2 Television and audio-visual content

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2.1 Recent developments in Wales

**ITV Cymru Wales**

Now in the third year of its ten-year licence, ITV Cymru Wales is required to broadcast four hours of news and 90 minutes of non-news programming every week on ITV, available across all platforms and on its HD channel. See section 3 for details on regional news programming.

One of the most significant developments has been the creation of the new production label, Shiver Cymru, a partnership between ITV Cymru Wales and ITV Studios. Shiver Cymru’s first network commission was *The Aberfan Young Wives’ Club*, an hour-long documentary shown on ITV across the UK to commemorate the 50th anniversary of the disaster. The programme won the history prize at the 2017 RTS Programme Awards. ITV Wales also made two additional documentaries on the Aberfan anniversary for audiences in Wales, as well as providing extensive news and online coverage of the commemorations.

In 2016, the long-running current affairs programme Wales *This Week* and the political programme *Sharp End* were complemented by 24 different series and individual programmes produced by ITV Wales and by independent producers in Wales. These included the series *Crime Files* (made back-to-back with *Y Detectif* for S4C) and *The Harbour*.

In March 2017 *Coast and Country* broadcast its first live edition from a Welsh sheep farm. Other new series in 2017 included *Adrian’s Welsh Bites* and the three-part *Welsh Horse Power*. *Wales on TV* revisited events over the past 50 years with classic ITV archive footage provided by the National Library of Wales.

Outside its licence obligations for Wales, ITV’s partnership with the BBC continued the universal coverage of Wales in the 2017 Six Nations Rugby Championship on free-to-air television.

**BBC Cymru Wales**

**Strategic and operational**

In February the BBC announced plans to invest an extra £8.5m a year in English language television programmes for Wales. The new investment is intended to achieve a 50% increase in English language programming, and will be used to fund new drama, comedy and entertainment programmes. The investment is expected to generate around 130 hours of programming to be broadcast on BBC One Wales, BBC Two Wales and BBC iPlayer. The BBC also plans to channel this investment into news services, including expansion of BBC Wales’s specialist coverage, and online and mobile services.

Construction work continued on the new BBC Wales building in Central Square, Cardiff, with the building set to be fully operational by spring 2020. As part of this move, it was announced that BBC Cymru Wales is to adopt ‘next generation’ web technology at the new building, making it the first BBC facility in the UK to use internet protocol (IP) technology across both its production and broadcast operations.

BBC Cymru Wales also announced, in partnership with the National Library of Wales and the Heritage Lottery Fund, that a National Broadcast Archive would be established at Aberystwyth and three other locations: Cardiff, Wrexham and Carmarthen. This partnership will enable the library to hold the very large collection of original recordings at these premises and to make the digitised BBC Wales archive available to the public.

**Programming**

Dramas portraying Wales included *Ordinary Lies* and *Hinterland* for BBC One Wales. Owen Sheers’ film poem *The Green Hollow*, commemorating the 50th anniversary of the Aberfan disaster, achieved the highest Appreciation Index (AI) score of any BBC production in the past five years. For more detail on ITV Cymru Wales’ output and spend, please see section 1.4.
S4C

Future funding arrangements
During a Westminster debate on S4C’s funding arrangements in January 2017, the Minister of State for Digital and Culture Policy, Matt Hancock MP, confirmed that DCMS’ contribution to S4C would fall from £6.76m to £6.06m for the next financial year.

Pushing boundaries
S4C published its ten-year vision, in a document called Pushing the Boundaries, in April. S4C calls for its content to be available on all new platforms, including short-form video sites and social media platforms, and for its remit in law to be redefined from a television channel to a public service media company. The channel argues that the changes would give it greater freedom to pursue new programme-making and commercial opportunities; it is currently working to a remit set in 1982, when the channel first came on air.

S4C also says it wants to create content that is “more relevant, competitive and diverse” and to increase the “economic, linguistic and educational benefits” of its work. To do this, it says it needs £6m to ensure that its programming is available on all new devices and digital platforms.

Review by DCMS
In February 2016, the UK Government announced its commitment to conducting a comprehensive review of S4C in 2017. The review is looking at the broadcaster’s remit, governance and funding in order to ensure that it can continue to meet the needs of Welsh-speaking audiences in the future.

Relocation of HQ to Carmarthen, West Wales
Cabinet Secretary for the Economy and Infrastructure, Ken Skates, has agreed to allocate £3m of Welsh Government capital funding to support the Yr Egin creative industries project in Carmarthen, following consideration of a business case from the University of Trinity St David’s. Yr Egin will be home to S4C’s headquarters in West Wales.

New CEO
S4C’s Chief Executive, Ian Jones, has announced that he will be stepping down this October. Owen Evans, who joined the civil service in 2010 and is currently deputy permanent secretary to the Welsh Government, has been appointed to take over as the new Chief Executive.

Channel 4 commissioning in the nations
Channel 4 has an obligation to commission 3% of its output, measured by value and volume, from producers in the UK outside of England. This figure will rise to 9% in 2020.

In 2016 Channel 4 spent 8.5% of its commissioning budget in the devolved nations. The breakdown by nation was Scotland (5.2%), Wales (2.8%) and Northern Ireland (0.5%).

By volume of programming, Channel 4 commissioning in the devolved nations amounted to 9.2% of the total number of hours broadcast in 2016. The breakdown by nation was Scotland (6.3%), Wales (2.4%) and Northern Ireland 0.5%.
Local TV

Mold
Following the acquisition of Bay TV by the Made Group, Ofcom received a request to approve the Mold service to be delivered from Made’s headquarters in Liverpool. After careful consideration, Ofcom agreed, subject to Made TV accepting additional commitments being included in its licence, to ensure a Mold-focused service.

The strengthened Programming Commitments focus on delivering interviews, local news, lifestyle and current affairs programming which is planned, produced, hosted, filmed and edited in the Mold coverage area. It also provides for 30 minutes of first-run programmes in the Welsh language each week. The quantitative commitments included in the licence (e.g. hours per week of local programming) remain the same as those originally proposed by Bay TV Clwyd.

Cardiff
The planned changes to the frequencies used by local TV, as a result of the 700Mhz clearance programme, present challenges for Made, as for almost all local TV operators. On average, the reduced reach will mean that stations lose about 10% of their potential DTT audience, but Made Television’s strategy is to compensate for this via distribution on Virgin Media and Sky.

Swansea Bay TV
Bay TV Swansea broadcasts two live shows every weekday, along with news in English and Welsh, providing BBC Wales with four news stories every weekday.

Its partnership with the University of Wales, Trinity Saint David enables graduates to become camera operators, video journalists and studio technicians.

IWA media summit
The third annual IWA Cardiff media summit, entitled ‘The future of media in Wales’, was held in Cardiff in March.

Hosted by the Institute of Welsh Affairs (IWA), in partnership with BBC Cymru Wales and the University of South Wales, and supported by ITV Cymru Wales, S4C and TAC, the summit explored major issues affecting the media in Wales, including the media workforce, Welsh language media provision and news from and for Wales. The event coincided with the publication of Ofcom’s consultation on the BBC’s draft operating licence and strong opinions were voiced on the need to safeguard the volume of programming produced in Wales for Welsh audiences and to ensure that the new arrangements would secure better portrayal of Wales on television and radio networks.
In 2017, satellite penetration across households in Wales was unchanged since 2016. Statistically, take-up of Freeview, cable TV and hybrid DTT and IPTV (including BT, EE, NowTV and TalkTalk) also remained unchanged.

While there is no difference by location in 2017 for take-up of Freeview in Wales, take-up of satellite TV in Wales is higher in rural areas (59% compared with 43% in urban areas) and take-up of cable services is higher in urban areas (12% compared to 0% in rural). Compared to the UK overall, penetration of satellite TV is higher in Wales, although households in Wales are less likely than in the UK overall to have cable TV (10% in Wales compared to 15% in the UK).

Figure 2.1: Main television set share, by platform

Source: Ofcom Technology Tracker, Half 1 2017
Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2017, between Wales urban and rural in 2017 and at the 99% confidence level between Wales 2016 and 2017
QH1B: Which of these do you consider is your main type of television?
Note: Remaining percentages are ‘Don’t know’ responses

1 These are hybrid services that provide the bulk of their channels via the DTT platform and offer additional channels and functionality through a broadband connection (such as access to online video services and programme recordings). Now TV offers this through its TV Smart Box and also provides access to channels and content libraries directly through its website and app.
Six in ten TV households in Wales have pay TV, lower than in 2016 and in line with the UK overall

In 2017, six in ten households in Wales (with a television set) had pay TV; this incidence is lower than in 2016 and 2015, and at a comparable level to 2014. Households in Wales are as likely as the UK overall to have pay TV (62% in the UK).

Take-up of pay TV does not vary significantly by urban/rural location in Wales. However, the overall decline since 2016 in the incidence of pay TV in Wales is significant for rural areas of Wales (from 65% to 53%).

See the Market in Context section for more discussion of changing viewing habits and consumption in Wales.

**Figure 2.2: Proportion of homes with free and pay television**

![Percentage of homes which take up Pay-TV platforms in Wales](image)

**Year-by-year comparison**

- 2012: 60%
- 2013: 62%
- 2014: 59%
- 2015: 69%
- 2016: 71%
- 2017: 60%

**Urban**

- 2012: 61%
- 2013: 62%
- 2014: 59%
- 2015: 69%
- 2016: 71%
- 2017: 60%

**Rural**

- 2012: 53%
- 2013: 53%
- 2014: 53%
- 2015: 53%
- 2016: 53%
- 2017: 53%

**Source:** Ofcom Technology Tracker, Half 1 2017

**Base:** All adults aged 16+ with a TV in household (n = 3564 UK, 476 Wales, 2109 England, 496 Scotland, 483 Northern Ireland, 238 Wales urban, 238 Wales rural, 508 Wales 2012, 485 Wales 2013, 480 Wales 2014, 485 Wales 2015, 471 Wales 2016, 476 Wales 2017)

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1 ‘Free TV’ refers to households that only receive Freeview or only receive Freesat satellite TV. Pay TV refers to all other types of television service.
Eight in ten TV households in Wales have an HDTV set, in line with the UK overall

Among households in Wales with a TV set, 80% claimed to have either HDTV services or an HD-ready television set. Most (69%) of the TV-owning households in Wales receive HDTV services, with a further 10% claiming to have an HD-ready TV, but without receiving HD services. Each of these incidences are in line with the UK overall.

In Wales, those in TV households in rural locations are more likely than those in urban locations to have an HD-ready TV, but not receive HD services (16% vs. 9% urban). The overall incidence of having an HDTV set does not differ between urban and rural locations.

**Figure 2.3: Awareness of receiving HD television**

Source: Ofcom Technology Tracker, Half 1 2017
Base: All adults aged 16+ with a TV in the household (n = 3564 UK, 476 Wales, 2109 England, 496 Scotland, 483 Northern Ireland, 238 Wales urban, 238 Wales rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2017 and between Wales urban and rural in 2017

QH53: Is the main TV in your household an HDTV set or HD-ready?/ QH54: Although you have an HDTV-ready set, to actually watch TV channels and programmes that are broadcast in high definition, you need an HD set-top box or a TV with built-in HDTV receiver.

For the main TV set, does your household have an HDTV service?


**Around one-third of TV households in Wales have a smart TV, in line with the UK overall**

Among those in Wales with a TV in the household, 36% claimed to have a smart TV set (i.e. a TV set which can connect directly to the internet), in line with the UK overall and unchanged since 2016. Smart TV ownership does not differ by location in Wales in 2017 and ownership has not changed to any significant extent since 2016 in urban or rural areas.

**Figure 2.4: Smart TV take-up**

![Figure above bar shows % point change in take-up of smart TVs since H1 2016]

**Source:** Ofcom Technology Tracker, Half 1 2017

**Base:** All adults aged 16+ with a TV in household (n = 3564 UK, 476 Wales, 2109 England, 496 Scotland, 483 Northern Ireland, 238 Wales urban, 238 Wales rural)

**QH62:** Are any of your TV sets ‘smart TVs’? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.
More than half of adults in Wales watch programmes or films on demand, mostly through catch-up services

More than half of all adults in Wales (58%)\(^1\) watch online TV programmes or films on any type of device, and four in ten (42%)\(^2\) have done so in the past week. Watching online through live or catch-up broadcast services (e.g. BBC iPlayer, ITV Hub) is the most-used method of on-demand viewing in Wales; just under half of adults use catch-up services and one-third had used them in the past week. Watching live TV on the internet at the same time it is broadcast is the next most-used online service for viewing. 18% of adults in Wales have watched live TV online; 9% have done so in the past week.

About one in ten adults in Wales have watched online on-demand programmes or films using subscription services such as Netflix or Amazon Prime Video, or pay-per-view services such as iTunes or Google Play. Fewer (7%) have used other free professional TV programmes or video channels online, such as Jamie Oliver’s Food Tube.

**Figure 2.5: Watching TV programmes and films on the internet, on any device**

<table>
<thead>
<tr>
<th>Type of Service</th>
<th>Ever Used</th>
<th>Used in the last week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadcast services (live or catch-up)</td>
<td>46%</td>
<td>32%</td>
</tr>
<tr>
<td>Subscription services (e.g. Netflix, Amazon Prime Video or Pay Per View)</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>Live TV online - same time as it is broadcast (e.g. via BBC iPlayer, Sky Go)</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Other free professional TV programmes/video channels online (e.g. Jamie Oliver’s FoodTube)</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>None of these</td>
<td>58%</td>
<td>42%</td>
</tr>
</tbody>
</table>

**Source:** Ofcom Technology Tracker, Half 1 2017
**Base:** All adults aged 16+ in Wales (n = 495)

\(^1\) This measure is the inverse of the 42% shown in Figure 2.5 for None of these ‘Ever used’

\(^2\) This measure is the inverse of the 58% shown in Figure 2.5 for None of these ‘Used in the last week’
## 2.3 Broadcast television content

### Definitions

**Broadcast TV viewing**

BARB analysis is based on viewing of scheduled TV programmes such as those listed in TV listings, magazines or on electronic programme guides (EPGs) on TV sets in homes. This broadcast TV viewing includes programmes watched on the TV set at the time of broadcast, recordings of these programmes such as through a DVR, or viewing of these programmes through catch-up player services, up to seven days after they were televised.

### Channel group definitions

<table>
<thead>
<tr>
<th>Main five PSB channels</th>
<th>BBC Portfolio</th>
<th>ITV portfolio</th>
<th>Channel 4 portfolio</th>
<th>Channel 5 portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC One</td>
<td>BBC Four</td>
<td>ITV/STV/UTV/ ITV Wales +1</td>
<td>Channel 4+1</td>
<td>Channel 5+1</td>
</tr>
<tr>
<td>BBC Two</td>
<td>BBC News</td>
<td>ITV2</td>
<td>E4</td>
<td>SSTAR</td>
</tr>
<tr>
<td>ITV/STV/UTV/ITV Wales</td>
<td>BBC Parliament</td>
<td>ITV3</td>
<td>Film4</td>
<td>5USA</td>
</tr>
<tr>
<td>Channel 4</td>
<td>CBBC</td>
<td>ITV4</td>
<td>More4</td>
<td>My5</td>
</tr>
<tr>
<td>Channel 5</td>
<td>CBeebies</td>
<td>ITVBe</td>
<td>4Music</td>
<td>Spike</td>
</tr>
<tr>
<td>S4C*</td>
<td>BBC red button channels</td>
<td>ITV Encore</td>
<td>4seven</td>
<td></td>
</tr>
</tbody>
</table>

Channels include HD variants where applicable. PSB portfolio channels include their +1 variants. *S4C is not included in the BARB analysis below.
Wales has the highest average television viewing per day across the nations

In 2016, people in Wales spent an average of four hours per day watching television. As in the last five years, this was higher than all other UK nations and the UK average (3 hours 32 minutes in 2016). This may be explained by Wales’ audience profile; it has consistently had the highest proportion of its viewers aged 55 and over, compared to the other nations (53% in 2016). This age group are the heaviest TV viewers. Each of the nations have had falls in viewing since 2011. The smallest drops were in Wales (-25 minutes per day) and the English regions, which both had declines of 10%. The highest fall was in Northern Ireland, with a 14% decrease. The 12% fall in daily viewing time in Scotland was in line with the decline across the UK as a whole.

Figure 2.6: Average minutes of television viewing per day, by nation: 2011-2016

Source: BARB, individuals (4+).
*Note: Figures reflect the average across the English regions.
The main five PSB channels account for over half of all viewing in Wales

In 2016, the main five English language PSB channels accounted for the majority of total TV viewing in Wales, 1.9 percentage points (pp) higher than the average share across the UK. In Wales the distribution of viewing share across the main five PSB channels is similar to the UK as a whole, with BBC One having the largest share, followed by ITV. Of all the nations and regions, Wales is the only country where viewing share of Channel 5 was higher than that of Channel 4. The viewing share of Channel 4 was lowest in Wales than in the other UK nations and regions, and the UK as a whole.

**Figure 2.7: Share of the main five PSB channels, by UK nation and region: 2016**

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

Note: Chart shows figures rounded to one decimal place. Numbers may not appear to sum up to total share of main five PSBs due to rounding.
Share of the main five PSB channels has increased in Wales since 2011

Between 2011 and 2016 there was a slight increase in the combined share of the main five PSB channels in Wales. This was driven by BBC One, which increased its share by 2.8pp, while viewing to the other main PSBs fell (ranging from 0.2pp to BBC Two, 0.7pp to Channel 4 and Channel 5 and 0.9pp to ITV). Across the UK, there was an average decrease of 2.6pp. Border was the only other ITV region where the audience share of the main PSBs increased.

Figure 2.8: Combined share of the main five PSB channels: 2011 and 2016

Share of the main five PSB channels in 2016 (%)

<table>
<thead>
<tr>
<th>Region</th>
<th>Share difference since 2011 (percentage points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>-2.6%</td>
</tr>
<tr>
<td>Border</td>
<td>+0.5%</td>
</tr>
<tr>
<td>East of England</td>
<td>-1.3%</td>
</tr>
<tr>
<td>London</td>
<td>-3.5%</td>
</tr>
<tr>
<td>Meridian</td>
<td>-3.7%</td>
</tr>
<tr>
<td>Midlands</td>
<td>-3.1%</td>
</tr>
<tr>
<td>North East</td>
<td>-2.5%</td>
</tr>
<tr>
<td>North West</td>
<td>-3.0%</td>
</tr>
<tr>
<td>South West</td>
<td>-3.6%</td>
</tr>
<tr>
<td>West</td>
<td>-1.1%</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>-3.0%</td>
</tr>
<tr>
<td>Scotland</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Wales</td>
<td>+0.3%</td>
</tr>
<tr>
<td>N. Ireland</td>
<td>-3.0%</td>
</tr>
</tbody>
</table>

Source: BARB, individuals (4+). HD channel variants are included but not +1s.
The total share of the main five PSBs and their families is broadly stable in Wales

The combined audience share of the main five PSBs and their portfolio channels stood at 71.6% in 2016. While the main five PSB channels’ share of viewing in Wales increased slightly between 2011 and 2016, the PSB portfolio channels’ share fell to a greater degree in the same period, resulting in a net decline of one percentage point. Nevertheless, viewing of the PSB family of channels in Wales was broadly stable compared with the other nations and regions such as London, Meridian, North West and South West.

**Figure 2.9: Net change in the audience share of the main five PSB channels and their portfolio channels: 2011 and 2016**

![Net change in the audience share of the main five PSB channels and their portfolio channels: 2011 and 2016](chart)

Source: BARB, individuals 4+. Note: Numbers may not add to 100% due to rounding.
Sport featured in ten of the 20 most-watched programmes in Wales in 2016

The UEFA European Championships and the Six Nations Rugby were some of the most popular programmes in Wales in 2016. The Wales vs. Belgium match, when Wales secured its first ever semi-final in a major tournament, attracted just over a million viewers to BBC One, representing 37.6% of the TV population in Wales and a 68.1% share of the total TV audience while the match was on. The post-match analysis of the game was the most watched programme overall, with just over 1.2 million viewers. These viewing figures do not capture out-of-home viewing in pubs and other social spaces, so are likely to be even higher.

The most viewed programme from ITV was the European championship game between Wales and Portugal with just under a million viewers and a 60.7% share of the audience, ranking it third of the top 20 programmes. *I’m A Celebrity Get Me Out Of Here*, *Britain’s Got Talent* and matches featuring Wales in the Six Nations Rugby and European championships completed the list.

### Figure 2.10: Top 20 programmes in Wales: 2016

<table>
<thead>
<tr>
<th>Programme</th>
<th>Channel</th>
<th>Date</th>
<th>Average 000s</th>
<th>TVR %</th>
<th>Share %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Euro 2016: Post Match</td>
<td>BBC One</td>
<td>01/07/2016</td>
<td>1,216</td>
<td>42.5</td>
<td>68.1</td>
</tr>
<tr>
<td>Euro 2016: Wal V Bel</td>
<td>BBC One</td>
<td>01/07/2016</td>
<td>1,075</td>
<td>37.6</td>
<td>64.1</td>
</tr>
<tr>
<td>Euro 2016: Wal V Por</td>
<td>ITV</td>
<td>06/07/2016</td>
<td>983</td>
<td>34.4</td>
<td>60.7</td>
</tr>
<tr>
<td>The Great British Bake Off</td>
<td>BBC One</td>
<td>26/10/2016</td>
<td>850</td>
<td>29.7</td>
<td>54.1</td>
</tr>
<tr>
<td>Six Nations Rugby: Wales V Scotland</td>
<td>BBC One</td>
<td>13/02/2016</td>
<td>799</td>
<td>28.0</td>
<td>65.3</td>
</tr>
<tr>
<td>I’m A Celebrity - Get Me Out Of Here!</td>
<td>ITV</td>
<td>13/11/2016</td>
<td>795</td>
<td>27.7</td>
<td>52.7</td>
</tr>
<tr>
<td>Six Nations Rugby: Wales V France</td>
<td>BBC One</td>
<td>26/02/2016</td>
<td>782</td>
<td>27.4</td>
<td>52.0</td>
</tr>
<tr>
<td>Euro 2016: Wal V Nir</td>
<td>BBC One</td>
<td>25/06/2016</td>
<td>764</td>
<td>26.7</td>
<td>74.0</td>
</tr>
<tr>
<td>Ten O’clock News</td>
<td>BBC One</td>
<td>01/07/2016</td>
<td>762</td>
<td>26.6</td>
<td>54.2</td>
</tr>
<tr>
<td>Britain’s Got Talent</td>
<td>ITV</td>
<td>23/04/2016</td>
<td>748</td>
<td>26.1</td>
<td>50.6</td>
</tr>
<tr>
<td>Strictly Come Dancing: The Final</td>
<td>BBC One</td>
<td>17/12/2016</td>
<td>734</td>
<td>25.6</td>
<td>53.6</td>
</tr>
<tr>
<td>Mrs Brown’s Boys Christmas Special</td>
<td>BBC One</td>
<td>25/12/2016</td>
<td>725</td>
<td>25.3</td>
<td>50.3</td>
</tr>
<tr>
<td>Strictly Come Dancing: The Results</td>
<td>BBC One</td>
<td>11/12/2016</td>
<td>694</td>
<td>24.2</td>
<td>46.2</td>
</tr>
<tr>
<td>Rugby: 6 Nations Live: Ire V Wal</td>
<td>ITV</td>
<td>07/02/2016</td>
<td>693</td>
<td>24.3</td>
<td>60.4</td>
</tr>
<tr>
<td>Strictly Come Dancing: Ire V Wal</td>
<td>BBC One</td>
<td>03/12/2016</td>
<td>688</td>
<td>24.0</td>
<td>51.0</td>
</tr>
<tr>
<td>Rugby: 6 Nations Live: Eng V Wal</td>
<td>ITV</td>
<td>12/03/2016</td>
<td>672</td>
<td>23.5</td>
<td>63.2</td>
</tr>
<tr>
<td>Euro 2016: Rus V Wal</td>
<td>ITV</td>
<td>20/06/2016</td>
<td>659</td>
<td>23.0</td>
<td>44.1</td>
</tr>
<tr>
<td>Call The Midwife</td>
<td>BBC One</td>
<td>28/02/2016</td>
<td>658</td>
<td>23.1</td>
<td>43.9</td>
</tr>
<tr>
<td>Euro 2016: Por V Fra</td>
<td>BBC One</td>
<td>10/07/2016</td>
<td>650</td>
<td>22.7</td>
<td>49.2</td>
</tr>
<tr>
<td>Planet Earth II</td>
<td>BBC One</td>
<td>06/11/2016</td>
<td>647</td>
<td>22.6</td>
<td>42.1</td>
</tr>
</tbody>
</table>

*Source:* BARB, individuals 4+, based on the single best-performing episode of a programme title ranked on average audience 000s. Filtered on programmes with a minimum duration of 10 minutes. Channels include HD variants.
Regional news and HD channels

**Channel 3/ITV**

ITV does not currently broadcast HD variants of its regional news programmes for all of its regions. This means that for some areas, an out-of-region HD version of regional news is shown on the ITV HD channel. London, Meridian, Wales, Central, Granada, STV¹ and UTV² currently offer the HD service across all platforms, while Anglia, Yorkshire and Tyne Tees offer it on some platforms only.³ In the remaining areas, the regional news shown on the HD channel is not the regional news for that region (e.g. in Border, the Granada news feed is shown). The chart below includes all viewing to any early evening news programming, even if it is not the relevant one for the area.

**BBC One**

There are BBC One HD channels for Scotland, Wales and Northern Ireland which show regional news in HD. At the moment BBC One HD in the English regions cannot show local news (a message prompts viewers to turn over to BBC One during the regional news slot). The chart below reflects viewing of the early evening news on BBC One HD, where available.

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**BBC One’s early evening news bulletin attracted a greater share than ITV Wales’ counterpart bulletin**

*Wales Today*, BBC One’s early evening news bulletin, had an average 30.7% share of all TV viewing in Wales between 6.30pm and 7.00pm in 2016, slightly higher than the BBC One UK average for the same time slot. *ITV News at Six* attracted a lower share than *Wales Today*, although, with 22.3% share at 6pm, it was higher than the Channel 3 UK average.

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**Figure 2.11: BBC One and ITV/STV/UTV/ITV Wales early evening news bulletin shares, all homes: 2016**

Source: BARB, individuals (4+). HD viewing included where applicable (see methodology box above). Note: Early evening (‘local’) news bulletin figures based on ‘regional news’ genre programmes, start time 17:55-18:35, 10mins+ duration, weekdays. UK figures based on share to respective early evening news bulletin time slots. BBC One’s early evening news bulletin is transmitted between 18:30 and 19:00 and ITV/STV/UTV/ITV Wales’ is transmitted between 18:00 and 18:30.

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¹The Glasgow regional news is shown.

²UTV HD was introduced in October 2016.

³On 31 March 2016 ITV launched these regions in HD on Sky and Freesat (Freeview and Virgin Media pending).
TV is the main source of news for more than six in ten adults in Wales

In Wales in 2016, around six in ten (63%) adults aged 16+ said that the TV was their main source of UK and world news. Websites or apps were cited by 14% as their main source of news,\(^1\) and radio by 7%. Each of these are in line with the UK averages, but adults in Wales are more likely than those in the UK as a whole to use print newspapers as their main media source of news.

Figure 2.12: Respondents’ main media source for UK and world news, by nation: 2016

Source: Ofcom Media Tracker 2016
Base: All (2,069); England (1,591); Scotland (179); Wales (144); Northern Ireland (155). Prompted, single code.

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\(^1\)These include broadcaster, newspaper, social media and other websites or apps
The following section outlines spend and hours of programming.

**Definitions**

**First-run originations**
Programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the United Kingdom in the reference year.

**First-run acquisitions**
A ready-made programme bought by a broadcaster from another rights holder and broadcast for the first time in the UK during the reference year.

**Repeats**
All programmes not meeting one of the two definitions above.

**Spend on output**
Includes all costs incurred by the broadcaster associated with making or acquiring programmes. These include both direct and indirect production costs for in-house productions and licensing costs for commissioned and acquired programmes, and excludes costs related to marketing and distribution.

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**2.4 TV programming for viewers in Wales**

for viewers in Wales, Scotland, Northern Ireland and the English regions, provided by the BBC and ITV/STV/UTV.

The figures exclude Gaelic and Welsh-language programming, but include some spend on Irish-language programming by the BBC. See section 5 for details on S4C.

Historical financial figures have been adjusted for inflation using CPI, which was particularly high in the period from 2007 to 2013. Due to the commercially-sensitive nature of this data, BBC and UTV spend figures have been combined.
The BBC Cymru Wales and ITV Cymru Wales’ spend on first-run originated content for viewers in Wales fell by 8% in real terms from 2015 to 2016.

In 2016, £276m was spent by the BBC and ITV/STV/UTV on producing first-run originated programmes specifically for viewers in Wales, Scotland, Northern Ireland and the English regions, up by £4m in real terms year on year. Conversely, BBC Cymru Wales and ITV Cymru Wales’ spend on first-run UK-originated programming for viewers in Wales fell by 7.8% in real terms between 2015 and 2016.

Since 2011, the BBC and channel 3 licensees’ spending on first-run originated content specifically for viewers in the UK nations and regions has fallen by £12m, representing a negative compound annual growth rate (CAGR) of -0.9%.

In Northern Ireland, the increase in spending could be explained in part by ITV’s takeover of UTV in 2016. Prior to the takeover, UTV did not charge staff costs to their news programmes, allocating direct costs only. From 2016, ITV have allocated relevant staff costs to UTV news programming, consistent with their approach across the rest of the ITV network.
BBC Cyrmu Wales and ITV Cyrmu Wales spent £26m on English-language programming for viewers in Wales in 2016

Including acquisitions and repeats, BBC Cyrmu Wales and ITV Cyrmu Wales spent £26m on English-language programming for viewers in Wales in 2016. Non-news/non-current affairs accounted for just under half of total spend (£13m); news accounted for a further 38% (£10m), with current affairs making up the remainder (£4m).

In addition to this, the BBC spent £29.2m on additional content to S4C in 2016/17, on top of the £75m that comes directly from the licence fee.

**Figure 2.14: Total spend by the BBC/ITV/STV/UTV on nations/regions output: 2016**

- England: £161m
- Northern Ireland: £31m
- Scotland: £58m
- Wales: £26m

Source: Broadcasters.

*Note: BBC includes BBC One and BBC Two channels. Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Scotland figures include programming for viewers of ITV Border in Scotland, which was 76 hours of current affairs in 2016.*
Programme spending has fallen in the past year, particularly in non-news and non-current affairs programming

Including acquisitions and repeats, BBC Cymru Wales and ITV Cymru Wales’ spending on nations’ and regions’ output fell in real terms by 8% between 2015 and 2016, and by an average of 2% each year since 2011. Their spending on non-news/non-current affairs programming for viewers in Wales has fallen by 18% since 2015, and presents a negative compound annual growth rate of -3% since 2011.

Conversely, spending on current affairs programming for viewers in Wales by BBC Cymru Wales and ITV Cymru Wales has increased in real terms, both since 2015 (by 11%) and since 2011 (by an average of 5% each year). While spending on news increased by 2% in real terms between 2015 and 2016, overall it has fallen by an average of 2% each year since 2011.

**Figure 2.15: Change in total spend on nations’ and regions’ output, by genre and nation: 2011-2016**

<table>
<thead>
<tr>
<th>Genre</th>
<th>UK</th>
<th>England</th>
<th>N. Ireland</th>
<th>Scotland</th>
<th>Wales</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1yr CAGR</td>
<td>1yr CAGR</td>
<td>1yr CAGR</td>
<td>1yr CAGR</td>
<td>1yr CAGR</td>
</tr>
<tr>
<td>Current affairs</td>
<td>9%</td>
<td>2%</td>
<td>20%</td>
<td>-2%</td>
<td>22%</td>
</tr>
<tr>
<td>News</td>
<td>1%</td>
<td>-1%</td>
<td>-2%</td>
<td>-2%</td>
<td>16%</td>
</tr>
<tr>
<td>Non-news/non-current affairs</td>
<td>1%</td>
<td>-2%</td>
<td>36%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Total spend in 2016</td>
<td>£277m</td>
<td>£161m</td>
<td>£31m</td>
<td>£58m</td>
<td>£26m</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Change in spend</th>
<th>UK</th>
<th>England</th>
<th>N. Ireland</th>
<th>Scotland</th>
<th>Wales</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1yr CAGR</td>
<td>1yr CAGR</td>
<td>1yr CAGR</td>
<td>1yr CAGR</td>
<td>1yr CAGR</td>
</tr>
<tr>
<td>Current affairs</td>
<td>2%</td>
<td>-1%</td>
<td>1%</td>
<td>-2%</td>
<td>13%</td>
</tr>
</tbody>
</table>

*Source: Broadcasters. All figures are adjusted for inflation (2016 prices).*

*Note: BBC includes BBC One and BBC Two channels. Excludes spend on BBC Alba and S4C output, but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is divided between England and Scotland from 2014 onwards and attributed to England only prior to 2014.*
**Hours of first-run originated programming for viewers in Wales have fallen since 2011**

In 2016, BBC Cymru Wales and ITV Cymru Wales produced 951 hours of first-run UK-originated output for viewers in Wales, representing a fall of 2% (16 hours) since 2015.

Against this general trend, hours have increased since 2015 in two categories: BBC news, by three hours, and and ITV current affairs, by 15 hours.

BBC productions account for over 60% of all hours of first-run UK-originated content for viewers in Wales, at 612 hours, with news output accounting for nearly two-thirds of all hours across both the BBC and ITV.

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**Figure 2.16: Hours of first-run originated nationsregions output, by genre and broadcaster: 2016**

<table>
<thead>
<tr>
<th>Genre/Channel</th>
<th>England</th>
<th>Northern Ireland</th>
<th>Scotland</th>
<th>Wales</th>
<th>2016 total hours</th>
</tr>
</thead>
<tbody>
<tr>
<td> </td>
<td>3,873</td>
<td>55</td>
<td>363</td>
<td>430</td>
<td>6,922 hrs</td>
</tr>
<tr>
<td> </td>
<td>2,682</td>
<td>52</td>
<td>198</td>
<td>40</td>
<td>60</td>
</tr>
<tr>
<td> </td>
<td>59</td>
<td>255</td>
<td>110</td>
<td>258</td>
<td>999 hrs</td>
</tr>
<tr>
<td> </td>
<td>40</td>
<td>164</td>
<td>216</td>
<td>60</td>
<td>1882 hrs</td>
</tr>
<tr>
<td> </td>
<td>198</td>
<td>110</td>
<td>350</td>
<td>46</td>
<td>951 hrs</td>
</tr>
<tr>
<td> </td>
<td>109</td>
<td>59</td>
<td>399</td>
<td>258</td>
<td></td>
</tr>
<tr>
<td> </td>
<td>216</td>
<td>255</td>
<td>350</td>
<td></td>
<td></td>
</tr>
<tr>
<td> </td>
<td>46</td>
<td>198</td>
<td>110</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Source: Broadcasters.       |
| Note: Hours data for first-run originations only. BBC includes BBC One and BBC Two channels. Excludes hours for BBC Alba and S4C output but includes some hours of Irish-language programming by the BBC. These figures do not include hours of network content. Scotland figures include programming for viewers of ITV Border in Scotland, which was 76 hours of current affairs in 2016. |
The cost per hour of first-run programming for viewers in Wales has fallen

At £27,600, the cost per hour of first-run originated nations’ and regions’ output in Wales was higher than the UK average (£25,700) in 2016. Cost per hour is also higher than in England, but lower than in both Scotland and Northern Ireland.

In real terms, over the five-year period, the cost per hour of first-run originated nations content has fallen slightly in Wales, by an average of 0.4% each year (from £28,200).

This is in contrast to the general UK trend, and trends in Northern Ireland and Scotland, where the cost per hour has increased between 0.7% and 9.2% on average each year since 2011.

**Figure 2.17: Cost per hour of first-run nations and regions output, by nation: 2011-2016**

Source: Broadcasters. All figures have been adjusted for inflation (2016 prices).

Note: BBC includes BBC One and BBC Two channels. Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Scotland figures include programming for viewers of ITV Border in Scotland, which was 76 hours of current affairs in 2016.
In 2013, S4C agreed with the BBC Trust that S4C would be part-funded by the television licence fee.

As part of the terms of the agreement, S4C would receive £76.3m in financial year 2013/2014, falling year on year to £74.5m in 2016/2017. This level of funding will be maintained until the end of the current licence fee arrangement in 2022. DCMS also provided funding of £6.8m to S4C in the year to April 2017. The remaining 2% of funding comes from S4C’s advertising revenue and commercial activities.

The BBC has a statutory obligation to provide ten hours of content per week free of charge to S4C. This is currently provided in the form of the Newyddion (news) service, the soap opera Pobol y Cwm and some sports and special events output, the value of which was agreed at £19.4m per annum. For the financial year 2016/17, the BBC estimates that total cost including central overheads in providing the programmes to S4C is £29.2m. S4C spent £64.7m on Welsh-language programming in addition to this.

S4C spend (excluding the previously-mentioned BBC production spend) on first-run commissioned programming fell in real terms in 2016/17. Although spending in the majority of genres remained broadly stable, falls were seen, particularly in sport and drama.

**Figure 2.18: Spend by S4C on first-run Welsh-language programming**

Source: S4C. All figures are adjusted for inflation (2016 prices). Note: Does not include programming provided by the BBC under the statutory obligation.

1. [http://www.s4c.co.uk/e_press_level2.shtml?id=726](http://www.s4c.co.uk/e_press_level2.shtml?id=726)
The total number of hours broadcast by S4C in 2016 fell by 416 hours to 6,306 hours. The majority of this fall was in first-run acquisitions, which fell from 418 hours in 2015 to 31 hours in 2016. In early summer 2016, S4C ceased its night-time coverage of National Assembly of Wales proceedings, so these hours are no longer included in first-run acquisitions. BBC statutory programming hours increased by four hours to 538 hours in 2016, while first-run commissions from the BBC increased to 20 hours in 2016, from 13 in 2015. Repeats continued to make up the majority of the channel’s output at 3,968 hours, accounting for 63% of all programming during the year. Repeats in children’s programming was 2,073 hours.

Figure 2.19: Type of Welsh-language output on S4C, by hours

Source: S4C
2.6 Network television productions made in Wales

Figure 2.20 and 2.21 below illustrate the proportion of UK PSB network programmes that were produced in the nations and regions over the last five years, by expenditure and volume respectively.

In 2016, 3.2% of network spend on original content, excluding news, was directed towards Wales, down from 3.5% in 2015. This made up 2.5% of all first-run UK-originated hours broadcast across the PSB channels in 2016, down from 2.7% in 2015.

As in previous years, the majority of such spend was in London; 57% of spend on new, non-news content returned 49% of all network hours.

Figure 2.20: Expenditure on originated network productions: 2011-2016

Source: Ofcom/broadcasters
Note: This expenditure does not include network news production. The category ‘other’ refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See www.ofcom.org.uk/__data/assets/pdf_file/0013/87040/Regional-production-and-regional-programme-definitions.pdf on Ofcom website for further details.
Figure 2.21: Volume of originated network productions: 2011-2016

Source: Ofcom/broadcasters

Note: These hours do not include network news production. The category ‘other’ refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See www.ofcom.org.uk/__data/assets/pdf_file/0019/87040/Regional-production-and-regional-programme-definitions.pdf on Ofcom website for further details.