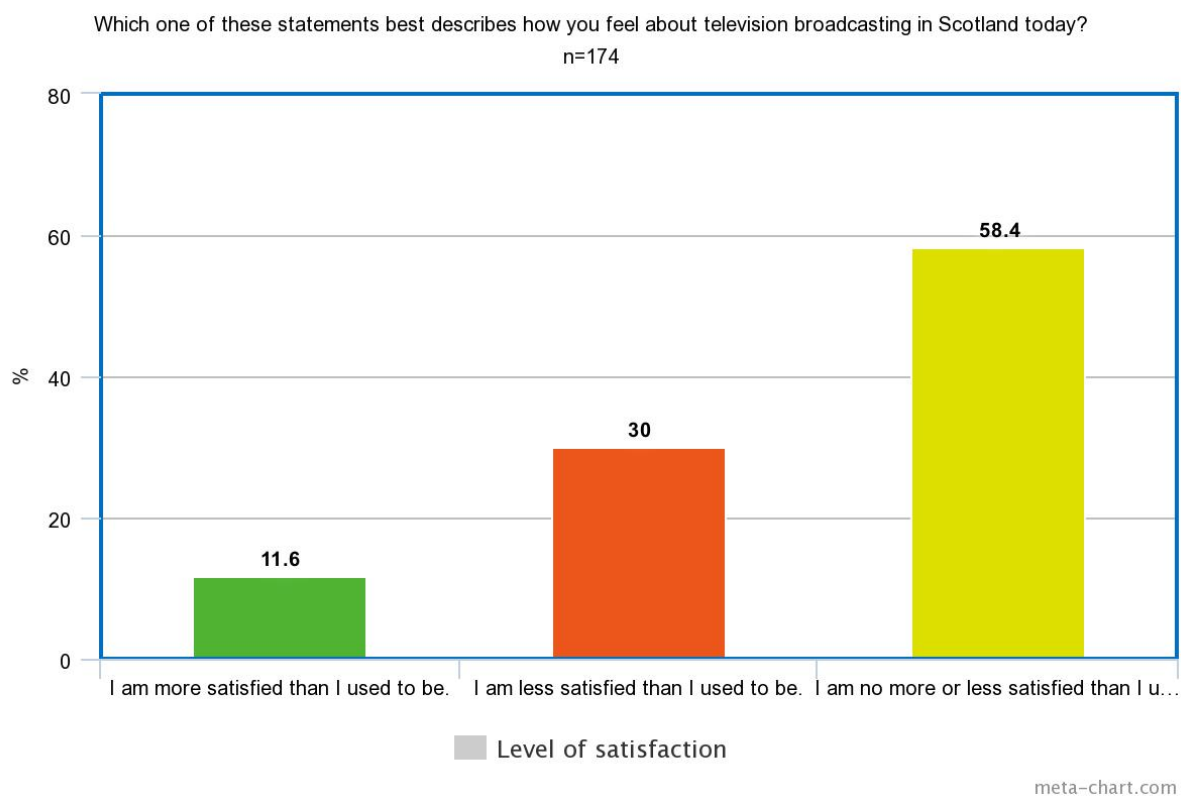
Figure 5 Audience satisfaction levels compared to the past.

This is a significant finding given the recent initiatives designed in attempt to improve output in recent years. As aforementioned, as part of the Television Network Supply Review in 2008 the BBC committed to sourcing more network television from the nations and regions, citing an overarching concern to secure strong creative output and value for money for audiences. Mark Thompson, Director-General at the time, argued that the BBC should source a proportion of network programmes from Scotland, equivalent to Scotland's share of the UK population (BBC Trust, 2008). Significant progress was made fairly promptly. For instance, in 2007 only 3.3% of the network television budget was spent in Scotland, but by 2010 this had more than doubled to 7.4% ahead of the 2012 target of 6.2% (BBC News, 2011). By 2016, 10.3% was spent in Scotland (BBC Annual Report, 2017, p.97).

The previous chapter argued that these improvements in network spend had largely failed to provide any long-term benefits for the broadcasting industry in Scotland due to the way they were implanted. These findings suggest that they were also unsuccessful in producing any

tangible boost to audience satisfaction. In the qualitative responses to this section of the survey, respondents gave specific examples of past programmes they feel were superior to current offerings.

> It wasn't long ago that there was a good variety of Scottish programmes on at once. Taggart, Rebus, Hamish MacBeth and 2000 Acres of Sky, Monarch of the Glen. We seem to be going through a bit of a lull.
> Respondent ID: 41625629

> I think a Taggart or a Monarch of the Glen is missing. Something from Scotland that collectively a lot of people watch and talk about.
> Respondent ID: 41346089

> I think Taggart was very good in its prime. There hasnt really been anything to fill its shoes.
> Respondent ID:39946814

> I think Taggart was the last programme that had quality to be proud of.
> Respondent ID: 41625310

> I think the last really memorable, quality programmes were Still Game/ Chewing the Fat and Taggart.
> Respondent ID:41715397

There is perhaps a tendency for nostalgic bias towards past programmes that might skew results. However, the above statements are consistent with a reoccurring observation within this research, namely the current lack of a prominent returnable network drama from Scotland. It is certainly true that there has been no programme with comparable audience or critical ratings since *Taggart* (which ceased to be broadcast in 2010). The previous chapter highlighted how producers and broadcasting executives saw this as an inhibiting factor to the development of a successful production base in Scotland.

There is a few three or four parters coming through but it's not enough to sustain
a production base. There is no *Taggart*, no *Rebeus,* no *Monarch of the Glen,* no
2000 Acres of Sky (Alan Clements, Interview, February 2015).

It is clear from these results that the audience also lament this shortfall. *Shetland* does not appear to have lived up to previous dramas such as *Taggart* and *Monarch of the Glen* in the eyes of viewers.

6.7 Audience opinions and constitutional views

As chapter two highlighted, a prevalent theme throughout the history of television broadcasting in Scotland is the tendency to see issues through the lens of constitutional debate. There is a perception that criticism of the broadcasting landscape and calls for various levels of change is a purely nationalist agenda, with unionists favouring the status quo. This chapter has already examined the link between constitutional debate and opinions on news and current affairs in Scotland, and found that views on the issue do not neatly align with either camp. Whilst those who voted for independence were more likely to express dissatisfaction, so did a significant portion on those who voted pro-union.

Similar findings were made when examining the relationship between constitutional views and feelings about the way Scotland is represented on television more generally. A cross-tab analysis of responses showed that those who were unhappy with the way in which Scotland was represented on television generally, were far more likely to have voted pro-independence than pro-union in the 2014 independence referendum. 70% of those who voted pro-independence claimed to be either dissatisfied or very dissatisfied.

In general, how do you feel about the way Scotland is represented on television?		Which way did you vote in the Independence Referendum in 2014?				
		Pro Independence	Pro Union	I did not vote	I prefer not to say	Row Totals
	Very Dissatisfied	13 22%	0 0%	0 0%	1 3%	14 8.2%
	Dissatisfied	28 47.5%	24 35.8%	2 16.7%	10 30.3%	64 37.4%
	Neutral	16 27.1%	24 35.8%	5 41.7%	19 57.6%	64 37.4%
	Satisfied	2 3.4%	17 25.4%	5 41.7%	3 9.1%	27 15.8%
	Very Satisfied	0 0%	2 3%	0 0%	0 0%	2 1.2%
	Column Total	59 34.5%	67 39.2%	12 7.0%	33 19.3%	171 100%

Table 3 A cross tab analysis of referendum voting behaviour and feelings about the representation of Scotland on television.

These results suggest that the majority of those who voted for independence were not happy with the status quo. One might argue that is perhaps because to somebody who wishes Scotland to be an independent country, the very idea that the nation's broadcasting primarily exists as part of UK-wide framework is unpalatable. This argument is problematic, as it could imply that regardless of what strategies might be implemented to attempt to improve broadcasting within the current framework, there will always exist a substantial proportion that are simply adverse to the nature of the set up. In other words, that unless the population's political leanings regarding the constitution align, perhaps there will always be a significant split in opinion over broadcasting.

However, further analysis of replies to the survey suggests that the issue is not so black and white. For instance even within those who voted pro-union, only 28% claimed to be satisfied or very satisfied with how Scotland is represented on television. It is certainly not the case, therefore, that all those who are pro-union are particularly enamoured with the current broadcasting framework, and how it is working for audiences in Scotland. Moreover, a cross tab analysis with opinions on a well performing genre shows that pro-independence voters are not necessarily dissatisfied with broadcasting by default.

How satisfied are you with Scottish factual programmes on television?	Which way did you vote in the Independence Referendum in 2014?				
		Pro Independence	Pro Union	I did not vote	I prefer not to say	Row Totals
	Very Dissatisfied	6 10.2%	2 3%	1 7.7%	1 3%	10 5.8%
	Dissatisfied	13 22%	6 9%	0 0%	2 6.1%	21 12.2%
	Neutral	26 44.1%	37 55.2%	6 46.2%	15 45.5%	84 48.8%
	Satisfied	13 22%	20 29.9%	6 46.2%	12 36.4%	51 29.7%
	Very Satisfied	1 1.7%	2 3%	0 0%	3 9.1%	6 3.5%
	Column Total	59 34.3%	67 39.0%	13 7.6%	33 19.2%	172 100%

Table 4 A cross tab analysis of referendum voting behaviour and feelings satisfaction levels regarding Scottish factual programmes on television.

The above table highlights how pro-independence voters more likely to be satisfied than dissatisfied, with genres that are generally received well by Scottish audiences. For instance only 32% were dissatisfied or very dissatisfied with the well performing factual genre, a marked reduction in the 70% measured in Table 3. This implies that many pro-independence voters are in fact receptive to Scottish television within UK-wide institutions, so long as the programming is of a satisfactory standard and in satisfactory quantities.

6.8 Local Television

A notable absence amongst the qualitative survey responses was any mention, either negative or positive, of local television. Whilst there was no specific question on the survey referring to STV Edinburgh or STV Glasgow, it was fairly remarkable that those living in the central belt made no mention of the channels when asked about content more generally.

As detailed in chapter two, local television was an initiative introduced by the UK government in 2010, and was perceived to cut across the Scottish Broadcasting Commissions proposals for a Scottish Digital Network, which were still on the table at the time. The two initial licences for Scotland were won by STV, and STV Glasgow and STV Edinburgh were launched in June 2014 and January 2015 respectively. STV always maintained that two channels were successful, breaking even within the first year and

reaching an average 900,000 viewers a month (Connelly, 2015). In April 2017 the channels combined to launch STV2, providing a single schedule of networked programming. However, during the time the survey was live, the two stations were still broadcasting separately.

To properly investigate how well local television served Scottish audiences, a much more focused research would be required. However, the absence of any acknowledgement amongst survey respondents perhaps suggests that the provision had a fairly limited impact. A particularly noteworthy observation was that the 10pm news bulletin that was broadcast across both channels was not given a single mention when respondents were asked about Scottish news and current affairs. This is despite the bulletin being the most viewed programme offered by either station (BBC News, 2014). Interestingly, by merging the two existing channels and new licences from Dundee, Ayr and Aberdeen to become STV2, STV has moved away from the concept of specific local television and has instead created a national network of local output. As shall be further examined in chapter eight, this very recent development will provide ample scope for future research.

6.9 Stereotypes and 'myth making'

Perhaps the most unanticipated finding of this audience research was the marked lack of comment about the nature of Scotland's representation on television. As explored in chapter three, there is a dominant discourse amongst literature pertaining to Scotland on screen, which argues that representations in film or television fiction tend to be reductive and stereotypical. For instance McCrone (1992) identifies 'tartanry', 'kailyardism' and 'clydesidism' as three prevalent 'mythical' representations of Scotland, which he argues stereotypes Scotland with symbols of clan and honour, twee rural landscapes or bleak, depraved urbanism (McCrone, 1992, pp. 131-140).

These stereotypes have been identified in portrayal of Scotland on television. For instance, Blaikie (2010) argues that soap operas *Dr Finlay's Casebook* (1962), *Take the High Road* (1980) and *Strathblair* (1992) all evoke 'kailyardist' imagery, by portraying a 'twee' and ruralized version of Scotland (Blaikie, 2010, p.120). Scullion (2003) argues that *Monarch of the Glen* imagined Scotland in a classic stereotypical fashion, presenting Scotland as a

beautiful and mythical space, populated by eccentric characters, and many have observed how *Taggart* drew upon the iconography of 'clydesideism' and bleak city landscapes (Edensor, 1997; Haider, 2002; Blaikie, 2010; Petrie, 2010).

The emphasis previous literature placed on these controversial stereotypes led to an anticipation that the *nature* of representation would have featured significantly in survey responses. However, when asked how they felt about the way in which Scotland was represented on television, only a small number of respondents discussed the type of portrayal. With regards to stereotypes, only three comments were made, none of which referred to a specific programme.

> I think there is a tendency for Scotland to be stereotyped.
> Respondent ID: 41339451

> I feel a lot of programmes show Scotland in a bad light ie portrayed as drunk or rude/violent
> Respondent ID: 34022025

> It's not all Haggis, Kilts and shortbread/whisky.
> Respondent ID: 22342951

In different circumstances, the scarcity of comments regarding stereotypes might be interpreted as a positive finding, in that current offerings did not seem to evoke that reaction from Scottish audiences. However, considering that the overwhelming theme throughout survey responses was a perceived shortage of output, the lack of discussion about the *nature* of representation is more likely down to a lack of representational content in the first place. Indeed, the most prevalent response to being asked about the way in which Scotland was represented on television was that there simply wasn't enough portrayal.

> I feel like there is not enough of Scotland shown on the television in general, there is too much focus on London.
> Respondent ID: 39803040

I dont see a problem with what is on television, I like River City. I just don't think there is enough.

Respondent ID: 39803224

I feel as though sometimes Scotland gets left out or isn't shown.

Respondent ID: 39943172

I think most genres are lacking in quantity. More comedy, more drama, just more programmes in general would help.

Respondent ID: 41346089

I know it is impossible to please everyone but I do feel as though there isn't enough representation on television currently.

Respondent ID: 41355719

I don't feel like Scotland gets featured enough on television to represent a well rounded view of the different aspects of the country.

Respondent ID: 41337707

It appears as though there wasn't enough depiction of Scotland and its people for there to be much meaningful reflection as to how it represents national identity or culture. If broadcasting is said to provide a communicative space within which to imagine and reflect upon a culture-in-common, these responses suggest that the UK-wide broadcasting framework does not currently facilitate this adequately for Scotland's national sphere.

6.10 Conclusions

The findings outlined throughout this chapter demonstrate that whilst opinion on Scottish television differs genre to genre, there is evidence to suggest that there are problematic aspects with the way in which the current television landscape serves the Scottish audience.

The most common theme throughout responses was a perceived deficit in representational content, particularly with regards to the genres of drama and comedy. Interestingly, audience

perception of a shortfall in Scottish drama echoes the concerns of producers and broadcasters, which were outlined in the previous chapter. Those within the broadcasting industry also found Scottish drama to be lacking, with several key players arguing that the lack of a high profile returnable network drama was extremely detrimental to sustaining a production base in Scotland. The findings presented in this chapter also provide further evidence of the failure of 'lift and shift' production spend strategies, as the relocation of *Waterloo Road* seems to have had little impact on Scottish audience, with the programme receiving no mention, either positive or negative, by survey respondents.

However, the shortage in comedy is a new observation, as a perceived deficit was not a key theme throughout interviews with those within the broadcasting industry. One might speculate that this is because comedies tend to have much smaller budgets than dramas. Therefore, comedy productions aren't as likely to have such a significant effect on the health of the industry. Yet, amongst replies to the survey, comedy was the worst performing genre, with several respondents claiming to not even be aware of any Scottish comedies currently being broadcast. A significant number of respondents also noted the distinction between the presence of Scottish comedians on television, of which they argued were a good amount, and the existence of Scottish comedy programmes, of which they identified a shortfall.

Statements made by the BBC Audience Council for Scotland in their recent Charter Review submission to the BBC Trust support these conclusions regarding drama and comedy with regards to BBC content. The Council claimed that research on the BBC's public purposes has consistently shown that audiences in Scotland believe that the BBC does not adequately represent Scotland in drama and entertainment. Moreover, the 2015 government consultation paper on the BBC (the 'Green Paper') acknowledges that performance scores in 'representing my nation/region in drama' in Scotland have remained consistently lower than in Wales and Northern Ireland throughout the Charter period (Department for Culture, Media and Sport, 2015, pg.30).

The shortage within these two genres is problematic due to the conceptual link between television fiction and the construction of national culture. As Castello (2007) argues, national identity is promoted and reflected through fictional discourse by referring to familiar territorial, linguistic, historical, and cultural elements (Castello, 2007, p. 49). There has been a dominant discourse in literature pertaining to Scottish television fiction in the

past, which argues that representations have been predominantly regressive. For instance, Caughie (1982) and McArthur (1982) argue that portrayals tend to be nostalgic and stereotypical, a celebration of a national identity already given, rather than progressive representations which evoke reflection and discovery. A notable finding within this audience research was the lack of comment regarding the *way* in which Scotland was portrayed in fiction. Responses suggest that this is down to a shortage of content. As argued by Hibberd (2007) 'any representation is after all, a starting point for a discussion over what national identity is' (pg.121).

It is also clear that Scottish news and current affairs continues to be a controversial issue. Many respondents voiced what are now long standing complaints about Scottish news coverage (particularly BBC news coverage). Namely, that now Scotland has many devolved powers it is difficult to be clear as to what news stories on the main bulletin are relevant, and that there is often too much repetition with the UK wide news and reporting Scotland. There was also an appetite amongst respondents for an opt-out Scottish national news bulletin (a 'Scottish Six'), a proposal that has been discussed on and off for nearly twenty years. These observations were all supported by recent research conducted by the BBC Audience Council for Scotland. It is clear therefore, that news and current affairs programming are not adequately serving Scottish audiences. In fact, in August 2016 the Westminster culture committee backed plans for a 'Scottish Six' (BBC News, 2016).

Findings pertaining to news and current affairs also suggest that whilst there is a relationship between opinion about the future of news provision in Scotland and constitutional views, it is unhelpfully simplistic to frame the debate in purely nationalist or unionist terms. Whilst respondents who called for change were more likely to be pro-independence, a significant number of pro-union respondents also expressed their dissatisfaction at the current set up. This is a trend that was also prevalent regarding audience opinion on television in Scotland more generally. Those who were pro-independence were more likely to be dissatisfied, however, a desire for more representation of Scotland as a national sphere was a theme across both sides of the constitutional debate.

However, there were two aspects of Scottish television that were found to be serving audiences well. Namely, factual programming and content broadcast on the Gaelic channel BBC Alba. With regards to factual, it was clear by comparing the survey to previous

research that there had been a marked improvement in audience opinion. This is another finding that resonates with the opinions of those within the industry. It appears as though the increase in factual commissioners based in Scotland (Natalie Humphreys, Jo Street and Jonty Claypole) and the subsequent increase in programming has produced a real improvement in how the Scottish audience views the genre. In particular, respondents wrote how they appreciated the wealth of nature documentaries and enjoyed how they showcased Scotland's natural beauty. Programmes that featured the Highlands and Islands were particularly praised with BBC's *Hebrides* receiving several special mentions.

Television broadcast on the Gaelic channel BBC Alba also appears to be serving audiences well. Seven out of 10 Gaelic speakers in Scotland watch BBC Alba every week, which is the same reach that BBC1 enjoys nationally (McKenna, 2016). Despite some criticism regarding the unoriginal nature of the formatting, audience research has largely found positive attitudes towards the content broadcast. Moreover, many non-Gaelic speakers in Scotland also respond well to the programming, particularly with regards to sports and music.

If one considers the findings presented here and those outlined in the previous chapter it seems fair to conclude that whilst dedicated funding and commissioning power can have positive affects on a genre, a lack of clear strategy and the appropriate application of funds have led to a deficit in drama and comedy; a deficit which is felt strongly by audiences and the industry alike.

Chapter Seven

Findings Chapter 3: An investigation into the appetite for and viability of a new Scottish television service

The aim of this chapter is to address the final research questions of this thesis. Namely, is there an appetite for the creation of a dedicated Scottish television service, and if so what type of service might be viable? The last two chapters have outlined how there is a perception, amongst the industry and audience, that there are problematic aspects with the way in which the current broadcasting framework serves Scotland. It is the task of this exploratory side to the research to consider whether the creation of a dedicated Scottish television service could offer a potential solution. A 'dedicated Scottish television service' is defined by this research as a service created solely to serve Scottish audiences, not merely an opt-out regional division of a UK-wide broadcaster, as exists currently.

This idea of a television service for Scotland is not new. There have been two proposals in recent years, which have taken very different forms. For instance, in 2008 the Scottish Broadcasting Commission recommended the creation of a Scottish Digital Network (SDN) as an addition to the existing landscape. It was argued that this would enhance the economy of Scotland's creative sector and provide audiences with more Scottish content. According to the Commission, the network should consist of a linear broadcast channel along with an innovative online platform, which would serve to compliment and enhance the channel's programming (The Scottish Broadcasting Commission, 2008, p.5). Despite not carrying out detailed planning, the report estimated that the likely annual costs for such a venture would be £70 million. The commission suggested that these costs be funded as part of the future funding for UK public service broadcasting (The Scottish Broadcasting Commission, 2008, p.36).

In the run up to the 2014 referendum on Scottish independence the SNP proposed that, in the event of a yes-vote, the BBC in Scotland would be replaced with a new television service for Scotland, a Scottish Broadcasting Service (SBS). The SNP planned for the new service to be founded on the staff and assets of BBC Scotland and to be funded with Scotland's share of the licence fee. Whilst they proposed the service would work in a joint venture with the

BBC to protect network commissions, the SNP argued the new service would increase opportunities for Scottish producers, and supply the audience with an increase in content that reflects Scottish life (The Scottish Government, 2013, p.316-317). Whilst neither the SBS nor the SDN has come to fruition, they were naturally referred to throughout discussions regarding the creation of a dedicated Scottish television service.

The structure of this chapter is as follows. Part one shall examine evidence produced by interviews with producers and broadcasting executives in order to explore the appetite for a new service amongst industry players. Part two shall then turn to the quantitative and qualitative results to the audience survey, to investigate the appetite amongst the Scottish audiences. Part three will examine the experiences of three different initiatives, in order to further explore the potential impact and viability of a dedicated Scottish service. BBC Alba will be discussed in order to explore the potential impact of an additional service, and injection of public money. Arts platform The Space will then be examined to highlight the difficulty in creating a new service without an established brand. Before offering final conclusions the chapter shall make a note on the recent announcement that a new TV channel for the BBC in Scotland, which will begin broadcasting in autumn 2018. Whilst this development occurred after the period of field research, it would be a missed opportunity to not see how the findings pertain to this new venture.

7.1 Appetite amongst the Scottish Broadcasting Industry

When asked about potential advantages and disadvantages of creating a dedicated Scottish television service many differing opinions, musings and ideas were offered. However, there was a fairly strong consensus amongst interviewees regarding one particular point. Namely, there was a clear opposition to the idea of creating a service that would replace the UK-wide broadcasters currently operating in Scotland. Both producers and broadcasting executives often referred to the recent proposal made by the SNP to replace BBC Scotland with an SBS, and recalled how this plan evoked concern and scepticism amongst the industry. For instance, CEO of Hopscotch films John Archer explained:

> The uncertainty certainly was not welcomed. You know, people were worried.
> Were about to lose our biggest source of funding? It could have been the end of

a lot of businesses…by losing that link to the network (John Archer, Interview, October 2014).

As chapter five demonstrated, despite the often-problematic relationship Scotland has with the UK-wide framework, underpinning these issues was the recognition of the benefits that come from being part of the UK broadcasting ecology. This was most clearly demonstrated by the highly coveted nature of network commissions. Whilst there are numerous frustrations amongst the industry regarding the difficulties in accessing the network from Scotland, there was clear opposition to losing the opportunity altogether.

For instance, Paul Tucker, founder of Monkey Puzzle Productions argued that without the presence of the BBC in Scotland, and the guaranteed link with the UK, it would be far more difficult for content creators to access a wider market.

> Relationships have been built through the commissioning power that is based in Scotland through the BBC. How would this work if an SBS and the BBC were separate and all commissioners were in London? Why would the BBC ever commission anything new in Scotland? Its most people ambition, and particularly the bigger production companies, to be part of a bigger thing. You know, I want to be selling my ideas to London and the world (Paul Tucker, Interview, October 2014).

In the 2013 white paper on independence, the SNP attempted to abate this uncertainty by outlining a plan demonstrating how they believed the creation of an SBS would increase production opportunities in Scotland. They claimed that by retaining the licence fee raised in Scotland, the SBS would spend over £100m more north of the border than the BBC currently does (The Scottish Government, 2013, p.318). However, there was widespread scepticism regarding these calculations, with many questioning whether the extra £100m was a realistic claim. For instance Ian Small, Head of Public Policy and Corporate Affairs at BBC Scotland explained:

> There are around 2,197,000 licenced premises in Scotland, which gives you approximately, just under £320 million. At present, Scotland spends about £220 million (that's on local, distribution, online, radio and network spend), which is

where this supposed extra £100 million comes from. However, these calculations don't take into account several things such collection costs, part payment and people that do not have to pay the licence fee due to special circumstances. It means that the gap is actually only about 80 million. And you have to ask, will this extra 80 million give you everything else the BBC provides? Things such as BBC iPlayer, radio networks and research and development into new initiatives? I think the answer to that is obviously no (Ian Small, Interview, January 2015).

These concerns widely resemble the commentary on the SNP's plan at the time. Critics perceived the mathematics presented as overly simplistic, and warned against merely dividing the BBC's budget and assuming the costs are half of the total. Losing the economies of scale enjoyed by a large organization like the BBC would mean that overheads are likely to rise significantly: leaving less money to invest in programming (Enders, 2014). Schlesinger (2013) argued that although these plans suggest a broadcaster with some quality production might be sustained, it would be a small-scale operation and its indigenously produced content could not match the range of the BBC.

Producers also iterated these concerns. Whilst some thought that number of commissions might well increase due to the autonomy over commissioning power, there was an acknowledgement that these would likely be lacking in size and scale. As this producer explained:

> There are many, and I believe legitimate, arguments that the BBC and particularly STV don't commission nearly enough network programmes in Scotland. But the commissions that do happen, benefit from the bigger budgets and big audiences on offer. I think the worry is that although we might have more commissions, we would only afford low quality, inexpensive stuff that doesn't get seen by many people (Anon, Interview, February 2015).

As is a reoccurring theme throughout this research, the focus here is on the importance of scale. As outlined in chapter three, due to the non-rivalry nature of television broadcasting consumption, smaller countries typically struggle to broadcast as many hours of original

programming as larger countries, and often avoid expensive genres (Noll, Peck and McGowan 1973; Owen Beebe and Manning Jr. 1974; Owen and Wildman 1992; Doyle, 2002; Picard, 2011). There is a perception, therefore, that being park of a UK-wide framework allows the production industry in Scotland to avoid these disadvantages, by providing an opportunity to access a wider market and win bigger, network commissions. A fairly strong consensus existed amongst interviewees that replacing the current UK-wide broadcasters with a dedicated Scottish service would severely risk these opportunities, and this would be of detriment to the health of the production industry.

There was, however, an appetite (particularly amongst small to medium sized companies) for a smaller operation that would instead aim to supplement the current broadcasting framework. This proclamation by CEO of Hopscotch Films John Archer encapsulates the sentiment shared by the majority of producers.

> You know, great! More market…more people to sell to, more people to make things for (John Archer, Interview, October 2014).

The majority of producers interviewed argued that the creation of an additional service to supplement the existing landscape would provide a significant boost to the industry in Scotland. It was argued that this would help sustain a more prosperous production base, and help provide an outlet for more Scottish content. Founder of True TV and Film Barbara Orton argued that that even the creation of a fairly modest venture would have the potential to make a big difference to small, creative companies.

> Something like that could provide room for little the creatives set to flourish. It wouldn't even need to be very large scale. Smaller production companies like mine fund our projects by going cap in hand pitching to different investors. A Scottish broadcaster putting in even just £10,000 could be the difference between something getting made and something getting shelved.

Orton went on to explain how this would also mean more work for emerging local talent, explaining that she currently had little to offer them.

It would also mean more opportunities for local talent. I am a small operation yet I still get around 100 CV's a month from young crew who are looking to work in the industry here. I can't offer them anything (Barbara Orton, Interview, November 2014).

These findings are perhaps expected given the evidence explored in chapter five. This research has seen how there is a perception amongst producers that market conditions were tough for smaller independent companies in Scotland, with opportunities for commissions few and far between. It is unsurprising, therefore, that an appetite would exist for a supplement to the existing market.

However, not all production companies expressed enthusiasm for the idea. Larger companies seemed less certain about whether such a venture would interest them. As former Head of Business Development at Shed Media Margaret Scott explained:

Companies like Shed would probably not be interested in it because the budgets wouldn't be big enough. I mean it would depend on the size of the budgets…and if it was outward facing and wasn't completely Scottish, our interests are in reaching UK-wide and worldwide audiences (Margaret Scott, Interview, December 2014).

There has, of course, previously been a proposal for an additional service for Scotland. The Scottish Broadcasting Commission recommended the creation of a Scottish Digital Network in 2008. Interestingly, whilst those interviewed were generally in favour of the creation of an additional service, the reaction to this particular proposal was mixed. For instance, producers were concerned that the creation of a £70 million channel using licence fee cash would mean that the BBC would no longer be obliged to commission a certain quota of programmes north of the border.

A real concern would be whether the amount of Scottish made content on the UK network would be the same (Jane Muirhead, Interview, March 2015).

There was also a feeling that despite being labelled a 'Digital Network', the proposal did not go far enough with regards to embracing recent technological advancements. For instance, the BBC's Ian small described his feelings on the proposal:

> I felt it was an analogue solution for a digital age (Ian Small, Interview, January 2015).

Maurice Smith, CEO of TVI Vision Limited argued that by opting to propose a conventional channel, proposals for the Scottish Digital Network were unnecessarily costly.

> One thing I found disappointing about the Commission was that it took quite a conventional approach. The Scottish Digital Network appeared to be BBC Alba in English. Lets create a channel, let the BBC and STV populate it … other people can make things for it. That's all fine, but because it was seen as a conventional television channel its cost was relatively high. I was disappointed that it didn't really embrace the digital side to it too much (Maurice Smith, Interview, November 2014).

In fact, there was much discussion about whether a more suitable solution for Scotland would be the creation of an online-only service. Certainly the notion that an online service would be cheaper, and perhaps more realistic than a conventional channel, was recognized by several participants. As this founder of a medium-sized production company mused:

> It would obviously be better to have more commissions available, but I think most people are sceptical about how you would fund a new channel. It has never been more difficult to get public money for the arts. I suppose something online might be achievable (Anon, Interview, February 2015).

It is important to note, however, that an online service is not necessarily a cheaper distribution model. Any cost savings are due to the reduced need for a set level of content to fill a schedule. This concept can be clearly identified in relation to the BBC's decision to make BBC Three an 'online only' service. As Doyle (2015) explains, despite reporting a saving of £50 million the BBC did not save a significant amount of money from discontinuing distribution of BBC Three as a channel per se. The transmission costs for

BBC Three have always been small relative to the cost of its content. For instance, in 2013/2014, distribution costs for BBC Three (the channel and online) were £5.8 million, compared with content costs of £81 million. Rather, it was the ability to reduce the quantity of content that enabled the BBC to produce savings by moving BBC Three online (Doyle, 2015, p.13).

BBC Three's reduction in content investment is arguably a detrimental consequence of a channel transitioning to an 'online only' service. However, within the context of a *new* venture attempting to secure funding, a smaller content budget would perhaps be realistic. The disadvantage to the creation of a linear channel would be the need to produce a set amount of content to fill a schedule. Arguably a limited budget would arguably either lead to poor quality content, or infrequent high quality programming on a channel with an unattractively high repeats ratio. Without the need to fill a schedule, an online service for Scotland would arguably be able to concentrate more fully on creating original content.

In addition to the perceived cost savings, some argued that an online venture would actually present more of an opportunity to showcase content to a wider audience. For instance, CEO of Hopscotch Films John Archer explained how he had already spoken to Creative Scotland regarding the idea.

> You know why not have something online? I did start talking to creative Scotland a couple of years ago about doing a cultural channel online. Creative Scotland could be behind a website called Scotland Creates and it could cover cultural stuff, news reports but also have the short films that are paid for by the Scottish lottery all of that. If you have a digital space it is there for the world to see (John Archer, Interview, October 2015).

Whilst it is true that a digital space would have the potential to reach audiences worldwide, the reality is that most online content struggles to attract a large number of views. As shall be discussed later in the chapter during the analysis of the experience of The Space, in this age of media convergence there is now a wealth of media distributed online. In order to be competitive, it is now crucial for media companies to build up and establish their brands successfully (Chan-Olmsted, 2011; Malmelin and Moisander, 2014). Simply distributing Scottish programming online 'for the world to see', does not mean that the world will see it.

A carefully thought out branding strategy would need to be implemented, to ensure that when navigating the overabundance of online content, consumers would arrive at this particular platform.

Perhaps the most prominent argument for the creation of an online service, however, was that it would be appropriate given the direction the broadcasting industry was headed.

> I think things are moving in that direction anyway…audiences are moving online in greater numbers so it [creating a service online] might actually be an advantage (Anon, Interview, February 2015).

As outlined in chapter two, the growth of online content providers has evoked vast changes in audience behaviour in recent years. Audiences in the UK have gravitated towards using on demand services provided by traditional broadcasters, and online-only services such as Netflix and Amazon in increasing numbers. For instance, since 2009 BBC iPlayer has seen its monthly requests rise from 45 million to 274 million (Bell, 2017). Moreover, throughout the timeline of this research the number of UK households subscribed to online streaming service Netflix doubled. 2.5 million households were subscribed in 2013, and at the time of writing the total is now said to exceed 5 million. This represents a remarkable 24% of all UK households (Jackson, 2016).

The success of online only services such as Netflix have led some to predict the imminent demise of broadcast television, and the linear channel as a method of distribution. YouTube's chief business officer Robert Kynci forecast that online video would overtake linear TV by 2020 (Jefferson, 2016). Netflix CEO Reed Hastings argued that broadcast television would be fully obsolete by 2030, which is supported by research conducted by technology conglomerate Cisco (Cisco IBSG, 2011).

However, whilst these prophecies imply vast and rapid change, the 2016 Communications Market Report Ofcom revealed that 63% of all viewing minutes in 2016 were still spent watching live, linear television. Interestingly, this figure only represents a slight decline from the 69% recorded in 2014. Recorded TV accounted for 17% of all adults viewing time, whilst the time spent viewing free on-demand and paid-for on-demand services were both 6% (Ofcom, 2016, pg. 57). With such a small percentage of viewing time spent online in the

UK at present, and the fairly small change shift recorded in two years, one might argue that it is difficult to see how conventional television channels will disappear altogether by 2030.

Indeed, authors such as Meikle and Young (2008), paint a more gradual picture, and argue that whilst the growth of online platforms poses challenges to conventional television, traditional channels will still dominate for some time to come. Doyle (2015) argues that caution is needed during this transitional stage, as discontinuing linear channels may run the risk of running too far ahead of emergent changes in audience behaviour (Doyle, 2015, p. 17).

Ian Small, Head of Public Policy and Corporate Affairs at BBC Scotland also thought that the idea of an online-only service was too premature.

> I don't think we are quite there yet, where we would see an online station … Most of us do not go there on an everyday/all day basis. I don't go home at night and think right: I have to construct this evenings schedule for my viewing pleasure. That's just not what we do. I turn the TV on and make some dinner whilst watching what's on (Ian Small, Interview, January 2015).

Whilst Small might be right in his assertion that most people do not watch television this way, there is evidence to suggest that many of those aged 16-24 do construct their own schedules. In fact, 16-24s watched more recorded, on-demand and online content than live television in 2016 (59% vs 36%). Moreover the last two years has seen a fairly dramatic change amongst this age group, the time spent watching live TV among the 16-24s had fallen by 14% since 2014, to 36% of total viewing time in 2016. By contrast, viewing of paid-for on-demand services had increased 14% since 2014, and accounted for 20% of this age groups total viewing time in 2014 (Ofcom, 2016, p.57).

What does this mean for a hypothetical new television service for Scotland? According to the Ofcom data above it would appear that currently an online service would currently run the risk of excluding large groups of its potential audience, specifically older viewers. However, despite changes in audience behaviour perhaps occurring more gradually than some commentators have predicted, they are undoubtedly shifting (Ofcom, 2016, p57).

Whether the conventional channel will eventually become obsolete remains to be seen. Yet, if an online service is realistically all that might be funded for Scotland, then some comfort might be taken from the fact that audiences are gravitating towards online content in growing numbers year on year. Moreover, arguments for caution and a gradual approach to change are predominantly in reference to existing broadcasters. By starting as online-only from the offset, a new service would not face the formidable challenge of transitioning at a pace that both secures future relevance, but does not alienate the portion of the audience that still prefers conventional, linear television.

7.2 Appetite amongst the Scottish Television Audience

Although there was a clear appetite amongst many producers for the creation of an additional service for Scotland, this can once again be interpreted as rent-seeking behaviour. Whilst there is much to be gained by some within the industry from the creation of a new service, such a venture would not be tenable without interest amongst television audiences in Scotland.
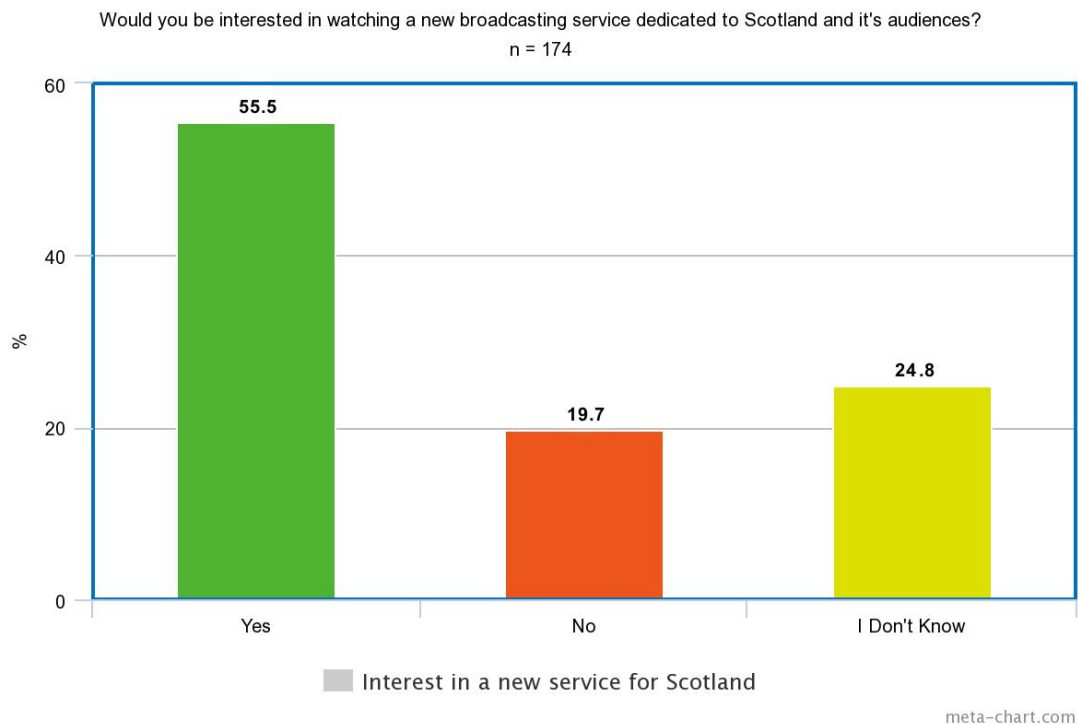
Figure 6 Interest in watching a new broadcasting service dedicated to Scotland and its audiences.

Interestingly, findings of the online survey suggest that there was a fairly strong latent demand for a new service for Scotland amongst the audience. 55% of respondents claimed to be interested representing a majority and only 20% were confident that this would be of no interest to them. Whilst analysing these results using a cross tab analysis very little variations were found across age groups or geographical locations. It was found, however that audience members currently dissatisfied with broadcasting in Scotland were much more likely to be interested in the idea of a new service.

Cross Tab Results

In general, how do you feel about the way Scotland is represented on television?		Would you be interested in watching a new broadcasting service dedicated to Scotland and it's audien...			
		Yes	No	I don't know	Row Totals
	Very Dissatisfied	13 13.5%	1 3%	1 2.3%	15 8.7%
	Dissatisfied	45 46.9%	9 27.3%	10 23.3%	64 37.2%
	Neutral	28 29.2%	11 33.3%	25 58.1%	64 37.2%
	Satisfied	9 9.4%	12 36.4%	6 14%	27 15.7%
	Very Satisfied	1 1%	0 0%	1 2.3%	2 1.2%
	Column Total	96 55.8%	33 19.2%	43 25.0%	172 100%

A total of 2 responses were not included in the above report as they skipped one of the questions.

Table 5 Cross tab analysis comparing current satisfaction levels and interest in a new broadcasting service for Scotland.

This is perhaps an expected correlation. As detailed in the previous chapter, there was a strong perception amongst dissatisfied respondents that there was a shortage of Scottish content on television, and a strong appetite for more representational programming. It is understandable therefore; that a service dedicated to Scotland and its audiences would appeal.

The analysis also showed a correlation between voting for independence in the 2014 referendum, and expressing an interest in a new television service for Scotland. In fact, only 12% of those who voted for independence claimed to have no interest in a new service.

Cross Tab Results					
	Would you be interested in watching a new broadcasting service dedicated to Scotland and it's audien...				
Which way did you vote in the Independence Referendum in 2014?		Yes	No	I don't know	Row Totals
	Pro Independence	44 45.8%	4 11.8%	12 27.9%	60 34.7%
	Pro Union	31 32.3%	20 58.8%	16 37.2%	67 38.7%
	I did not vote	7 7.3%	3 8.8%	3 7%	13 7.5%
	I prefer not to say	14 14.6%	7 20.6%	12 27.9%	33 19.1%
	Column Total	96 55.5%	34 19.7%	43 24.9%	173 100%

Table 6 Cross tab analysis comparing voting on independence and interest in a new broadcasting service for Scotland

This once again is unsurprising given that those who voted pro independence were more likely to be dissatisfied. However, once again, despite the correlation opinions did not fit neatly into different sides of the constitutional debate. A significant minority (32%) of those who voted pro-union also claimed to be interested in the prospect of a new service. As explored by chapter two, past proposals for a separate television broadcaster, or indeed any calls for significant change to the current set up, have often been attributed with a nationalist agenda. These findings suggest that amongst the audience, interest in a new television service for Scotland does not necessarily coincide with support for independence.

When comparing results to those collected by the Scottish Broadcasting Commission in 2008, it appears as though appetite for the creation of a new service has remained fairly static in recent years. As demonstrated by Figure 6, only 19% of respondents claimed not to be interested in the creation of a new channel for Scotland.
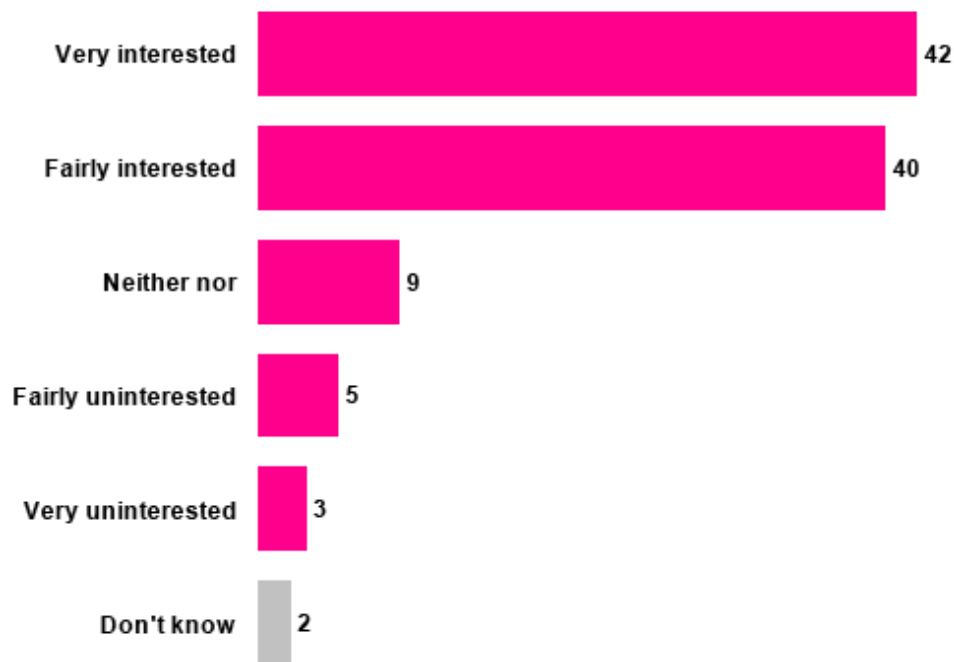
All respondents = 1021

Figure 6 Level of interest in new Scottish television channel (The Scottish Government, 2008).

However interestingly, what does appear to have changed are preferences with regards to what type of programming audiences would want to see on a new service. In 2008 the Scottish Broadcasting Commission found a clear preference for news and documentary type programming, including history/heritage programmes, in comparison to 'lighter' types of programming such as comedy and drama (including soaps).
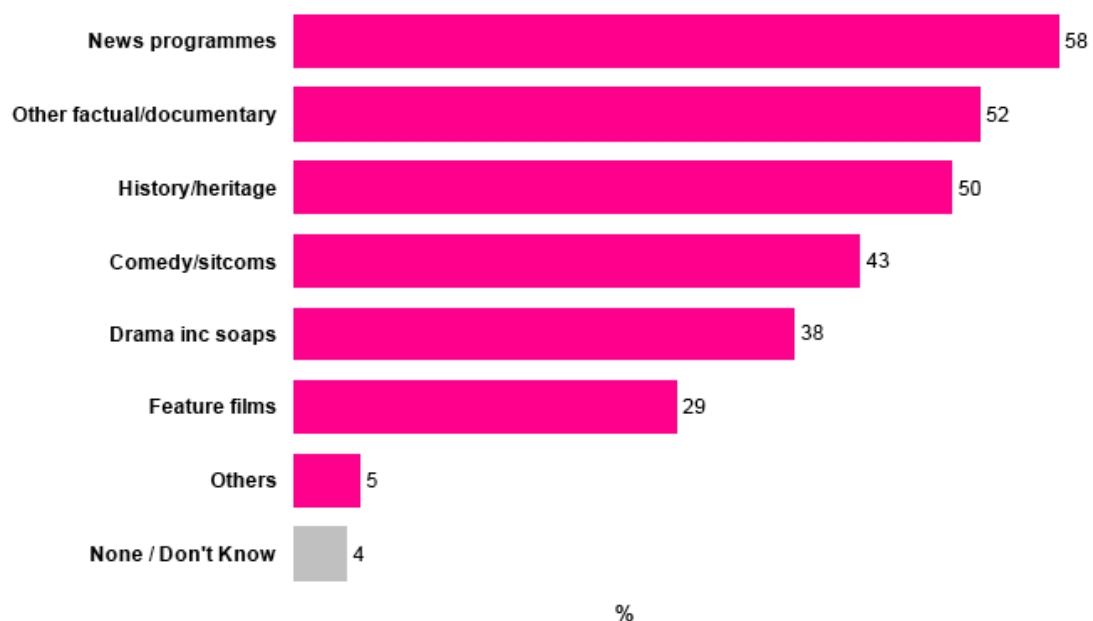
Figure 7 Types of programme interested in for a new Scottish Channel (The Scottish Government, 2008).

Interestingly, respondents to this research expressed almost entirely opposite preferences. In fact, comedy and lighthearted content was the genre singled out the most.

> Comedy that shows the funny side to living in Glasgow.
> Respondent ID: 39803040

> Definitely comedy.
> Respondent ID: 39803224

> Comedy and Drama.
> Respondent ID: 39831979

> If there was good Scottish comedians on, I would probably give it a watch.
> Respondent ID: 41625212

> Would love to see some comedy.
> Respondent ID: 41864981

> Comedy, drama or light hearted documentaries. Scottish people/characters being relatable to people north of the border.
> Respondent ID: 39717198

> More comedy sketch (new not legacy) live stand up.
> Respondent ID: 34016764

This change in preference could perhaps reflect a shift in audience taste in the intervening years. However, it could also reflect the current shortfall in Scottish comedy perceived by audiences, as was highlighted in the previous chapter. Moreover, unlike responses to the survey conducted by the Scottish Broadcasting Commission, very few people singled out factual and documentaries as a genre they would most want to see. Once again, this could be interpreted as indicative of current programming levels provided by existing broadcasters. In the years following the Scottish Broadcasting Commission, factual is a genre that has flourished due to key commissioners basing themselves in Scotland. Previous chapters have explored how this has had positive ramifications for both the audience and the industry.

It is understandable that respondents would express particular interest in a type of programming which they felt was currently lacking. However this is not to say that interest in a new service is purely a manifestation of grievances about certain genres. Apart from singling out comedy, the most popular response was a desire to see as varied output as possible.

> A mixture of shows including comedy, landscape, nature, food and drink (specific Scottish produce) plus more.
> Respondent ID: 22177201

> A good mix of sport, drama, comedy, lifestyle etc.
> Respondent ID: 22203206

> All kinds - factual, current affairs, drama, comedy...
> Respondent ID: 22289337

> I'd like to see a real mix of things from news, television of all genres.
> Respondent ID: 22238992

> Drama, Music and cultural matters, Children's programmes, History, Current affairs, News, Political commentaries.
> Respondent ID: 36783865

Along with a variety of different genres, respondents made it known they would like to see programming that represented Scotland, and that showcased different Scottish regions and issues facing different aspects of Scottish life.

> It has to have something for everyone. For me it has to be representative of the Scottish population
> Respondent: ID: 22288827

> Lots of different content showing all the different sides to Scotland.

Respondent: <u>ID: 39717264</u>

A little more 'regionalised' programming, and representation of all of Scotland, please
Respondent <u>ID: 22342951</u>

I would like to see local programming, so issues affecting communities, such as cuts being made to budgets and how these areas are being dealt with. I would also like to see programming involving local issues so in fife it would be about the new bridge crossing, education, childcare, disabled issues, what is happening in fife for jobs, programs highlighting the places that we sometimes miss in the country, cooking. There is a wide gamut of programming that I would like to see that is actually made in Scotland and generates Scottish jobs.
Respondent <u>ID: 36761880</u>

A reoccurring theme throughout this thesis has been the notion that television broadcasting is an important medium through which to explore and imagine national identity. Chapter two outlined how UK-wide broadcasting framework has failed to provide Scotland with a satisfactory outlet for representing its national culture in the past. Chapter six presented evidence that suggests a shortage of representational content is still prevalent today. It is unsurprising; therefore, that respondents felt that representational programming should populate a new service dedicated to Scotland.

The evidence presented thus far suggests that there is a latent demand for a new television service for Scotland, which would broadcast a wealth of different representational programming across a variety of different genres. However, in order to achieve this, a fairly large scale, well-funded service would be needed. This is potentially problematic because as a small country, Scotland would struggle to finance a wide range of representational content. Whilst some small countries successfully produce a few programmes to a very high standard (such as Denmark with *The Killing* and *Borgen*), typically most of the day-to-day schedule is dominated by acquired programming (Redvall, 2013, pp.227-234). It seems, therefore, that by hoping for a wide range of representational content spanning different genres, audiences in Scotland might have unrealistic expectations as to what a new television service could offer.

As the concept of an online-only service was such a prevalent theme amongst discussions on the industry side to the research, it was deemed astute to investigate audience opinion on the idea. Respondents who declared an interest in a new television service for Scotland were asked to then divulge whether they would be interested if the service was 'online only'.
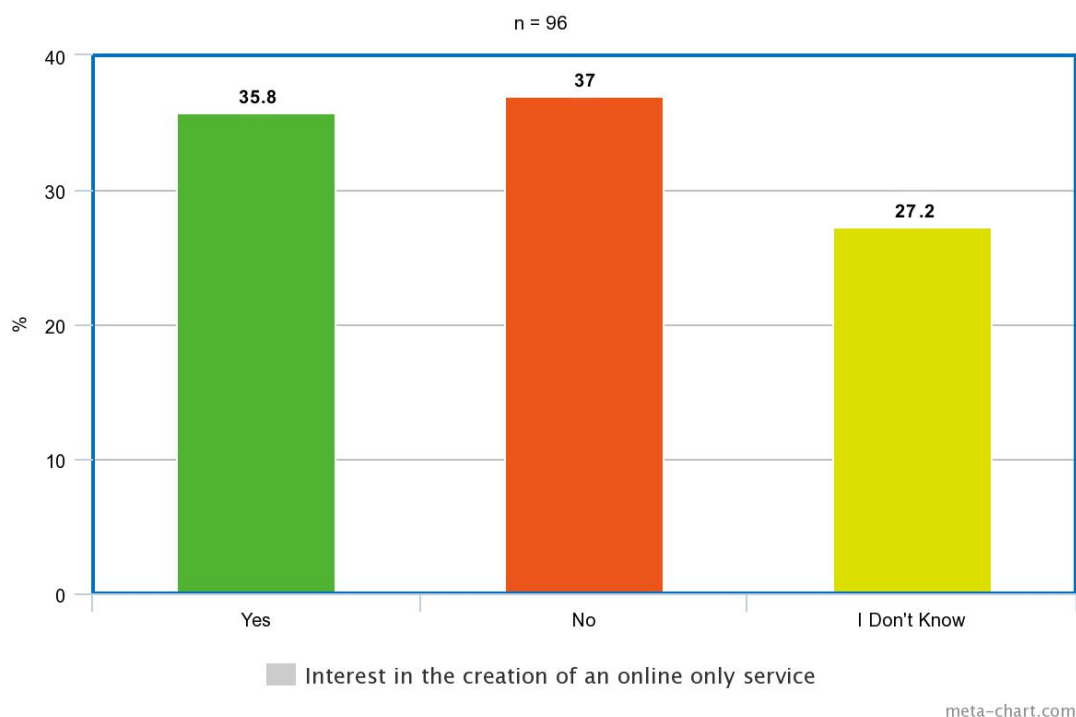
Figure 8 Interest in an 'online only' television service for Scotland.

Results show that there was not much consensus regarding the issue, with almost equal numbers answering 'Yes' and 'No'. This raises questions about whether an online service would struggle to attract viewers in Scotland. Moreover, this result is likely skewed in favour of interest in an online-only service, given that the survey was also online. The survey therefore excludes respondents who do not use the Internet by its method of distribution.

The survey also found that interest in 'online only' was extremely dependent on age. 100% of respondents under the age of 18 were interested in an online service, as were 60% of those aged 18-30. The survey found that interest declined further in each subsequent age bracket. These results align with the findings Ofcom published in their 2016 Communications Market Report, which show that younger audiences are much more likely to watch online on-demand television services (Ofcom, 2016). As aforementioned, this may

be interpreted as an advantage or a disadvantage for the prospect of an online service for Scotland. On the one hand, it would run the risk of alienating a large percentage of the Scottish television audience. On the other hand, it presents an opportunity to establish a presence on a platform that is highly likely to become even more prolific in the coming years.

7.4 Case Studies

Some key observations have been made by the findings presented thus far. Firstly, it appears as though an appetite does exist for an additional, supplementary television service amongst the audience and some industry players (in particular, small to medium sized production companies). For audiences, there was a hope that this would provide more representational content across a variety of different genres. Producers claimed that this would have the potential to act as a supplementary layer to the industry, helping to sustain smaller independents and to provide more jobs for talent in Scotland. Another key observation was the problematic nature of considering a new service within the context of recent technological advancements and changes in audience behaviour. For instance, an online-only service would have the advantage of aligning with the likely future direction of broadcasting, whilst also negating the need to use funds to fill a schedule. However, potential disadvantages would be the exclusion of a large portion of the Scottish audience who do not watch content online, and the difficulty in building a brand that would attract audiences.

In order to further investigate these observations, and provide a more in-depth exploration into the viability of different hypothetical services, this section shall now examine two different organisations and highlight how their experiences provide useful insights for this debate. Firstly, Gaelic channel BBC Alba shall be discussed as an example of a publicly funded service which was added to the broadcasting landscape in Scotland. Secondly, the digital arts organization The Space will be studied as an example of an online-only content platform. Whilst these organizations are not directly comparable to the service proposed by participants, their experiences can help gain an insight into the challenges and opportunities it would likely face.

7.4 BBC Alba

First broadcast on the 19th September 2008, BBC Alba is available in Scotland via Freeview and throughout the UK on Sky, Freesat, Virgin Media, BBC iPlayer, and TVPlayer. The channel has four studios across Scotland, located in Glasgow, Inverness, Portree and Stornaway and in 2015/16 broadcast 693.3 hours of original programming including news, current affairs, drama, documentary, entertainment, education, children's programming and sport. Latest figures show that the channel averages an audience of more than 700,000 a week, reaching 74% of the Gaelic-speaking audience and an average national weekly reach of 15% (BBC News, 2016).

BBC Alba is jointly owned and funded by the BBC and MG Alba, which is the operating name of the publicly funded Gaelic Media Service. MG Alba's budget was £14m in the 2015/16 financial year, of which £12.8m came from the Scottish Government grant-in-aid, £1m from the UK Government and £196k from project funding and charges for services and facilities. (MG Alba Annual Report, 2016, p.13). The UK Government has since withdrawn its commitment to help fund Gaelic broadcasting in Scotland, however this has led to the Scottish government boosting its contribution by £1m to make up the difference (BBC News, 2016). Of their £14m budget, £11.7m was spent on producing content for BBC Alba (MG Alba Annual Report, 2016, p.63). The BBC also contributes financially to producing, in the same year the BBC spent £9m on BBC Alba, £5.5m of which was spent on creating content (BBC Annual Report and Accounts, 2016, p.92).

Despite this relatively small budget (the total amount spent on the channel would represent just 1.5% of the money spent on BBC One), BBC Alba broadcasts a fairly wide range of content. For instance current affairs series *Trusadh* (now in its ninth series) has featured topics ranging from sex reassignment surgery to wolfdog ownership in the Highlands. More examples include a live 30 minute news bulletin every weeknight at 8pm (*An Là),* a Gaelic-learning programme (*Speaking our Language),* children's magazine show *Dé a-nis?,* Book show *Leugh Mi* and weekly coverage of a Scottish Premier League match (*Spòrs)* and rugby union (*Rugby Beo)*. A noteable success has been *Bannan,* a drama now in its third series filmed on the Isle of Skye. The programme was produced by successful Scottish producer

Chris Young and proved to be the most popular programme since the channel launched on Freeview in 2011 (BBC News, 2015).

BBC Alba soon began to play an important role in the economic development of Gaelic, and the language's growing status in Scotland. Chalmers et al. (2012) argued that the channel had proven to be an important source of employment for the growing Gaelic Creative Class, and that there were indicators that it was beginning to positively contribute to the learning and use of Gaelic in Scotland (Chalmers et al., 2012, p.221). The 2011 census also revealed that the number of Gaelic speakers increased amongst young age groups. The proportion of speakers rose from 0.53 per cent to 0.7 per cent for three to four-year-olds, from 0.91 per cent to 1.13 per cent for five to 11-year-olds, and from 1.04 per cent to 1.10 per cent for 12 to 17-year-olds (The Scotsman, 2015). Whilst it is not possible to conclusively deduce that BBC Alba had a causal role in this increase, it is certainly likely that the channel has played a part in an increased awareness of the language.

There is a perception that BBC Alba has had a fairly significant impact on the Scottish broadcasting impact. PACT (the Producers' Alliance for Cinema and Television) estimated that BBC ALBA accounted for over 50% of all Scottish commissions by hour (PACT, 2010). In 2015/16 £9.9 million was spent generating content from 26 different production companies, of that, £8.6m was spent with the independent production sector, much of it alongside measures intended to foster the development of talent, skills and Gaelic language (MG Alba Annual Report, 2016, p.12). Almost 300 jobs result from MG ALBA's activities, 40% of which are based in the Highlands and Islands, a significant contribution to the employment levels and sustainability of an area partially designated as economically fragile (McKenna, 2016).

BBC Alba is also thought to have had a positive impact on audiences. As detailed in the previous chapter, research conducted by the Scottish Opinion Survey run by TNS BMRB on behalf of BBC Alba showed that the Gaelic speaking audience has consistently held the channel in high esteem (Ofcom PSB Annual Report, 2014). The Audience Council for Scotland has also claimed that attitudes towards BBC Alba are largely positive. They reported that audience members who attended Gaelic engagement events in in both Glasgow and Elgin regarded the channel as innovative and engaging and were pleasantly surprised with the high quality production values. The Council also found that non-Gaelic speakers

were also generally pleased with BBC Alba's programming, with music and sport proving to be the most popular (BBC Audience Council Scotland, 2016c).

However, BBC Alba has not avoided controversy or criticism since its inception. A consistent complaint from BBC Alba itself has been that the channel does not have the means to meet the demand for original content, and that subsequently the repeats rate sits too high at 74% (MG Alba Annual Report, 2016, p.11). For instance, as part of the BBC Charter Review consultation in 2015, MG Alba raised concern that on current funding levels only 1.7 hours of originations per day, including News, were possible. This compares to almost 8 hours of originations per day on the Welsh channel S4C, and 5 hours of originations on the Irish language channel (MG Alba, 2015). MG Alba maintains that the repeat ratio creates unsustainable deficiencies for BBC Alba's audience and that an increase in funding is needed to achieve a full comprehensive service (Ferguson, 2016).

BBC Alba has also been criticized by those out with the organisation for relying too heavily on imitating English formats. For instance the baking programme *Fuine* and motoring series *Air an Rathad* clearly feature similar themes to *The Great British Bake Off* and *Top Gear* respectively. The Audience Council for Scotland claim that viewers would prefer that more programmes were inspired by Gaelic life (Audience Council for Scotland, 2016). Another criticism has been that the viewing numbers and success of BBC Alba is somewhat disingenuous, due to the channel's sports coverage. Scottish historian Michael Fry has claimed that many of BBC Alba's viewers are watching for the sport, and that "the whole thing is being set up to make this channel appear more popular than it is" because "you don't need Gaelic to watch football" (cited in Moran, 2013, p.357). It is true that viewing figures vastly surpass the number of people who speak Gaelic. However, one could argue that by broadcasting content suitable for non-speakers, BBC Alba is promoting awareness of the channel and consequently the Gaelic language.

Despite these criticisms and perceived shortfalls the channel is generally regarded as a success. Writing for The Guardian Kevin McKenna remarks that 'the station, by any of the instruments used to measure such thing, has been an outstanding success' (McKenna, 2016). Launching the organisation's 2016 annual report in Edinburgh, MG Alba's chairperson Maggie Cunningham spoke of building 'on the success of the channel'. She went on to say: 'we're delighted the channel enjoys very high levels of awareness in Scotland, offering both Gaelic speakers and non-Gaelic speakers unique programmes of interest and value' (McKay,

2016). In their submission to the BBC Trust as part of the Charter Review, the Audience Council for Scotland hailed BBC Alba as 'one of the BBC's most signal successes in the recent Charter period' (BBC Audience Council Scotland, 2016, pg.11).

With regards to the viability of an additional Scottish broadcasting service, some useful observations can be made from the case study of BBC Alba. Firstly, in support of the hypothetical venture, BBC Alba demonstrates how the injection of public money can be advantageous to broadcasting in Scotland. It is clear there is a perception that BBC Alba has had a positive impact on the industry, especially with regards to the number of commissions available to the independent sector. A particularly impressive outcome is the sheer number of production companies benefiting from the money invested in BBC Alba, which suggests that if a service dedicated to producing Scottish content were created with a similar or larger budget, it would have the potential to be a very positive development for the production sector in Scotland. The resulting jobs and training opportunities would also be hugely beneficial, helping to create a larger sustainable production base north of the border.

The success BBC Alba has had audiences despite its relatively small budget could also be seen as encouraging for the prospect of a new service for Scotland. However, BBC Alba is fortunate in that they have a very specific target audience and remit: to serve Gaelic speakers, those learning the language, those that might wish to learn, and those interested in the language and culture. A service created to serve audiences across the whole of Scotland would perhaps struggle to achieve the same level of positive attitude. As results to the survey suggest, there is an appetite for a wide variety of programmes spanning several different genres.

A particularly significant observation is that BBC Alba is seen to experience difficulty in creating sufficient quantities of original content. As aforementioned, those within BBC Alba do not feel they are adequately funded to produce enough programming in order to provide a comprehensive service and are seeking to improve what they see as an unacceptable repeat ratio of 74%. This struggle is a manifestation of a recurrent theme throughout this thesis, the idea that small-scale broadcasters typically do not have the funds to produce a significant amount of original content.

This is potentially problematic when one considers the viability of a new additional service for Scotland. As detailed by the previous chapter, one of the biggest complaints regarding

the current broadcasting framework was the lack of content reflecting Scotland and the life of Scottish people. Reducing this deficit was a key reason many audience members argued for the creation of an additional Scottish service. The experience of BBC Alba demonstrates how a small-scale additional service might well struggle to produce a significant amount of original programming, and that a linear schedule may well be populated with a high percentage of repeats.

The experience of BBC Alba perhaps adds a certain amount of credence to those who argue in favour of an online platform. Without the need to fill a linear schedule, there would perhaps be less emphasis on the specific number of original hours. Whilst there would clearly need to be an importance placed on creating as much quality original content as possible (in order to provide benefits to the industry or audience), there would be no concern over repeat ratios. However, as shall now be highlighted whilst studying the experience of The Space, the difficulty is ensuring this content would be found.

7.5 The Space

When discussing the prospect of an online service for Scotland, industry interviewees cited arts organization The Space as an example of a purely digital venture. The Space was launched as an online platform for a wide range of digital arts projects in 2014. Described as a 'gallery without walls' by its former chairman, the site's remit is to commission a wide variety of different projects from artists and organisations in order to make 'great art' accessible to wider audiences (BBC News, 2014). There aim is also to help the creative economy grow by supporting new and emerging talent with various skills training, events and resources. The Arts Council for England and the BBC funds The Space jointly, with both institutions committing £8 million over a three-year period. With regards to annual expenditure, the latest available financial statements show that the organisation spent £4.5 million in the year ended March 2015 (TheSpace CIC, 2015).

The art commissioned by The Space has thus far been widely varied. Examples include *Ai Weiwei,* an online interactive experience of the artists Royal Academy exhibition, *Dragon Matrix,* an immersive outdoor augmented reality adventure, *Soundtrack 7,* an online scrapbook of sounds, images and stories by singer FKA Twigs and *1984* a Northern Ballet interpretation of George Orwell's 1984 on television and on demand. A particular success

has been a joint venture was between Radio 1, BBC3 and The Space: a reworking of the 2011 cult Ryan Gosling movie *Drive*. The DJ Zane Lowe rescored it, with six students making their own mash-ups for The Space.

Initially, the ambition for The Space was that the website would act a digital centre of the arts, helping large audiences access the projects it commissioned. The official target was 10 million global hits in three years, 20% of them aged 18 to 24 (BBC News, 2014). However, The Space found meeting this ambition extremely challenging, and was met with a fair amount of criticism. In an article for *The Guardian* media writer Maggie Brown claimed that her exploration of the site had uncovered broken content and 'clunky' amateurish web design. Brown also quoted British filmmaker Don Boyd accusing the venture as being 'a shocking abuse of public money', and claiming that most people had not even heard of The Space (Brown, 2014). Questions were also raised regarding how the BBC could justify the money it invested, and what return licence fee payers have had (Goslett and Newton Dunn, 2015).

Following a review in the summer 2015, The Space decided to adjust its brief. Rather than focusing on its own website as a destination for the public to engage with art, instead the organisation was to look to existing platforms to host its content, such as the BBC services and YouTube, where existing audiences could be tapped in to. In an interview conducted as part of this research John White, Chief Operating Officer of The Space, offered some insight into this change in direction. He explained that the biggest difficulty was building a brand that would draw audiences to an online platform, particularly as it was extremely difficult to determine who the audience was likely to be.

> [The target for 10 million global hits] proved to be unrealistic and we have changed our remit in response to this. It is extremely difficult to build a platform and a generic brand from scratch. You have the enormous marketing costs along with the overheads etc. Also, who are your target audience? Is there something that unifies them? For us it was very difficult as someone who is interested in ballet is not necessarily interested in spoken word poetry. It was hard to get traffic to a generic arts website. So now, rather than being focused on attracting an audience we are more concerned with directing content to where the audience already is… BBC services, YouTube etc (John White, Interview, October 2016).

This observation is pertinent within the context of considering the viability of a new service for Scotland. There was a fairly optimistic attitude amongst some producers that an online venture would be an opportunity to publish content onto a global stage. However, White identifies what would be a key challenge for the hypothetical service, namely: building a reputable brand, and audience, from scratch. It would be difficult to ensure that whilst navigating the vast array of media on the Internet, audiences land on a new online platform for Scottish content. Presumably this would require a significant marketing budget, which could potentially negate the cost saving advantages of an online service.

Of course a new service for Scotland would have a very different remit to The Space, and would therefore perhaps not face quite the same level of difficulty. As explained by White, The Space had particular trouble in building an audience due to the wide variety of different art forms it commissions. Whilst this new online platform for Scotland would undoubtedly commission content across different genres, all content would presumably fall within the category of television production. Yet, whilst not directly comparable, The Space serves as a cautionary tale with regards to launching online-only media platforms.

7.6 The new BBC channel for Scotland

As aforementioned in the introductory chapter, a rather important development occurred during the writing up period of this thesis, which is always a risk when researching a live and evolving context. On the 22nd of February 2017 it was announced that a new BBC channel for Scotland would begin broadcasting in the autumn of 2018. The new channel, which still needs to be approved by Ofcom, is to be funded with a budget of £30 million, and will broadcast from 7pm to midnight every evening, including a Scottish news hour at 9pm that will broadcast stories from Scotland, the UK and the world (BBC News, 2017). It is important to stress that this development occurred some time after the field research of this study was completed. Therefore, the findings cannot speak directly to this new channel. However, it is interesting to consider what the key observations may imply with regards to the potential for this new venture to succeed.

One of the key findings was that there appears to be a latent demand for an additional service amongst the audience and many within the production industry. An additional, supplementary service is in effect what the BBC has announced, with the aim of creating new jobs and opportunities for the industry and programming that 'reflects modern Scotland' (Lord Hall – cited in BBC News, 2017). In this sense, findings suggest that this the new channel aligns with the mood amongst the audience and production industry. Particularly as the BBC have stressed that this will not negatively effect the commitment to network programming in Scotland, with a further announcement that the budget for creating UK-wide content would increase by £20m (BBC News, 2017). This is an important addition, given the emphasis industry players placed on scale, and the indispensible advantages afforded by access to the UK network.

However, other observations made by this research raise some questions regarding the nature of the new BBC channel for Scotland. For example, despite the budget of £30m being double that of BBC Alba, this still represents a relatively small sum. Interestingly, it is less than half of the £70m thought to have been needed to fund the Scottish Digital Network. Findings have shown that audiences would like to see a variety of representational output on a hypothetical new service, with a particular enthusiasm for drama and comedy. Although the new BBC channel is only planning to broadcast 35 hours a week, £30m will unlikely afford the production of this wealth of original content. This raises questions about whether this new venture will go far enough to meet the audience's appetite for more representational content.

The most specific detail about the new BBC channel released at the time of writing is that it will include a news hour that will broadcast local, national and international issues from a Scottish perspective. This is the BBC's answer to the debate about news provision in Scotland that has been prevalent since devolution, and has featured heavily in this thesis. Chapter six outlined how numerous respondents to the survey expressed their support for a main news provision coming from Scotland, suggesting that this feature of the new BBC channel may be welcomed by audiences. However, some have raised questions about the schedule slot of 9pm, rather than 6pm. The main TV news bulletins on every channel are timed to deliver news when viewers are willing and ready to consume it, usually 7.30 – 9am, 12-2pm, 5-7pm and 10-11pm. These are times the audience is preparing to leave home for school, work or study, having a lunch time break, eating an evening meal or getting ready

for bed (Riddoch, 2017). By broadcasting at 9pm, the new channel's flagship news programming would have to compete with prime time entertainment and drama offerings from other channels, which may mean it struggles to establish an audience.

Another question raised by the findings to this research is whether the new channel presents a contemporary enough solution, given rapid technological advancements and changes in audience behaviour. The BBC's Ian Small described the proposal for a Scottish Digital Network as an "analogue solution for a digital age", yet a decade later it is thus far difficult to see how this new BBC channel for Scotland offers anything more imaginative. Although programming will be available as catch up on BBC iPlayer, the initial announcement describes a very traditional set up of a linear channel, broadcasting five hours per evening (BBC News, 2017).

7.7 Conclusions

Several key observations can be deduced from the evidence explored throughout this chapter. First, that there is a strong preference for an additional, rather than substitute, service. Despite the perceived faults with the current broadcasting framework in Scotland, those within industry were not willing to risk losing the benefits of being part of the UK-wide broadcasting ecology; namely, access to the UK network and commissioning quotas for Scotland. A fairly strong consensus emerged that creating a dedicated Scottish television service to replace existing broadcasters would be risk these benefits, and would be of detriment to the production industry.

There was however, an appetite for the creation of a smaller scale additional service for Scotland amongst small to medium sized production companies. There was a hope that this would act as a supplementary layer to the industry, helping to sustain smaller independents and to provide more jobs for talent in Scotland. This finding is perhaps unsurprising, as with an additional service there would effectively be more market to sell to, which producers would financially benefit from. Therefore, once again there is likely an element of rent seeking behaviour here. That is not to say that an additional service would not be a successful addition to landscape, but that caution should be adopted when considering this narrative.

The survey found that generally there was also a latent demand for the creation of a new dedicated Scottish television service amongst audiences, with only 20% of respondents claiming to not be interested in watching. A comparison with levels of interest recorded by the Scottish Broadcasting Commission in 2007 suggests that the appetite for a new service had remained fairly static. With regards to programming, respondents expressed a desire to see representational programming across a variety of different genres, with an emphasis on comedy and drama. Considering the findings outlined in chapter six, this is likely due to the perceived shortfall of these genres amongst current output.

With regards to viability of a new service, a recurrent theme in the discussion was whether or not the creation of an online-only service might be an appropriate distribution method. Without the need to fill a schedule, an on-demand online service would likely need a smaller budget, and it would therefore perhaps be easier to secure the necessary public funds. Moreover, there would be no issue with regards to repeat ratios, a typical problem for small-scale services, as demonstrated by the experience of BBC Alba. Some also alluded to evidence that online television consumption is steadily growing amongst audiences, and suggested that this represents the future of the industry. Therefore, not only would it be more realistic with regards to funding, the creation of an online platform might also be a more contemporary solution.

However, a problematic aspect to the idea of an online-only service would be that of establishing an audience. When respondents were asked if they would still be interested in a new service if it were to be 'online only', only 36% answered yes, and the results of an online survey are likely to skewed in favour of interest in Internet services. The experience of The Space demonstrates the immense difficulty in building a brand and audience from scratch when creating a purely digital service. This raises questions about whether an online venture could attract a big enough audience to justify its existence?

Of course this is near impossible to predict. Particularly as expressing 'interest' in a new service would not necessarily mean that a respondent would go on to watch it. Furthermore, expressing disinterest does not mean that a captivating marketing campaign would not inspire a respondent to reconsider. The smaller budget that would most likely be required for online television service for Scotland, along with the appetite amongst content creators does present a strong case. Moreover, despite only a small portion of the audience claiming to be

interested in an online service, research into audience behaviour suggests that this will increase over time and that the viability of conventional channels will gradually decrease (Ofcom, 2016).

The recent announcement of a new BBC channel for Scotland presents a specific concept to apply these observations to. On the surface, the new channel appears to align with the mood amongst the audience and many amongst the industry, in that is will provide an additional service to provide more opportunity for production companies, and more output for audiences. However, the findings of this research also raise questions as to whether the service will be adequately funded to provide the type of content called for by audiences, namely high quality representational output across a variety of different genres. The little information provided also suggests that this new venture will adopt a very traditional, linear approach to television broadcasting. Whilst there were disagreements with regards to the merits of online-only platforms, the emphasis placed on addressing digital developments suggests that this falls short of offering an imaginative contemporary solution.

The debates and discussions regarding a new service for Scotland outlined in this chapter are once again manifestations of the theoretical concepts prevalent throughout this thesis. The appetite for an additional service for Scotland is driven by a perception that there is inadequate room within the current UK-wide framework for Scotland to develop its own communicative space. From an industry perspective, there is a perception that being peripheral to the main network causes a deficit in opportunity to win commissions. The argument is that an additional service will expand the market and will therefore aid in sustaining and growing a production base in Scotland. From an audience perspective, there is a perception that the UK-wide network does not provide enough representational portrayal, and that an additional service could supplement this.

Most of the problematic aspects outlined in this chapter stem from issues relating to size and scale. The funding available to create a supplementary service is only ever likely to enable to the creation of a fairly small-scale venture, as highlighted by the budget of the new BBC channel. Whilst this injection of public money may well provide a boost to the small to medium sized players amongst the industry it is unlikely to afford a significant amount of original content. The previous chapter highlighted how although audiences called for more representational output, they specifically expressed a desire for high quality output such as

Taggart, Hebrides, Still Game and *Scotland's Wild Heart.* This expensive, networked content will unlikely be replicated by a small-scale additional service. This raises questions about whether the programming it does produce would be able to attract viewers in Scotland, particularly as this audience also have access to high quality output from networked services, which they may already be familiar with and enjoy on a regular basis.

Chapter Eight

Conclusions

As a small, stateless nation, Scotland often finds itself situated in a complex and conflicted environment with regards to a wide-range of policy areas. This thesis has demonstrated how television broadcasting is certainly no exception. It has outlined how Scottish television has had an ongoing complicated relationship with the UK-wide networks that dominate its broadcasting landscape. Findings have shown that there is a perception, amongst a variety of interested parties, that the existing networks do not provide Scotland with adequate freedom or opportunity to sustain a satisfactory production base, or indeed to produce enough content to portray a fully rounded representation of Scotland on television.

Social communication theories of national identity suggest that ideally; Scotland would have its own dedicated broadcaster, as this would provide the freedom to explore different representations within its own communicative space. In reality, however, the situation is far more complex because of the inevitable constraints on funding and scale. The economic conditions of broadcasting are such that small countries typically struggle to finance original, representational content.

Findings showed that there is not currently a significant appetite for a service that would replace the UK-wide institutions in Scotland. This is largely because of concerns that by divorcing itself from the UK-wide broadcasting ecology, Scotland would be exposed to the economic disadvantages associated with television in small nations. However, an appetite was found for the creation of an additional television service for Scotland, which could act as a supplement to the current broadcasting landscape. This finding is now particularly significant due to the BBC's recent announcement that a new television channel for Scotland will be launched in the Autumn of 2018.

The debate surrounding television in Scotland is shaped by numerous socioeconomic and political factors. The way in which these dynamics interrelate creates a curious environment, whereby Scotland's position in the UK-wide broadcasting framework is perceived to produce both indispensable advantages and debilitating disadvantages. The chapter will

unfold by first providing a summary of findings, addressing each main research question in turn. Then, in a section entitled 'Peripherality, Politics, and People', the chapter pulls together the main themes of the debate. Lastly, it shall make a note to the limitations of the study and some possibilities for further research, before offering final concluding remarks.

8.1 Summary of Findings

How well does the current broadcasting landscape serve the television industry in Scotland?

Perhaps the most prominent finding to this side of the research was the particularly coveted nature of network commissions, and the perception that the industry in Scotland is dependent on large-scale network commissions from the UK-wide network in order to sustain a production base of a satisfactory scale. Television programmes broadcast to the entirety of the UK generally have much higher budgets, and these high budget commissions have a significant impact on the Scottish industry. For instance, the average value of UK network commissions is more than 200% higher than that of local commissions (EKOS, 2013).

However, despite the importance of network programmes, the autonomy to make these commissioning decisions largely lies out with Scotland. The structure of commissioning power within the UK is such that most key individuals are based in London. For instance, out of the 54 people employed by the BBC TV network with commissioning responsibility, only 4 are based in Scotland (Scottish Parliament, 2015). This puts Scottish producers at a disadvantage, as they miss out on the informal network of contacts that develop as a result of geographical proximity. As well as the physical impracticalities, there is a perception that the structure of commissioning power facilitates a decision-making environment that is removed from Scottish culture, which subsequently leads to a resistance to Scottish content.

In light of these issues, it would seem fair to conclude that Scotland would benefit greatly from more network commissioning power, particularly given the successes resulting from factual commissioners being based north of the border. Interviewees remarked upon how the presence of BBC Daytime commissioner Jo Street, Factual and Daytime commissioner

Natalie Humphries and the Director of Arts Jonty Claypole provided a significant boost to factual production in Scotland. However, it is important to ask to what extent much more network commissioning power would be realistic within an organization attempting to serve the UK as a whole. At first glance, the four BBC commissioners currently based in Scotland seems an inadequate number. However, this actually represents 7.5% of the total, which is in fact not far away from Scotland's population share of the UK.

That is not to suggest there is no room for improvement with regards to network commissions for Scotland. For instance, many argued that recent BBC policy trend labeled 'lift and shift' was an example of a shortsighted strategy that failed to establish a sustainable production base for network content. The term was used by interviewees to describe how companies had been moved to Scotland temporarily, in order to meet increased production spend targets, instead of commissions being awarded to indigenous indies based permanently based north of the border.

The example of the relocation of the school-based drama *Waterloo Road* and the opening of Shed Media Scotland was used by this research to present a case study illustrative of 'lift and shift.' Hailed as an exciting commitment to Scottish production, the move resulted in a significant increase in production spend and the creation of over 200 jobs. However, these benefits were to be short lived, as after two series the programme was cancelled, and Shed Media subsequently closed their Scottish branch. Crucially, there were no plans for another high-budget returnable drama to take the place of *Waterloo Road*. Therefore despite the initial boost, spending network production quotas in this ' lift and shift' manner did not provide any long-term sustainable benefits to production in Scotland.

At first glance, this strategy could be perceived as a well-intended, but ultimately unsuccessful approach to boosting the industry in Scotland. However, if one considers the assumptions that must have been made when deciding upon this relocation, it appears as though it is suggestive of a deeper problem. The example of *Waterloo Road* illustrates how the BBC decided to relocate both an existing drama and production company from England, rather than commission an indigenous company to produce content that was organically Scottish. While the relocation might have resulted in a bigger initial investment than a new programme might have, the move necessitated an awkward storyline that arguably led to

programme's demise. By choosing this route, the BBC displayed a lack of confidence in Scottish production and a scepticism regarding the UK-wide appeal of Scottish stories.

It was not solely BBC strategy that was criticized by interviewees. It was seen to be a major disadvantage that STV no longer provided any external commissions to the independent sector in Scotland, choosing instead to make their programmes in-house through STV Productions. Of course, it is easy to see why it is in STV's interest to operate in this way and perhaps one might also argue that the size of STV Productions, and the economies of scale it enjoys, has allowed it to provide a beneficial contribution to the industry. However, it is clear that recently STV Productions has not been committed to using its position to fill gaps in the market. Rather than focusing on producing programmes that smaller independent companies were struggling to win (such as high-quality drama), STV Productions has decided to focus on winning factual commissions. This strategy puts them in direct competition with many other independent producers in Scotland, for whom factual programming is the backbone of their business.

In sum, the findings to this side to the research suggest that there are several aspects with the current landscape that frustrate those amongst the industry, and are regarded as preventing an optimal environment for Scottish production to prosper. Similar to many of the historical issues outlined in chapter two, these frustrations largely reflect the challenges presented by being peripheral to the main network. However, despite resentments expressed about Scotland's relationship with the UK-wide network, the perceived advantages of being part of this larger framework are clearly recognised. The dominant narrative was that Scotland is not given enough access to the network commissions needed to engage in production on a much larger scale. From an industry perspective, the opportunity to access to the larger UK-wide network was deemed essential to the health of production in Scotland.

How well does the current broadcasting landscape serve the television audience in Scotland?

Results of the audience research suggest that for many the current broadcasting landscape is not satisfactorily serving the television audience in Scotland. While factual and Gaelic

content were generally praised, respondents noted a significant lack of representation within the drama and comedy genres.

News and current affairs proved to be the most contentious genre; with many respondents expressing their opinions on the debate surrounding bias in the run up to the 2014 independence referendum. It was also the genre with the strongest correlation between satisfaction levels and views on the constitution, with those who reported dissatisfaction (and disclosed how they voted) were more likely to be pro-independence. However opinions did not neatly align with political leanings, for instance, a significant number of those who called for change (36%) were pro-union.

Many of the respondents voiced what are now long-standing complaints about Scottish news coverage (particularly BBC news coverage). Namely, that since devolution, it is sometimes unclear whether news stories on the main bulletin are relevant to Scotland. In addition, there was also a perception that there is often too much repetition with the UK-wide news and Reporting Scotland. Interestingly, a significant appetite amongst respondents was found for an opt-out Scottish national news bulletin (a 'Scottish Six), a proposal that has been discussed on and off for nearly twenty years. These findings were supported by recent observations made by the BBC Audience Council for Scotland in their 2015-16 review (BBC Audience Council Scotland, 2016).

With regards to drama and comedy, by far the most cited reason for dissatisfaction was a perceived shortage of representation. In fact, a number of respondents claimed they struggled to think of a current Scottish drama or comedy at all. As a result of this, the survey found very little discussion, positive or negative, regarding the way in which Scotland was depicted on television. This is a significant observation as drama and comedy are considered important genres for the representation of national identity, whereby different facets of national culture can be explored (Birrell, 1997: Nelson, 2007: Castello, 2007). Indeed, much of the previous literature surrounding depictions of Scotland on screen has explored the tendency for stereotypical or 'mythical' representations to dominate. However, it appeared as though there simply wasn't enough content for respondents to comment one way or another on the nature of representation.

Findings showed a clear appetite for more Scottish content amongst the audience. However it also found that this appetite was largely for a certain type of content. As with the industry research, it was found that network programming was particularly coveted. For instance, respondents often referred to successful network crime drama *Taggart* and popular network comedy *Still Game* as examples of content they wished to see more of. Moreover, when praising BBC nature documentary *Hebrides*, several respondents noted that they enjoyed the notion that Scotland's natural beauty was being showcased to the rest of the UK.

In sum, it is clear that there was perceived to be a significant shortfall with regards to representational content. However, what is not clear is just how much would be enough for audiences to feel like they were well represented. There is clearly a demand for plenty of high-quality Scottish content within all genres, but this begs the question - just how realistic is this within broadcasting institutions that are tasked with serving the UK as a whole? Particularly as, with regards to population share, Scotland represents a fairly small part of this whole. Is there room within the UK-wide framework for there to be a wealth of high-quality Scottish content across numerous genres, while still adequately serving audiences of other nations and regions of the UK?

To what extent is there an appetite for a new television service for Scotland? What might such a service look like?

The final research question of this thesis was made particularly pertinent on the 22nd of February 2017, when the BBC announced they would be launching a new £30m television channel for Scotland. The channel will begin broadcasting in the autumn of 2018 and will run from 7 pm to midnight every evening. While the research was conducted prior to this announcement, it is important to now consider what conclusions can be drawn from the findings in light of this new development.

Generally speaking, it does appear that there is some demand amongst both the industry and the audience for the type of service proposed by the BBC. For instance, it was clear from the research that despite the numerous criticisms of the UK-wide networks, there was no demand to forgo these and replace institutions like BBC Scotland or STV. Bar a small number of respondents to the audience survey, there was no real support for the creation of

an institution such as the Scottish Broadcasting Service, as proposed by the SNP in their white paper on Scottish independence (The Scottish Government, 2013). This was perhaps unsurprising; as it was clear throughout the research that network programming was key from both an industry and audience perspective. It was unlikely; therefore, that many would be in favour of replacing the institutions that, however flawed, facilitate access to that network.

There was, however, a fairly strong appetite for the creation of a new service that would act as supplementary to the existing broadcasting landscape, as the new BBC channel proposes to do. Although this would not offer a direct solution to the specific complaints about a lack of network content, it was thought an extra layer to the landscape could have a positive impact on general areas of concern. For instance, it may help provide a more reliable source of work for smaller independent production companies, helping to sustain and grow the industry. Moreover, audience members hoped that an additional service would increase representational portrayal. In light of these findings, it appears as though the new BBC channel will be a much-welcomed development.

With regards to speculating how this television service would be funded, or what form it might take, most industry players predicted that the scarcity of public funds would mean that any such venture would likely be small in scale. However, many argued that an attractive distribution method for such a service would be the creation of an online platform. Without the need to fill a schedule, it was thought an on-demand online service would be able to concentrate on quality rather than quantity of content. Also, many also alluded to evidence that online television consumption is steadily growing amongst audiences, and how this likely to continue in the future (OFCOM, 2016). These findings raise questions about whether the proposed new channel for Scotland offers a contemporary enough solution given the well-documented changes in audience behaviour.

However, when one considers BBC Alba as a case study, it is clear that an additional service in the form of a linear channel can still provide significant benefits to the broadcasting landscape in Scotland. With a modest annual budget of £23 million (just £7m less than the budget for the new BBC channel for Scotland), BBC Alba has had an extremely positive impact on the industry since its launch in 2008. PACT (the Producers' Alliance for Cinema and Television) estimated that BBC Alba accounted for over 50% of all Scottish

commissions by the hour (PACT, 2010). In 2015/16 £9.9 million was spent generating content from 26 different production companies. Of that, £8.6m was spent on the independent production sector, much of it alongside measures intended to foster the development of talent, skills and the Gaelic language. (MG Alba Annual Report, 2016, p.12).

It is much harder to speculate about the impact of the new channel on the audience. Findings showed there was certainly a strong appetite for an additional service amongst the audience (only 20% reported not to be interested.) However, there was perhaps less pragmatism with regards to funding and scale. Respondents commented that not only would they hope to see a wide variety of different genres on a new channel, they would also like to see programmes representing different regions in Scotland along with the issues facing different aspects of Scottish life. In order to provide such a comprehensive service a fairly large budget would be required, far more than the £30m assigned to the new BBC channel. This raises questions about whether there is any real appetite for such a service, or whether the demand was ultimately for an additional television service of an unrealistic scale.

8.2 Peripherality, Politics and People

When one considers the picture of television broadcasting in Scotland as whole, it becomes clear that there are a number of identifiable themes that drive the debate. Firstly, if broadcasting is a medium which allows for the construction of a culture-in-common, allowing audiences to 'imagine' or reflect upon their national sphere, then it appears as though the UK-wide broadcasting framework does not provide a satisfactory outlet for Scotland. Historically, it has been argued that marginalization and a lack of representation has led to the propagation of subversive 'mythical' stereotypes through television (Blaikie, 2010; Caughie, 1982; Edensor, 1997; Haider, 2002; Nash, 2007; Petrie, 2010; Scullion, 2003). This research, however, found that the shortage of representational output led to a complete lack of discussion regarding the nature of Scottish portrayal, with the emphasis entirely placed on a demand for more. As argued by Hibberd (2007), "any representation is, after all, a starting point for a discussion over what national identity is" (pg.121).

Of course, the notion that there is a singular Scottish national identity to be projected is problematic. For Scotland, the situation is particularly complex as Scottish people differ as to which identity spheres they claim, with the ongoing constitutional debate amplifying and enlivening these differences in affiliations. For instance, recent research suggests that 62% identify as Scottish only, 8% identify as British only, and 18% identify as both (Simpson and Smith, 2014, p.3). Moreover, it is also clear that there is pluralism in culture, nationalism, and citizenship throughout the UK and it has been argued that tensions between these different interpretations of national identity both contributed to and were intensified by the Brexit vote (Ashcroft and Bevir, 2016).

These differences in identity claims and polarizing positions on the constitution do have an impact on how individuals consider issues pertaining to television in Scotland to a certain extent. However, as was explored by chapter two, this has often led to something of a policy stalemate, whereby any proposals for intervention or changing the status quo were tarred with the brush of nationalism and dismissed. This was most evident throughout the 'Scottish six' debate (Schlesinger, 2005, p.219). This research provides further evidence to suggest that framing the debate purely in either unionist or nationalist terms is an unhelpful oversimplification.

Although findings did find a slight positive correlation between views on independence and opinions on television in Scotland, it was clear that representational portrayal was an issue that transcended constitutional debate. A significant number of pro-Union respondents called for more Scottish output, argued for a main Scottish news bulletin and declared an interest in a new television service for Scotland. Whilst it is hard to imagine a time where there won't be passionate disagreement over Scotland's constitutional future, television remains an important medium whereby different notions what it means to be Scottish can be explored. The desire for more representation of Scotland's national sphere is felt from both political camps.

Another prominent theme throughout this thesis has been the emphasis placed on scale, and the importance attributed to the growth of the independent sector. Chapter three explored the limitations and challenges associated with the scale of broadcasting in small countries. For instance, Lowe and Nissen (2011) explore how high production costs and poor economies of scale generally produce unfavourable consequences for small countries. Robert G. Picard

(2011) surmises that in terms of provision one should expect that "countries with smaller populations will on average be expected to broadcast fewer hours, produce less original programming and avoid expensive genres" (Picard, 2011, p.49).

It was clear that those amongst the industry were well aware of the advantages of being part of a larger market. This was precisely why when asked about the creation of a new television service they were vehemently against the idea of Scotland divorcing itself from the broadcasting ecology of the UK. Industry players were adamant that the key to a successful television industry in Scotland was an increase in network commissions. They argued that this was necessary to increase the size of indies operating in Scotland and establish a production base capable of retaining talent. This emphasis on scale is not new, in 2010 Scottish Enterprise demonstrated the importance they placed on the size of indies by adopting a target to increase the number of production companies with a turnover of £10 million or more with a substantive base in Scotland from 1 to 6 by 2013 (Scottish Enterprise, 2010, p.5).

While it is understandable that producers and production companies would have a vested interest in expansion, it is important to question the assumption that big is necessarily better. Larger indies or 'super-indies' are not typically singular companies that have achieved steady and organic growth. They are generally formed from the merger of different smaller companies, and it is this consolidation, which allows them to acquire the scale that is necessary to compete on the international market successfully. It has been observed that subsequently their content catalogues, which combine material from several production companies, tend to begin to interest large international buyers (Chalaby, 2010). A clear example of this is IWC Media, one of Scotland's biggest indies, which was the product of a 2004 merger between Ideal World and Wark Clements. Just a year later the company was bought by international company RDF Media (now Zodiak) for £12m.

An increase in super-indies is arguably a concern if ownership of these companies is ultimately transferred outside Scotland and the UK. As Paterson (2017) highlights, there is a danger that over time this may result in a production sector dependent on the whim of foreign conglomerates whose focus is on making content for global audiences rather than domestic markets (p.20). Therefore, whilst drives to increase the scale of indies in Scotland has the potential to enhance production levels, there is also the risk that take-overs will lead

to a reduction in the expression of national culture. This would certainly be to the detriment of audiences in Scotland, particularly as this research found a significant demand for more representational portrayal.

Despite these potentially problematic outcomes for Scottish content, producers stand to profit handsomely from drives to increase the scale of the independent sector in Scotland. They therefore exhibit rent-seeking behaviour by lobbying for policies to help bolster the industry with larger production companies. As noted by McChesney (2000), the extent to which policymakers can act autonomously of industry interests is constrained by the influence of powerful lobbies that control the debate (McChesney, 2000, p.63). Indeed, producers stand out as a consistently powerful voice in the debate about Scottish broadcasting. This is particularly apparent through trade association PACT, who regularly submit responses to reports, contribute to committees and campaign on behalf of members for the best economic, regulatory and legislative environment for the growth of production companies.

When it comes to the balance of power in Scottish broadcasting policy, it is clear that some stakeholders are more dominant than others. As argued by Davis (2003) and Freedman (2008), the pluralist notion that media policymaking involves democratic discussions amongst a dispersed policy network is in need of critical analysis. There is an important distinction to be made between the size of the pools which surround decision-making processes (inhabited by civil servants, private and public lobbyists, regulators, politicians, academics and the public) and the core individuals who may choose to swim in these pools but ultimately have their own interests. (Freedman, 2008, p. 87) Indeed, when one considers the policy arena for communications in Scotland, despite a large number of stakeholders, decisions tend to be made by a small, powerful elite who pursue their own agenda.

Perhaps the starkest example of this is the lengthy debate surrounding the creation of a Scottish news at six. As detailed by chapter two, after the first proposal was made in 1998, John Birt (Director General of the BBC at the time) and a collection of senior politicians in London dismissed the idea due to their concern that it would have unintended consequences for the UK. Opposed to Scottish independence, these key decision makers rejected the proposal as they were concerned that the removal of a single common UK news would encourage separatist tendencies (Birt, 2002, p.484). This example also highlights how as a

stateless nation, the politics of broadcasting policy making in Scotland is particularly complex. As broadcasting is a reserved matter, it is ultimately UK level decision makers who have the final say.

This lack of autonomy often means that decision makers north of the border are unable to shape broadcasting policy in Scotland effectively. This happens in direct conflicts, such as with the resistance to a Scottish news at six, but also in a more indirect manner. Illustrative of this is how proposals for a Scottish Digital Network and the DCMS's Local TV plans, coincided. As detailed earlier in the thesis, plans for an additional television service for Scotland were first made in 2008 when the Scottish Broadcasting Commissions recommended the creation of a £75 million public service broadcaster for Scotland, the Scottish Digital Network. (Scottish Broadcasting Commission, 2008) In the years following this recommendation, the goal of launching a new public service broadcaster in Scotland became firmly entrenched in the Scottish Government's plans. However, in 2011 then Culture Secretary Jeremy Hunt announced plans to launch Local TV services across the UK. Despite these proposals having different remits, and one not necessarily negating the purpose of the other, the DCMS's local television initiative cut across conceptions of television's future in Scotland (Schlesinger, 2011). Ultimately, it was the Local TV that came to fruition, and the broadcasting landscape in Scotland was shaped by the UK government's agenda.

The findings of this research suggest that this turn of events has not produced favourable consequences for the audience. Local TV was a notable absence in responses to the audience research. Whilst there was no specific question on the survey referring to STV Edinburgh or STV Glasgow, it was fairly remarkable that those living in the central belt made no mention of the channels when asked about content more generally. In particular, it was noteworthy that the 10pm news bulletin that was broadcast across both channels was not given a single mention when respondents were asked about Scottish news and current affairs. This is despite the bulletin being the most viewed programme offered by either station (BBC News, 2014). Whilst Local TV appears to have had little impact on Scottish audiences, a fairly strong appetite was recorded for the creation of a new Scottish service. This suggests that when plans for Local TV cut across proposals for a Scottish Digital Network, this was to the detriment of audiences in Scotland.

Indeed, when one considers the different stakeholders involved in debates surrounding Scottish television broadcasting policy, it is clear that the interest group who appears to possess the least amount of power is the Scottish television audience. Little effort has been made to collect data about public opinion. In fact, this research represents the only notable audience surveying undertaken since the Scottish Broadcasting Commission in 2007. Apart from small-scale consultations on BBC output for Audience Council reviews, the audience is largely uninvolved in discussions about the issues affecting Scottish television. The public's peripheral role in influencing decisions is a phenomenon recognized within recent literature on media policy. As Freedman (2008) notes, there are few opportunities for individual members of the public to come into contact with and actively shape the core policymaking processes.

The discussions surrounding the 'lift and shift' policy and the relocation of *Waterloo Road,* which feature heavily in this research, demonstrate the way in which audiences tend to get sidelined from debates about television in Scotland. Complaints about the effectiveness of 'lift and shift' were almost all focused on how this method of meeting targets was damaging the sustainability of the Scottish television industry, and the opportunities for indigenous producers to obtain commissions. There was very little discussion about how this approach had affected audiences. However, findings to this research suggest that this is perhaps the most concerning outcome. Namely that as audiences do not even seem to have registered that *Waterloo Road* had become a Scottish programme, the move did nothing to address the perception that there was a significant deficit in Scottish drama, and representational output more generally.

8.3 Limitations of the research

The principal limitations of this research, as discussed in Chapter Four, spring from the methodology. More specifically, the scale of the field research in relation to the scope of the investigation.

For instance, with regards to the industry side to the research, there are limitations to the extent to which interviewees can be said to speak for the industry as a whole. Interviewees were predominantly made up of senior broadcasting executives and senior producers (i.e.

Managing Directors or CEOs) however, there are obviously many others who have a stake in the television broadcasting industry. Due to time restraints, it was not within the realms of the possible to interview a wide range of writers, actors, and technicians, etc. and perhaps their experiences and opinions would be different. The logic behind focusing on more senior individuals was an assumption that given the circumstances this would be the best way to achieve an extensive investigation of the industry. It was anticipated that possessing a comprehensive understanding of the industry as a whole was an important part of their job.

The online survey method of gathering audience data also presents some limitations, as explored in more detail in chapter four. Using a web-based survey had a significant advantage in that it was possible to collect a relatively large sample in the most cost effective and time efficient way possible. In order to gain enough data to determine trends in audience opinion, this was considered the most appropriate way to conduct the research. However, this meant that the audience sample was restricted to those with online access, which is potentially problematic. Online populations can differ in significant ways to those not online, and with regards to the television audience, this is likely to be the case. In order to help combat this limitation, a critical awareness of the potential bias was adopted throughout the process of analysis.

Another main issue derives from the social nature of the research process and the potential existence of researcher bias. As well as a researcher, I am also a member of the Scottish television audience and posses my own association with the cultural identities discussed. The risk is that my opinions, assumptions might have structured how I approached, conducted and interpreted my research material. Similarly, we don't know what assumptions, motivations, and understandings the industry subjects brought to the interview situation. The response to this has been to aim for a critical consciousness of all the potential drawbacks, what Alveson (2011) calls a 'reflexive pragmatism' throughout; and to make my methodology and analysis open and transparent.

8.4 Possibilities for further research

There are several possible lines of research that flow from this investigation. Due to the breadth in scope of the enquiry, several issues have been identified which would benefit from being researched further and in more detail.

For example, this research found that there is said to be a prejudice against Scottish content amongst some commissioners. However, as acknowledged several times throughout this thesis, this is just one side of the story. It would be useful to conduct an institutional analysis to explore structures and mechanisms behind commissioning; in order to further determine the extent to which apparent resistance to Scottish stories exists. For instance, it would be interesting to observe process involved in which network commissioners come to decisions, particularly with regards to content from the nations and regions.

Another opportunity for institutional analysis would be to further research the roles of Scottish Enterprise and Creative Scotland with regards to their strategies for improving television production. Due to access and time restraints, this research heard only from producers who were frustrated that these organizations did not do enough to aid the television industry in Scotland. It would be useful to gain insight into the perspective of these quangos and explore whether they might potentially be more proactive, and in what way.

The new BBC channel for Scotland also provides ample scope for further research. This investigation into the appetite for a new television service was exploratory in nature, whereas soon there will be a specific entity to investigate. It will be interesting to investigate the impact of the new channel on both the industry and audience and to explore how they relate to the findings of this research.

8.5 Concluding Remarks

In summary, this research has uncovered many frustrations about the way in which the current broadcasting landscape serves Scotland. Findings show that there is a perception that there is currently not enough opportunity to sustain a prosperous production base or to produce enough content to portray a fully rounded representation of Scotland on television. This is largely down to a shortfall in output, particularly network output, which has been

shown to provide a significant boost to the industry, and to provide audiences with the high-budget content they prefer.

Many of the issues contributing to this shortage of content are relatively short-term issues that could quite conceivably be addressed. For instance, the BBC's 'lift and shift' approach to commissioning in Scotland, the lack of effective drama strategy from STV and an absence of a clear policy for enhancing television production from Creative Scotland and Scottish Enterprise. However, findings also suggest that there are also more deep-rooted structural issues with how Scotland fits within the UK-wide framework that presents barriers for creating the much-coveted network content.

For instance, the fact remains that Scotland represents only 8.3% of the population of the UK as a whole, and there is only so much these institutions can justifiably do without under serving other nations and regions of the UK. There presumably cannot ever be an abundance of high-value network programming across all genres from Scotland to reflect the broad complexities of Scottish life. Therefore representing all that is Scotland within such a tiny share of a communicative space is perhaps always going to be problematic.

With regards to the potential for a new service television service for Scotland to fill this deficit, some key observations were made. Primarily, the likely small-scale nature of such a venture makes it unlikely that it would offer a solution to issues raised about the lack of high value, network content. That being said, a new additional service could have potential benefits for Scotland such as providing work for smaller independents and provide an increase representational portrayal for audiences. How the quantity or quality of this output will be received by the Scottish public remains to be seen. It will, therefore, be incredibly interesting to see what impact the new BBC channel for Scotland has after its launch in 2018.

Appendices

Appendix 1 – List of Interviewees

Name	Title	Location	Date
John Archer	Founder of Hopscotch Films	401 Govan Rd, Glasgow, Glasgow Metropolitan Area G51 2QJ	27th October 2014
Paul Tucker	Company Director at Monkey Puzzle Productions	Interviewees home address	31st October 2014
Maurice Smith	CEO of TVI Vision	TVI Vision Limited 107 Bell Street Glasgow G4 0TQ	11th November 2014
Barbara Orton	Founder of True TV and Film	Telephone interview	20th November 2014
Anon	Founder and owner of a small production company based in Glasgow.	Tinderbox 189 Byres Rd, Glasgow Metropolitan Area G12 8TS	10th December 2014
Margaret Smith	Production Executive at Shed Media Scotland	Telephone Interview	22nd December 2014
Ian Small	Head of Public Policy and Corporate Affairs at BBC Scotland	Pacific Quay, Pacific Drive, Glasgow, G51 1DA	13th January 2015
Alan Clements	Director of content at STV Productions	STV, Pacific Quay, Glasgow, G51 1PQ	12th February 2015
Anon	Founder and owner of a small-medium sized production company based in Glasgow.	Interviewees office	19th February 2015
Jane Muirhead	Jane Muirhead,	The Hub, Pacific	11th March, 2015

	Managing Director of Raise the Roof and PACT's representative for Scotland	Quay, Glasgow Metropolitan Area G51 1EA	
Anon	Operations, BBC News	Email Interview	17th March, 2015.
Murray Alford	Production Runner on Waterloo Road	Email Interview	18th March, 2015
Anon	Focus puller on Waterloo Road	Email Interview	31st March, 2015
Anon	Founder and owner of a small production company based in Glasgow.	Tinderbox 189 Byres Rd, Glasgow Metropolitan Area G12 8TS	31st March, 2015
John White	Chief Operating Officer of the Space	Telephone Interview	18th October, 2016

Appendix 2 – List of structured questions

This represents the basic framework of structured questions asked to interviewees. These very general questions were supplemented in accordance with the role and expertise of each individual participant, and in reaction to responses during the interviewees themselves.

    1.) What are the strengths of the television broadcasting landscape in Scotland?

    2.) What are the challenges faced by the television broadcasting landscape in Scotland?

    3.) How does the current landscape compare with the past?

    4.) Do you think the landscape would benefit from a new television service for Scotland?

    5.) If so, what type of service might be beneficial, or viable?

Appendices 3 – Print screen of online survey as seen by respondents

Attitudes to Television Broadcasting in Scotland

0%

1. Consent

Page 1 of 4

You are being invited to participate in a PhD research study investigating how the current broadcasting landscape in Scotland serves the audience. This study is being done by Nicola Johnson from the University of Glasgow. The purpose of this research study is to determine the attitudes towards television broadcasting in Scotland amongst the audience, and will take you approximately 15 minutes to complete. Your participation in this study is entirely voluntary and you can withdraw at any time. You are free to omit any question. Consent to the use of the data you provide is obtained by completion of the survey. All information will remain confidential. Any questions you may have about this research can be sent to n.johnson.1@research.gla.ac.uk.

Next Page

Powered by **SmartSurvey**

Attitudes to Television Broadcasting in Scotland

25%

2. About You

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1. What is your age?

○ 18 - 30 years old
○ 30 - 50 years old
○ 50 - 75 years old
○ 75 years or older

2. What is your gender?

○ Female
○ Male
○ Non-Binary
○ Prefer not to say
○ Prefer to self describe

3. Which best describes the region of Scotland you currently live in?

- ○ Dumfries & Galloway and the Scottish Borders
- ○ Glasgow and the West
- ○ Edinburgh, Lothian and Fife
- ○ Tayside and Central
- ○ Aberdeenshire
- ○ Highlands and Islands

4. How much television content do you consume per week on average? (Please include the use of both linear television channels and online on demand services)

- ○ 0 - 10 hours
- ○ 10 - 20 hours
- ○ More than 20 hours

5. Which one of these statements best describes your viewing habits?

- ○ I spend most of my viewing time watching public service broadcasters (BBC channels, STV, Channel 4 and Channel 5) either on the television or online.
- ○ I watch a combination of public service broadcasters, along with other satellite channels and programmes on subscription services such as Netflix and Amazon Prime.
- ○ I don't often watch public service broadcasters.
- ○ Other (please specify):

6. Which way did you vote in the Independence Referendum in 2014?

- ○ Pro Independence
- ○ Pro Union
- ○ I did not vote
- ○ I prefer not to say

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Attitudes to Television Broadcasting in Scotland

50%
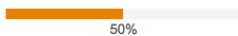
3. Scotland on Television

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7. How satisfied are you with Scottish drama on television?

○ Very Dissatisfied
○ Dissatisfied
○ Neutral
○ Satisfied
○ Very Satisfied

Comments:

8. How satisfied are you with Scottish factual programmes on television?

○ Very Dissatisfied
○ Dissatisfied
○ Neutral
○ Satisfied
○ Very Satisfied

Comments:

9. How satisfied are you with Scottish comedy on television?

○ Very Dissatisfied
○ Dissatisfied
○ Neutral
○ Satisfied
○ Very Satisfied

Comments:

10. How satisfied are you with how Scotland is reported on news and current affairs programmes?

○ Very Dissatisfied
○ Dissatisfied
○ Neutral
○ Satisfied
○ Very Satisfied

11. More specifically, how satisfied are you with how your region of Scotland is covered by news and current affairs programmes?

○ Very Dissatisfied
○ Dissatisfied
○ Neutral
○ Satisfied
○ Very Satisfied

12. Please comment on what, if anything, you would change about current affairs and news coverage in Scotland.

13. In general, how do you feel about the way Scotland is represented on television?

○ Very Dissatisfied
○ Dissatisfied
○ Neutral
○ Satisfied
○ Very Satisfied

Comments:

14. If you can, please comment on the last programme you watched that you felt represented Scotland in a satisfactory way. Please include what the programme was called, and what pleased you about its depiction of Scotland (i.e the landscapes, personalities, particular social issues etc)

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Attitudes to Television Broadcasting in Scotland

75%

4. A new Scottish service?

15. Which one of these statements best describes how you feel about television broadcasting in Scotland today?

○ I am more satisfied than I used to be.

○ I am less satisfied than I used to be.

○ I am no more or less satisfied than I used to be.

Comments:

16. Would you be interested in watching a new broadcasting service dedicated to Scotland and it's audiences?

○ Yes

○ No

○ I don't know

17. If you answered yes to the previous question, please comment on the sort of programming you would like to see on a new Scottish service.

18. Would you be interested if such a service was online only?

○ Yes

○ No

○ I don't know

Previous Page   Finish Survey

Appendix 4 – Consent to the use of data form

CONSENT TO THE USE OF DATA
University of Glasgow, College of Arts Research Ethics Committee

I understand that Nicola Johnson is collecting data in the form of taped interviews for use in an academic research project at the University of Glasgow.

Working title: **Broadcasting in Scotland, 2014 and Beyond: investigating the perceived appetite for and viability of a dedicated Scottish television service**

Please see attached document for more information.

I give my consent to the use of data for this purpose on the understanding that:

- ♣ All names and other material likely to identify individuals will be anonymised in accordance with the wishes of the participants.
- ♣ The material will be kept in secure storage at all times.
- ♣ The material will be retained in secure storage for use in future academic research
- ♣ The material may be used in future publications, both print and online.

Signed by the contributor:_____ Date:

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