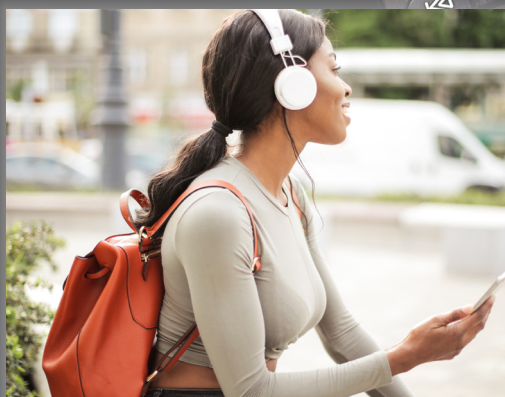


# Media Nations 2020

## Wales report



Published 5 August 2020

Welsh translation available – [Cyfryngau'r Genedl 2020: Adroddiad Cymru](#)

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# Overview

This *Media Nations: Wales* report reviews key trends in the television and audio-visual sector as well as the radio and audio industry in Wales. The majority of the research relates to 2019 and early 2020 but, given the extraordinary events that surround the Covid-19 pandemic, Ofcom also undertook research into how our viewing and news consumption habits changed during this period. This is explored in the *Impact of Covid-19 on audiences and broadcasters* section.

The report provides updates on several datasets, including bespoke data collected directly from licensed television and radio broadcasters (for output, spend and revenue in 2019), Ofcom's proprietary consumer research (for audience opinions), and BARB and RAJAR (for audience consumption).

In addition to this Wales report, there are separate reports for the UK as a whole, Scotland, and Northern Ireland, as well as an [interactive data report](#).

## Key points:

### Impact of Covid-19 on audiences and broadcasters

- There was a significant increase in broadcast TV viewing during the early stages of the Covid-19 pandemic. People in Wales spent an average of 5 hours and 30 minutes per day watching something on the TV screen at the height of the lockdown in April 2020, a 65-minute increase on the figure for 2019.
- BBC services were the most-used services for news about Covid-19 during the early stages of the lockdown. Eight in ten (78%) online respondents in Wales used BBC services during the first four weeks of the lockdown period.

### TV services and devices

- At the beginning of 2020 paid-for satellite and cable television services from Sky and Virgin Media were present in just under half of homes in Wales (46%).
- Some 59% of homes in Wales had a TV connected to the internet in Q1 2020 through a smart TV or other device such as a streaming stick (e.g. Amazon Fire, Roku and Google Chromecast).
- More than half of households in Wales (54%) had a subscription video-on-demand (SVoD) service from providers such as Netflix, Amazon Prime Video and Now TV at the beginning of 2020.
- Netflix is the most popular of these and was present in nearly half of homes (54%) while Amazon Prime Video was present in around a quarter of homes (24%).
- BBC iPlayer was the most popular broadcaster video-on-demand (BVOD) player in Wales. It was watched in half of Welsh homes (50%) at the start of 2020, followed by the ITV Hub (38%), All4 (28%) and My5 (23%).

### **Broadcast TV viewing**

- On average, people in Wales watched 3 hours 21 minutes of broadcast TV per day in 2019. This is a 13-minute (6.1%) decline from 3 hours 33 minutes in 2018.
- The Gavin and Stacey Christmas Day special was the most-watched programme in Wales in 2019, with an audience of nearly 1.3 million.
- TV channels BBC One and ITV Wales are the most-used news sources for people in Wales.

### **Spending on programming for and from Wales**

- The BBC's and ITV Wales' combined spend on programming for Wales decreased by 2% in 2019 to £33.5m. The BBC continues to drive the spend on first-run content for Wales, making up £27.4m of the total, with ITV Wales accounting for the remaining £6.1m.
- The BBC produced 629 hours of local programming in 2019, a slight rise on the previous year, while ITV produced 332 hours of local programming, slightly less than in 2018.

### **Radio and audio**

- Nine in ten adults in Wales tune in to live radio every week and, on average, for more than 20 hours a week.
- BBC services are more popular in Wales than in any other part of the UK, with Radio 2 retaining its position as the most listened-to station across Wales.
- Digital listening – through DAB radio, DTT and online (including smart speakers) – accounted for 52% of all listening in Q1 2020, having overtaken analogue listening in Q2 2019 for the first time.
- Just over a quarter of homes in Wales have smart speakers (26%). The most popular uses of smart speakers among users in Wales were to get weather reports (63%), or to listen to a live radio station or a music streaming service (both 62%).

# The impact of Covid-19 on audiences and broadcasters

## Introduction

The role of broadcasters has never been more important than in the early stages of the Covid-19 pandemic. The public looked to broadcasters – TV and radio – to keep them updated on news about the pandemic, and entertained as the lockdown kicked in. Viewing figures from the end of March onwards underline the key role that broadcasters played during that time.

The pandemic has had a significant impact on all aspects of the broadcasting sector in Wales and will continue to affect the industry for many months to come.

## Broadcast TV viewing and news consumption

### Lockdown prompted a surge in TV viewing

The UK government's implementation of lockdown measures in mid-March 2020 resulted in people having more time for indoor leisure activities in the spring and early summer than in any comparable extended period in recent history.

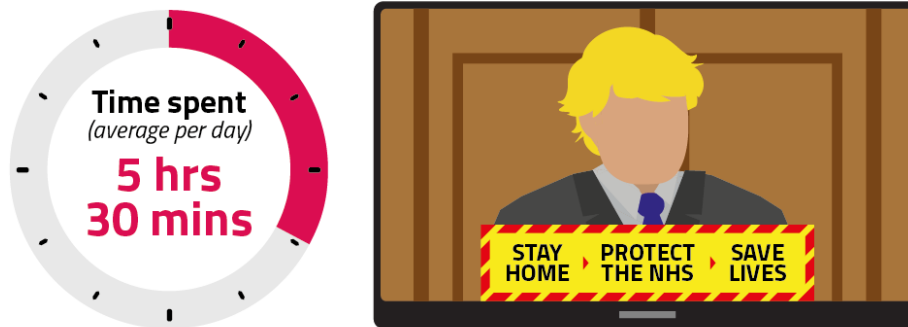
As a result, there were significant increases in both broadcast TV viewing and what we refer to as 'unmatched' viewing – time spent watching the TV set that cannot be attributed to broadcast programming by TV measurement agency BARB.<sup>1</sup>

People in Wales spent an average of 5 hours and 30 minutes per day watching something on the TV screen at the height of the lockdown in April 2020, a 65-minute increase on the figure for 2019. Most of this was still to broadcast television (3 hours and 38 minutes, up 9% on 2019) while viewing on the TV set that cannot be matched to broadcast viewing (like YouTube, SVoD and gaming) was 1 hour and 40 minutes, an increase of 74% on 2019.

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<sup>1</sup> Unmatched viewing = TV set in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs/box sets/archives, SVoD, YouTube, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content.

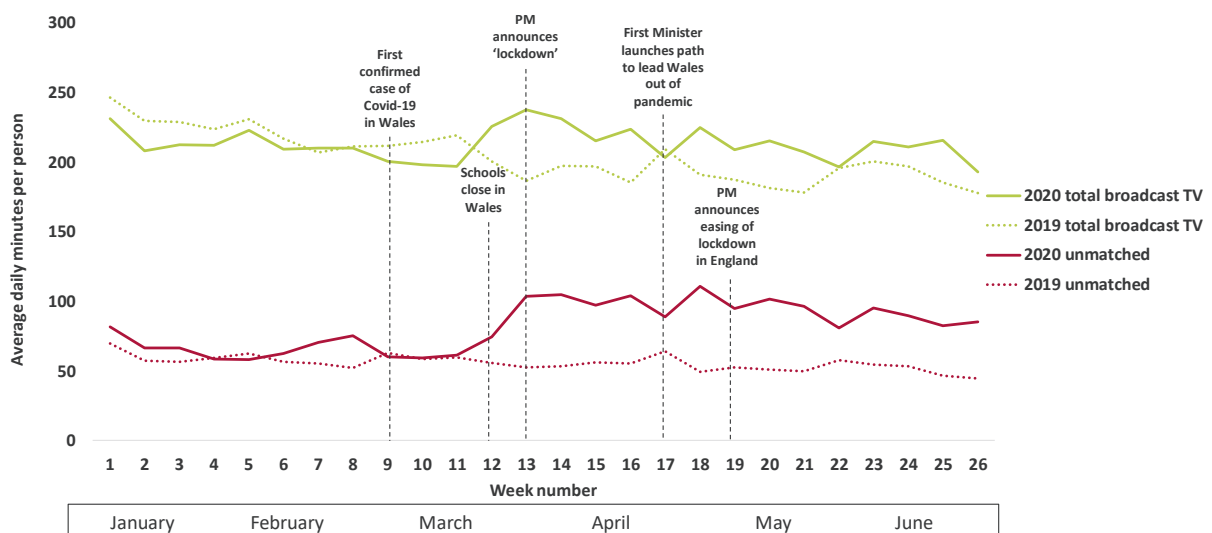
# Peak TV screen viewing in Wales: April 2020 at the height of the lockdown



In the week commencing 23 March (week 13), when the UK Prime Minister addressed the UK to announce the lockdown, average daily viewing of broadcast television peaked at 3 hours 58 minutes in Wales.

As the lockdown progressed, the combination of reduced viewing of news programming and easing of social restrictions saw broadcast TV viewing decline from its peak, but it remained higher than 2019 levels during the analysis period up to the end of June 2020, with the exception of the week commencing 20 April (week 17). Unmatched viewing, meanwhile, did not decline in a comparable way, retaining much of the uplift it achieved as a result of lockdown, largely due to a sustained increase in the viewing of subscription video-on-demand (SVoD) services such as Netflix and Amazon Prime Video.

**Figure 1: Total broadcast TV and unmatched viewing (daily mins per person) in Wales**



Source: BARB. All individuals (4+). BBC Wales area

Despite the increase in the amount of time spent watching broadcast TV during the lockdown period, the proportion of people who watched on average in a week (average weekly reach<sup>2</sup>)

<sup>2</sup> Reach criteria for all broadcast TV: 15+ consecutive minutes.

remained below 2019 levels for each month from January to June 2020. Over these six months, the average weekly reach for all measured broadcast TV in Wales was 85.4%, compared to 86.7% for the same period in 2019.

The year-on-year decrease in total broadcast TV reach in Wales came despite an increase in the proportion of people watching news programming. The average weekly reach of news on measured broadcast TV channels in the first half of 2020 peaked in March (71.3%) and although it has decreased since then (down to 66.8% in June 2020), it remained higher than in the same months in 2019.<sup>3</sup> The increase in news viewing in March helped the PSB channels increase their share of all broadcast viewing; to 59.3% in March from 56.7% in February.

### **Creative Wales and its response to Covid-19**

Launched in January 2020, Creative Wales is an agency within the Welsh Government set up to drive growth across the creative industries, to build on existing success and develop new talent and skills. Its role is to champion the creative industries in Wales, to provide a unified voice for the sector, and to position Wales as one of the best places for creative businesses to thrive.

Its initial focus is on three key sub-sectors: film and TV, digital and gaming, and music. For each of these sectors, Creative Wales will develop a comprehensive action plan with key stakeholders, seeking to promote each sector internationally, providing opportunities for key companies to build their global profile.

Creative Wales has been working to provide support where it is needed most and emergency funding for music, TV and digital sectors was launched as part of the £18m support for the culture, creative and sport sector in Wales. In total it has supported 72 businesses with £1.32m of emergency funding. Up to the end of June, 244 creative businesses also accessed about £3.4m in support from the Welsh Government Economic Resilience Fund.

In conjunction with its stakeholders, Creative Wales has published high-level guidance for a phased return for the creative industries in Wales, which is available on the [Welsh Government website](#).

Creative Wales continues to update the guidance as Wales starts to get back on its feet after Covid-19 and will continue to work proactively with key stakeholders to ensure its support mechanisms are fit for purpose to encourage sector stability and growth.

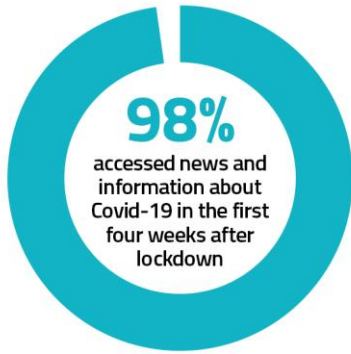
### **The BBC was the most-used news source for information about Covid-19**

The Covid-19 pandemic has been one of the biggest news stories of recent decades, affecting all parts of society in all parts of the world. Unsurprisingly, people's appetite for news surged during this period, with the public eager to keep up with latest developments. Given the diverse media landscape that exists in each of the UK nations, Ofcom carried out research during the pandemic to better understand from where people were getting news. The findings show that TV and radio services from traditional broadcasters like the BBC and ITV were the most-used sources of news for people in Wales, some way ahead of social media.

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<sup>3</sup> Reach criteria for news programming: 3+ consecutive minutes. News programming includes national/international and regional news.





In the first four weeks of the lockdown (27 March to 19 April), almost all the online population in Wales accessed news and information about Covid-19 at least once a day and there was no difference between the individual nations (Wales 98%, England 97%, Scotland 97%, and Northern Ireland 98%). Although this figure has decreased, it remained high during the four weeks to mid-May (91%) and the four weeks to mid-June (90%). The frequency has decreased since the height of the crisis, with one in five (19%) people in Wales accessing news and information at least 20 times or more during the

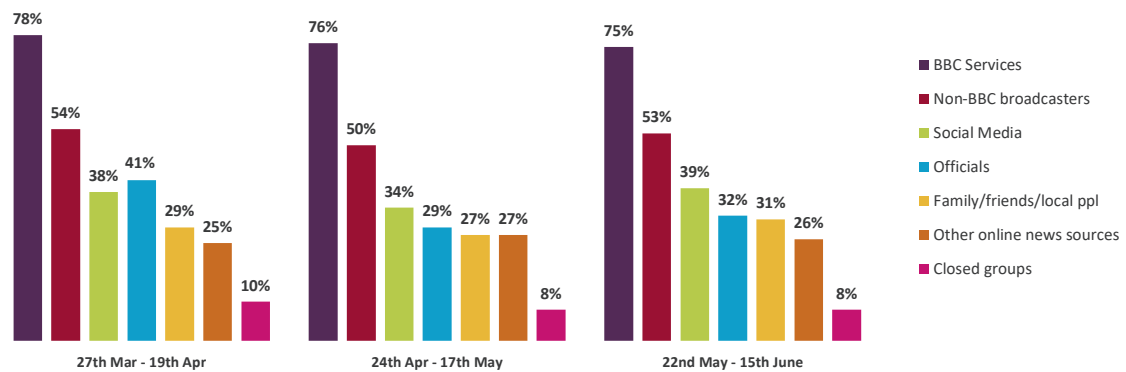
first four weeks of lockdown, compared to 8% during the four weeks to mid-June.

Eight in ten (78%) online respondents in Wales used BBC services (see Figure 4) during the first four weeks of the lockdown period. This was the most-used service, as it was across all the nations (England 79%, Scotland 76% and Northern Ireland 83%). BBC services continued to be the most-used service during the four weeks to mid-May (76%) and the four weeks to mid-June (75%). Half of the online respondents in Wales used non-BBC services (mainly ITV Wales) during the first four weeks of lockdown (54%) and this remained the case in the four weeks to mid-June (53%).

The use of non-BBC broadcasters was higher in Northern Ireland (74%) than in Wales (54%), Scotland (59%) and England (52%) during the first four weeks of the lockdown, and remained higher (at 66%) during the four weeks to mid-June.

Four in ten (39%) online respondents in Wales had used social media by mid-June. Although four in ten (41%) used official sources such as the NHS during the first four weeks of lockdown, this has decreased to 32% by mid-June.

**Figure 2: Sources used in Wales for news/information about Covid-19**



Source: Ofcom Covid-19 news and information: consumption and attitudes Q3a. Which, if any of the following sources have you used to get information/news about the Coronavirus outbreak in the last week? Base: All respondents in Wales who are getting information/news about the Coronavirus outbreak, Month 1 (443), Month 2 (445), Month 3 (425)



## Cardiff School of Journalism, Media and Culture

The Cardiff School of Journalism, Media and Culture conducted research that examined public understanding of the different lockdown measures across the four nations during the pandemic, and how network news programmes reported them.

The research project carried out a news diary study with 200 participants across the UK between April and May 2020. The research identified that people were confused by the health guidance they were receiving and did not understand which government was accountable for the measures.

When asked between 7 May and 10 May whether the UK government, or the UK government and the devolved administrations, were in charge of the UK's lockdown measures, half of all respondents incorrectly said the UK government.

In another diary entry, the researchers showed participants the UK government's new guidance to "stay alert" rather than "stay home" for people in England. Only 11 in 20 respondents correctly identified the guidance as applying to England only, and almost a third thought it was UK-wide government guidance.

Overall, the research found that respondents wanted more clarity in news reporting about the relevance of different lockdown measures across the UK. As one respondent put it: "Distinguishing between rules for different parts of the UK has been difficult, with reporters sometimes omitting which rules apply where. These rules should be stated explicitly as to who they apply to."

In order to explore how much clarity journalists communicated when reporting the lockdown measures, the research team examined UK network television news bulletins. They looked at the key dates of UK government announcements between March and June in order to assess how network bulletins communicated the relevance of the measures to viewers across the four nations.

The research found that broadcasters generally framed coverage as the UK being under lockdown in March and April. The focus was on the UK government and the Prime Minister's announcement. There was limited coverage of the nations and little recognition that the three devolved institutions had coordinated a response to the coronavirus with the UK government. Often journalists made references to a singular UK government decision, rather than reflecting the collective judgement of all four governments across the UK.

In May and June, the framing of coverage shifted to lockdown measures across the UK, alluding to differences between the nations. Generally, the research found that journalists made references to measures being relevant to England. But news bulletins rarely spelt out the difference in approaches across the UK, and when they did, it was not always with great clarity or precision; for example, very briefly mentioning Wales or the other nations at the end of a news item.

However, there were instances when coverage explicitly referenced the different approaches across each nation. On *ITV News at Ten* on 28 May, for example, an on-screen graphic compared the latest health guidance across all four nations:

“New rules mean that from Monday people in England will be able to gather in groups of up to six people at once. That must be outdoors, but can, for the first time, include private gardens. And social distancing rules will still apply, so different households must remain at least 2m apart at all times. Scotland announced its own easing will begin from tomorrow, up to eight people across two households can meet outdoors. In Wales, an announcement on loosening restrictions is expected tomorrow. While Northern Ireland plans to enter the second phase of lifting its lockdown a week on Monday.”

Research at Cardiff University has previously suggested that audiences are more likely to understand the devolved relevance of news stories when nations are explicitly referenced by journalists.<sup>4</sup> Implicit references, such as stating “in England” at the beginning of a news item, was not enough to alert viewers in Wales about the relevance of particular stories, such as when junior doctors were striking in England only.

The different responses to the pandemic across the UK have brought into sharper focus the importance of network news accurately reporting devolved decision-making. In order to enhance public understanding, the Cardiff University research suggests that network news could find more creative ways of repeatedly and explicitly communicating the different policy decisions of all four governments across the UK.

The Cardiff School of Journalism research was produced by Professor Stephen Cushion, Dr Maria Kyriakidou, Dr Marina Morani and Dr Nikki Soo. It was funded by an AHRC project entitled ‘Countering disinformation: enhancing journalistic legitimacy in public service media’ (Grant reference AH/S012508/1). More details about the research can be found on the [website](#).

## How broadcasters in Wales responded to the Covid-19 pandemic

TV and radio services enjoyed strong audiences as people looked for news and information as well as company and entertainment during the lockdown. But continuing to provide a service was far from straightforward with social distancing guidelines in place.

Despite the challenges, broadcasters continued to provide news, current affairs and entertainment programming throughout the week on TV and radio.

### Making TV during lockdown

During the lockdown, BBC Cymru Wales’ teams delivered comprehensive daily coverage across 14 hours of weekday output for BBC Wales Today, Newyddion for S4C, BBC Radio Wales and BBC Radio Cymru.

On television, the Welsh Government’s daily coronavirus news conference was broadcast daily at 12.30pm on BBC One Wales and repeated in full on BBC Radio Wales.

Radio services were extended, with Post Cyntaf on BBC Radio Cymru and Gareth Lewis in Drivetime on BBC Radio Wales extended by half an hour and an hour respectively each day. Rolling updates on the pandemic in Wales were also provided on the BBC’s online services in English and Welsh.

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<sup>4</sup> Stephen Cushion, Justin Lewis, Allaina Kilby, ‘[Why context, relevance and repetition matter in news reporting: Interpreting the United Kingdom’s political information environment](#)’, Journalism, 2020, 21(1) 34-53.

BBC Radio Wales and BBC Radio Cymru provided a range of information and entertainment programming during this period. The BBC's online education service, Bitesize, revamped its production model, offering daily lessons to reflect the devolved and bilingual curriculum in Wales.

BBC Cymru Wales also announced a range of new programmes, commissioned during the lockdown period, for television, radio and online. BBC Wales also set out a package of support for the creative sector and called for independent production companies to submit new programme ideas.

Following the commissioning round, independent companies produced more than 30 new programmes for BBC One Cymru Wales, BBC Radio Wales and BBC Radio Cymru, to be broadcast before the end of September.

## **Focus on news**

ITV Cymru Wales maintained comprehensive news coverage across the morning, lunchtime and late evening parts of its schedule. Running orders were changed to concentrate on the impact of coronavirus and how it was being tackled, and to pass on important public health information.

*Wales at Six* featured lengthy live interviews with key figures from the health and other emergency services as well as stories from the 'front line' of how the pandemic was being tackled. Both BBC Cymru Wales and ITV Cymru Wales played an important role too in highlighting the emerging differences between the approach to Covid restrictions of the Welsh Government and other UK administrations.

An early report on ITV Cymru Wales, widely praised on social media across the UK, showed the difficulties of one correspondent in explaining the importance of shielding to his mother and disabled uncle. Senior medical figures talked in detail about how they were tackling the virus on their wards.

A significant proportion of coverage was also devoted to reassuring and uplifting stories. Images of wild goats roaming through the empty streets of Llandudno appeared on programmes across the UK and as far away as the Middle East.

Dedicated current affairs programmes were scheduled to broadcast in peak-time slots to maximise the audience reach on both ITV Cymru Wales and S4C. Well-known and established brands *Wales This Week*, *Y Byd ar Bedwar* and *Y Byd yn ei Le* were reformatted to become studio-based programmes to reflect the fast-moving nature of the story.

## **Online and social media**

Broadcasters also focused on their online presence during the pandemic. ITV Cymru Wales claimed 3.1 million page-views during April 2020, with 6.1 million Facebook video views and another million video views on Twitter. The broadcaster carried the Daily Welsh Government news conferences live on its social media platforms along with commentary and analysis.

## **On-screen impact**

Making television is a team activity and while viewers noticed only minor on-air changes, broadcasters had to make considerable behind-the-scenes adjustments. Managers had to devise new and safe ways of working while crews found innovative ways to keep filming in lockdown.

News packages were shot by contributors on mobile phones, with Skype and other video software systems used to record and edit interview clips. Following a decade of investment in mobile technologies, all journalists at ITV Cymru Wales were able to work remotely from home to edit packages, access running orders, write scripts, send back completed reports and to appear live from their homes into the evening news programme. Journalists also used other mobile broadcasting technology – including the LiveU system of broadcasting via multiple mobile phone sim cards.

Inevitably, there has been a significant impact on schedules and the wider sector in Wales. The majority of S4C productions had to cease filming, but some programme making continued. Magazine programmes such as *Prynhawn Da* and *Heno* managed to continue to provide daily shows under social distancing rules.

Some children’s content, and some content for lifestyle change series, *Ffit Cymru*, the factual entertainment show *Priodas Pum Mil Dan Glo*, *Eisteddfod T*, and *Cyswllt (mewn Covid)*, the first drama produced in the UK during lockdown, was recorded and broadcast.

But as most plays, sports, live events, entertainment, soap operas and factual productions were cancelled or postponed, S4C’s schedules will continue to be affected over the coming months.

## **Yma i Chi (Here for You)**

Within days of lockdown, S4C launched a dedicated pop-channel ‘Yma i Chi’ (Here for You) on its online player, S4C Clic, to “offer help and guidance and represent the voice of the nation”.

Among the new content featured on Yma i Chi, was a series of short films called *Bwrw 'Mlaen*, which followed key workers during a day in their job while *I.T a Fi (I.T. and Me)* provided some light-hearted advice from the younger generations about how to stay in touch with people by using technology like Skype, WhatsApp and Facetime.

S4C also launched *Ysgol Cyw* to support learners in the home, providing box sets and archive content, and reported a significant increase in the numbers viewing S4C children’s content.

Meanwhile *Hansh*, S4C's online brand, had its best-ever month on social media in April 2020; the broadcaster claimed a 200% increase in viewers of S4C content on Facebook compared to April 2019.

## **Supporting the sector**

S4C provided a package of support worth £6m for the production sector in Wales in April. This included:

- a fast-track commissioning cycle, with some £5m worth of new content. Production companies were asked to think creatively about how they provide content, and to submit programmes that could be broadcast as quickly as possible.
- Additional support provided to production companies. To enable companies to support production staff, S4C introduced additional period payments if a company was between the periods when productions had to come to an end.
- A new online portal to advise production companies of all the Covid-19 support available to them.

S4C also offered free advertising slots for charities offering Covid-19 support in Wales, as well as financial support to help create the adverts.

### **Senedd Cymru's Culture Welsh Language and Communications Committee**

The Committee undertook a short inquiry into Covid-19 and the impact on the sectors within its remit, and has published its final report and recommendations in relation to the creative industries. Among those who gave evidence to the Committee's inquiry were BBC Cymru Wales, ITV Cymru Wales and S4C, as well as Teledwyr Annibynnol Cymru, representing the independent television sector in Wales.

The Committee report notes the importance and the value of the PSBs in Wales "in providing up-to-date information specific to Wales on the pandemic and the lockdown." The Committee's chair, Helen Mary Jones MS, said: "Public service broadcasting has been an essential component of our fight against COVID-19. Broadcasters have provided critical public health information, specific to Wales, education support for children as well as much-needed entertainment."

The Committee also discussed the financial pressures facing the PSBs and said: "The Welsh Government should respond to the Ofcom consultation on the future of public service broadcasting to advocate for sufficient funding to ensure public service broadcasters can continue to provide Wales-originated programmes and distinctly Welsh content."

The Committee recognised the £1.57bn financial support package for the arts, culture and heritage sectors announced by the UK government and the subsequent Barnett funding formula of £59m to Wales. The Committee recommended that the Welsh government should "commit to spending the whole amount, on arts, culture and heritage."

The Committee heard concerns about the impact of the lockdown on the workforce across the supply chain within the creative industries. The Committee recommended that the Welsh government should work with the UK government to "explore ways of financially supporting workers in the creative industries who, as lockdown eases, are still not able to return to work safely."

The Culture Welsh Language and Communications Committee also heard about the barriers facing the sector in restarting productions, and that the biggest obstacle was insurance. The Committee recommended that the Welsh Government should "initiate talks with the Treasury and the insurance industry to seek guarantees which will give insurance providers the confidence they need to make production insurance available."

# TV services and devices

## Introduction

While television is still the main device for delivering entertainment services into people's homes, the range of services, and the platforms over which they are delivered, has grown rapidly in recent years.

Traditional platforms such as Freeview, which is available through digital terrestrial television (DTT), satellite – from either Sky or Freesat – and cable (Virgin Media) are still the main providers in this area.

These platforms rely on different infrastructure to deliver their services. Freeview uses a network of transmitters across Wales to deliver television services into people's homes through a rooftop aerial. These services are widely, though not universally, available across Wales. Satellite is universally available<sup>5</sup> while cable coverage is available only in built-up urban areas.

However, the story of recent years has been the rapid rise of new subscription video-on-demand (SVoD) services such as Netflix and Amazon Prime Video, helped by the spread and improved speed of broadband networks. Although these SVoD services are mainly taken in addition to content on other platforms, they are having a hugely disruptive effect on the sector, winning over new customers and having an impact on how and where people are watching TV-like content.

Traditional public service broadcasters are also adapting how they deliver content to viewers. Alongside their linear TV services, the BBC, ITV, Channel 4, S4C and Channel 5 all have their own broadcaster video-on-demand (BVoD) services. These SVoD and BVoD services are delivered over the internet and accessed on connected TVs as well as on mobile phones and tablets.

## Traditional TV platforms

### More homes in Wales have a pay-TV service than rely on Freeview or Freesat

Television sets are an established presence in our homes; more than nine in ten households in Wales (94.5%) had a TV set at the beginning of 2020.<sup>6</sup> But the services accessed on our televisions is changing, mainly because of the amount of content that is being delivered and accessed through the internet.

Traditional paid-for television services such as satellite (mainly Sky) and cable services (Virgin Media) were present in just under half of homes in Wales (46%) at the beginning of 2020. Paid-for satellite accounts for most of these, with Virgin Media's cable service present in just 7% of Welsh households, down from 8.1% in Q1 2019.

DTT services only (delivered through an aerial) account for most free TV viewing (34%) with free satellite present in just 8.8% of homes, probably through Freesat. Forty-two per cent of households in total had only DTT or free satellite.

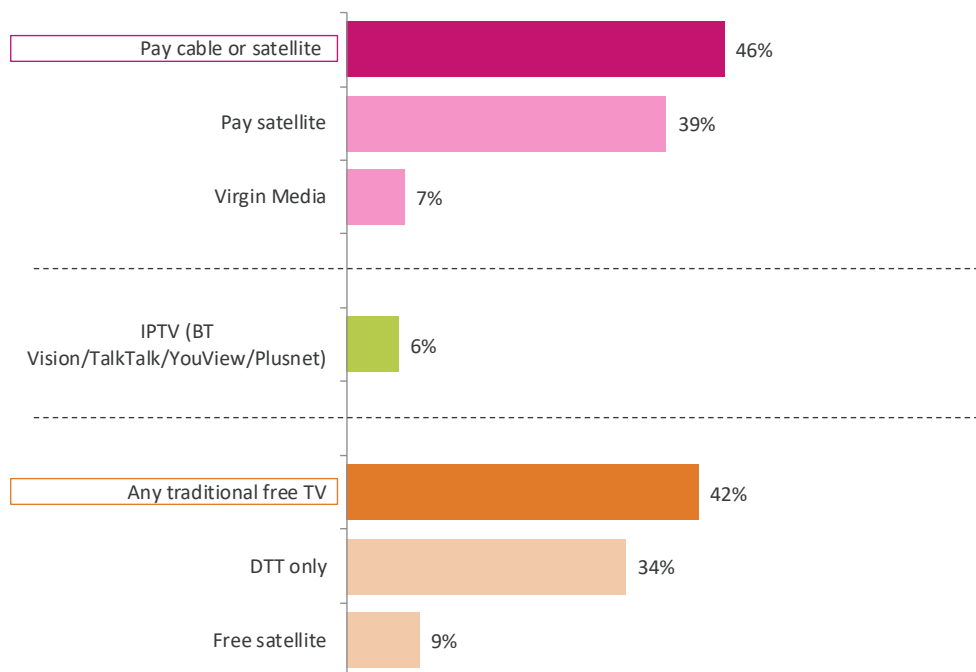
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<sup>5</sup> Based on the availability of a line-of-sight path to the satellite

<sup>6</sup> BARB Establishment Survey Q1 2020

Only a small proportion of homes in Wales (6%) had an internet protocol television service (IPTV). These are delivered through set-top boxes from providers including TalkTalk and BT, and offer a Freeview service alongside pay-TV channels delivered through an internet connection.

**Figure 3: Take-up of TV platforms in Wales**



Source: BARB Establishment Survey Q1 2020

## Online TV platforms

### More than half of homes in Wales have a TV set connected to the internet

As with other nations of the UK, take-up of subscription video-on-demand (SVoD) services from providers like Netflix and Amazon Prime Video, delivered over the internet, continues to gather pace among households in Wales.

Some 79% of homes had a fixed-line broadband connection at the beginning of 2020 and 59% of homes had a TV connected to the internet, either via a smart TV or by using devices such as streaming sticks (e.g. Amazon Fire, Roku and Google Chromecast).<sup>7</sup>

### Nearly half of homes use Netflix

More than half of households (54%) had a subscription to one or more of the paid-for online services at the beginning of 2020. Netflix was the most popular and was present in nearly half of homes (47%) while Amazon Prime Video was present

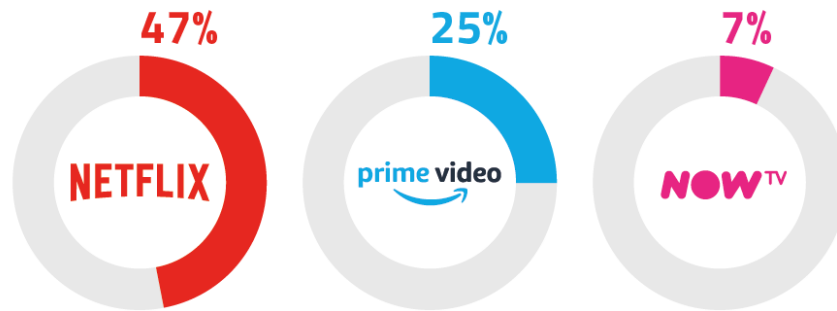


<sup>7</sup> Ofcom Technology Tracker 2020



in a quarter of homes (25%). A significant amount of viewing of these services is also done on devices other than a TV, such as smartphones and tablets.

And competition for viewers, from and between these paid-for online players, is set to increase with high-profile launches from Apple (Apple TV+), Disney (Disney+) and BBC/ITV (BritBox) in the last year.

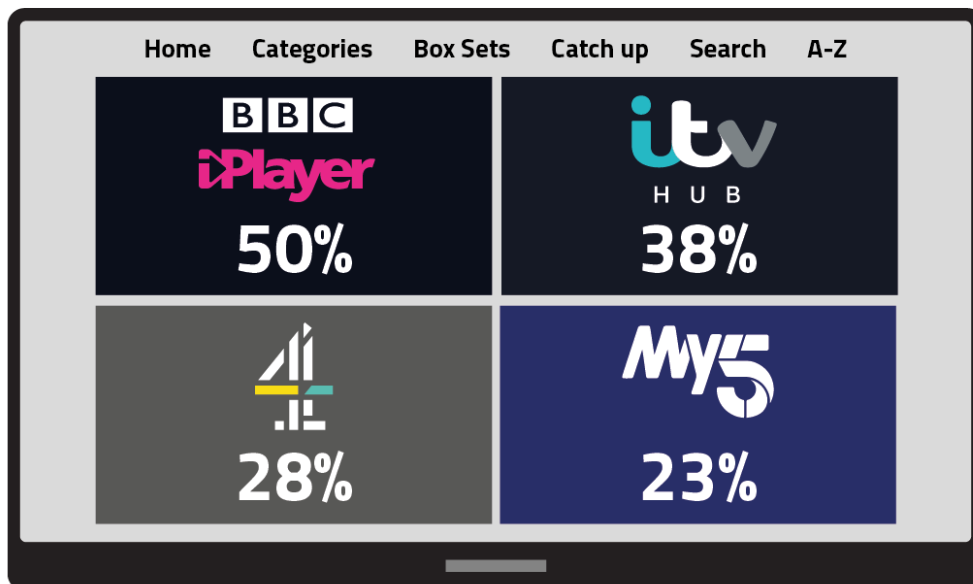


Source: BARB Establishment Survey Q1 2020

### Online players from traditional broadcasters are also proving popular

Major broadcasters – the BBC, ITV, Channel 4, S4C and Channel 5 – have their own online players. These broadcaster video-on-demand players are also proving popular with viewers. The most popular, the BBC iPlayer, was watched in half of Welsh homes (50%) at the beginning of 2020. The ITV Hub (38%) is the next most popular BVoD player, followed by All4 (28%) and My5 (23%).

Figure 4: Use of main broadcaster video-on-demand (BVoD) services in Wales (households)



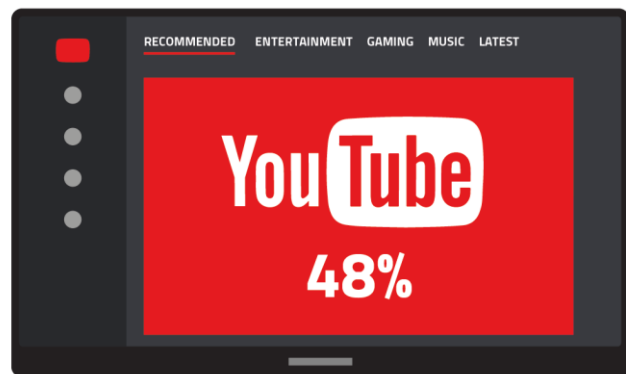
Source: Ofcom Technology Tracker 2020

### S4C's Clic

S4C has developed its online catch-up player Clic into a destination for a wide variety of Welsh language content. The site currently hosts six online channels including ones for children, young people and younger adults as well as a dedicated channel for those learning Welsh. Clic also provides access to many series from S4C's archive, including box sets of drama series and subtitled European drama on its Walter Presents channel.

## Nearly half of homes in Wales use YouTube

Research carried out for Ofcom's Online Nation 2020 report<sup>8</sup> highlighted that viewers are spending a significant amount of time watching video content online on sites like YouTube. Indeed, a third of adults (32%) across the UK who are online report spending more time watching videos on the internet than they do watching live TV (not including recorded playback or BVoD viewing), rising to 57% among 18-24-year-olds.<sup>9</sup> Almost half of households (48%) in Wales used YouTube to watch programmes, films or other video at the beginning of 2020.<sup>10</sup>



<sup>8</sup> Ofcom, [Online Nation](#), 2020.

<sup>9</sup> [Ofcom video-sharing platforms research 2020 \(adults\)](#)

<sup>10</sup> Ofcom Technology Tracker 2020

# Broadcast TV viewing

## Introduction

People in the UK still spend hours watching TV every day, but over the past decade new services and new ways of watching have evolved, driven largely by improved broadband networks and new on-demand services delivered over the internet. The ability for viewers to watch what they want when they want, through online players from the BBC, ITV, Channel 4, S4C and others has proved especially popular with younger people. S4C's irreverent Twitter feed Hansh attracts a far younger audience than its linear channel.

Having TV sets that can be connected to the internet has also paved the way for major global players like Netflix, Amazon Prime Video and others to launch new subscription video-on-demand (SVoD) services in markets around the world, providing yet more choice for viewers and increased competition for domestic broadcasters.

The consequences of this increasingly fragmented TV landscape can be seen throughout this *Broadcast TV viewing* chapter. Daily viewing of broadcast television in Wales fell again in 2019 but remains substantial at an average of 3 hours 21 mins a day, while the amount of time spent watching other content such as SVoD services has increased, although it is still modest by comparison.

Significant numbers still tune in for blockbuster television programmes: the *Gavin and Stacey* Christmas Day special attracted more than a million viewers in Wales, while four of the top five most-watched programmes were Wales rugby games. Elsewhere, Ofcom's News Consumption Survey research underlines the importance of public service broadcasting: BBC One and ITV remain the two most popular news sources for people in Wales.

## Where our data comes from

TV screen viewing data and analysis in this section uses data from the Broadcasters' Audience Research Board (BARB), a nationally representative panel of 5,300 homes across the UK (with more than 400 homes in Wales) providing the official broadcast TV measurement for the industry. This includes all viewing of broadcast TV through a television set, and via any device attached to the set such as a computer, streaming device or set-top box.

Unless otherwise stated, figures quoted are for seven-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast on TV (live viewing) as well as from recordings on digital video recorders (DVRs) and through catch-up player services (e.g. apps on smart TVs) up to seven days after the first broadcast (time-shifted).

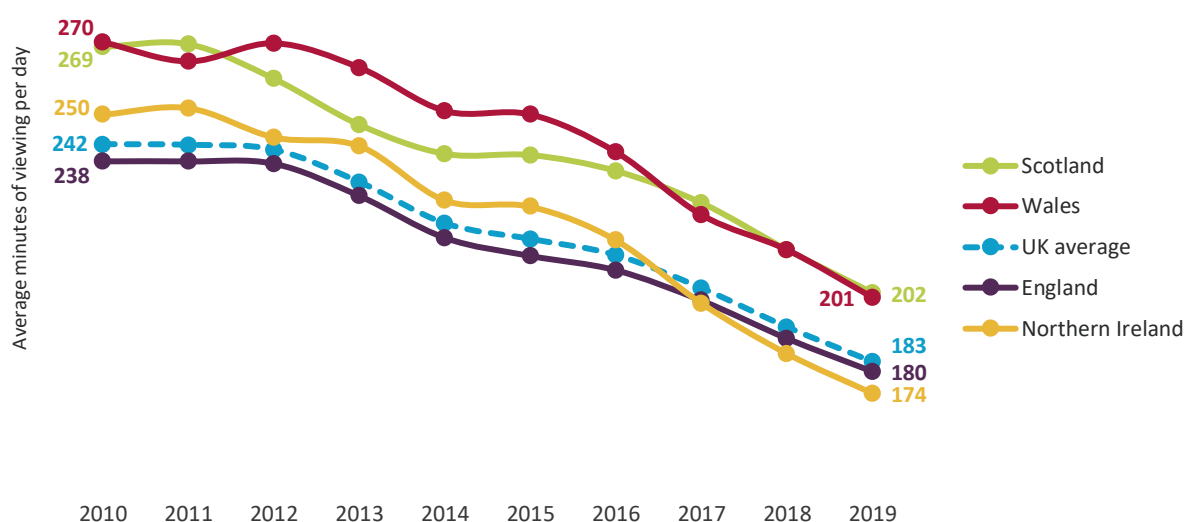
Data included in this section are for the calendar year 2019 – pre-Covid – and do not reflect the different viewing patterns from that period, outlined elsewhere in this report.

## People in Wales, along with those in Scotland, watch more broadcast TV every day than the UK average

On average, people in Wales watched 3 hours 21 minutes per day minutes broadcast TV on the TV set in 2019. This is a 13-minute decline on 2018 and more than an hour less than at the start of the decade.

Daily viewing in Wales declined by 6.1% between 2018 and 2019, compared to the UK average of 4.9%. Wales experienced the largest decline in daily viewing for all of the UK nations.

Figure 5: Average daily minutes viewed per person, by nation: 2010-2019



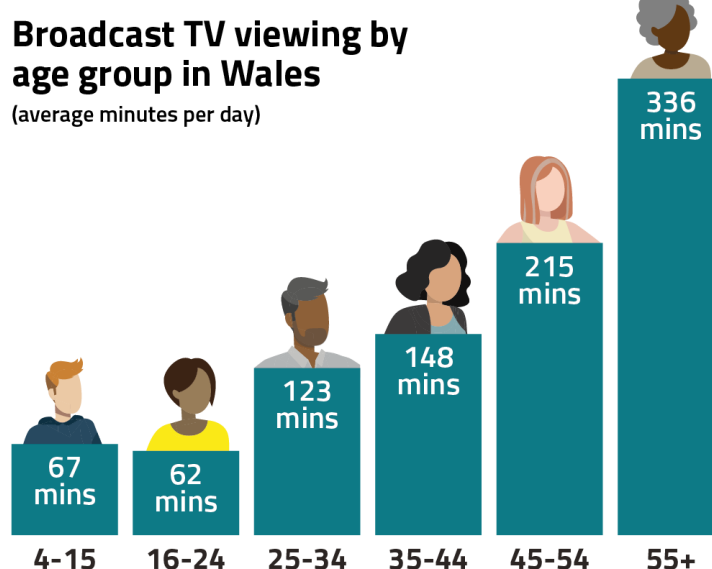
Source: BARB. BBC areas, all individuals (4+).

## Older viewers drive broadcast TV viewing in Wales

Looking at the viewing habits of different age groups in Wales, we find that older people watch more broadcast TV than younger viewers.

In 2019, the over-54s watched an average of 5 hours 36 minutes per person per day, which dropped to 3 hours 35 minutes for the 45-54 age group. In contrast, children aged 4-15 watched just over an hour (67 minutes) on average per day.

Viewing by 16-24 year-olds and children aged 4-15 fell by 18% – the joint largest decline in percentage terms. Viewing by over-54s fell by just 4% since 2018.<sup>11</sup>



## The *Gavin and Stacey* Christmas Day special was the most-watched programme in Wales in 2019

*Gavin and Stacey* – returning after a nine-year break – was 2019’s most watched programme. It had a higher audience and share than the top programme of 2018 (*I’m a Celebrity - Get Me Out of Here!*), with more than 1.2 million viewers tuning in. Rugby dominated the rest of the rankings, with Wales’ Six Nations and Rugby World Cup matches filling four of the top five places.

**Figure 6: Top 20 most-watched programmes in Wales: 2019**

Rank	Programme Title	Channel	Date	Average 000s	Share %
1	Gavin And Stacey	BBC One	25/12/2019	1,286	66.1
2	Six Nations Rugby: Wales v Ireland	BBC One	16/03/2019	933	82.7
3	Six Nations Rugby: Wales v England	BBC One	23/02/2019	778	70.1
4	Rugby World Cup 2019	ITV Cymru Wales	27/10/2019	742	80.2
5	Six Nations Rugby: France V Wales	BBC One	01/02/2019	724	50.1
6	I’m A Celebrity Get Me Out Of Here!	ITV Cymru Wales	17/11/2019	700	49.0
7	Six Nations Rugby: Scotland v Wales	BBC One	09/03/2019	638	72.2
8	Britain’s Got Talent	ITV Cymru Wales	13/04/2019	618	50.9
9	Rugby: Six Nations Live 2019	ITV Cymru Wales	09/02/2019	612	57.3

<sup>11</sup> Source: BARB. BBC Wales area, all individuals (4+).

10	Mrs Brown's Boys	BBC One	01/01/2019	575	48.1
11	Strictly Come Dancing	BBC One	14/12/2019	562	48.6
12	His Dark Materials	BBC One	03/11/2019	534	40.0
13	Cleaning Up	ITV Cymru Wales	09/01/2019	531	38.3
14	Seven Worlds, One Planet	BBC One	03/11/2019	528	44.3
15	Death In Paradise	BBC One	10/01/2019	525	38.1
16	Coronation Street	ITV Cymru Wales	16/01/2019	519	41.2
17	Line Of Duty	BBC One	05/05/2019	516	42.5
18	Manhunt	ITV Cymru Wales	07/01/2019	513	37.9
19	Call The Midwife	BBC One	13/01/2019	510	32.7
20	Vera	ITV Cymru Wales	27/01/2019	496	33.8

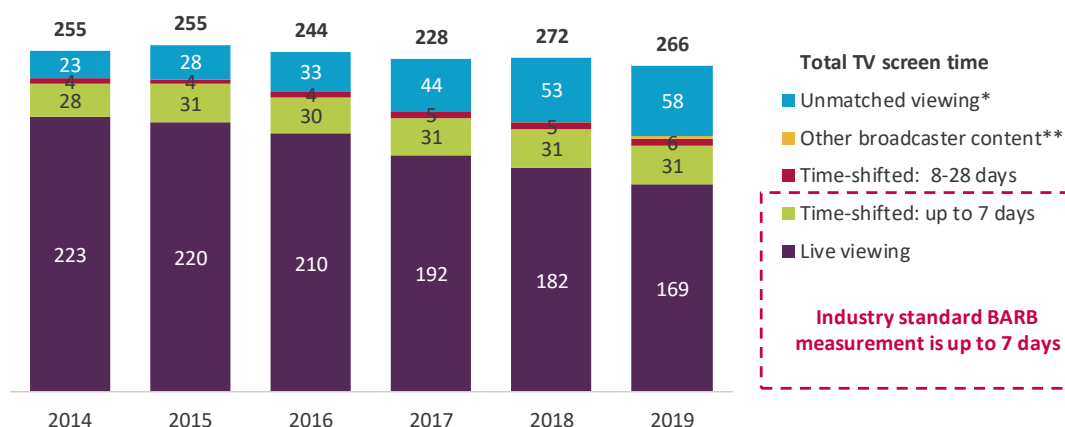
Source: BARB. BBC Wales area, all individuals (4+)

## As live viewing continued to decline in 2019, time-shifted and 'unmatched' viewing grew

As in the rest of the UK, although people in Wales are watching less broadcast television than previously, their time spent watching other things on their TV sets has increased. Viewing of non-broadcast services on the TV set (classified as 'unmatched' by television measurement agency BARB and including streaming services like Netflix, Amazon Prime Video, YouTube, and gaming) increased by five minutes per person per day in 2019, to 58 minutes.

Overall, time spent on the TV set has declined by six minutes since 2018. Time spent watching catch-up and recorded viewing up to seven days after broadcast remains stable (31 minutes in both 2018 and 2019).

Figure 7: Average daily minutes of TV screen time per person in Wales



Source: BARB. BBC areas, all individuals (4+). Average minutes of viewing/day.

\*Unmatched viewing = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs, SVoD, YouTube, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded. \*\*Other broadcaster content = content viewed on measured broadcasters' BVoDs and

AVoDs that has not broadcast on linear television channels. For example, BVoD exclusives or historical box sets. Note: this was included within unmatched viewing in previous Ofcom reports.

### What is public service broadcasting?

Public service broadcasting is provided in Wales by the BBC, ITV (holder of the Channel 3 licence in Wales), S4C, Channel 4 Corporation (C4C) and Channel 5. While all the BBC and S4C Television services are PSB, only the main channels of the other broadcasters are. In return for providing PSB services such as news and original productions, these broadcasters receive certain benefits: access to spectrum (the radio waves that support wireless communication) to broadcast their services; prominence on electronic programme guides on television (EPGs); and in the BBC and S4C's case, funding from the licence fee.

### The five main PSB channels accounted for more than half of total broadcast viewing

The main channels had a combined share of 51.7% of the total broadcast TV audience in Wales in 2019. As in 2018, this audience share is higher than in Northern Ireland and England, but slightly lower than in Scotland.

BBC One had the highest audience share of any individual PSB channel at 21.5%; this was higher than BBC One's share in the other nations.

**Figure 8: Percentage share of total TV viewing in the nations of the UK for the five main PSB channels: 2019**



Source: BARB. BBC areas, all individuals (4+). Excludes any plus 1 channels.

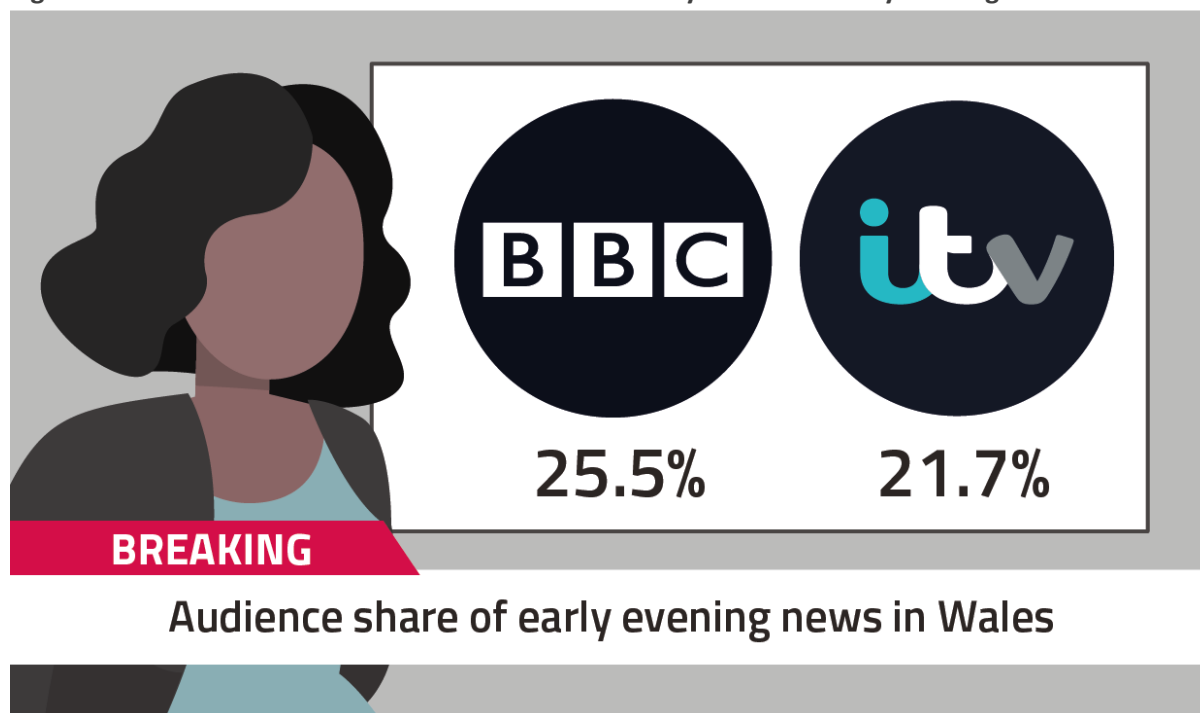
### BBC One Wales' and ITV Cymru Wales' early evening news bulletins continue to attract a lower share in Wales than their equivalents in the other devolved nations

Viewing of *Wales Today*, BBC One Wales' early evening news bulletin, decreased from a 26.9% share of the slot's viewing in Wales in 2018 to 25.5% in 2019. This was lower than the equivalent early



evening news programmes in Scotland and Northern Ireland, and lower than the UK average for the BBC early evening news bulletin (29.3%). ITV Cymru Wales' counterpart *Wales at Six* decreased its share of viewing from 22.2% in 2018 to 21.7% in 2019.

**Figure 9: Audience share % of BBC One Wales and ITV Cymru Wales early evening news: 2019**



*Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures based on 'regional news' BARB genre programmes, start time 17:55-18:35, 10mins+ duration, weekdays and include the HD and +1 channels where applicable. BBC One's early evening news bulletin, Wales Today, is transmitted between 18:30-19:00 and based on BBC areas. ITV Cymru Wales' Wales at Six is transmitted between 18:00-18:30 and is based on ITV areas.*

## Small Screen: Big Debate



### Small Screen: Big Debate

Ofcom has launched *Small Screen: Big Debate* to seek ideas and prompt discussion on how to ensure that the UK has a resilient public service broadcasting system which continues to meet audience needs. To support this, in February 2020 we published a five-year review of public service broadcasting from 2014-2018.

At the end of 2019, Ofcom hosted an event in Cardiff to gather views from industry and audiences about the future of public service broadcasting. Engagement on this topic has continued during the Covid-19 pandemic, with a series of meetings with the broadcasting sector in Wales over the last few months.

As part of Ofcom's *Small Screen: Big Debate* national conversation, Senedd Cymru's Culture Welsh Language and Communications Committee held a session discussing the future of public service broadcasting in Wales in November 2019. Kevin Bakhurst, Ofcom's Group Director for Content and Media Policy, outlined the challenges facing broadcasters in Wales, including the importance of prominence and Welsh-language content. Members of Ofcom's Advisory Committee for Wales also

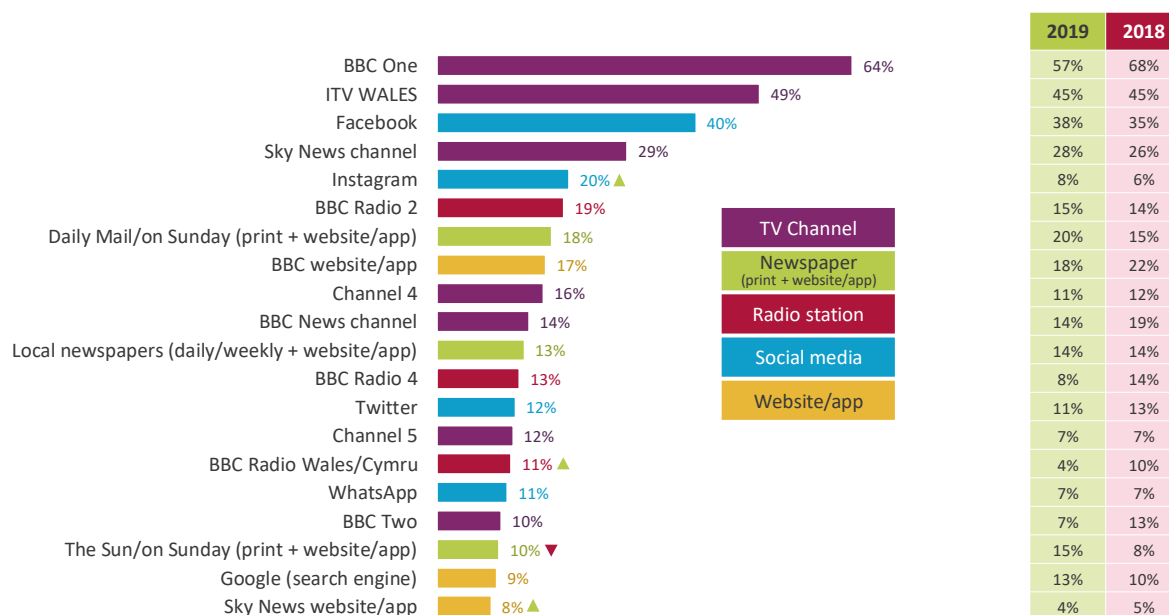
gave evidence, as did academics from the University of South Wales, Cardiff University, and representatives from the independent production sector.

There will be a further opportunity to feed into this project during the consultation to be published on the *Small Screen: Big Debate* website later in the year.

## TV channels are still the most-used source of news for people in Wales

In 2020, two-thirds of adults in Wales use BBC One for news while half use ITV and two in five use Facebook. Instagram and BBC Radio Wales/Cymru have both increased in use since last year.

**Figure 10: Top 20 sources of news in general in Wales: 2020**



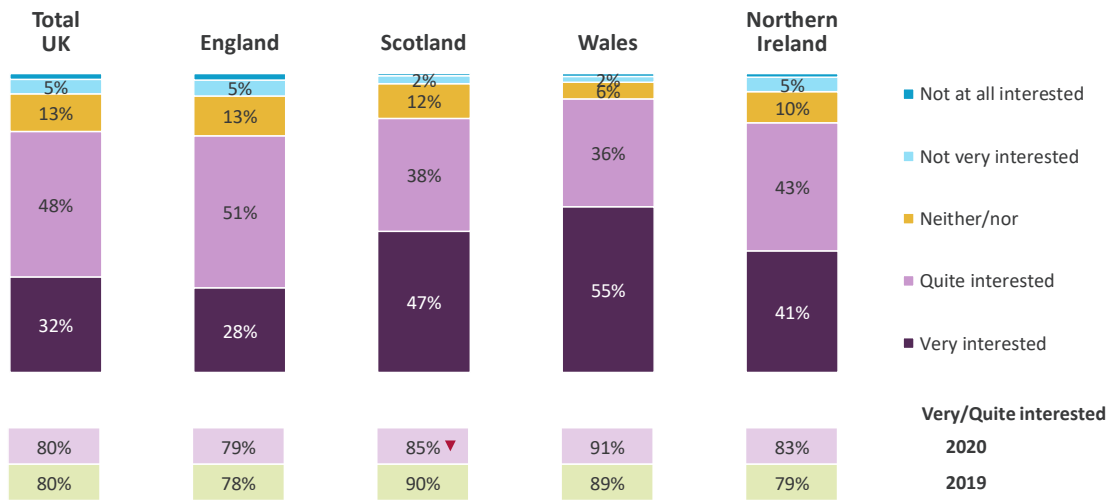
Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ in Wales – 2020=456, 2019=475, 2018=458. Green/red triangles indicate statistically significant differences between 2020 and 2019.

## Adults in Wales and Scotland are the most likely to say they are ‘very interested’ in news about their nation

There is a significant amount of interest in news about Wales among people who live there. More than half of adults who follow news claim to be ‘very interested’ in news about Wales (55%) and that figure rises to 91% when looking at people who are ‘very’ or ‘quite’ interested.

As shown in Figure 11, the responses of people claiming to be ‘very interested’ in news about their nation is greater in Scotland, Wales and Northern Ireland than it is in England.

**Figure 11: Level of interest in news about own nation, by nation**



Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ who follow news 2020/2019 - Total=4379/4524, England=3082/3150, Scotland=526/544, Wales=420/435, Northern Ireland=351/395. Green/red triangles indicate statistically significant differences between 2020 and 2019.

### BBC One is the most-used source of news about Wales

For news about their own nation, television is the most popular source for people in Wales. BBC One and ITV Wales are the first and second most-used sources for news about the nation, followed by Facebook and BBC Radio Wales / Cymru. Newspapers also remain an important source of news; local and regional papers feature among the most-used news sources.

**Figure 12: Sources used to access news about own nation: 2020**

England	%	Scotland	%	Wales	%	Northern Ireland	%
BBC One	38%	STV	34% ↓	BBC One	51%	UTV	47%
ITV	24%	BBC One*	24% ↓	ITV WALES	33%	BBC One	46%
Facebook	15%	BBC Scotland*	18%	Facebook	19%	Facebook	21%
BBC website/app	7%	Facebook	17%	BBC Radio Wales/Cymru	8% ↑	BBC Radio Ulster/Foyle	16%
Twitter	4%	BBC website/app	10%	Local daily newspaper	6%	Cool FM	15%
BBC local/regional radio station	4%	Bauer local commercial radio	9%	BBC website/app	5%	BBC website/app	8% ↑
Google (search engine)	4%	Twitter	6%	South Wales Echo	5% ↓	RTE Channels/Virgin Media One	7%
Sky News Channel	4%	The Daily Record	5%	The Western Mail	4%	Twitter	7%
		Google (search engine)	5%	Wales based news site/app	4%	The Belfast Telegraph	6%
		BBC Radio Scotland	4%			Google (search engine)	5%
		BBC One / BBC Scotland NET	39%			Any NI based news site/app	5% ↑
						Local commercial radio station	4%
Don't follow nation's news	5% ↓	Don't follow nation's news	1% ↓	Don't follow nation's news	3% ↓	Don't follow nation's news	2%

Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ using TV/Newspapers/Radio/Internet/Magazine for news – England=3032, Scotland=521, Wales=415, Northern Ireland=346. Only sources with an incidence of 4%+ in each Nation are shown. ↑ and ↓ indicate statistically significant differences between 2020 and 2019. \*BBC Scotland new this year. BBC Scotland and BBC One Scotland figures may be affected by respondent confusion about BBC Scotland branding.

## S4C's reach increased in 2019

The reach of Welsh language broadcaster S4C increased both in Wales and across the UK in 2019. Across the UK the channel reached more than half a million viewers, a 9.7% increase on 2018.

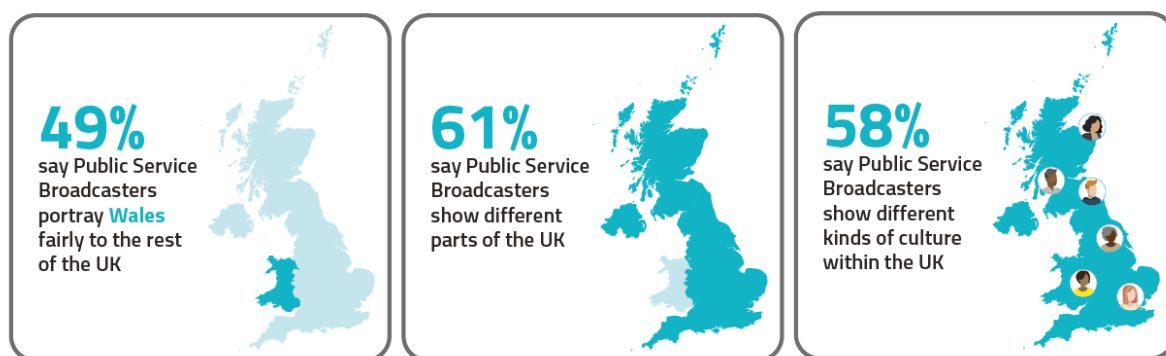
In a typical week in 2019, 306,000 viewers in Wales watched S4C on television for at least three consecutive minutes.

**Figure 13: Average weekly reach (000s) of S4C – individuals: 2010-2019**



Source: BARB. Individuals (4+). S4C total area and S4C network. Reach criteria: 3+ consecutive minutes, full weeks used.

### How viewers in Wales rate the public service broadcasters



Source: Ofcom PSB Tracker 2019

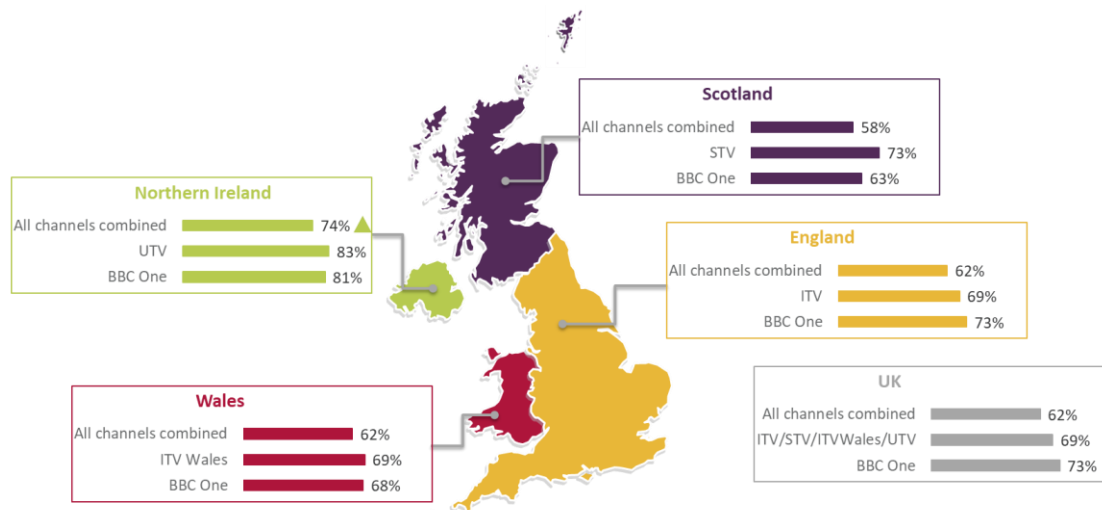
Three-quarters (75%) of PSB viewers were satisfied with PSB provision in 2019, remaining level with 2018 (74%). This is in comparison to 68% in Scotland, 73% in England and 76% in Northern Ireland.<sup>12</sup>

When looking at news provision specifically for Wales, viewers in Wales rated ITV Cymru Wales and BBC One very similarly, as in 2018 (69% and 68%, respectively), but rated all channels combined slightly lower (62%). These ratings are broadly in line with other nations.<sup>13</sup>

<sup>12</sup> Ofcom PSB Tracker 2019

<sup>13</sup> Ofcom PSB Tracker 2019

**Figure 14: Provision of high-quality news within nation, by provider (7-10 rating)**



% Rating for delivery 10/9/8/7

Source: Ofcom PSB Tracker 2019. Q16- Extent to which the channel is rated as 7-10 out of 10 in relation to the following statement: *Its regional news programmes provide a wide range of good quality news about my area.* Base for individual channels: Self-reported viewers of each in each nation (BBC One = UK: 2062; Eng: 1443; Scot: 208; Wales: 214; Northern Ireland: 197), (ITV1 = UK: 1774; Eng: 1224; Scot: 173; Wales: 188; Northern Ireland: 189). Base for 'All channels combined': All respondents who ever watch any PSB channels in each nation (UK: 2993; Eng: 2103; Scot: 303; Wales: 294; Northern Ireland: 293).

In Wales, three in five (61%) of regular PSB viewers rate PSB channels favourably (7-10) on delivery for 'showing different parts of the UK, including England, Northern Ireland, Scotland and Wales', compared to England (59%), Northern Ireland (63%) and Scotland (56%).<sup>14</sup>

Around half (49%) of in Wales rated 'it portrays my region/nation fairly to the rest of the UK' between 7-10 on the scale. This compares with England (50%), Scotland (46%) and Northern Ireland (53%).<sup>15</sup>

Nearly three in five (58%) rated the delivery of 'its programmes show different kinds of cultures within the UK' highly, compared to Scotland (55%), England (62%) and Northern Ireland (65%).<sup>16</sup>

<sup>14</sup> Ofcom PSB Tracker 2019

<sup>15</sup> Ofcom PSB Tracker 2019

<sup>16</sup> Ofcom PSB Tracker 2019

# TV programming for and from Wales

## Introduction

The BBC and ITV provide programming specifically for viewers in Wales across a range of genres, but most notably news and current affairs output. S4C is the Welsh-language broadcaster, commissioning content for distribution on its linear television channel and a variety of digital platforms.

### **S4C – Sianel Pedwar Cymru**

S4C was established in 1982 following many years of campaigning by Welsh language activists for a dedicated Welsh-language television service. Providing a wide range of programmes in peak time pleased not only Welsh speakers, but also those unable to understand Welsh who wanted Welsh language output removed from BBC One Cymru Wales and ITV Cymru Wales. Like Channel Four, S4C was a publisher-broadcaster; this led to the growth of the independent production sector in Wales. Until 2011 S4C was also the home of most Channel Four output in Wales but became a wholly Welsh-language service following the completion of digital switchover.

S4C currently receives £74.5m from the licence fee, £6.85m from the Department for Digital, Culture, Media and Sport (DCMS) and a small amount of commercial income. Following the recommendations of a Government-sponsored independent review in 2019, the whole of S4C's funding, to be set by the Secretary of State at DCMS, will come from the licence fee from 2021-22 onwards.

The BBC's and ITV Wales' combined spend on programming for Wales decreased by 2% in 2019 to £33.5m. The BBC continues to drive the spend on first-run content for Wales, making up £27.4m of the total, with ITV Cymru Wales accounting for the remaining £6.1m.

The BBC produced 629 hours of local programming in 2019, a slight rise on the previous year, while ITV produced 332 hours of local programming, slightly less than in 2018.

Wales is also an important source of production for PSB content shown across the UK, with some 4% of qualifying network spend on the PSB channels spent on Wales-based productions in 2019.

### **BBC Cymru Wales moves to Central Square**

Continuous broadcasting began from the BBC's new headquarters in Cardiff's Central Square on 14 July. The first broadcast by BBC Wales TV Presentation team marked a significant milestone with all live services planned to have completed their move from the Llandaff site by autumn 2020. The move to Central Square is a crucial part of BBC Wales's strategy to modernise and renew BBC Wales, and to ensure it serves all audiences across Wales.



Central Square will be open to the public and a wide range of partners in the creative sector. The building will offer a range of learning experiences, particularly to younger people who hope to work in the creative industries. Central Square will also be the first broadcast centre in the world to have a Live IP core, meaning that it will have the most advanced technology of any broadcast centre in the UK.

### How we report spend on programming

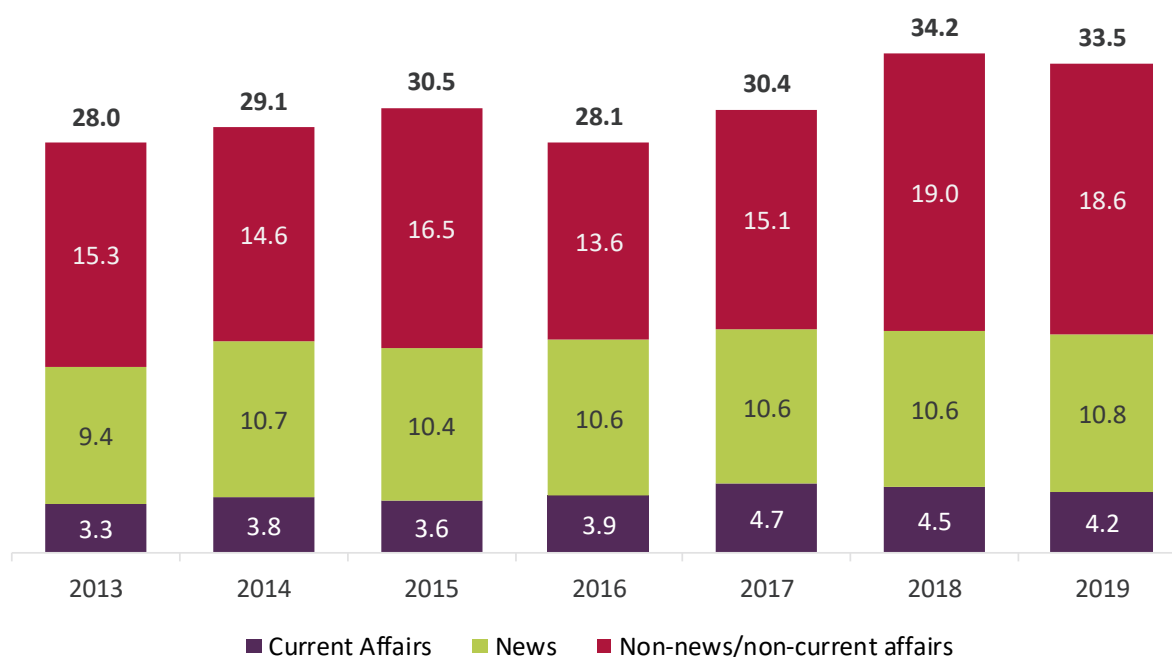
The analysis in this section covers programming made in Wales for viewers in Wales, as well as programming made in the nation and broadcast UK-wide. It focuses on first-run UK originations, which are programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the UK in the reference year.

Spend on this content includes all costs incurred by the broadcaster associated with making programmes. These include both direct and indirect production costs for in-house productions, and licensing costs for commissioned programmes, but exclude costs related to marketing and distribution. All spend figures are in real terms, which mean they are adjusted for inflation using the consumer price index (CPI) and are listed in 2018 terms.

### The BBC Cymru Wales' and ITV Cymru Wales' combined spend on programming for Wales decreased by 2% in 2019

Spending on news – at £10.8m – accounted for 32% of all programming spend by the BBC and ITV in Wales, marginally higher than in 2018. Spending on current affairs and other programming was marginally lower than in the previous year.

Figure 15: PSB spend on first-run UK-originated content for Wales, by genre (£m)



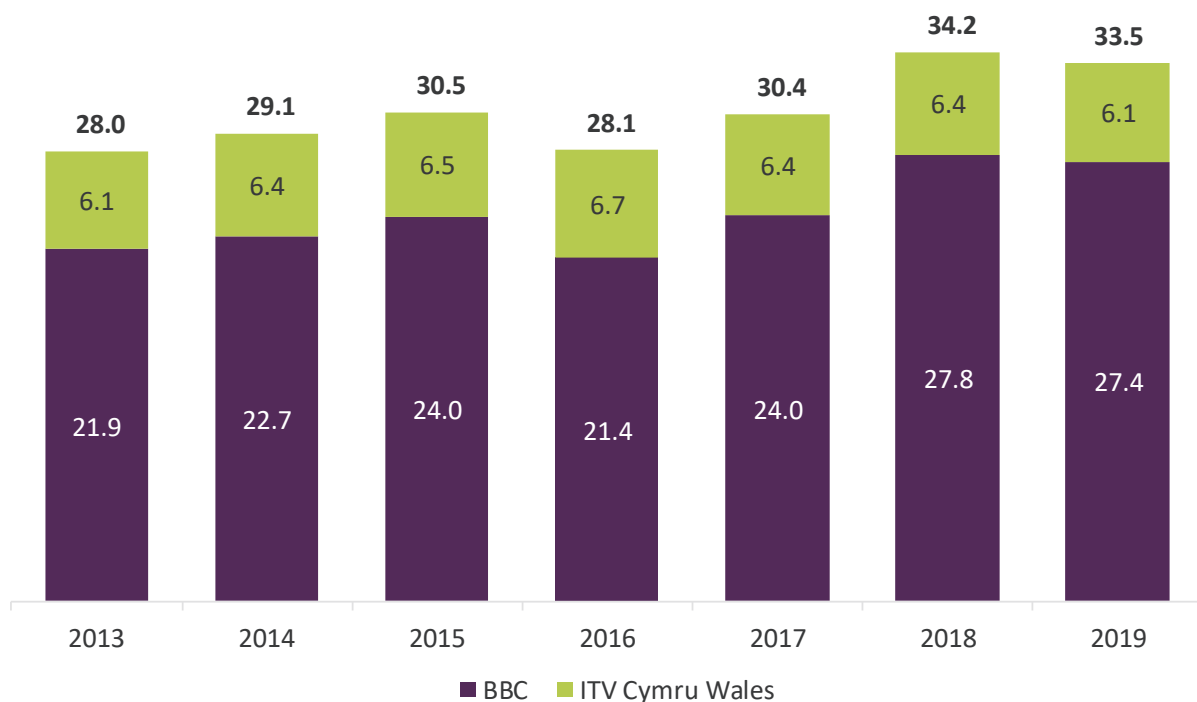
Source: Ofcom/broadcasters. Note: Figures are expressed in 2019 prices. Excludes spend on S4C output.

## Both BBC Cymru Wales and ITV Cymru Wales spent slightly less on non-network programming for Wales in 2019

BBC Cymru Wales continues to drive the spend on first-run content for Wales, remaining stable with spend in 2019 at £27.4m, a slight decline on 2018 in real terms.

ITV Cymru Wales' spend on first-run content for Wales has also remained relatively stable, declining by 5% to £6.1m. Despite this decline, levels of investment by ITV Cymru Wales for programming in Wales has been above £6m since 2009.

**Figure 16: BBC and ITV Wales spend on non-network first-run UK-originated content for Wales (£m)**



Source: Ofcom/broadcasters. Note: Figures are expressed in 2019 prices. Excludes spend on S4C output.

### Local programming requirements / commitments

Both ITV and the BBC are required to produce programming for viewers in Wales.

Under the terms of its licence, which was renewed on 1 January 2015 for ten years, ITV Cymru Wales has to deliver a minimum amount of programming which is “of particular interest” to people living in Wales. This is done through quotas for news and non-news/current affairs programmes.

These quotas require ITV to produce 4 hours of news and 1 hour 30 mins per week of regional non-news programming, of which 47 minutes must be current affairs.

BBC Cymru Wales, through its operating licence which came into effect on 1 January 2018, must also fulfil regulatory conditions specific to Wales.

Among other things, this operating licence stipulates that in each financial year the BBC must ensure that:

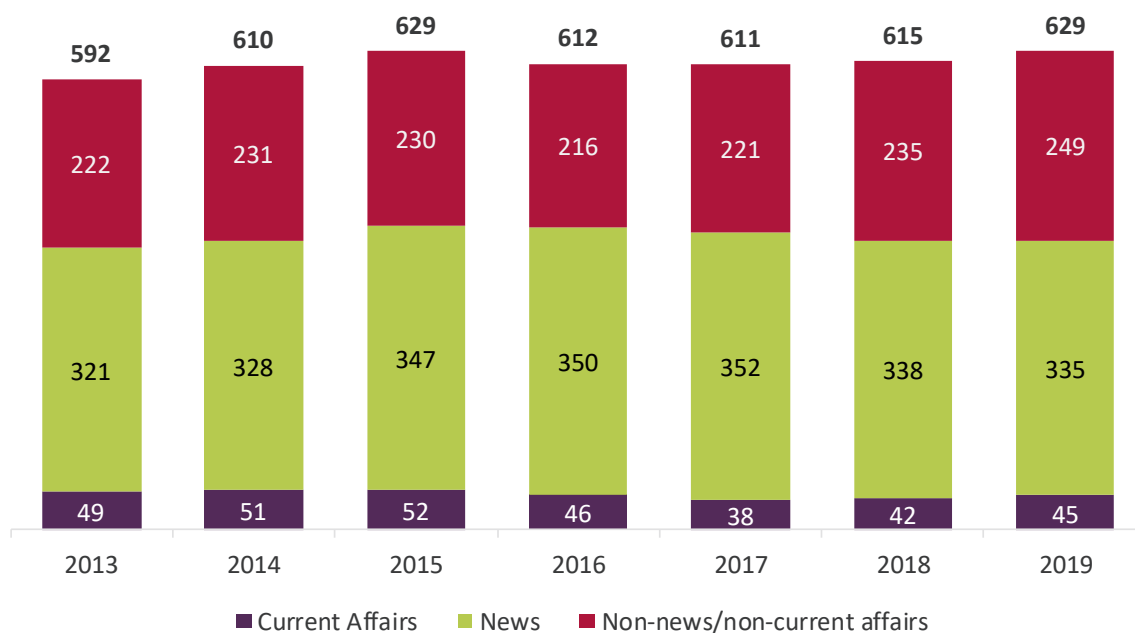
- in respect of BBC One Cymru Wales, at least 275 hours are allocated to news and current affairs programmes; and at least 65 hours are allocated to non-news programmes;
- in respect of BBC Two Cymru Wales, at least 175 hours are allocated to non-news programmes; and
- in respect of BBC One Cymru Wales and BBC Two Cymru Wales taken together, the BBC must ensure that they provide a range of genres in their programming that reflects Wales' culture.

## Overall hours of BBC first-run UK-originated content in Wales rose in 2019

Total hours of BBC first-run content for Wales rose to 629 hours in 2019, up by 14 hours and representing the highest output since 2013.

While hours of current affairs and news have remained relatively stable, programming in a variety of other genres has driven the increase in first-run hours by the BBC in Wales. Non-news/non-current affairs content increased by 6% to 249 hours. More than half (53%) of first-run content by the BBC for Wales is news programming.

**Figure 17: BBC hours of first-run UK-originated content for Wales, by genre**



Source: Ofcom/broadcasters.

## BBC Cymru Wales

BBC Cymru Wales has announced that it needs to make savings of £4.5m during 2020/21. This follows the Director General's announcement in April that the BBC would need to make a saving of £125m this year, due to the impact of the coronavirus and also reflecting the ongoing savings that the BBC has to deliver. The savings are anticipated to lead to a headcount reduction of around 60 staff in Wales. Further details of the proposals will be announced in autumn 2020. Before the coronavirus pandemic, the BBC had 24% less available to spend on UK public services than if the licence fee had risen with inflation since 2010. The organisation has £800m ongoing savings to make as well as the additional £125m deficit that needs to be met due to the impact of the coronavirus.

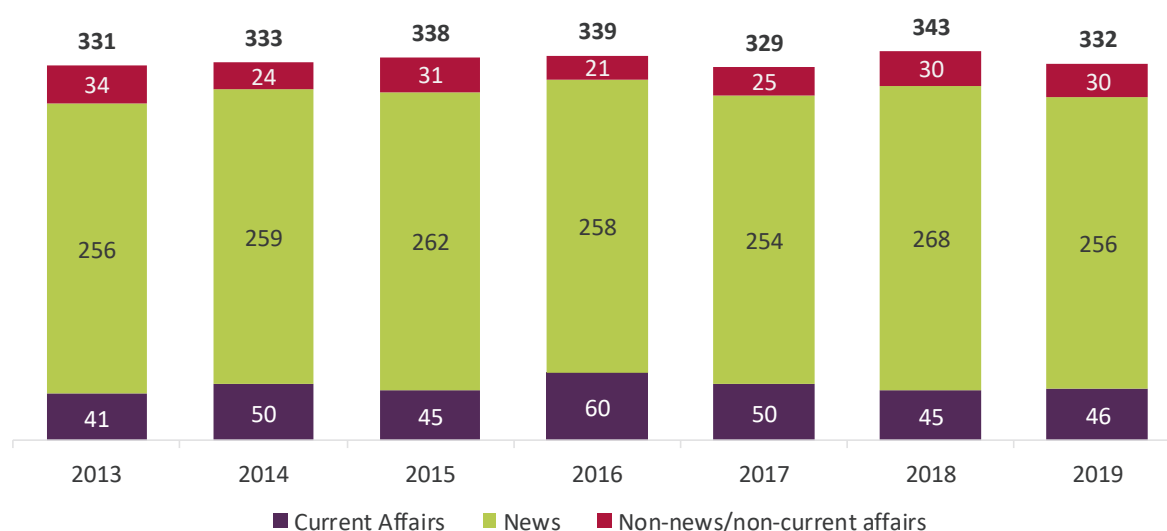
## ITV Cymru Wales' hours of first-run programming for Wales remained steady in 2019

After 2018's hours reaching the highest level of output since 2008, the small 3% decrease in hours since last year sees 2019 return to average levels over the period.

The vast majority of ITV Cymru Wales' hours of first-run content for Wales goes toward news programming, making up 77% of output. Most of the small year-on-year fluctuations in hours are due to changes in news programming.

Hours of current affairs content and other genres have remained at consistent levels in recent years.

Figure 18: ITV hours of first-run UK-originated content for Wales, by genre



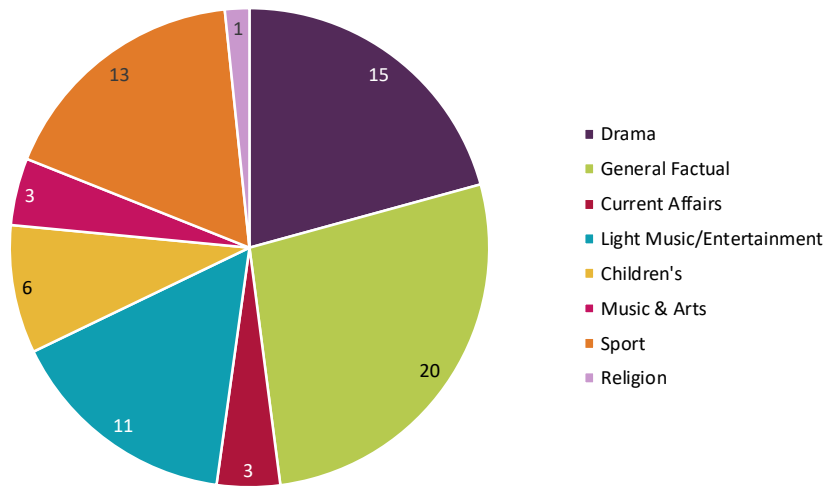
Source: Ofcom/broadcasters.

## S4C spent £72.8m on first-run commissions broadcast in 2019-20, across eight different genres

The majority of spend went toward general factual (£20m) programming followed by drama (£15m), comprising just under half of the total S4C spend on first-run commissions, consistent with the distribution of spend in recent years.

A significant amount of spend also goes toward sport (£13m), with the remainder funding content across current affairs, children’s, music, entertainment, arts, and religion.

**Figure 19: S4C spend on first-run commissions: 2019-20 (£m)**



Source: Ofcom/broadcasters. Note: Figures are expressed in 2019 prices

### Devolution of broadcasting

In early 2020, before the Covid-19 pandemic, the main focus of Senedd Cymru’s Culture Welsh Language and Communications Committee was its inquiry into whether the regulation of broadcasting should be devolved to Wales. Currently, broadcasting is a reserved matter to the UK government, but this is an issue that is often raised in Wales.

The inquiry ‘Devolution of Broadcasting’ asked questions about the governance and funding of the public service broadcasters in Wales and the changing ways in which audiences consume media in an increasingly digital world. The inquiry also asked specifically about Ofcom’s regulatory functions.

The Committee held several evidence sessions with stakeholders, including a workshop session, on a number of key themes. These included news and current affairs provision; content in a digital age; Welsh-language content; regulatory divergence; and the future of broadcasting.

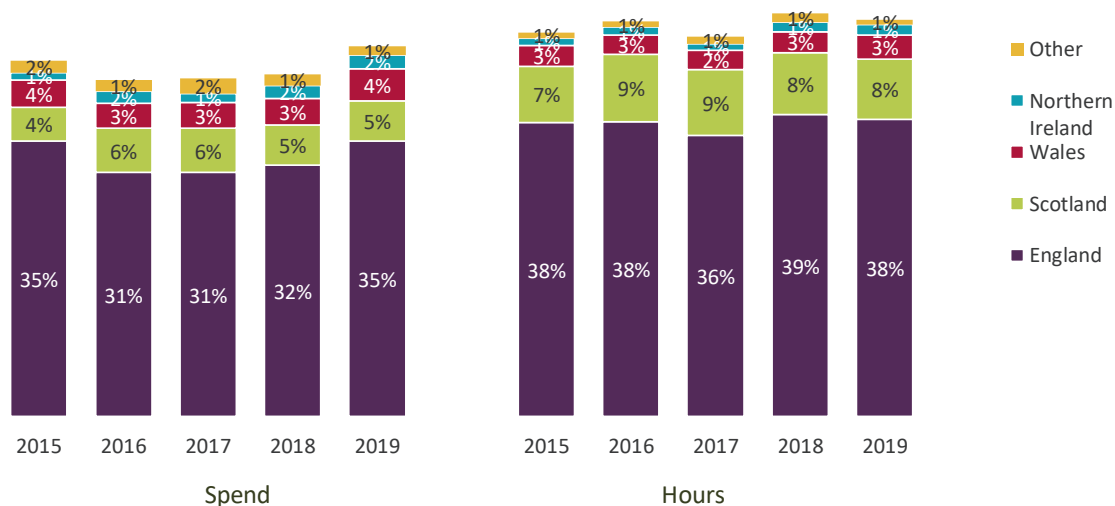
When asked for their views by the Committee, the PSBs remained neutral on the issue of devolving broadcasting. But others, such as the Welsh-language lobbyists, Cymdeithas yr Iaith, are in favour of devolving the responsibility. The inquiry is now complete, and the Committee will publish its conclusions and recommendations later in 2020.

## Network content produced in Wales

Public service broadcasters have to make programmes that are broadcast for the first time on their network TV channels in a range of places around the UK other than London. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours and the proportion of qualifying spend that must be outside London. The BBC has individual quotas for each of the UK nations, and Channel 4 also has an out-of-England quota. ITV and Channel 5 are not specifically required to make content outside England.

Across all the PSBs, 4% of qualifying first-run network spend was allocated to programmes qualifying as Wales productions, and 3% of hours. The proportion of qualifying spend in Wales has been increasing, primarily due to the BBC.

**Figure 20: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2015-2019**



Source: Broadcasters / Ofcom

### The proportion of network spend from the BBC in Wales reached its highest level in five years in 2019

The BBC increased the proportion of both its network spend and programme hours made in Wales in 2019. Cardiff is the home of the BBC's long-running and returning drama series *Casualty* and *Doctor Who*; in 2019 the first series of *His Dark Materials*, produced by Bad Wolf, was also made in Wales. In 2019, a range of factual entertainment shows broadcast on the BBC's services, Channel 4 and Channel 5 qualified as Wales productions, including Channel 4's *Extreme Cakemakers* and a series of titles commissioned from Boomerang Productions for Channel 5.

**Figure 21: Proportion of qualifying network production in Wales, by PSB: 2015-2019**

		2015	2016	2017	2018	2019
BBC	Spend (%)	7.1	5.8	6.7	6.3	8.2
	Hours (%)	4.9	4.3	4.4	4.6	5.4
ITV	Spend (%)	0.3	0.1	0.01	0.01	0.1
	Hours (%)	0.1	0.1	0.1	0.1	0.1
Channel 4	Spend (%)	2.0	2.8	2.2	3.4	2.4
	Hours (%)	2.6	2.4	2.7	4.2	4.6
Channel 5	Spend (%)	0	0.3	0.4	0.2	1.4
	Hours (%)	0.1	0.4	0.5	0.2	0.5

Source: Broadcasters / Ofcom.



# Case study

## Terrestrial television overlap viewing in Wales

The differing responses by governments in the UK to the Covid-19 pandemic has highlighted issues regarding the relevance and accuracy of information received by citizens in Wales. This is partly to do with the reporting by UK network news programmes that doesn't take into account the fact that many announcements made by the UK Government are not applicable in Wales, Scotland or Northern Ireland. But it is also to do with the fact that some people in Wales do not have access to television news services that are relevant to Wales.

### Background

The lack of availability of television services that provide information relevant to Wales has always been an issue in the eastern areas of Wales along the border with England. For many homes in these areas this is because the only available digital terrestrial services come from transmitters in England. For others it is because the full range of Freeview services are not available on local relay transmitters that carry programmes for Wales, so households choose to receive a greater range of programmes from England, thereby missing out on programmes for Wales. Some viewers in Wrexham, for example, have a choice between receiving around 27 services from a relay transmitter in Wales, or over 90 programme services from a main transmitter in England. This is only relevant to Freeview users; it is not an issue for those properties receiving satellite or cable services.

Historically, there are many reasons why some viewers in Wales would choose services from England as opposed to those from Wales. A number of factors may have influenced viewers' choices. These include:

- The significant growth of Welsh-language programming in the 1970s. Welsh-language programmes were broadcast on both the BBC and ITV in Wales at peak times and many non-Welsh speaking viewers opted to receive services from England where possible.
- The creation of S4C in 1982 provided an improved service for Welsh speakers on one channel and removed Welsh-language programmes from BBC Wales and ITV Wales. But with the fourth channel in Wales allocated to predominantly Welsh-speaking S4C, some viewers wanted to receive the Channel 4 service instead, which was only broadcast from transmitters in England.
- Channel Five. When this service started in the late 1990s it was not possible to receive it in many parts of the UK, including areas of Wales. However, viewers in many border areas were able to receive the service from transmitters in England.

Following devolution in 1999, the debate surrounding this issue intensified and its significance increased. Many areas of the Welsh Government's responsibilities, including health, education, the economy and transport are not generally reported in UK network news programmes (nor on local news bulletins for England), and this, coupled with the lack of a significant indigenous press in Wales, has led to concerns being raised about the implications on citizenship and democratic inclusion for those viewers in Wales receiving services from England.

In 2007 Ofcom commissioned Beaufort Research to assess the extent of this issue and its consequences for those viewers receiving services from transmitters in England. The report, *TV Overlap Viewing in Wales* found that around 7.5% of the Welsh population live in 'overlap areas' where it is possible to receive television services broadcast from England and from Wales. Of the 1.4 million households in Wales it is estimated that 42.7% are able to receive signals from English transmitters. The research found that a proportion of viewers in these areas receive English regional variants of BBC One, BBC Two and ITV1 rather than the BBC and ITV services for Wales. As a result, these viewers do not get access to news, current affairs and other programmes that are produced specifically for Welsh viewers. Somewhere between 1.5% and 3% of households can only receive services from transmitters in England.

The report also found that the majority of those households without access to programmes from

Wales “weren’t very well-informed about events in Wales outside their area and felt they missed out as a result”. Viewers in these households also admitted to low or no knowledge of the work and policies of the National Assembly for Wales, as the institution was called at the time. Respondents admitted to being better informed about what was going on in Westminster than in Cardiff and that this affected their likelihood of voting in elections for the National Assembly.



## Coverage

There are four powerful English transmitters situated near the border areas of Wales. Winter Hill provides television services for the north-west of England, but its signal can reach coastal areas of north-east Wales, parts of the eastern side of Anglesey, the Deeside area and towns such as Mold and Wrexham in north-east Wales. The Wrekin transmitter serves the West Midlands, but services from this site can also be

received in Wrexham and the north-east Wales borders. Further south, services from the Ridge Hill transmitter can be received in Newtown and some border towns in Monmouthshire, including Abergavenny. In addition, a group of small transmitters serving the border communities of Presteigne, Knighton, Knucklas and Garth Hill relay signals from Ridge Hill because, due to local terrain, it is not possible to receive an off-air feed from a transmitter based in Wales. Viewers on the south-east Wales coastal strip and in parts of the south-east Wales valleys can receive services from the Mendip transmitter in the west of England.

The issues relating to overlap viewing only affect the digital terrestrial platform. Cable and satellite television services in Wales already give due prominence to the public service broadcast (PSB) channels transmitted in Wales, BBC One Wales, BBC Two Wales, ITV1 Wales and S4C. For example, digital satellite homes that subscribe to Sky Digital in Wales automatically receive BBC One Wales as

the main default BBC One service (on channel 101) as do viewers to Virgin Media Services, although the 104 slot on Virgin Media is currently occupied by Channel Four rather than S4C which is currently on 166.

**Figure 22: Coverage of public service broadcasting terrestrial television services in Wales**

3PSB core DTT in Wales	Number of households	% of households
Total households	1,408,486	100%
Coverage from any transmitter	1,377,987	97.8%
Coverage from English transmitters	601,991	42.7%
Coverage from Welsh transmitters <sup>17</sup>	1,331,674	94.5%
Coverage from Welsh transmitters 95% time	1,356,104	96.3%
Coverage from English transmitters only	46,313	3.3%
Coverage from English transmitters only 95% time	21,883	1.6%

\*\*\*\*

For those viewers living in areas where only signals from England are available, the most viable option if they wish to receive services from Wales is to switch from terrestrial to satellite reception, but there is no reason to believe that this is widely understood. All the Welsh PSB services (and many other channels) are available on a free-to-air basis via satellite. While there is a one-off equipment and installation cost, there is no ongoing monthly subscription payable.<sup>18</sup>

<sup>17</sup> Includes the Storeton (Wales) transmitter, which is in England, but transmits programming for Wales to areas of the north-east coast of Wales

<sup>18</sup> More information on free-to-air satellite services is available at <https://www.freesat.co.uk> or <https://www.sky.com/shop/freesat/home/>.

# Radio and audio

## Introduction

Radio continues to be popular with people in Wales, with nearly nine in ten adults listening every week. And alongside TV screen viewing and online activities, radio continues to account for a considerable amount of time spent on entertainment services, with listeners tuning in for an average of more than 20 hours every week.

BBC services are more popular in Wales than in any other part of the UK, with Radio 2 retaining its position as the most listened-to station across Wales.

This has been a landmark year for digital listening in Wales. Digital listening – through DAB radio, DTT and online (including smart speakers) – accounted for 52% of all listening in Q1 2020, having overtaken analogue listening in Q2 2019 for the first time.

Radio listening figures in this section are from Q1 2020 and cover only a small portion of the Covid-19 lockdown period. As mentioned earlier in this report, radio stations played a key role in keeping people informed and entertained throughout the peak lockdown months of April, May and June.

## Radio listening in Wales

### On average, just under nine in ten adults listened to the radio each week in Wales in Q1 2020

Some 87.5% of adults listened to the radio each week in Wales in Q1 2020, and at an average of just under 21 hours per week, they listen for longer than adults in any of the other UK nations.

Figure 23: Average weekly reach and listening hours

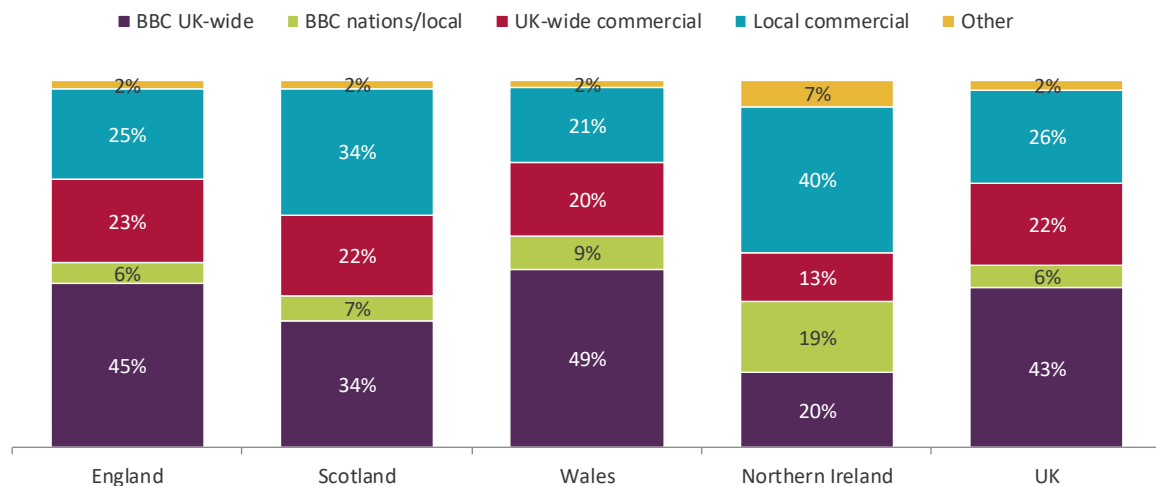
	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening (hrs:mins)	20:12	18:00	20:48	19:18	20:12
Weekly reach	89.0%	85.8%	87.5%	90.7%	88.8%

Source: RAJAR, All adults (15+), Q1 2020. England = BBC Local radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA. Reach is defined as a percentage of the area's adult population who listen to a station for at least five minutes in the course of an average week.

## UK-wide BBC services account for nearly 50% of all radio listening in Wales

BBC radio took the largest share of listening hours in Wales (58%), while 41% of listening was to commercial stations. However, the BBC's share of radio listening was made up mostly of listening to its UK-wide stations – Radio 1, 2, 3, 4 etc. BBC UK-wide stations accounted for 49% of total listening with BBC nations/local radio making up 9% of total listening. BBC UK-wide stations had a greater share of listening in Wales than in any other UK nation.

**Figure 24: Share of listening hours, by nation**



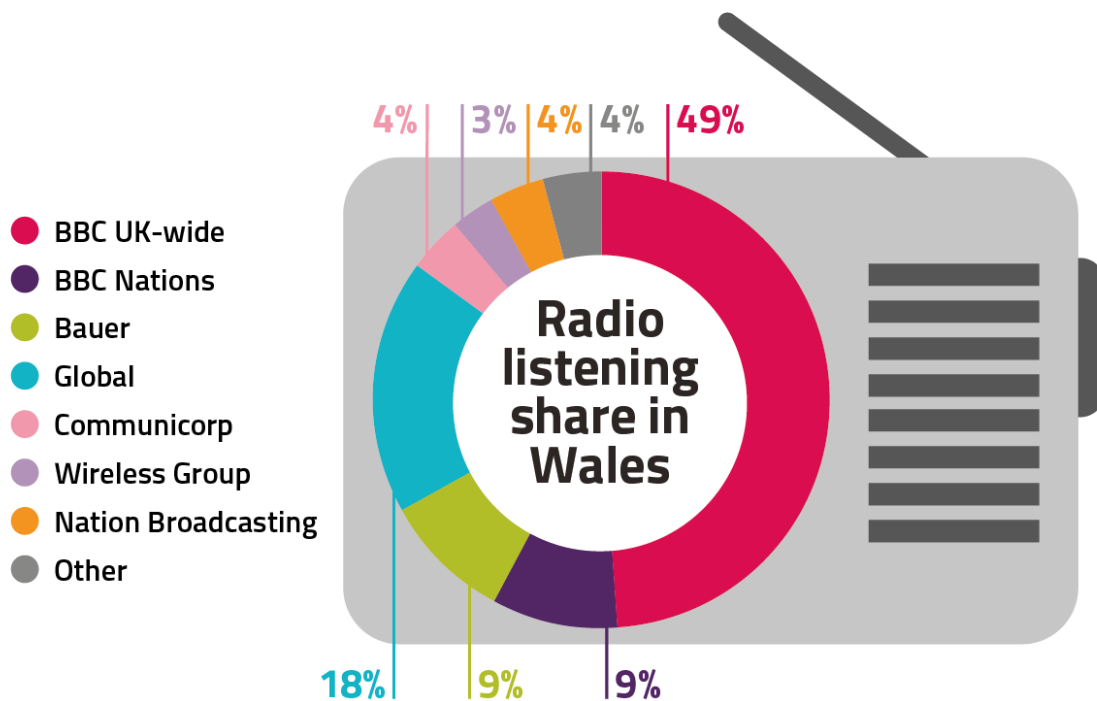
Source: RAJAR, all adults (15+), Q1 2020. England = BBC Local Radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA.

## BBC services accounted for more than half of radio listening in Q1 2020

While BBC services accounted for more than half of all radio listening in Wales (58%), Global and Communicorp, which operate the Capital, Heart and Smooth networks in Wales, accounted for 22% of listening. Meanwhile Bauer, which owns Swansea Sound and The Wave 96.4, took 9% share of listening in Q1.

In May 2020, Bauer announced that Swansea Sound and The Wave 96.4 (acquired by Bauer from Wireless) would become part of the Greatest Hits Radio Network South Wales. Greatest Hits Radio South Wales will retain its Welsh language programming, as well as local news, information and travel news. Bauer's new service will also be available on DAB further afield, including in Cardiff for the first time.

Figure 25: Share of listening in Wales, by radio group



Source: RAJAR, All adults (15+), Q1 2020, BBC Radio Wales TSA

### First radio show from BBC Cymru Wales' new headquarters

The first radio programme to be broadcast from the new BBC Cymru Wales headquarters in Cardiff city centre took place at the end of July. BBC Radio Cymru 2 went live from Central Square at 7am on 25 July. Before then, Radio Cymru had been broadcasting from the BBC's Llandaff site since its launch over 43 years ago.

### BBC Radio 2 was the most popular station across Wales in Q1 2020

BBC Radio 2 was the most listened-to radio station in Wales in Q1 2020, with a weekly reach of 34% among adults aged 15+. BBC stations dominated the reach rankings in all parts of Wales except for the Cardiff area, where Heart South Wales was the second most popular station.

Figure 26: Top three radio stations, by region

	UK		Wales*		Cardiff**		North Wales***	
Rank	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)
1	BBC Radio 2	26%	BBC Radio 2	34%	BBC Radio 2	34%	BBC Radio 2	37%
2	BBC Radio 4	20%	BBC Radio 1	21%	Heart South Wales	20%	BBC Radio 4	23%
3	BBC Radio 1	16%	BBC Radio 4	17%	BBC Radio 1	18%	BBC Radio 1	22%

Source: RAJAR, All adults 15+, Q1 2020. \* BBC Radio Wales TSA \*\* Capital South Wales TSA \*\*\*Heart North Wales TSA.

### Community radio in Wales

Community radio stations serve geographic communities (usually within five kilometres) and communities of interest. They are not-for profit, are owned and operated by the communities they serve, and reflect the needs and interests of their audiences, creating direct links with their listeners, offering training opportunities and making sure that members of the community can take part in how the stations are run.

There are currently 11 licensed community radio stations in Wales. Nine stations, Calon FM, Tudno FM, BRfm, Radio Tircoed, Môn FM, Radio Cardiff, Rhondda Radio, Bro Radio and GTFM are already on air, with Radio Aber and Merthyr Radio aiming to start broadcasting soon.

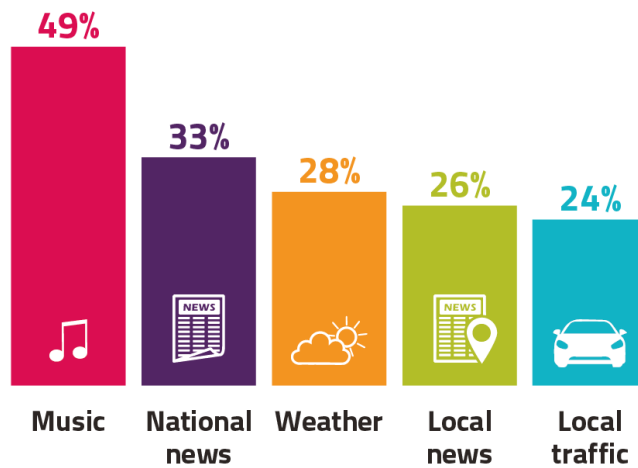
Community radio stations have provided a reassuring voice to thousands of people in Wales during the ongoing public health crisis, but many have faced severe financial difficulties. In response, the UK [government has announced](#) emergency funding to help them meet the costs of providing vital programming to local communities.

In May, the Community Radio Fund Panel, which acts independently from Ofcom, awarded grants to nearly one-third of stations in the UK, totalling £333,125. In July, Ofcom [re-opened applications](#) to award the remaining funds.

### Music is the main reason to tune in to the radio

Music is the most valued type of content for radio listeners across Wales, followed by national news – the same as in the UK as a whole. The weather is the third most valued type of content, unlike in Scotland and the UK where local news comes third (it is fourth in Wales). Local traffic and travel completes the top five most valued types of content on the radio in Wales.

Figure 27: Most valued types of content on the radio



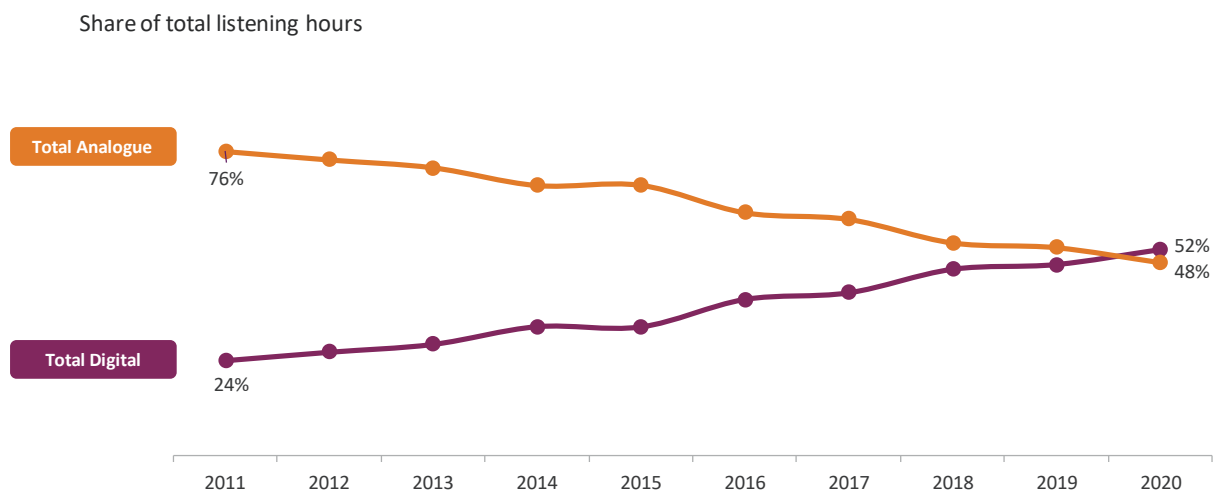
Source: TouchPoints 2019  
 Base: Weekly radio listeners aged 15+

## Digital listening in Wales

### Listening to radio through a digital platform has now overtaken analogue listening

Digital listening – through DAB radio, digital television and online (including smart speakers) – accounted for 51.6% of all listening in Wales in Q1 2020, having overtaken analogue listening in Q2 2019 for the first time. This means that Northern Ireland is now the only nation of the UK where the majority of listening is still via analogue means.

Figure 28: Share of listening hours via digital and analogue platforms in Wales: 2011-2020

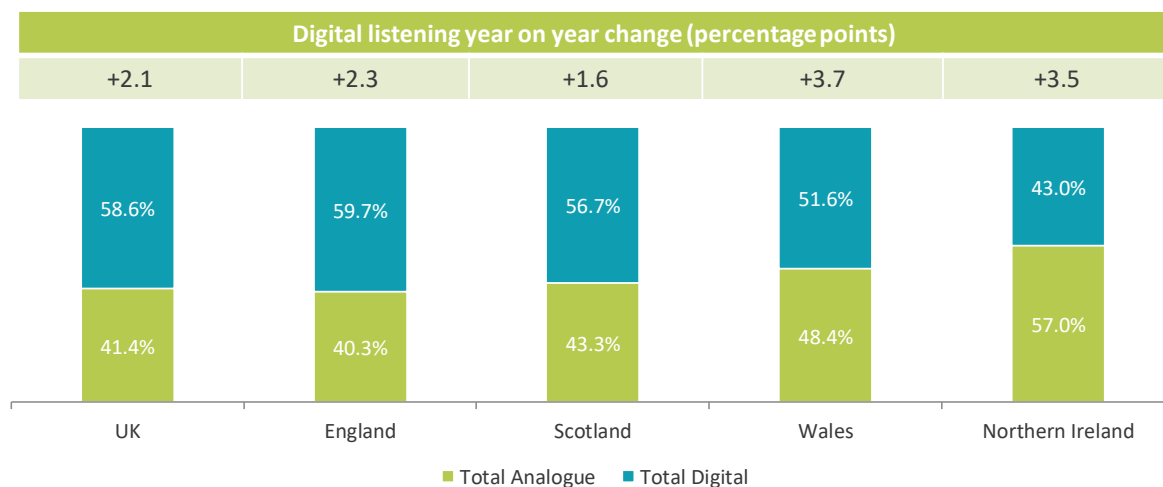


Source: RAJAR, all adults, Q1 of each year, BBC Radio Wales TSA.



Despite the rise (3.7pp year on year), digital listening in Wales (51.6%) is still lower than in the UK as a whole (58.6%). Five years ago (Q4, 2014), digital accounted for just 32% of total listening in Wales.

**Figure 29: Share of listening hours via digital and analogue platforms**



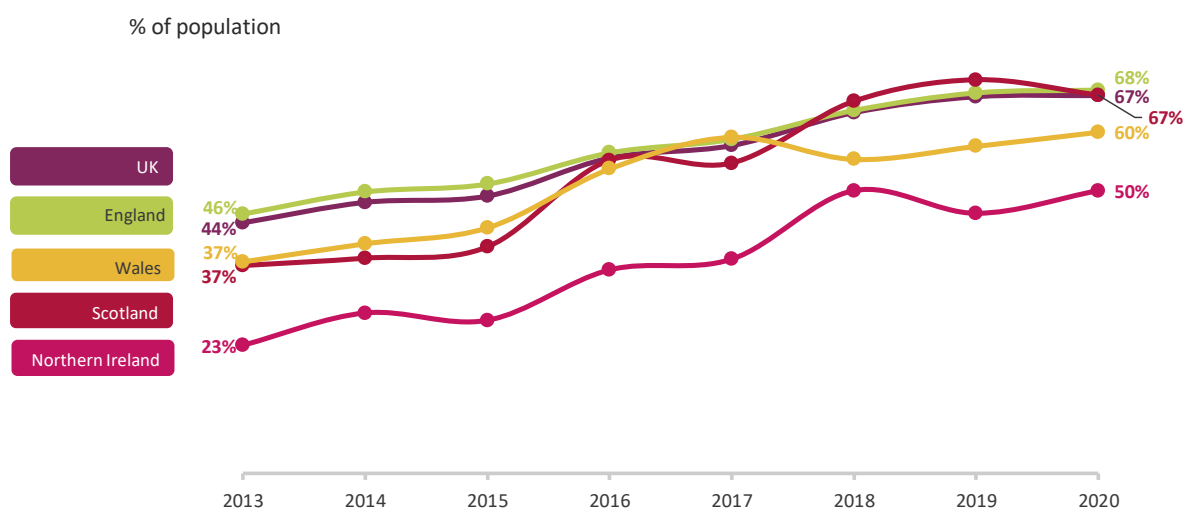
Source: RAJAR, All adults (15+), Q1 2020; within the BBC Radio TSA for each nation.

### Six in ten adults in Wales have a DAB digital radio

Ownership of DAB radio sets in Wales stood at 60% in Q1 2020, including at home and in the car, and is two percentage points higher than a year ago.

Take-up was higher across the UK as a whole (67%) and in Scotland (67%) at the start of 2020, but remained lower in Northern Ireland, at 50%.

**Figure 30: DAB ownership**



Source: RAJAR, All adults 15+, Q1 in each year England = BBC Local Radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA.

## Ofcom sets out licensing plans for small-scale DAB radio

Small-scale DAB will expand local digital radio coverage and ensure that listeners will be able to tune into a diverse range of radio services across the UK on the digital audio broadcasting platform.

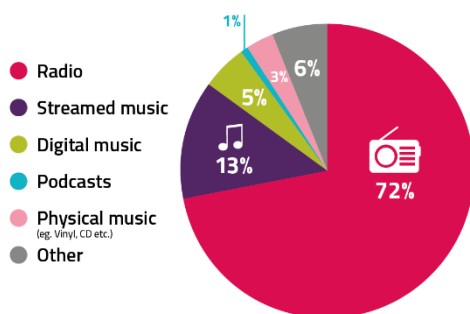
This platform uses freely available software and computer technology to transmit digital radio services and broadcast them to a relatively small geographic area. It allows stations to use inexpensive equipment to get on air for far less money than was previously possible.

Ofcom will advertise multiplex licences for small-scale DAB in batches, starting in September 2020 with 25 local areas across the UK, including Cardiff and the Welsh Valleys.

Community radio applications, in the form of the new Community Digital Sound Programme ('C-DSP') licences, will open for each local area at the same time as the publication of multiplex licence advertisements.

Small-scale DAB will give community radio, smaller commercial radio stations and new entrants an affordable pathway to terrestrial digital radio, ensuring the continued availability of a diverse range of radio services across the United Kingdom, on a platform which accounts for an increasing amount of radio listening.

## Audio trends



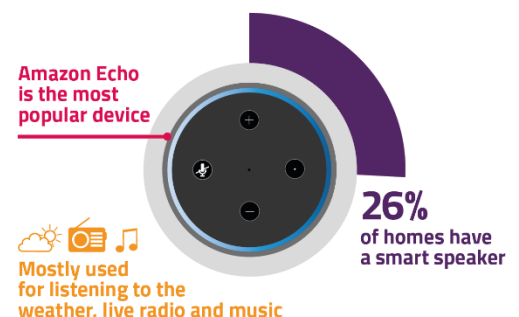
### Listening to live radio is the most popular audio activity in Wales

Of all the time spent each week listening to any type of audio, 72% is to radio. This is higher than the proportion of time spent on radio in Scotland (66%) and at a similar level to the Great Britain average (72%).<sup>19</sup>

## More than a quarter of homes in Wales have smart speakers

A significant amount of new digital listening is done through smart speakers. Just over a quarter of homes in Wales have smart speakers (26%). The Amazon Echo is by far the most popular type (found in 89% of homes in Wales that have a smart speaker).

The most-cited requests among users were for weather information (63%), to play music via a streaming service, such as on Spotify (62%), or to listen to a live radio station (also 62%). Around half of users in Wales use



<sup>19</sup> Source: TouchPoints 2019, Base: Government Office Region: Wales. Figures don't add up to 100% due to rounding.

smart speakers to get general information online (50%), to get news reports (46%) or to set an alarm or list (also 46%).<sup>20</sup>

### **The UK government's digital radio and audio review**

The Department for Digital, Culture, Media & Sport (DCMS) has announced a review of digital radio and audio to ensure that radio is fit for the future, given changing listener trends. The review will:

- assess future scenarios for the consumption of UK radio and audio content on all radio and online platforms, and assess the impact of these scenarios on access to UK radio services;
- assess the impact of likely models of future listener trends on current and future distribution strategies for UK radio groups and industry; and
- make recommendations on further measures and collaborative actions to strengthen the UK radio and audio industry for the benefit of all listener groups and to promote innovation.

In July, the DCMS and Digital Radio UK hosted a virtual round-table discussion with stakeholders in Wales as part of a programme of engagement to ensure that the Review effectively captures all relevant issues, opportunities and recommendations from all parts of the industry. The DCMS expects to publish its report on this by March 2021.

### **One in eight adults in Wales listen to podcasts each week**

One in eight adults aged 15+ in Wales (13%) listen to podcasts each week; 3% do so daily.<sup>21</sup> Two-thirds of podcast listeners<sup>22</sup> use their mobile phone for this activity (64%), with half this proportion using a smart speaker (31%).<sup>23</sup>

Among podcast listeners, the most popular type of podcasts are catch-up versions of BBC radio programmes (64%) such as *Desert Island Discs*, non-BBC radio stations (56%) such as *The Frank Skinner Show*, and other podcasts from the BBC (47%)<sup>24</sup> such as *That Peter Crouch Podcast*.

Also popular are podcasts that also have video versions (41%) such as TED talks, podcasts made by newspapers or magazines (39%) and those linked to TV programmes (16%).

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<sup>20</sup> Ofcom Technology Tracker 2020

<sup>21</sup> RAJAR Q1 2020, UK

<sup>22</sup> Note that the sample size for podcast listeners in Wales is below 100, therefore the data is indicative only and should be treated with caution

<sup>23</sup> Ofcom Technology Tracker 2020

<sup>24</sup> Other podcasts from the BBC are those that were not originally broadcast on radio and not linked to TV programmes