

**BBC Scotland Submission to the
Free-to-Air Events Review Advisory Panel**

Further to the appearance before the Advisory Panel by BBC Scotland on 18 June 2009, the attached paper offers information on BBC and BBC Scotland broadcast output which serves to meet the tastes and demands for live sport among UK and, in particular, Scottish audiences.

In providing detailed statistics on UK and Scotland audience viewing patterns across 2008/09, the paper sets out to offer information on and around specific issues and questions raised by the Advisory Panel during the 18 June session.

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1. Background

(i) Scottish viewers

Scotland accounts for around 8.6% of the UK population, around 5.1m people. The population is slightly older than the UK average, has a higher percentage of C2DEs (52% v 45%) and a bigger rural population (16% v 12%).

The Scots have a strong sense of national identity: responders to the recent ICM poll for BBC Scotland ¹(June 2009) indicate that 26% felt themselves to be Scottish, not British, nearly one third felt more Scottish than British and 30% opted for the description 'equally British and Scottish'.

Favourite genres among Scottish television viewers are drama, soaps and sport. In particular, the appetite among Scottish audiences for football, and in particular live football, delivered across broadcast platforms, remains strong.

2. BBC, BBC Scotland and Sport

(i) Network

Scottish viewers, like their counterparts across the UK, are able to enjoy a rich and varied offering of live sport on BBC network television channels and, increasingly, on BBC HD, via BBCi, Red Button selection and the iPlayer catch-up service.

Live coverage of major events such as the Olympics, the World Cup, the Commonwealth Games, the RBS Six Nations Championship and Wimbledon attract significant audiences in Scotland.

Tennis

Most recently, in the run-up to Wimbledon 2009, Andy Murray's victory at the Aegon Championships at Queen's, where he became the first Briton to lift the trophy in 71 years, drew large audiences relative to slot. The final against James Blake saw audiences peak at 2.6m viewers with an average 500,000 more watching the game than did so last year when Rafael Nadal beat Novak Djokovic.

At this year's Wimbledon finals, interest in Murray has been intense. His first round match over-performed in Scotland with an average share of 26% (UK wide – 20%) and the five set evening marathon against Stanislas Wawrinka on Monday 29 June 2009 drew, at its peak, 11.8m UK viewers, an impressive 53.9% share of the UK audience. In Scotland, it attracted an average of 935,000 viewers (48% share), peaking at 1.2m (64% share).

The afternoon quarter final against Spain's Juan Carlos Ferrero, on Wednesday 1 July, attracted an average 3.6m viewers across the piece (37.9% share), peaking at 5.6m (47.2%). In Scotland, viewing figures averaged 350,000, 41.2% share, peaking at 510,000 and 49% share.

¹ ICM poll for BBC Scotland on issues of devolution and the Scottish Parliament(1010 people interviewed, 22-24 June 2009)

The afternoon semi-final against Andy Roddick, on July 3, drew an average UK audience of 6.3m, 48% share (10m at peak, 54% share: in Scotland, 730,000 tuned in, 52% audience share (1.2m at peak, 60%). Although Murray was unsuccessful in his attempt to reach the final, viewing figures across the UK and Scotland held up for Sunday's (5 July) final, with 7.1m UK viewers, 50% share (at peak, 11.1m and 57% share) and, in Scotland, 620,000 viewers, 49% share (at peak, 1 million, 59% share).

Football: from network

There is a similar appetite for live football in Scotland. The finals of the European Championships 2008 performed particularly well with a UK average (on BBC One, BBC Two and ITV1) of five million viewers (25% share) for live matches. However Scotland out-performed the network for every match, with an average 580,000 viewers and 32% share – 7% above UK average and that despite the fact that none of the four home nations featured in the finals. Live coverage reached two thirds (65%) of the population in Scotland.

Increasingly, BBC Three has also brought football to UK audiences, with highlights packages from the 2008 Africa Cup of Nations and live games from the 2009 FIFA Confederations Cup proving popular viewer choices (the USA v Brazil final of the Confederations Cup, on 28 June 2009, attracted an average UK audience of 998,000, 5.1% share, the highest audience that day on UK non-terrestrial television).

The Premiership highlights programmes on network - BBC One's Saturday evening *Match of the Day* (rpt Sunday mornings) – is as popular in Scotland as elsewhere (across the 2008/09 season the average UK audience was 3.8m and an average share of 23%: in Scotland, the average audience was 300,000 and a share of 21%). MOTD2, on Sunday evenings, also performs in Scotland on a par with network.

Formula One

UK-wide, live coverage on race day has to date attracted average audiences of 3.6m and 41% share. Coverage tends to underperform in Scotland where so far it averages 270,000 viewers and 33% share (however its performance on BBC is ahead of ITV's which last year averaged 220,000 and 21% in Scotland, 3.7m and 30% UK-wide).

(ii) BBC Scotland: general

For its part, BBC Scotland aims each year to complement the network sports provision, providing audiences in Scotland with a wide range of sports coverage on television, radio and online. Core elements of this output include football and rugby (eg the Scotland v Canada rugby international, on BBC One Scotland in November 2008, drew 350,000 viewers, 20% audience share) as well as minority interest sports such as shinty, mountain biking, bowls and the Scottish Rally Championship.

A key component within the BBC Scotland mix is Scottish football, with live coverage and highlights packages of the two domestic cup competitions for which we hold rights (CIS Cup and Scottish Cup), spot-bought UEFA Cup qualifiers and international games, as well as, where possible, the qualifying rounds of the UEFA Champions League.

To feed a clearly identified appetite for sports coverage, live and highlights output is complemented by magazine programmes such as the recently introduced *Sport Monthly*, covering sports as diverse as Formula One, basketball, swimming and hammer-throwing, and, in any one year, a number of one-off factual documentaries are broadcast (over the past 12 months these have included *Gordon Smith, from Player to Power*; *Scott Harrison - On The Ropes* and *Football Far East: Beyond Nakamura*).

(iii) BBC Scotland Television

The live football rights market in Scotland differs from that of the rest of the UK: where ITV has been a strong free-to-air commercial player in football rights in recent years, STV chose not to engage with the market for live rights and its long-running highlights programme, *Scotsport*, aired for the last time at the end of season 2007/08.

Live football

In season 2008/09, BBC Scotland covered the following games live on television:

Competition	Date	Game	Scotland Audience	Scotland Share
Scottish Cup	13/01/2009	St Johnstone v Rangers	590,000	26%
	08/03/2009	Rangers v Hamilton	446,000	32%
	30/05/2009	Final: Rangers v Falkirk	303,000	39%
CIS Cup	24/09/2008	Rangers v Partick Thistle	474,000	25.5%
	29/10/2008	Kilmarnock v Celtic	499,000	23.0%
	28/01/2009	Rangers v Falkirk	525,000	25%
	15/03/2009	Final: Celtic v Rangers	798,000	51%
UEFA Champions League Qualifier	05/08/2008	FBK Kaunas v Rangers	479,000	28%
UEFA Cup Qualifying rounds	26/08/2008	FCNordsjaellen v Queen of the South	201,000	11%
	18/09/2008	AS Nancy-Lorraine v Motherwell	235,000	13%
	02/10/2008	Motherwell v AS Nancy	306,000	16%

The 11 editions of *Sportscene Live*, broadcast across the season, attracted an average audience of 540,000 and 30% share for those broadcast on BBC One Scotland and 340,000, 21% audience share for those broadcast on BBC Two Scotland.

The last Scotland international to be broadcast live on BBC Scotland was on 17 October 2007 when Scotland played Georgia in the Euro 2008 qualifiers. It was carried live on BBC Two Scotland where it averaged 810,000 viewers and 41% and was the channel's top-performing programme of the year in Scotland.

Highlights

In addition, our television football highlights programme, *Sportscene*, was on air 46 times between August 2008 and May 2009 (BBC One Scotland). It attracted an average audience of 195,000 and an average share of 14% (one edition broadcast on BBC Two Scotland – 205,000, 14% share). The Saturday *Sportscene Results* programme aired 33 times on BBC One Scotland, seven on BBC Two Scotland, to average audiences of 235,000, 19% share (on One) and 120,000, 9% share (on Two).

BBC Alba

BBC ALBA also offers an 'as live' SPL game each Saturday evening, rolled back five hours in transmission to 8.00PM. This is offered on a third or fourth choice basis, after Sky, Setanta, BT Vision have chosen live games for coverage. TNS System 3 data is used to monitor channel performance (though this does not extend down to individual programme data). The TNS data indicates the current weekly reach of the channel to be 200,000 and research responses show that 'sport' ranks top of the most popular programme genres, particularly among 'English only' speaking audiences who cross over to ALBA to view.

(iv) BBC Scotland Radio and Online

News and sport remain the main drivers of traffic to BBC Radio Scotland. In direct response to audience demand, BBC Scotland continues to offer live coverage of every Scottish Premier League game via its 92.6-94.7 FM and 810 MW frequencies, in addition to listener access via BBC Radio nan Gaidheal (103.5-104.9) and online. This coverage forms part of a five year deal with the SPL (2006 – 2010), which includes broadband clips of every game, made available to viewers via the BBC Scotland website.

The Saturday afternoon Radio Scotland *Sportsound* programme, preceded by the topical football-focussed *Off The Ball*, maintain Radio Scotland's robust performance on Saturday afternoons, with listening audiences in the first quarter of 2009 peaking at 33% share.²

In the same quarter (January – March 2009) there were recorded 82,000 requests, daily, for downloads of BBC Radio Scotland Scottish Football podcasts,³ up from 64,000 the previous quarter (the March 2009 figure alone was 23,000 UK downloads, making it the top performing BBC Scotland podcast that month).

² RAJAR results for BBC Radio Scotland, Quarter 1 2009

³ BBC Scotland Server Logs

3. External commentary on Scottish internationals, free-to-air broadcasting (and BBC Scotland): selected extracts, 2007 to date

(i) Scottish Parliament Public Petitions Committee: January 2007

Petition Number: PE 1026

Main Petitioner: Stuart McMillan

Subject: Calls for the Parliament to urge the Scottish Executive to exert all its political powers upon BBC Scotland to ensure the corporation provide television coverage of every Scotland National Football Team match and notes the sporting and cultural importance of the national team which should ensure that this issue is highlighted every time the Scottish Executive meet with BBC Scotland.

(ii) Salmond hits out over TV football: 27 February 2008

BBC News Report

“Alex Salmond has criticised broadcasters such as BBC Scotland and STV for not showing Scotland’s international football matches live.

In a hard-hitting speech, the First Minister said Scotland's qualifying campaign for the 2010 World Cup would not be shown on terrestrial channels. He told the Royal Television Society in Glasgow that England's home matches would be shown on the BBC in Scotland. He said this was an "extraordinary and frankly unacceptable" position. Mr Salmond said: "Let me simply say that when it comes to getting the national team back onto the screens of all our citizens - it can be done and it should be done."

He did not specify what action he had in mind but aides said the comments were aimed at broadcasters and the Westminster Government.

(iii) Public Attitudes to Broadcasting in Scotland: research by Scottish Government on behalf of Scottish Broadcasting Commission: May 2008

Key findings

71% of males claimed to be interested, compared to 37% of females. All respondents were asked to agree or disagree (using a five point rating scale) with the following statement: “Competitive matches played by Scotland’s national football team should be shown live on free terrestrial television rather than only on Pay TV channels.”

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

(iv) **Scottish Parliamentary Motion: May 2008**

Keith Brown (Ochil) (SNP): “The National Game on Terrestrial Television: That the Parliament notes the new findings of the Scottish Broadcasting Commission that there is an overwhelming 96% public support for Scotland’s international football matches being shown on free-to-air terrestrial television from among those interested in football and even 70% support from those who would not watch it; recognises that only one-third of households have access to subscription TV services; supports the right of the entire Scottish public to see the national team playing the national sport, and reiterates calls for this to take place, either through successful and wholehearted bidding by terrestrial broadcasters or through the exercise of government powers to reserve Scotland matches exclusively for terrestrial television.”

Supported by 19 signatories

(v) **Public e-Petition to Prime Minister: September 2008**

“We, the undersigned, petition the Prime Minister to enforce that all competitive Scottish national football games should be shown on a ‘free to air’ broadcaster instead of the rights being sold to Digital Television companies such as BSkyB.”

Details of Petition:

“These events are of national importance and should be available for the entire nation to enjoy. As it stands, people in Scotland require a subscription to Sky Sports in order to watch their national football side play their home World Cup and European Championship qualifying matches. This is unacceptable - why should anyone have to pay in order to watch their national side live on TV? The FA in England, quite rightly, award their contract to a ‘free-to-air’ broadcaster, but the SFA, would appear to have financial matters at best interest instead of the Scottish population. Therefore they should be bound by law to award their live-game contract to a terrestrial broadcaster. As things currently stand, a staggering 1 in 4 households cannot watch the national football team in international competition. By ensuring Scottish international games are shown on a ‘free to air’ broadcaster it would mean a great deal for a proud Scottish nation.”

UK Government response

“Thank you for taking the time and trouble to sign this e-petition. The Government wants to make sure that key sporting events are made available to as many television viewers as possible, particularly those who cannot afford the extra cost of subscription television. This is why some events are protected by law as “listed events”. A listed event is one which is generally felt to have special national resonance. It should contain an element which serves to unite the nation, a shared point on the national calendar, not solely of interest to those who follow the sport in question.

The law guarantees the availability of rights to live coverage of listed events to broadcasters who meet certain set criteria, i.e. those providing channels which are received by at least 95% of the UK population and at no additional cost to

the viewer than the television licence fee. Channels currently meeting these criteria (qualifying broadcasters) are BBC1, BBC2, ITV1, Channel 4 and Five.

The list is split into two groups, A and B. Full live coverage of Group A events is protected by ensuring that, where offered at all, broadcasting rights must be made available to qualifying broadcasters. Exclusive live coverage of Group B events is permitted on channels which are received by less than 95% of the UK population or which require payment of a subscription (non-qualifying broadcasters) provided that adequate arrangements are made, where sought, for delayed coverage by qualifying broadcasters.

As far as Scottish football coverage is concerned, the Scottish Football Association owns the rights to Scotland Home Internationals and they are free to sell their rights to whomever they please, subject to the requirements of competition law, and broadcasters are free to show events without restrictions, subject to listed events legislation. The finals tournaments of the World Cup and European Championship are listed as group A events (along with the Scottish FA Cup final), whereas friendly games and qualifying round matches are not.

It is worth remembering that the revenue from broadcasting rights contributes significantly to the amount of money available to sport for grass roots investment.”

- (vi) **First Minister’s Question Time: Scottish Parliament, 11 June 2009**
(In response to question on the potential impact of the demise of Setanta on Scottish Premier League club football):

FM: “As Tavish Scott (MSP, Lib Dem Leader) knows, I have ventilated my opinions about Scottish international matches being shown on terrestrial television —I think that that is a right and entitlement that people should have.”

- (vii) **Relevant extracts from BBC Scotland Annual Review - 2007/08**

a) Management Review

Sport – and in particular, football – proved to be as controversial a topic as it was popular with viewers. Many registered their disappointment that the final games of Scotland's Euro 2008 qualifying campaign were not available live on terrestrial television. BBC Scotland did, however, show highlights, in addition to carrying 22 live matches across the season (07/08), including Scotland's away games against Georgia and Italy, virtually all of Aberdeen's and Rangers' UEFA Cup encounters in Europe, the CIS Cup and the latter stages, including the final, of the Scottish Cup.

Televised SPL highlights formed part of a package of sports rights acquisitions that also saw clips of all of the Premier League's goals available, each week, on broadband, complementing the live coverage of every single

SPL game on radio and online. Mountain biking, rugby sevens, shinty, curling and equestrianism were only some of the other sports covered across the year.

b) BBC Scotland Audience Council Review

The Council monitored audience logs, met with stakeholders and considered BBC Scotland research. The most prominent issue concerned coverage on terrestrial television of Scotland's progress in the qualifying stages for Euro 2008, the most successful qualifying campaign the national team has had in recent years.

For a range of reasons, in spite of the best efforts of the BBC, many of the key matches were not shown live on the BBC, or other free-to-air channels. Matches which were shown included some of the highest audiences of the year for BBC Scotland.

Positive progress has been made in coverage of sport on BBC Scotland with the launch of broadband coverage of the Scottish Premier League (SPL), live TV coverage of the Scottish Cup and some club matches, strong SPL coverage on BBC Radio Scotland, the return of SPL highlights to BBC Scotland television, the reintroduction of Gaelic commentary for international football, and imaginative coverage of a wide range of sports away from football, from shinty and curling to cricket.

Audience Council priority 08/09

The Department of Culture, Media and Sport (DCMS) lists certain sporting events which must be made available for free-to-air terrestrial broadcasters. They are defined as those "generally felt to have a special national resonance" and should "contain an element which serves to unite the nation". The Council recommends that as part of an impending review, the DCMS add the qualifying stages of international football competitions to the list of events which must be made available to terrestrial broadcasters.

Recommendation

To recommend to the DCMS that, in the interests of audiences, home nations' fixtures in the qualifying stages of European and World Cup football be added to the list of 'Crown Jewels' sporting events.

ENDS