

Media nations: Wales 2019



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Overview

This is Ofcom's second annual *Media Nations: Wales* report. The report reviews key trends in the television and audio-visual sector as well as the radio and audio industry in Wales. It provides context to the work Ofcom undertakes in furthering the interests of consumers and citizens in the markets we regulate.

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](#).

The report provides updates on several datasets, including bespoke data collected directly from licensed television and radio broadcasters (for output, spend and revenue in 2018), Ofcom's proprietary consumer research (for audience opinions), and BARB and RAJAR (for audience consumption). It should be noted that our regulatory powers do not permit us to collect data directly from online video-on-demand and video-sharing services (such as ITV Player, Netflix, Amazon Prime Video and YouTube) for research purposes, and therefore we also use third-party sources for information relating to these services.

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Key points

On average, people in Wales watched 3 hours 33 minutes of broadcast TV in 2018 – nine minutes less than in 2017

- Average daily viewing minutes in Wales declined by 4.3% between 2017 and 2018 compared to an average of 5.2% across the whole of the UK.
- Viewing of non-broadcast services on the TV set (such as streaming services like Netflix, Amazon Prime Video and gaming) increased by 10 minutes per person per day in 2018, to 54 minutes.
- The opening episode of *I'm A Celebrity – Get Me Out Here!* on ITV Cymru Wales was the most-watched broadcast programme on TV sets in Wales in 2018. This episode achieved an average audience of 878k and a share of 62.6% of those watching TV at that time.

Nearly half (48%) of TV households in Wales have a television connected to the internet

- Almost six in ten (56%) adults in Wales used an on-demand/streaming service, such as Netflix, Amazon Prime Video and BBC iPlayer, in 2019. This was comparable to the other UK nations, and unchanged for each since last year.
- Among these services, the BBC iPlayer and Netflix had comparable levels of claimed use (34% and 28% respectively), followed by the ITV Hub (25%).

More than half of all broadcast TV viewing in Wales in 2018 was to the main PSB channels

- The main five PSB channels accounted for a combined 53% share of the total broadcast TV audience in Wales in 2018.
- Television is the most-used platform for news consumption for people in Wales, with BBC One and ITV Cymru Wales coming first and second in the top 20 list of most-used news sources.

Nearly three-quarters of PSB viewers in Wales were satisfied with PSB provision in 2018

- However, PSB services were rated lower by viewers in Wales compared to those in England and Scotland for delivery, regarding '*showing different parts of the UK, including England, Northern Ireland, Scotland and Wales*'. Some 52% of viewers in Wales rated this highly compared to 55% in England and Scotland, and 51% in Northern Ireland.

BBC and ITV Wales' combined spend on programming for Wales increased by 13% in 2018 to £33.6m

- Spend on current affairs programming was £4.4m, down from £4.6m the previous year; spending on news was stable at £10.5m, while spending on other programming including general entertainment, was 26% higher at £18.7m.
- In real terms, spending by the BBC rose by 16% to £27.3m in 2018, the highest level since 2009. ITV Cymru Wales' spend on local programming was up marginally at £6.3m.
- The BBC produced 615 hours of local programming in 2018, similar to the previous year, while ITV produced 343 hours of local programming, 4% more than in 2017.

Nine in ten adults listen to live radio each week in Wales, tuning in for more than 22 hours every week

- National BBC stations have a greater share (49%) of listening in Wales than in other nations while UK-wide commercial stations have a lower share (18%) of listening than elsewhere. This is reflected in BBC Radio 2 being the most popular station across Wales.
- Nearly three in ten adults in Wales have a digital radio.
- The share of listening done through digital platforms (DAB, online and DTT) in Wales increased only slightly over the past year to 47.8% in Q1 2019 and remains below the UK-wide average of 56.4%.
- Meanwhile, ownership of smart speakers, with uses including streaming music and listening to live radio, has increased to almost a quarter (24%) of households.



TV services and devices

Introduction

TV services are available in a variety of ways in Wales. Freeview is available through digital terrestrial television (DTT) and delivered through a television aerial, while Sky and Freesat offer satellite services and Virgin Media offers a cable TV service.

Set-top boxes from providers including TalkTalk and BT offer a Freeview service alongside pay-TV channels, delivered through an internet connection, sometimes referred to as internet protocol television (IPTV).

There are also many on-demand and streaming services available to consumers over the internet. These range from public service broadcaster (PSB) services like BBC iPlayer, ITV Hub, S4C's Clic, All 4 and My5 to the subscription services offered by Netflix and Amazon Prime Video.

These platforms rely on different infrastructure to deliver their services. Freeview relies on a network of main and relay transmitters across Wales to deliver service into people's homes. These services are widely though not universally available across Wales.

Satellite, which only requires a user to attach a dish to their home, is universally available across Wales.¹ Cable coverage, by comparison, is more limited as this requires a provider to have laid a cable past the premises in order for it to be connected.

Services such as Netflix, Amazon Prime Video and YouTube are delivered online through connected TVs as well as mobile phones and tablets. Ofcom research shows that eight in ten (79%) households in Wales had a fixed internet connection in 2019; some 75% of adults now own a smartphone while 65% of households in Wales have a tablet device.²

97.9% of premises in Wales have DTT coverage in 2019³

Digital terrestrial television (DTT) services, which are delivered through a television aerial, are provided in Wales through a combination of public service broadcasting (PSB) and commercial

¹ Based on the availability of a line-of-sight path to the satellite. Does not include the impact of factors such as access in multi-dwelling units where it is not feasible to install a dedicated household satellite dish and where there is no internal wired distribution system for satellite, or the need for planning permission in some locations.

² Ofcom Technology Tracker 2019

³ Ofcom analysis of DTT coverage and operator data, January 2019

(COM) multiplexes. These multiplexes are the transmission infrastructure that deliver channels carried on the Freeview platform.

Examples of services on the PSB multiplexes include BBC One, ITV Wales, S4C, Channel 4 and Channel 5, while the COM multiplexes provide access to services such as Dave, Sky News and E4.

As of January 2019, 97.9% of premises in Wales had access to the core PSB services. Coverage of the commercial multiplexes, which are carried on a smaller number of transmitters, reaches 72.6% of premises.⁴

At 96.6%, a higher proportion of homes in Wales had a television in the first quarter of 2019 than in England (95.1%) or Scotland (94.5%). Over a third of homes in Wales (36.3%) had DTT only as their TV platform in Q1 2019.⁵

Nearly half of homes in Wales have a satellite service

Satellite TV services are provided by Sky and Freesat and are available to about 98% of UK premises⁶, with broadly the same level of availability across Wales.

Pay satellite was the most popular form of pay-TV in Wales at the beginning of 2019, serving 38.1% of homes. A further 9.8% had a free satellite service, most likely from Freesat, meaning that at 47.9%, a higher proportion of homes in Wales than in any other nation had a satellite service (the UK average was 37.1%).⁷

Almost one in ten homes had a cable TV service

Virgin Media's cable service was available to more than 300,000 premises in Wales (22.8%) in January 2019. This is lower than England (49.6%), Scotland (41%) and Northern Ireland (39.2%).⁸ At the beginning of 2019, Wales had the lowest proportion of all the nations of homes taking up cable TV services (8.1%).

IPTV services are less popular in Wales than in the rest of the UK

The proportion of homes that have internet protocol television (IPTV) only (any one of BT TV, TalkTalk TV, Plusnet TV, or a standalone YouView box, and do not also have satellite, cable or other service), was only 4.8% in Wales in Q1 2019, the lowest across the UK nations.⁹

⁴ Ofcom analysis of DTT coverage and operator data, January 2019

⁵ BARB Establishment Survey Q1 2019

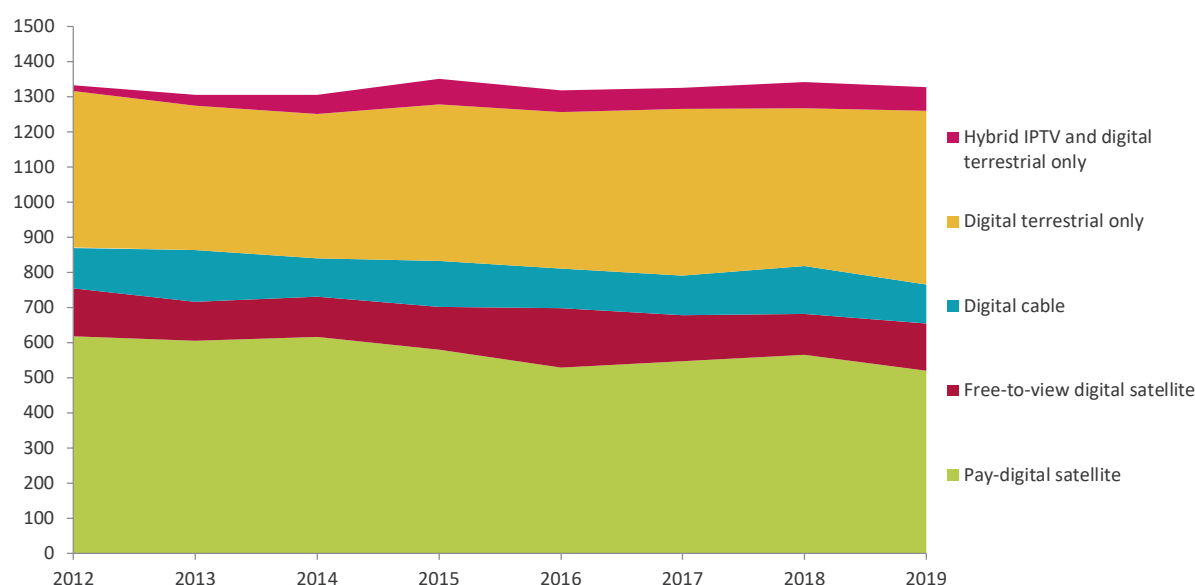
⁶ Based on the availability of a line-of-sight path to the satellite. Does not include the impact of factors such as access in multi-dwelling units where it is not feasible to install a dedicated household satellite dish and where there is no internal wired distribution system for satellite, or the need for planning permission in some locations

⁷ BARB Establishment Survey Q1 2019

⁸ Ofcom analysis of operator data, January 2019

⁹ BARB Establishment Survey Q1 2019

Figure 1: Platform take-up in Wales, households: 2012-2019 (000s)



Source: BARB Establishment Survey. BBC Wales area. Household-level data, all TV sets in home, therefore there are platform overlaps. Notes: Data points are based on Q4 of each year until 2018 when it is Q1. From Q4 2015 the claimed usage element was removed, which led to an increase in the 'TV set homes' population. 'Digital terrestrial only TV' = receives digital TV through an aerial and not through DSAT/DCAB or other platforms. 'Hybrid IPTV digital terrestrial only' = receives digital terrestrial TV through any of BT TV/TalkTalk TV/YouView/Plusnet TV and not DSAT/DCAB/other platforms.

Nearly half of TV households in Wales have a television connected to the internet

The number of households connecting their TV to the internet is increasing across the UK. As well as using a smart TV, other devices (such as a set-top box, streaming stick, games console, etc) can be connected, allowing online content to be viewed on the TV set.

Almost half (48%) of TV households in Wales had some form of connected TV in 2019, 57% in England, 56% in Scotland and 67% in Northern Ireland.¹⁰

Almost six in ten adults in Wales use video-on-demand services

Fifty-six per cent of adults in Wales used any on-demand/streaming service, such as Netflix, Amazon Prime Video and BBC iPlayer, in 2019. This was comparable to the other UK nations, and unchanged for each since last year.¹¹

Among all these services, the BBC iPlayer and Netflix had comparable, and the highest, levels of use (34% and 28% respectively), followed by the ITV Hub (25%).¹²

¹⁰ Ofcom Technology Tracker 2019

¹¹ Ofcom Technology Tracker 2019

¹² Ofcom Technology Tracker 2019



Around one in ten respondents in 2019 claimed to use other services such as YouTube (13%), Amazon Prime Video (11%), All4 (11%) and My5 (10%). Again, none of these services had increased use by respondents in Wales since 2018.¹³

Paying for on-demand content does not appear to be a deterrent, as nearly half (45.8%) of all households in Wales had a subscription-video-on-demand service (SVoD) in Q1 2019. This is up from 38.1% in Q1 2018. As with the rest of the UK, Netflix is the most popular service (in 40.4% of all homes in Wales).¹⁴

More SVoD services are on the way

Disney and WarnerMedia and Apple, and the BBC and ITV are set to launch their own SVoD services in 2019 and 2020, increasing the number of services in the SVoD market, currently led by Netflix and Amazon Prime Video.

Apple TV+ is set to launch in autumn 2019, and globally shortly after. The app will be also available on non-Apple devices. The service will provide original content ad-free; Apple currently has 30 original web series and movies in preparation.

Britbox is a joint BBC and ITV venture due to be launched in Q4 2019 at £5.99 per month. ITV will control the venture with a 90% share, with the BBC having the option to increase its holding to 25%. The service will contain archive content as well as Britbox original content commissioned from UK production companies, planned to be available in 2020.

Disney+ is set to launch in the US in November 2019 and then globally shortly after. Disney+ will exclusively stream content from its popular brands Marvel, Lucasfilm and Pixar, offering 500 movies and access to 7,500 episodes.

WarnerMedia is also set to launch the HBO Max service in Spring 2020. The service will include HBO, Turner as well as WarnerMedia content.

¹³ Ofcom Technology Tracker 2019

¹⁴ BARB Establishment Survey Q1 2019



Screen viewing

Introduction

In recent years, there has been a significant rise in the number of new TV services delivered over the internet. At the same time, viewers have started using new devices, such as smartphones and tablets, to view this and other content. Younger viewers especially are avid adopters of these services and devices.

This is inevitably having an impact on our TV watching habits. However, our research shows that this trend is gradual rather than precipitous. Take-up of what might be called ‘traditional’ TV platforms and services, such as Freeview, satellite and cable, remains strong. And while there has been a further drop in the amount of live TV viewing in 2018 in all the nations of the UK, this activity still accounts for significant majority of people’s screen time.

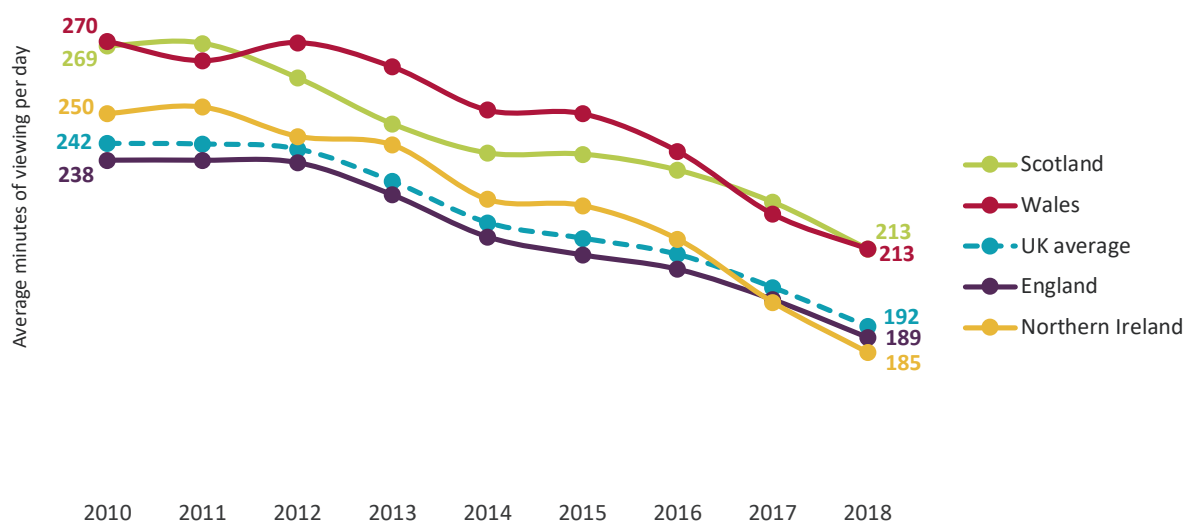
Where our data comes from

This section uses data provided by the Broadcasters’ Audience Research Board (BARB), a nationally representative panel of about 5,300 homes across the UK (with over 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. BARB has also started to measure what people are watching on PCs/laptops, tablets and smartphones not connected to the TV set, to monitor viewing of broadcaster video-on-demand (BVOD) services. However, this newer measurement of other devices is not complete and is not yet the industry standard. Unless otherwise stated, figures quoted are for seven-day consolidated viewing on the 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). See the [methodology annex](#) for more information.

In 2018 people in Wales spent an average of 3 hours 33 minutes per day watching broadcast television

Wales and Scotland had the joint highest average viewing per day of broadcast television on the TV set in 2018 – higher than the UK average of 3 hours 12 minutes. As with the rest of the UK, viewing has been decreasing each year, and Wales has followed the same overall pattern as the UK average. Between 2017 and 2018, viewing fell by 10 minutes (4.3%) in Wales; this was the smallest decline of all the nations and smaller than the 5.2% average across the UK.

Figure 2: Average daily minutes viewed per person, by nation: 2010-2018



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

The biggest decline in broadcast TV viewing was among 45-54s

Total TV viewing figures for all demographics declined in 2018 except for 35-44 year olds, which remained stable. The biggest year-on-year decline was among 45-54-year-olds in 2018; their viewing of broadcast TV on the TV set decreased by 34 minutes (13%) to 3 hours 43 minutes.

Children's viewing also declined steeply by 11% to 1 hour 21 minutes, although they still watched more than the other nations and the UK average. TV viewing among the over-54s dropped by 8 minutes to 5 hours 50 minutes in Wales but this was still the highest figure for this age group in any UK nation.

Viewing among 16-24s in Wales has declined by 61% since 2010 – a steeper decline than the UK average of 49% for this age group.

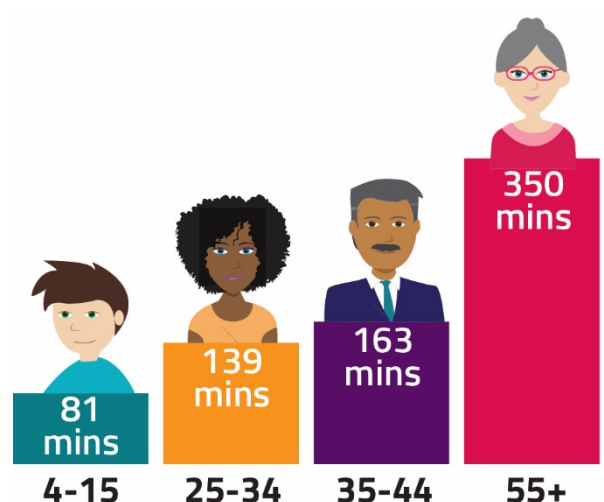
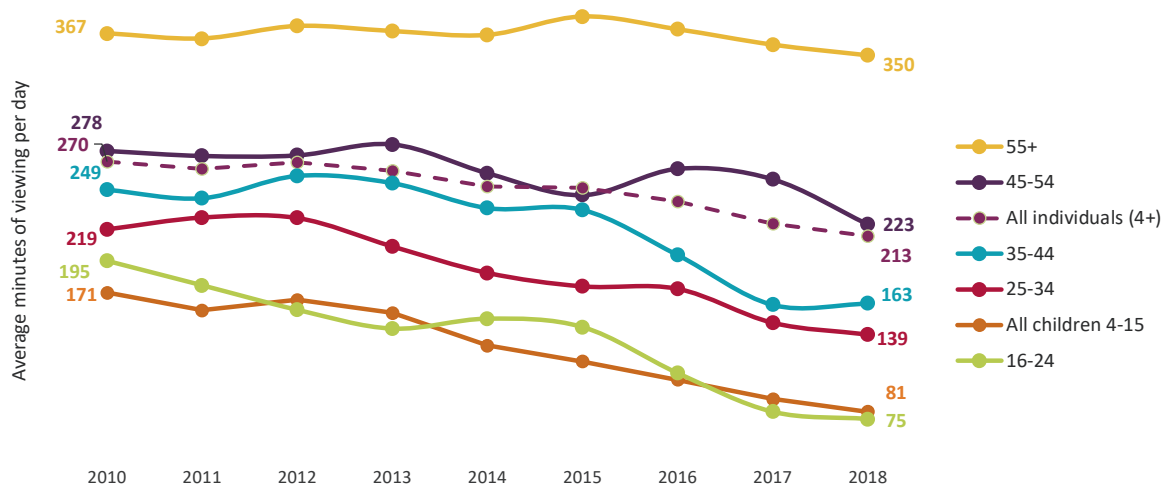


Figure 3: Average daily minutes viewed per person, by age in Wales

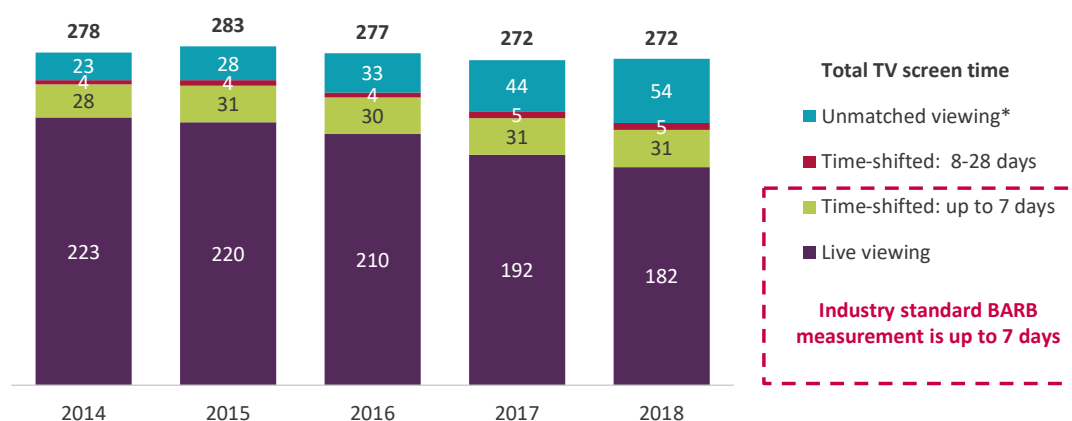


Source: BARB. BBC Wales area, all individuals (4+).

Total TV screen time in Wales remained stable

As in the rest of the UK, although people in Wales are watching less broadcast television, their time spent watching other things on their TV sets has increased. Viewing of non-broadcast services on the TV set (such as streaming services like Netflix, Amazon Prime Video, YouTube, and gaming) increased by 10 minutes per person per day in 2018, to 54 minutes. This meant that overall use of the TV set in 2018 remained stable year on year, with average daily minutes at 4 hours 32 minutes.

Figure 4: Average daily minutes of TV screen time per person in Wales



Source: BARB. BBC Wales area, all individuals (4+). * Note: Unmatched viewing refers to when the TV is in use, but content cannot be audio-matched or otherwise identified. It includes gaming, viewing DVDs/box sets/archives, SVoD, 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.

What is public service broadcasting?

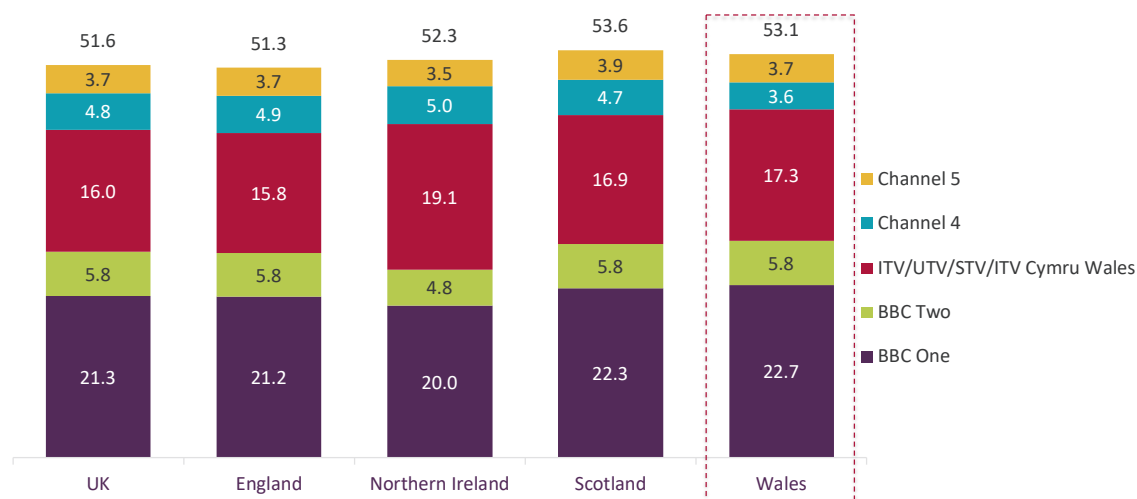
Public service broadcasting is provided in Wales by the BBC, Channel 4 Corporation (C4C), ITV (holder of the Channel 3 licence in Wales), Channel 5 and S4C. While all the BBC TV services are PSB, only the main channels of the other broadcasters are. In return for providing PSB services such as news and 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's case, the licence fee.

The share of the main five PSB channels has remained stable since 2017

The main five PSB channels accounted for a combined 53.1% share of the total broadcast TV audience in Wales in 2018. This audience share is higher than in Northern Ireland and England, but it is lower than in Scotland. For context, there are more than 270 BARB-reported channels in the UK, available to view via digital terrestrial television, satellite, cable and other platforms.

BBC One had the highest audience share of any individual PSB channel at 22.7% and this was higher than BBC One's share in the other nations.

Figure 5: Percentage share of total TV viewing in the nations of the UK for the five main PSB channels: 2018



Source: BARB. BBC areas, all individuals (4+). Channels include HD variants but exclude +1 channels.

A new future for public service broadcasting

In June 2019, Ofcom announced a range of measures to ensure that public service broadcasters (PSBs) continue to deliver high-quality content for UK viewers and listeners.

PSB has been a powerful cultural force for more than 80 years, and remains central to innovation and investment in broadcasting, helping to underpin the UK's wider creative economy.

But public service broadcasting is now at a crucial juncture, as broadcasters face competition from global on-demand and internet services such as Netflix, Amazon Prime Video and YouTube.

So Ofcom has set out a package of measures, including recommendations to government, to support PSB now and in the years ahead. These include:

- updating rules to ensure that traditional PSB TV channels are [prominent and easy to find](#) within programme guides;
- making recommendations to government for new legislation to help ensure that PSB programmes and players are also [clearly visible on internet-connected devices](#) such as smart TVs, set-top boxes and streaming sticks;
- endorsing a range of commitments by ITV, Channel 4 and Channel 5 to increase their focus on [high-quality children's programmes](#); and
- launching **Small Screen: Big Debate** – a national forum to discuss the future of public service broadcasting on TV and online. This will call for Parliament, regulators, broadcasters and viewers to be involved in developing a [new framework for public service media](#) in future.

I'm A Celebrity – Get Me Out of Here! was the most-viewed TV programme in 2018

The opening episode of *I'm A Celebrity – Get Me Out of Here!* on ITV Cymru Wales was the most-watched broadcast programme on TV sets in Wales in 2018. This episode achieved an average audience of 878k and a share of 62.6% of those watching TV at that time. This was higher than the top programme of 2017, *Six Nations Rugby: Wales v Ireland*, which aired on BBC One Wales (806k individuals watching on average, 54.7% share of viewing).

Figure 6: Top 20 most-watched programmes in Wales: 2018

Rank	Programme Title	Channel	Date	Average 000s	% TVR	% Share
1	I'm A Celebrity - Get Me Out Of Here!	ITV Cymru Wales	18/11/2018	878	30.5	62.6
2	World Cup 2018: Cro V Eng	ITV Cymru Wales	11/07/2018	770	26.8	60.7
3	Bodyguard	BBC One Wales	23/09/2018	737	25.7	50.5
4	Six Nations: Wales V Scotland	BBC One Wales	03/02/2018	734	25.6	71.4
5	Rugby: Six Nations Live 2018	ITV Cymru Wales	10/02/2018	732	25.5	62.4
6	World Cup 2018: Swe V Eng	BBC One Wales	07/07/2018	684	23.8	78.2
7	Britain's Got Talent (Series 12)	ITV Cymru Wales	28/04/2018	675	23.5	55.5
8	New Year's Eve Fireworks	BBC One Wales	31/12/2018	663	23.0	65.7
9	Rugby Six Nations: Wales V Italy	BBC One Wales	11/03/2018	658	22.9	68.6
10	Call The Midwife	BBC One Wales	21/01/2018	619	21.5	38.4
11	Strictly Come Dancing	BBC One Wales	03/11/2018	616	21.4	48.9
12	Ant & Dec's Saturday Night Takeaway	ITV Cymru Wales	03/03/2018	602	20.9	43.0
13	Mrs Brown's Boys	BBC One Wales	01/01/2018	597	20.7	46.8
14	Vera	ITV Cymru Wales	07/01/2018	592	20.5	40.8
15	Rugby Six Nations: Wales V France	BBC One Wales	17/03/2018	589	20.5	56.2
16	World Cup 2018: Col V Eng	ITV Cymru Wales	03/07/2018	588	20.4	53.1
17	Strictly Come Dancing: The Final	BBC One Wales	15/12/2018	586	20.3	49.2
18	World Cup 2018: Tun V Eng	BBC One Wales	18/06/2018	586	20.3	48.2
19	Mrs Brown's Boys Christmas Special	BBC One Wales	25/12/2018	581	20.1	45.9
20	Six Nations: France V Ireland	BBC One Wales	03/02/2018	568	19.8	53.6

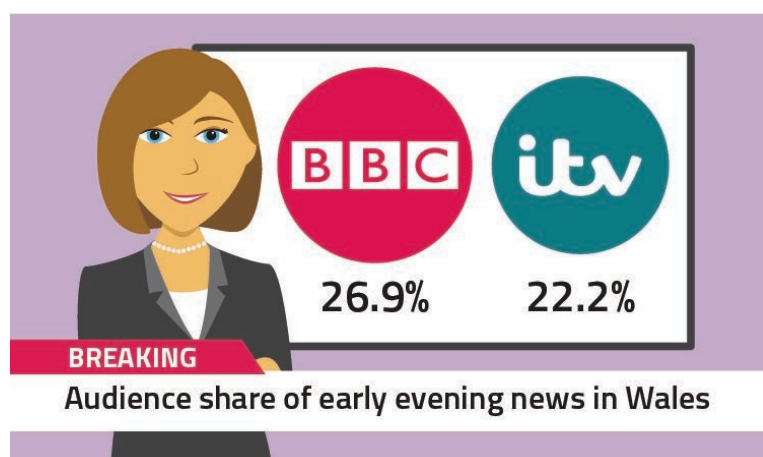
Source: BARB. BBC Wales area, all individuals (4+). Reach criteria: 15+ consecutive minutes, full weeks used. The TVR (television rating) is the measure of the popularity of a programme, daypart, commercial break or advertisement by comparing its audience to the population as a whole. One TVR is numerically equivalent to 1% of a target audience.

BBC One Wales' and ITV Cymru Wales' early evening news bulletins attracted 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 29.2% share of the slot's viewing in Wales in 2017 to 26.9% in 2018. This was lower than the equivalent early-evening news programmes in Scotland and Northern Ireland. ITV Cymru Wales' counterpart *Wales at Six* increased its share of viewing from 21.1% in 2017 to 22.2% in 2018; its share was similar to the Channel 3 UK average share (22.9%) for this slot.¹⁵

¹⁵ Source: BARB. Individuals (4+). UK averages based on share to respective early evening news bulletin time slots.

Figure 7: Audience share % of BBC One Wales and ITV Cymru Wales early evening news: 2018

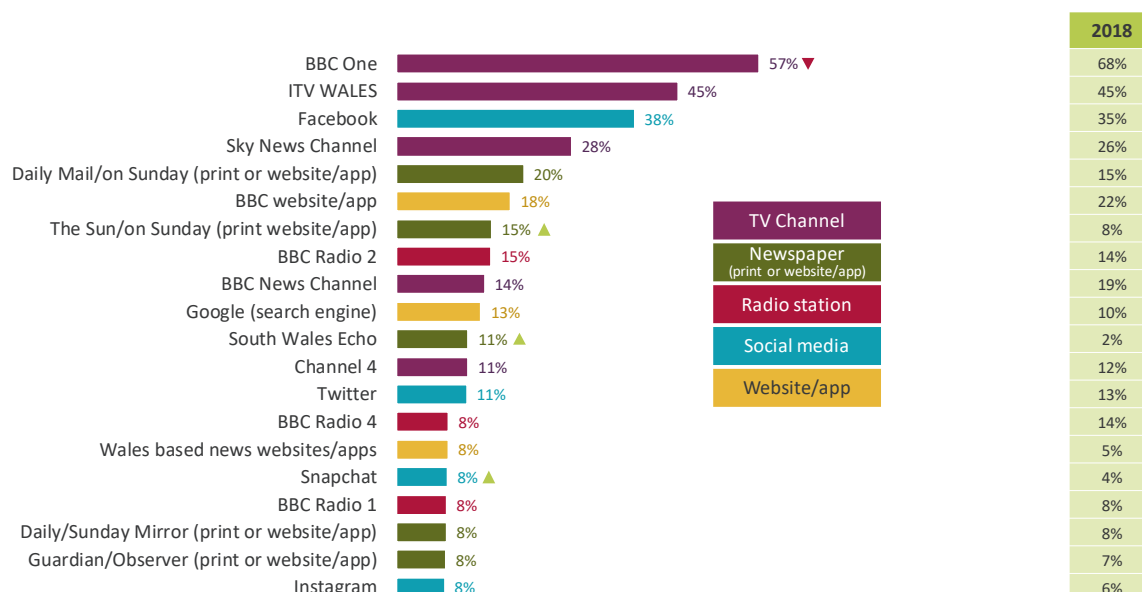


Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures based on 'regional news' BARB genre programmes, start time 17:55-18:35, 10mins+ duration, weekdays and include the HD and +1 channels where applicable. BBC One's early evening news bulletin, Wales Today, is transmitted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

BBC One and ITV Wales are the most-used sources of news for people in Wales

Television remains the most-used platform for news consumption for people in Wales, with BBC One and ITV Cymru Wales coming first and second in the top 20 most-used news sources list. Television channels, including Sky News and the BBC News Channel, make up four of the top ten most-used news sources in 2019. Online platforms: Facebook, the BBC website/app and Google search engine, ranked third, sixth and tenth respectively.¹⁶

Figure 8: Top 20 sources of news in general in Wales: 2019



¹⁶ Source: Ofcom News Consumption 2019

Source: Ofcom News Consumption survey 2019

Question: Thinking specifically about <platform>, which of the following do you use for news nowadays? Base: All adults 16+ in Wales – 2019=475. Green/red triangles indicate statistically significant differences between 2019 and 2018.

BBC One, ITV Wales and Facebook are the are the most-used sources for people in Wales looking for news about their own nation

For news about their own nation, the main TV channels; BBC One and ITV, and Facebook are the main sources of news for people in Wales. Nearly half of adults (44%) use BBC One, with about a third (35%) using ITV Wales. A quarter of adults say they use Facebook to get news about their nation.

Figure 9: Sources used to access news about own nation: 2019

England		Scotland		Wales		Northern Ireland	
BBC One	39% ▼	STV	44%	BBC One	44% ▼	UTV	52%
ITV	22%	BBC One	39% ▼	ITV WALES	35%	BBC One	50% ▲
Facebook	15%	Facebook	19%	Facebook	25% ▲	Facebook	25%
BBC website/app	8%	BBC website/app	7%	South Wales Echo	12%	BBC Radio Ulster	20% ▲
BBC News Channel	5%	Twitter	6%	The Western Mail	6%	Cool FM	15%
Twitter	4%	BBC Radio Scotland	6%	BBC website/app	5%	The Belfast Telegraph	5%
BBC local/regional radio station	4%	The Sun	6%	Any Wales based news site/app	5%	Twitter	5%
Google (search engine)	4%	The Daily Record	5%	Local daily newspaper	5%	RTE Channels / Virgin Media One / TG4	5%
		Local commercial radio station	4%			BBC Radio 1	5%
		Google (search engine)	4%			Local commercial radio station	4%
						The Irish News	4%
						Sunday Life	4%
Don't follow Nation news	12%	Don't follow Nation news	4%	Don't follow Nation news	7%	Don't follow Nation news	2%

Source: Ofcom News Consumption Survey 2019

Question: From which of the following sources do you get news about what is going on in your NATION. nowadays? Base: All adults 16+ using TV/Newspapers/Radio/Internet/Magazine for news. Wales =475. Green/red triangles indicate statistically significant differences between 2019 and 2018.

News and current affairs: relevance in Wales

Having reviewed representation and portrayal, Ofcom is currently reviewing the BBC's news and current affairs output, and how it is adapting to the changing news environment. It will inform the way Ofcom assesses the BBC's delivery of purpose 1 over the Charter period.

In Wales PSB viewers rated the range of news output less highly than across the rest of the UK. Seventy per cent of regular viewers in Wales rated BBC One highly for its wide range of quality news. This was lower than the UK average, 75% (Media Nations 2018).

S4C's reach decreased in 2018

In a typical week in 2018, 300,000¹⁷ viewers in Wales watched S4C on television for at least three consecutive minutes, at 18% lower than in 2017. UK-wide, the weekly reach of S4C was 466,000, 17% lower than in 2017.

Figure 10: Average weekly reach (000s) of S4C – individuals: 2010-2018



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

Review of S4C

In March 2019, the Department for Digital, Culture, Media and Sport (DCMS) published its response to the independent review of S4C undertaken by Eyrn Ogwen Williams. The Government accepted the recommendations to update S4C's public service remit to include digital and online services and remove the current geographical broadcasting restrictions; to enable it to work with Welsh Government on the aim of increasing the number of Welsh speakers to a million by 2050; to provide S4C's public funding entirely through the licence fee from 2022/23 onwards, with all future funding decisions made as part of the BBC licence fee funding settlement; to give it greater commercial freedom; and to replace the S4C Authority with a new unitary board comprising executive and non-executive directors;

Since the review, S4C has invested significantly in its digital offering as it evolves from a television-only service to being a provider of digital content across a range of platforms throughout the UK. Use of S4C's online player, S4C Clic, is increasing, with box-sets offered for the first time at the end of 2018, and compulsory log-in from June 2019. S4C has continued to perform well on the BBC iPlayer for both live streaming and catch-up.

Several S4C programmes achieved critical success during 2018/19. Prosiect Z won a BAFTA Kids in 2018 as well as the best children's programme at the 2019 RTS Awards. *Un Bore Mercher/Keeping Faith*, a co-production with BBC Cymru, was the BBC's most successful non-network drama in more than 20 years. The second series of *Un Bore Mercher* has already broadcast on S4C.

¹⁷ These reach figures are rounded to the nearest 1000.

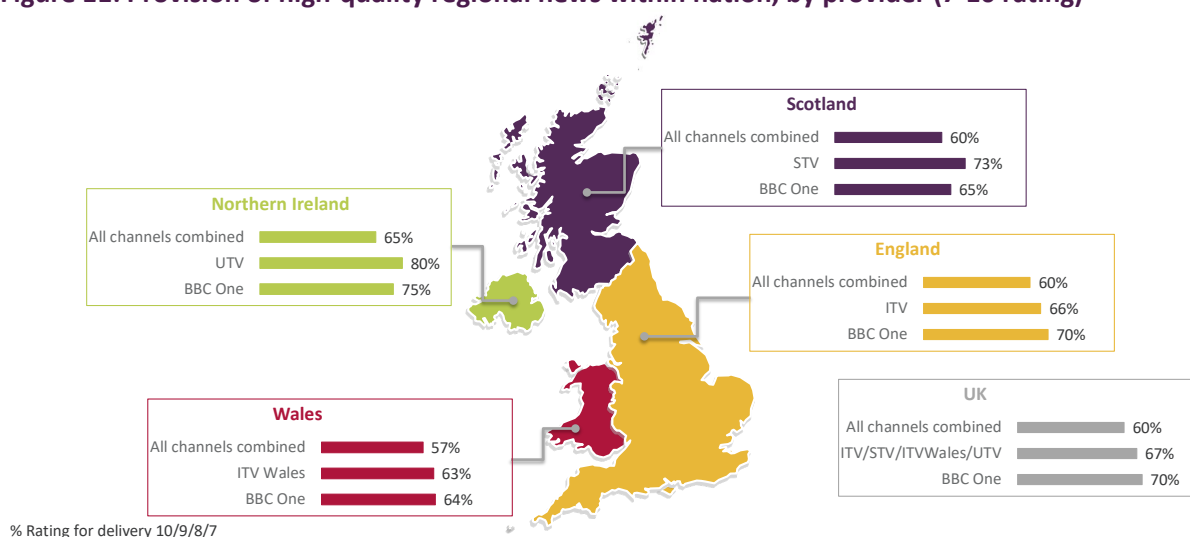
In September 2018, S4C moved its headquarters to Carmarthen where it is the anchor tenant at a new centre developed by University of Wales Trinity St David. S4C retains a presence in Cardiff, where it will co-locate its broadcast and technical functions with BBC Cymru Wales at the new Central Square development once it is completed.

How viewers in Wales rate PSB services

Nearly three-quarters of PSB viewers in Wales were satisfied with PSB provision in 2018 (74%). This is on par with the UK average (74%) and England (74%) and compares with 77% in Northern Ireland and 73% in Scotland.¹⁸

In terms of regional news provision, audiences in Wales rated BBC One's (64%) and ITV Wales' (63%) delivery very similarly. However, these ratings are the lowest compared to the other nations, which suggests that viewers in Wales are less satisfied with regional news delivery.¹⁹

Figure 11: Provision of high-quality regional news within nation, by provider (7-10 rating)



Source: Ofcom PSB tracker 2018. 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 = 2069, 1411, 211, 230, 187; ITV1 = 1776, 1211, 192, 188, 185). Base for 'All channels combined': All respondents who ever watch any PSB channels in each nation (2780, 1944, 274, 283, 279).

PSB services were rated lower by viewers in Wales compared to those in England and Scotland for delivery in regard to 'showing different parts of the UK, including England, Northern Ireland, Scotland and Wales'. Fifty-two per cent of viewers in Wales rated this highly, compared to 55% in England and Scotland, and 51% in Northern Ireland.²⁰

¹⁸ Ofcom PSB Tracker 2018

¹⁹ Ofcom PSB Tracker 2018

²⁰ Ofcom PSB Tracker 2018

Audiences in Wales (43%) rated the performance delivery of *'It portrays my region/nation fairly to the rest of the UK'* the lowest of all nations. However, this was rated relatively low across all the nations – England (47%), Northern Ireland (44%) and Scotland (45%).²¹

In terms of representing diversity in the nations, 56% of audiences in Wales rated highly the delivery of *'programmes that show different kinds of cultures within the UK'*. This compared to 57% in England, 58% in Scotland and 51% in Northern Ireland.²²

Attitudes to TV in Wales

One of Ofcom's duties under the Communications Act 2003 is to ensure that people who watch television and listen to the radio are provided with appropriate protection from harmful or offensive material. The Ofcom cross-platform media tracker looks at attitudes to offensive language, sex and violence on an annual basis.

There is no difference between Wales and the UK overall in feelings about the amount of sex on television; just under a quarter (23%) say this in Wales and in the UK overall. The same is true of their feelings about violence on TV; about a third (35%) both in Wales and in the UK overall say there is too much violence on television. Viewers in Wales are less likely to say there is too much swearing (28% vs. 33% in UK overall).²³

When asked if they feel that TV programmes have improved, got worse or stayed the same in the past 12 months, those in Wales are more likely to say it has got worse (28%) compared to 23% in the UK overall.²⁴

The reasons given for saying this are: more repeats (70%), general lack of quality (41%) and lack of variety (51%).²⁵ However, these differences are not significant.

²¹ Ofcom PSB Tracker 2018

²² Ofcom PSB Tracker 2018

²³ Ofcom cross-platform media tracker 2018

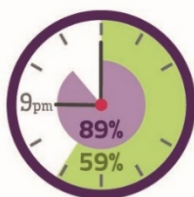
²⁴ Ofcom cross-platform media tracker 2018

²⁵ Ofcom cross-platform media tracker 2018. Note: these are based on 69 respondents in Wales who say TV programmes have got worse in the last year

Percentage of adults who have seen something offensive on television...



Television has too much...



The watershed...

89% of adults are aware of the 9pm watershed
59% of adults believe that 9pm is a suitable time for the watershed.

28% of adults thought the quality of TV got worse in the last year. Top reasons why:

More repeats	70%
Lack of quality	51%
Lack of variety	41%
Too many reality shows	40%
More violence	22%
More offensive language	19%
More antisocial behaviour	13%
More sex	12%
More nakedness	9%

21% of adults thought the quality of TV got better in the last year. Top reasons why:

More interesting/entertaining	61%
Wider range/type of programmes	60%
More/better dramas	56%
Improved quality	42%
More/better films	31%
More up to date	28%

Source: Ofcom cross-platform media tracker 2018. Base: All with any TV sets in 2018; UK (2321), Wales (250)



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 a channel dedicated to Welsh-language programming across a wide range of genres.

The BBC's and ITV Wales' combined spend on programming for Wales increased by 13% in 2018 to £33.6m.

In real terms, spending by the BBC rose by 16% to £27.3m in 2018, the highest level since 2009. ITV Cymru Wales' spend on local programming was up marginally at £6.3m.

The BBC produced 615 hours of local programming in 2018, similar to the previous year, while ITV produced 343 hours of local programming, 4% more than in 2017.

Wales is also an important source of production for PSB content shown across the UK. Just over 3% of qualifying network spend across the PSB channels was on Wales-based productions in 2018. Notably, Channel 4 increased the proportion of its content, both in spend and hours, that was made in Wales in 2018.

How we report spend on programming

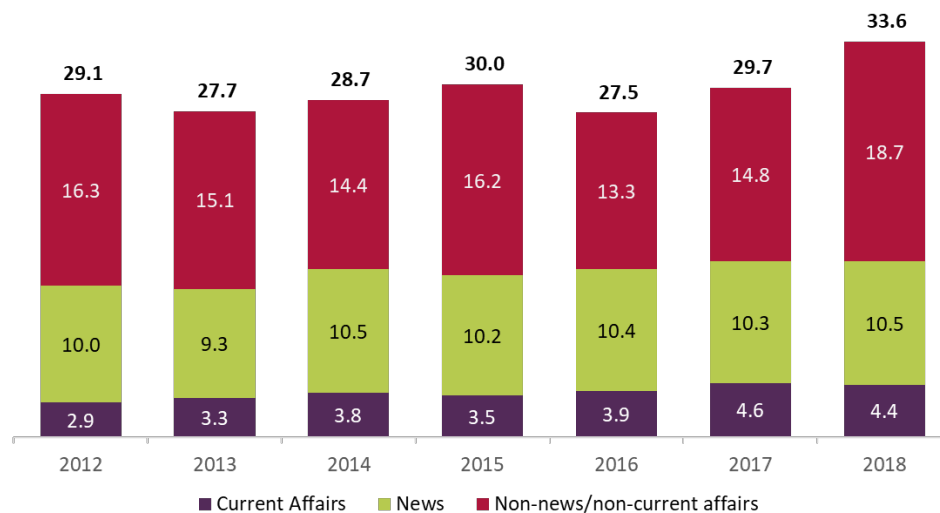
The analysis in this section covers programming made in Wales for viewers in Wales as well as programming made in the nation and broadcast UK-wide. It focuses on **first-run UK originations**, which are programmes commissioned by or for a licensed public service channel with a view to their first showing 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's and ITV Wales' combined spend on programming for Wales increased by 13% in 2018

Total spending rose on this type of programming to £33.6m in 2018, up from £29.7m in 2017. Spend on current affairs programming was £4.4m, down from £4.6m the previous year; spending on news was stable at £10.5m while spending on other programming, including general entertainment, was 26% higher at £18.7m.

Figure 12: PSB spend on first-run UK-originated content for Wales, by genre (£m)

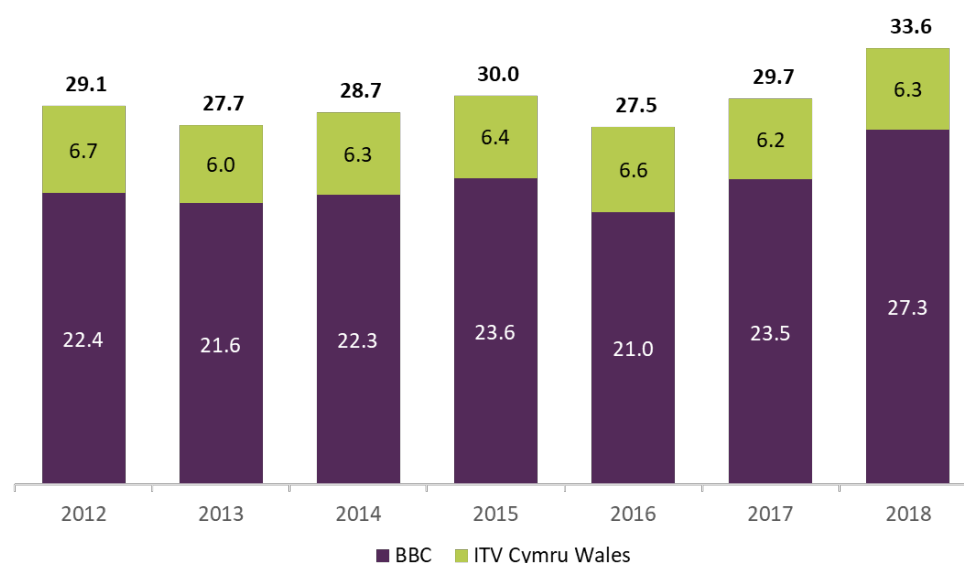


Source: Ofcom/broadcasters. Note: Figures are expressed in 2018 prices. Excludes spend on S4C output.

The BBC was the main driver behind increased spend on programming for Wales

Spending by the BBC spend in real terms rose by 16% to £27.3m in 2018, the highest level since 2009. In real terms, ITV Cymru Wales' spend on local programming was up marginally at £6.3m in 2018.

Figure 13: BBC and ITV Wales spend on non-network first-run UK-originated content for Wales (£m)



Source: Ofcom/broadcasters. Note: Figures are expressed in 2018 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 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.

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

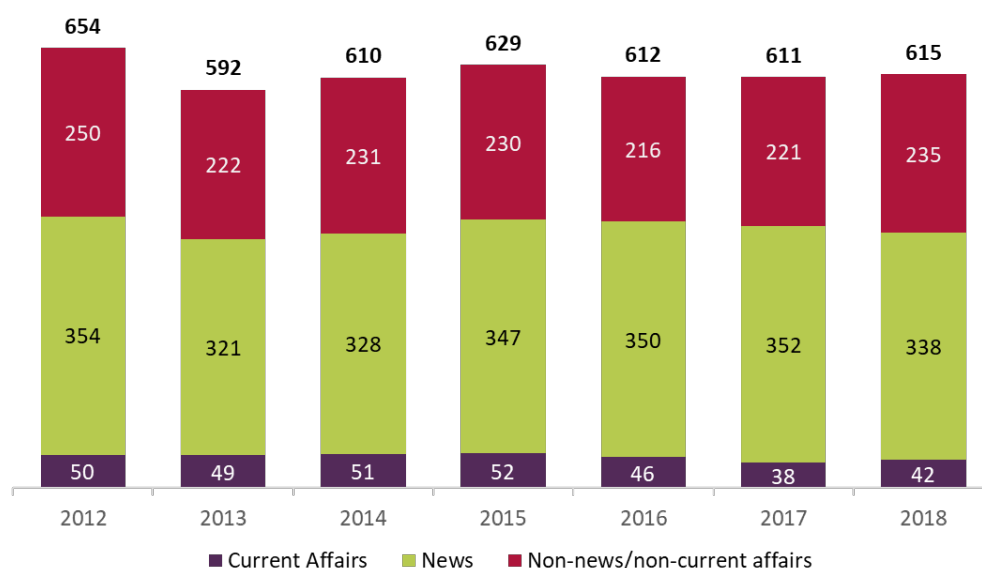
Among other things, this operating licence stipulates that in each Financial Year the BBC must ensure that:

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

Overall hours of BBC first-run UK-originated content in Wales were stable in 2018

While hours of news programming have declined by 4% since 2017, current affairs hours increased by 10% and other genres, including general entertainment, increased by 6%.

Figure 14: BBC hours of first-run UK-originated content for Wales, by genre



Source: Ofcom/broadcasters

BBC to strengthen its programming and online services in Wales

New investment of £8.5m in BBC Wales, announced as part of the new Charter package for Wales, has enabled the broadcaster to strengthen its programming and online services across a range of platforms. In 2018, BBC iPlayer requests for BBC Wales' content increased three-fold to 44 million in 2018, thanks to the success of a range of series including *Keeping Faith*, starring Eve Myles, and *Hidden*. Both series, co-commissioned with S4C, were in the UK top ten of drama premieres on BBC iPlayer in 2018 and both will return with a second series to network screens.

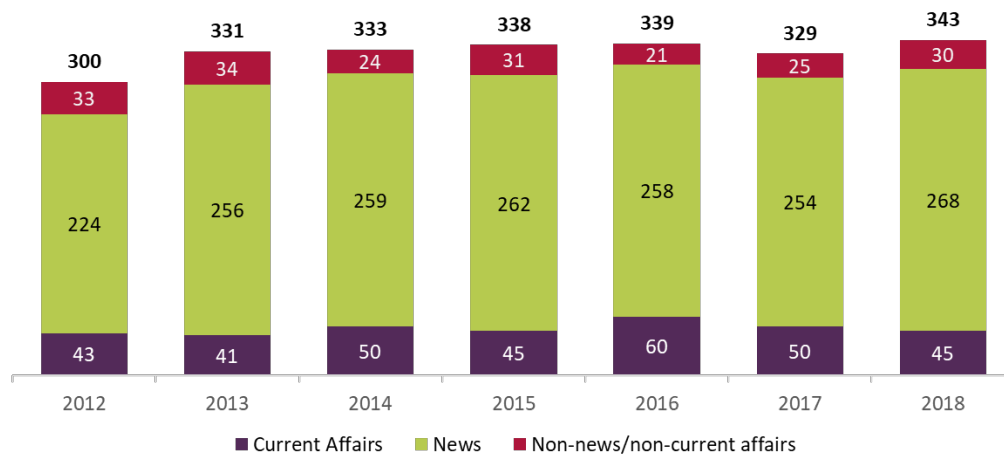
This creative momentum also boosted the portrayal of Wales on network screens. Home-grown series such as *Back in Time for the Factory*, *The River Wye* and *Hidden Wales* performed strongly with UK audiences.

The development of BBC Wales' new broadcast centre in Cardiff's Central Square continues apace and is due to be fully operational by spring 2020. The BBC's most open and accessible building 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 audiences with an aspiration to work in the creative industries.

ITV Cymru Wales produced 343 hours of local programming in 2018

This was a 4% increase on 2017, and was largely driven by growth in hours of news content to 268 hours. In contrast, there was a decline in current affairs programming to 45 hours, down from 50 in 2017.

Figure 15: ITV hours of first-run UK-originated content for Wales, by genre



Source: Ofcom/broadcasters

ITV in Wales

ITV Cymru Wales continues to attract substantial audiences for national news and current affairs made in Wales for viewers in Wales. Its news service has had additional investment in specialist journalism, focusing on devolved areas of policy and with an increased live broadcasting capacity across Wales. Its main evening news programme, *Wales at Six*, is broadcast *before* the UK news programme and is now being watched by more people in Wales than a decade ago. ITV Cymru Wales also provides plurality through returning current affairs series. *Wales This Week* and *Coast & Country* are broadcast in the heart of the ITV peak-time schedule, maximising audiences for this important genre.

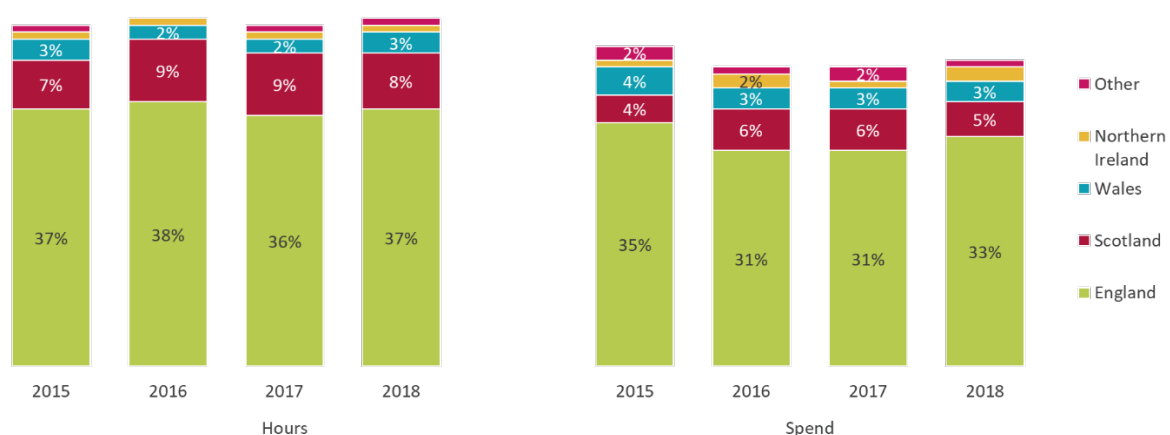
The weekly political programme *Sharp End* regularly outperforms the BBC's *Newsnight* in Wales. ITV Wales is also building significant audiences for trusted, substantial journalism about Wales, both online and across social media, often reaching younger audiences within and outside Wales. It also offers plurality for current affairs and factual content in the Welsh language, supplying S4C with many of its most popular and most talked-about programmes. These include the new political series *Y Byd yn ei Le*; the award-winning current affairs series *Ein Byd* and the *Y Byd Ar Bedwar* current affairs series, together with the ever popular *Cefn Gwlad*.

ITV Cymru Wales produces more than 300 hours of news and current affairs as part of its licence commitment. ITV is also a producer of scale in Wales and a significant player in the Welsh production sector, employing about 400 people. Cardiff-based ITV Studios companies Boom Cymru and Boomerang make around 500 hours of programming annually - from children's to returning drama for S4C, the BBC, Channel 4, Channel 5 and others.

Just over 3% of qualifying network spend across the PSB channels was on Wales-based productions in 2018

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 that are not London. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours that have to be made outside London, and the proportion of qualifying spend that has to be outside London. The BBC has individual quotas for each of the UK nations, which came into effect this year, and Channel 4 also has an out-of-England quota.²⁶

Figure 16: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2015-2018



Channel 4 increased the proportion of its content that is made in Wales in 2018. Two series of *Extreme Cakemakers* from the broadcaster qualified as Welsh productions in 2018, alongside the long-running series *One Born Every Minute*. ITV made only one title that qualified in Wales in 2018: *The Island Strait*, a four-episode series about the Menai Strait which separates the isle of Anglesey from mainland Wales.

²⁶ For further information, see the [PSB compliance pack](#) and the [regional programming guidance](#)

Figure 17: Proportion of qualifying network production in Wales, by PSB: 2015 2018

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

Welsh Assembly report on film and TV production

In May 2019 the Culture, Welsh Language and Communications Committee published its report²⁷ on film and major TV production in Wales and found that "there is a danger of losing momentum if we do not have sufficient skilled workers to support our growing screen industry". The culture committee said greater support would need to be given to the 'indigenous' film and TV industry, ensuring Welsh crews benefited from government investment.

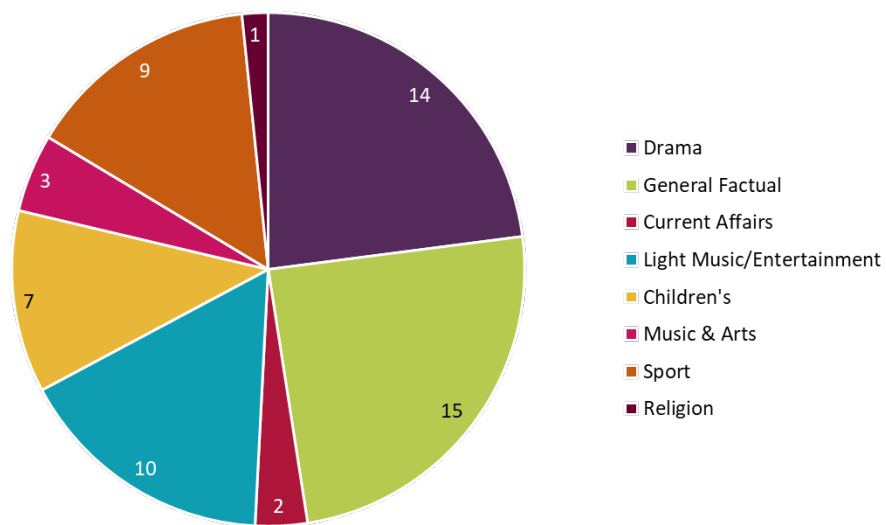
S4C spent £61m on first-run commissions broadcast in 2018-2019

In the 2018/2019 period, S4C spent £61m on original commissions across eight different genres of content. The majority of spend went to drama (£14m) and to general factual (£15m) programming, comprising almost half of the total S4C spend on original commissions at a combined figure of £29m.

In terms of hours, drama accounted for 94 hours of original commissions, while general factual made up 657 hours. The £9m spend on sports original commissions contributed to the second highest amount of hours, at 322 hours of programming broadcast.

²⁷ <http://www.assembly.wales/laid%20documents/cr-ld12524/cr-ld12524-e.pdf>

Figure 18: S4C spend on first-run commissions: 2018-19 (£m)



Source: S4C. Note: current affairs programming includes weather.



Radio and audio

Introduction

Radio remains popular across the UK and in Wales, where nine in ten adults tune in each week. Listeners in Wales also listen to more radio every week than in any other nation of the UK; more than 22 hours on average.

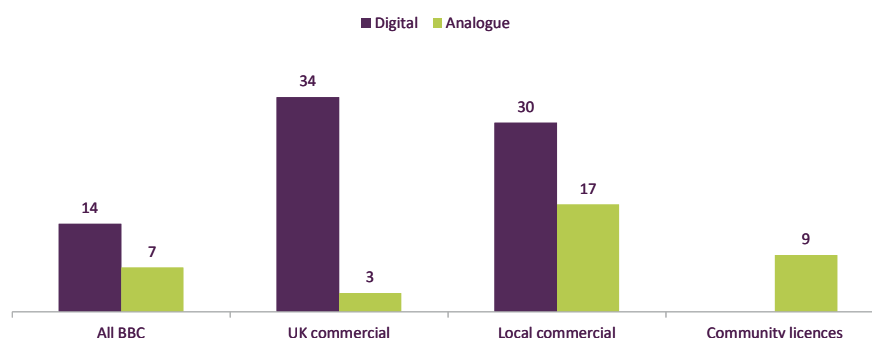
UK-wide BBC stations have a greater share of listening in Wales than in other nations, while UK-wide commercial stations have a lower share of listening than elsewhere. This is reflected in BBC Radio 2 being the most popular station across Wales.

Meanwhile, ownership of smart speakers, with uses including streaming music and listening to live radio, has increased to almost a quarter (24%) of households.

There were 78 radio services broadcasting on DAB in Wales in March 2019

The number of stations broadcasting on DAB in Wales has risen to 78 and compares with fewer than 50 five years ago.²⁸ By comparison, 36 stations are broadcasting on analogue, including nine community radio stations.

Figure 19: Radio station availability in Wales



Source: BBC / Ofcom, March 2019.

Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of them. All BBC Digital figure includes Radio Cymru 2. The local commercial digital figure refers to the number of services carried by local DAB multiplexes in Wales. Not all services will contain local content, and some services may be broadcast on a number of different multiplexes (but are still counted for these purposes as individual services).

²⁸ There may be some duplication in the services counted here, where services broadcast on more than one Welsh local multiplex

DAB services from the BBC are available to 92% of households in Wales

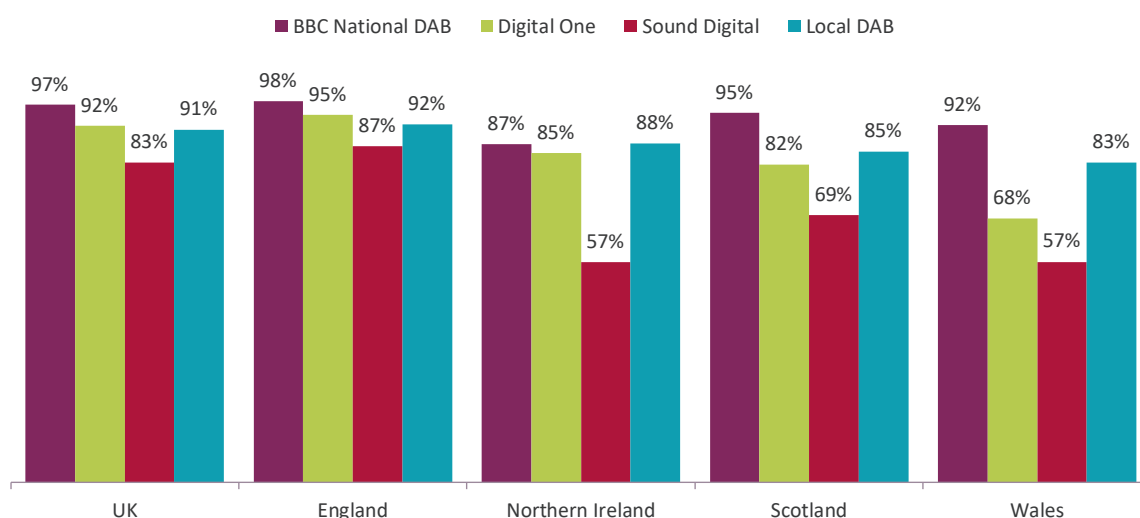
Coverage of the majority of multiplexes, the transmission infrastructure used to broadcast DAB radio stations, remains unchanged in 2019.

However, coverage of the second national commercial multiplex, operated by Sound Digital, increased over the year from 52% to 57% of households with the addition of extra transmitters to its network.²⁹

The availability of local DAB multiplexes, which carry the BBC's two national services for Wales, Radio Cymru and Radio Wales, is lower in Wales (83%) than in any other nation in the UK.

Figure 20: Household coverage of DAB: 2019

Proportion of households (%)



Source: BBC, Arqiva, Ofcom, March 2019.

Expanded footprint for BBC Radio Wales

In 2018 BBC Radio Wales's FM footprint increased significantly and is now available to 91% of households in Wales – a coverage increase of up to 400,000 people and over 550 miles of road - compared with the previous 79% nationwide. The boost coincided with Radio Wales's landmark 40th anniversary celebrations and was part of a commitment made by BBC Wales to increase the station's availability as part of its programme of work following the Charter reinvestment package.

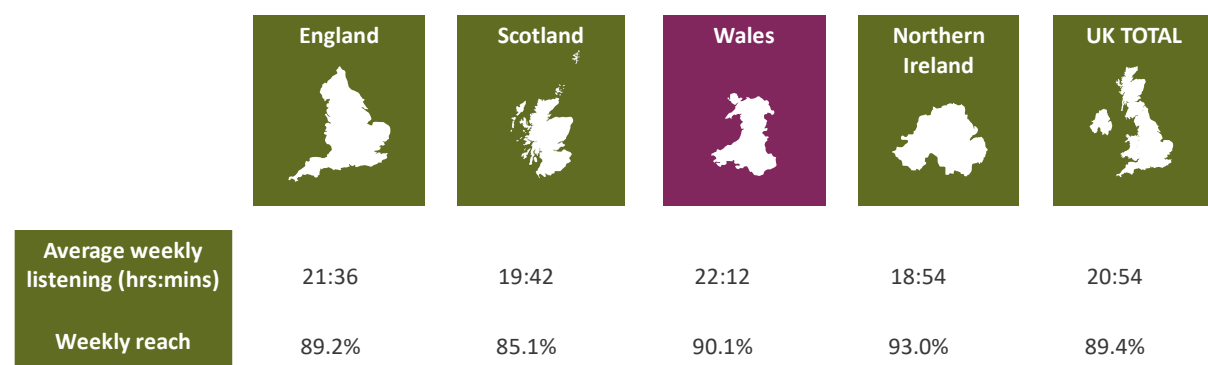
²⁹ <https://www.arqiva.com/news/press-releases/sound-digital-announces-imminent-completion-of-dab-radio-network-expansion/>

Ninety per cent of adults listened to the radio each week in Wales in Q1 2019

Nine in ten adults listened to the radio each week in Wales in Q1 2019, and at an average of just over 22 hours per week, they listen for longer than adults in any of the other UK nations.

Commercial radio stations have attracted more listeners than BBC Radio over the past year, increasing their reach from 60% to 64% while BBC Radio has dropped from 71% to 68% in the same period.

Figure 21: Average weekly reach and listening hours



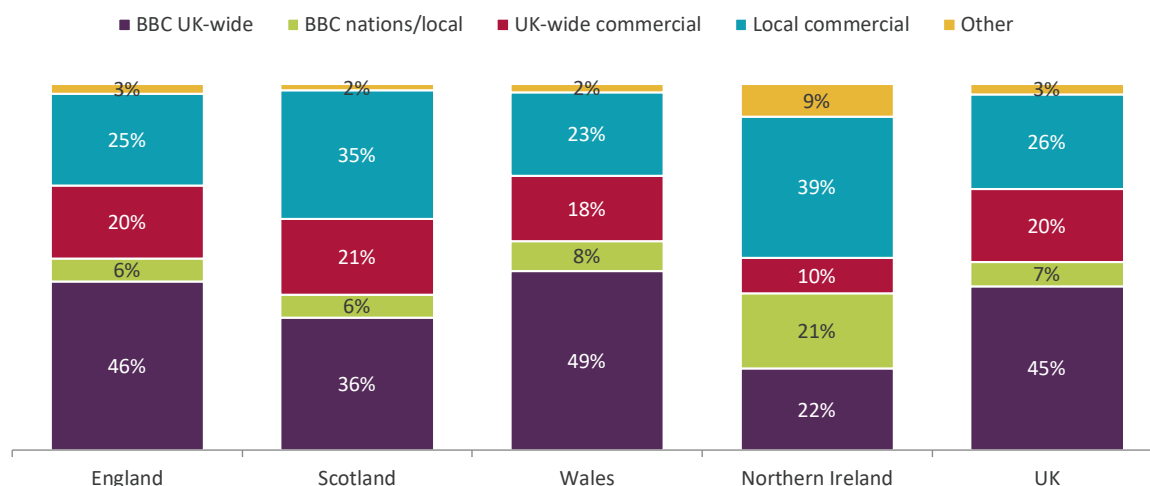
Source: RAJAR, All adults (15+), Q1 2019

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 5 minutes in the course of an average week.

BBC network radio stations are popular with listeners in Wales

As a proportion of all radio listening, more time is spent listening to BBC UK-wide services in Wales than in any other UK nation. BBC Radio 2 takes almost a quarter of the share of listening in Wales (24.2%). In contrast, local commercial services have a lower proportion of listening hours in Wales than in other nations. Commercial stations also have lower reach in Wales (41%) than in the other UK nations (56% in Scotland, 59% in Northern Ireland).

Figure 22: Share of listening hours, by nation



Source: RAJAR, all adults (15+), Q1 2019.

England = BBC Local radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA.

Welsh Assembly report on radio services in Wales

The Culture, Welsh Language and Communication Committee published a report on radio in Wales in December 2018.³⁰ The Committee's inquiry investigated the extent to which BBC Wales radio services, commercial radio services and community radio services meet the needs of audiences in Wales. The committee made 16 recommendations to Welsh Government, DCMS, the BBC and Ofcom which included:

The DCMS should consider introducing a regulatory requirement for commercial radio stations in Wales to report on distinctly Welsh news, as well as local and UK news as part of its reform of commercial radio.

Ofcom should explore the issue of competition in the commercial radio industry in Wales to see how greater market diversity and ownership can be encouraged.

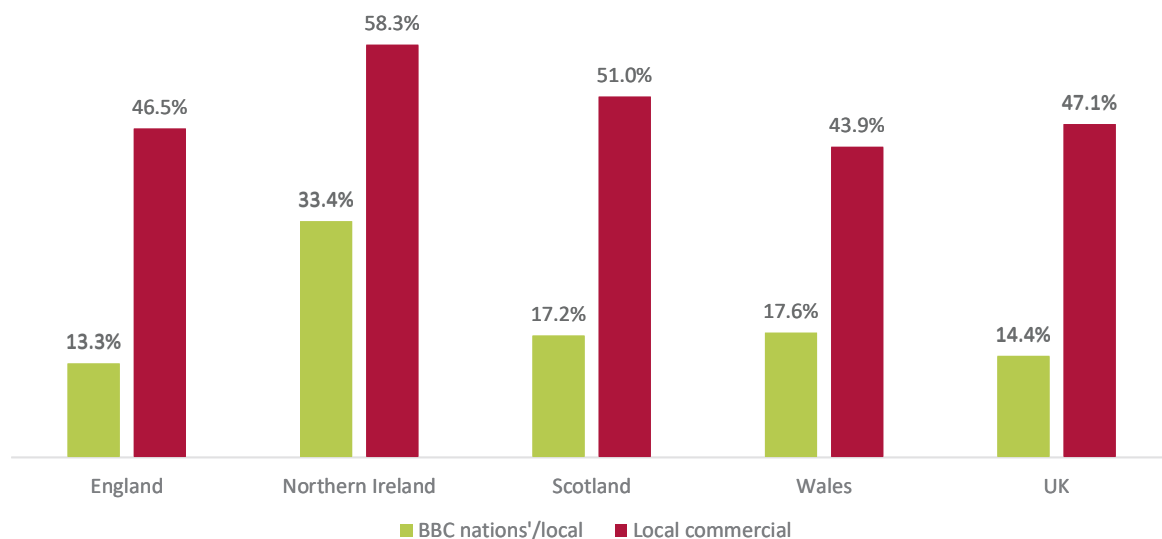
Ofcom should do more to publicise the availability in Wales of the Community Radio Fund that it operates on behalf of the DCMS.

³⁰ <https://www.assembly.wales/laid%20documents/cr-ld11993/cr-ld11993-e.pdf>

Local commercial radio reached more than four in five adults in Wales

More than four in five adults in Wales listened to local commercial stations (43.9%) with less than one in five listening to BBC nations'/local radio (17.6%) in Q1 2019. Across the UK, less than half of adults listened to local commercial radio and less than 15% listened to local BBC stations.

Figure 23: Weekly reach to local radio, BBC vs. commercial



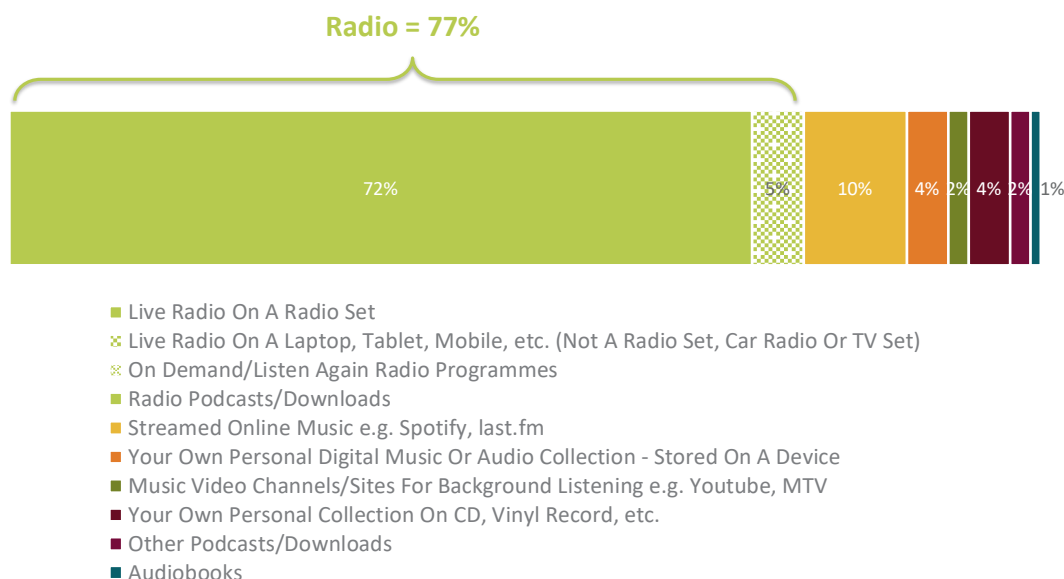
Source: RAJAR, Q1 2019.

Live radio is the most popular audio activity in Wales

Of all the time spent each week listening to any type of audio, 77% of this was to radio. This is higher than the proportion of time spent on radio across Great Britain (73%).

Figure 24: Share of ear – Wales 15+

For adults, the majority of time listening to content is to live radio

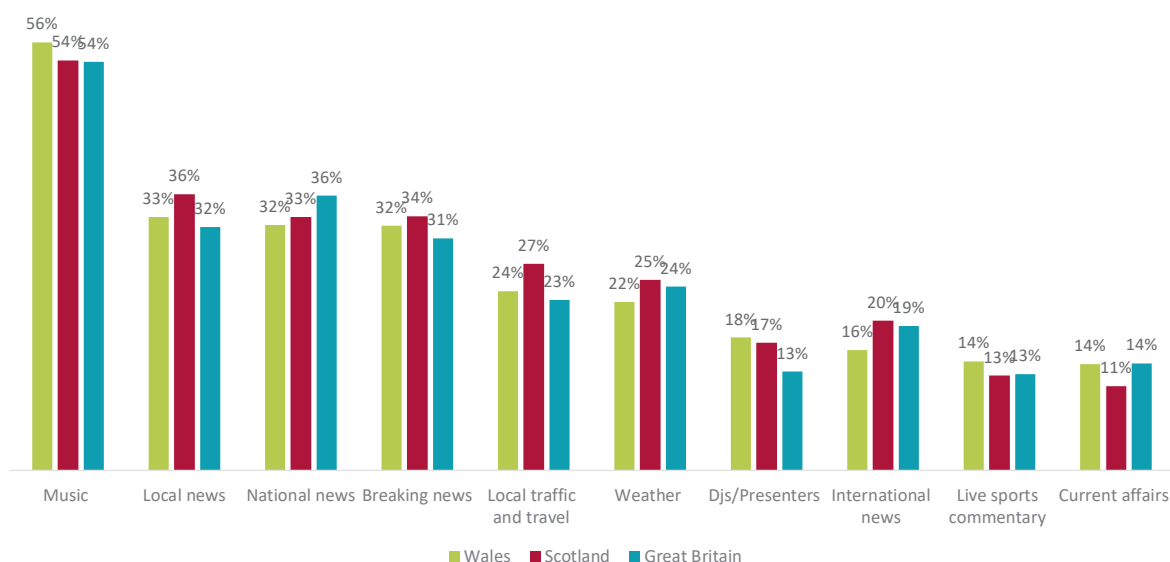


Source: TouchPoints 2018.

Base: Government Office Region: Wales.

Music is the most valued type of content for radio listeners across Great Britain, followed by national news. For listeners in Wales, however, local news coverage is the second most valued type of content. And listeners in Wales are less likely than those in Scotland or across the whole of Great Britain to say they value national or international news.

Figure 25: Top ten most valued types of content on the radio



Source: TouchPoints 2018.

Base: Weekly radio listeners aged 15+.

Ranked by listeners in Wales.

Smart speaker ownership has doubled in the last year

The use of smart speakers is increasing in the home, with uses from streaming music and listening to live radio, to accessing weather reports or setting personal alarms. Almost a quarter (24%) of homes in Wales owned a smart speaker in 2019, up from 11% in 2018.

Among homes in Wales with a smart speaker, the top three claimed activities on this device were: listening to a live radio station (59%), searching for information online (55%), and listening to music via a streamed service such as Spotify or Apple Music (48%).³¹

Nearly a third of adults have listened to podcasts or listen-again services

In 2019, respondents were asked if they ever used listen-again services or podcasts from various providers. Three in ten (30%) respondents in Wales said they ever used these services, in line with England (34%) and Scotland (25%), but higher than in Northern Ireland (22%).

Almost a quarter (24%) claimed to use the BBC for these services, followed by those who used UK commercial radio (14%) or other UK-based providers (11%). Use of non-UK based providers had the lowest claimed use for listen-again services or podcasts, at 4%.³²

Podcasting in Wales

In Wales, a range of organisations including the BBC create and distribute podcasts covering a range of topics in English and Welsh including politics, current affairs, arts and sport.

Until now, BBC podcasts in Welsh have almost entirely been drawn from content broadcast on BBC Radio Cymru. However, in May 2019 BBC Cymru announced it would commission seven original podcasts for distribution on [BBC Sounds](#).

Some S4C TV commissioning has also included podcasts associated with the programme, for example *FFIT Cymru*, a programme about healthier living, has an associated podcast. Podcasts featuring catch-up content are also produced and distributed by commercial radio and community radio stations broadcasting in Wales.

As in other parts of the UK, news brands based in Wales have also launched podcasts, covering news, current affairs and sport such as Walesonline's *Martin Shipson Meets* and *The Welsh Rugby Podcast*. Walesonline is the online portal for several newspaper titles in Wales, including the Western Mail and South Wales Echo.

Certain Welsh language podcasts are targeted at learners of the language, or created with Welsh language learners in mind. For example, [Hacio'r Iaith](#) (hack the language) is a technology news podcast in Welsh promoting discussion of technology through the medium of Welsh, aimed at fluent speakers as well as learners of the language. Other examples of independent podcasts in Welsh include [Sôn am Sîn](#) (a music podcast) and [Podpeth](#) (a discussion-led podcast).

³¹ Ofcom Technology Tracker 2019

³² Ofcom Technology Tracker 2019

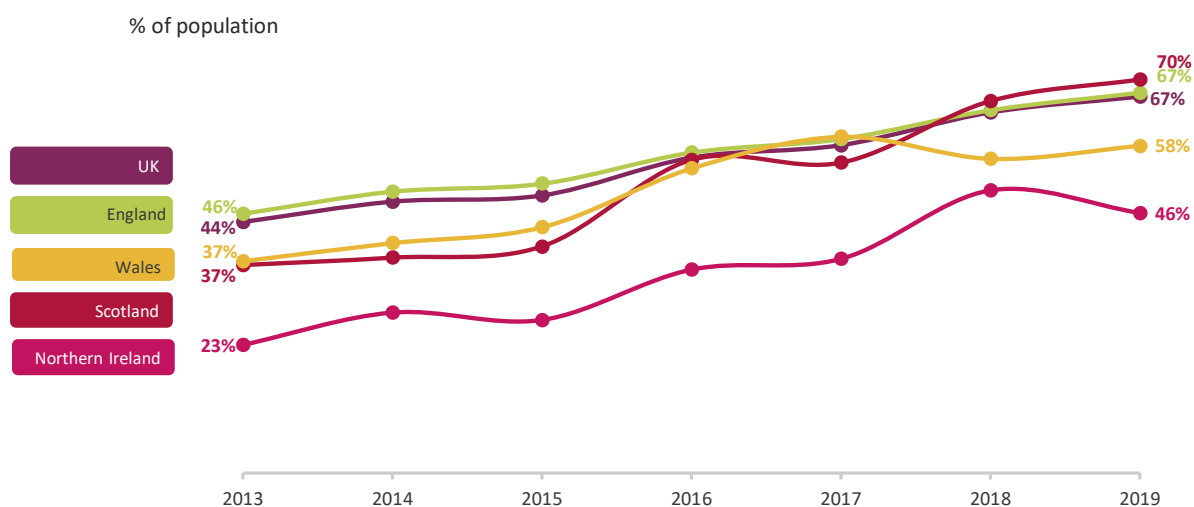
Nearly six in ten adults in Wales have a digital radio

Ownership of DAB radio sets in Wales stood 58% in Q1 2019, including at home and in the car, and is 2pp higher than a year ago.³³

Take-up was higher across the UK as a whole (67%) and in Scotland (70%) at the start of 2019, but remained lower in Northern Ireland, at 46%.³⁴

One in ten (11%) radio listeners in Wales who do not have a DAB set in the home said they were likely to purchase one in the next 12 months; the majority (70%) were unlikely to do so, and 19% were unsure.³⁵

Figure 26: DAB ownership



Source: RAJAR, Q1 in each year.

Digital listening increased slightly in 2019

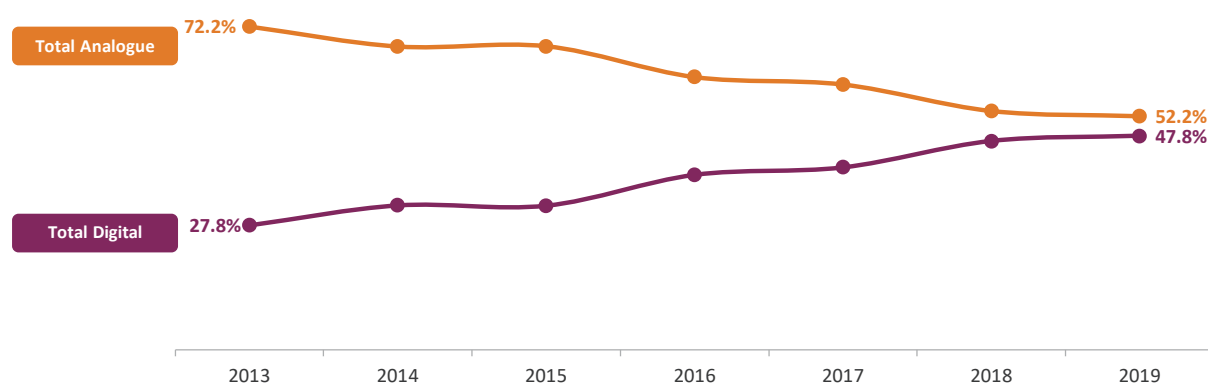
The share of listening done through digital platforms – DAB, DTT and online (including smart speakers) – in Wales increased only slightly over the past year. In Q1 2019, this stood at 47.8%, up 1.2pp on a year earlier.

³³ RAJAR, All adults 15+, Q1 2019

³⁴ RAJAR, All adults 15+, Q1 2019

³⁵ Ofcom Technology Tracker 2019

Figure 27: Share of listening hours via digital and analogue platforms in Wales: 2013–2019

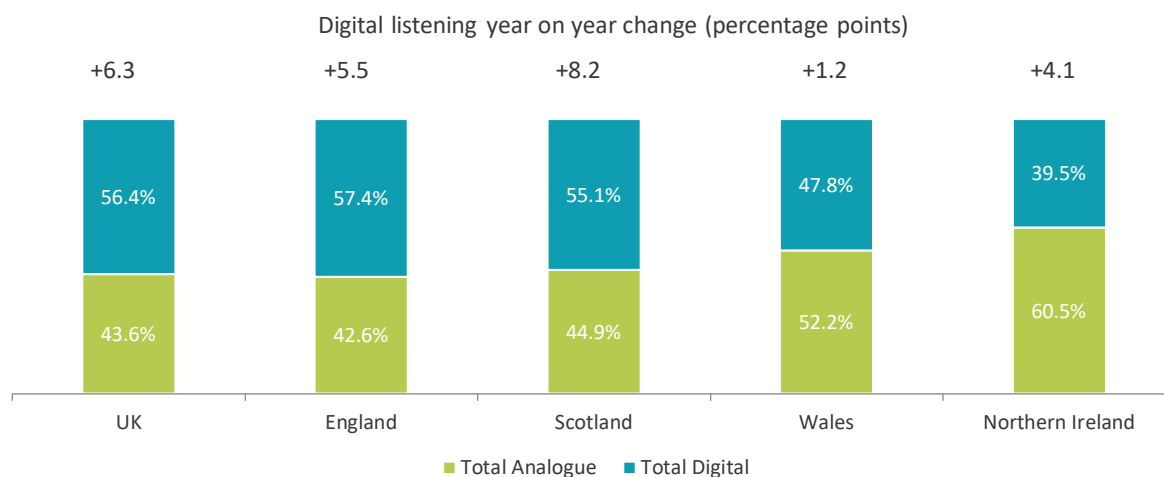


Source: RAJAR, Q1 of each year, BBC Radio Wales TSA.

The share of digital listening in Wales is lower than in England (57.4%) and Scotland (55.1%) but higher than in Northern Ireland (39.5%).

Time spent listening online has increased more in Wales than in any other nation (32% vs. 18% across the UK as a whole); 20% of adults in Wales now listen this way.

Figure 28: Share of listening hours via digital and analogue platforms



Source: RAJAR, Q1 2019 within the BBC Radio TSA for each nation.

Preparing for small-scale DAB

Small-scale DAB is a new way of transmitting digital radio that uses advances in software and low-cost computer technology to provide a flexible and inexpensive approach to the terrestrial broadcasting of digital radio services to a relatively small geographic area.

The concept was first tested by Ofcom engineer Rashid Mustapha in 2012 and subsequently the UK government funded a series of trials, licensed and facilitated by Ofcom, to test the feasibility of the technology. The trials demonstrated that small-scale DAB can provide a robust and reliable way for small analogue stations to broadcast on digital, as well as for entrants wishing to launch new radio services on a digital terrestrial platform.

In July 2019, Ofcom set out how it plans to license small-scale DAB, using new powers the UK government is proposing, through Parliament, to give us. This will enable a significantly wider range of commercial and community radio stations to broadcast on the UK's DAB digital radio platform.

Following the [consultation](#), Ofcom plans to publish a statement early in 2020.

BBC Radio 2 was the most popular radio station in Wales in Q1 2019

BBC Radio 2 was the most listened-to radio station across Wales in Q1 2018³⁶ with a weekly reach of 35.7%, followed by BBC Radio 1 at 19.8% and BBC Radio 4 with 17.4%.

BBC Radio 2 was also the most listened-to station in Cardiff³⁷, with a weekly reach of 33.4%. Global's Heart South Wales was the second most popular radio station in the Cardiff area, with a reach of 20.8%. Across North Wales³⁸, the three most popular stations were BBC Radio 2, BBC Radio 4 and BBC Radio 1.

Figure 29: Top three radio stations, by region

Rank	UK		Wales*		Cardiff**		North Wales***	
	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)
1	BBC Radio 2	28.0%	BBC Radio 2	35.7%	BBC Radio 2	33.4%	BBC Radio 2	46.8%
2	BBC Radio 4	20.1%	BBC Radio 1	19.8%	Heart South Wales	20.8%	BBC Radio 4	21.9%
3	BBC Radio 1	17.0%	BBC Radio 4	17.4%	Capital South Wales	20.6%	BBC Radio 1	21.7%

Source: RAJAR, All adults 15+, Q1 2019

* BBC Radio Wales TSA

** Capital South Wales TSA

*** Heart North Wales TSA

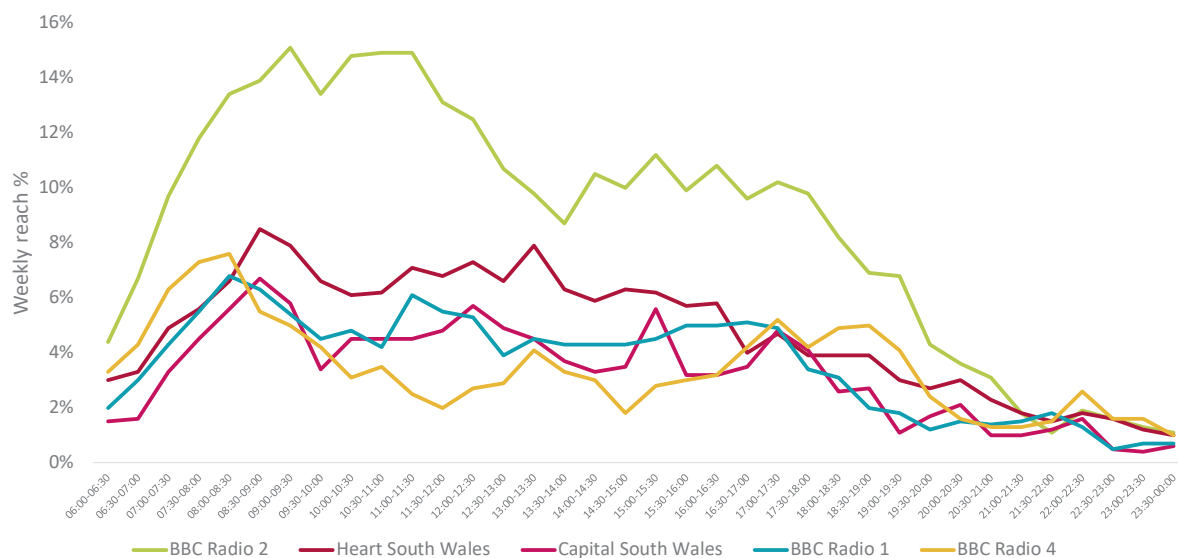
³⁶ RAJAR's BBC Radio Wales TSA

³⁷ RAJAR's Capital South Wales TSA which accounts for around 40% of the Wales adult population.

³⁸ RAJAR's Heart North Wales TSA, which covers around 727,000 adults.

Typically, across the UK, peak listening is between 8am and 9am. But in Wales the peak in Q1 2019 was between 10am and 10:30am, when around 15-16% of the population listened to *The Ken Bruce Show*. Across the duration of the show³⁹ it reached 20% of the population in the Cardiff area, higher than the average across the UK (16%).

Figure 30: Average audience across the day in Cardiff, Mon-Fri



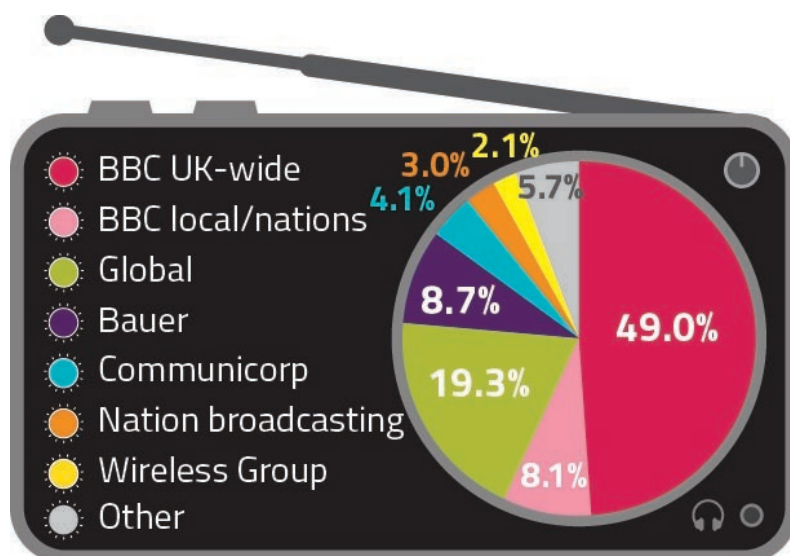
Source: RAJAR, all adults 15+, Q1 2019
Capital South Wales TSA

BBC services accounted for more than half of radio listening in Q1 2019

BBC network services make up nearly half of all radio listening in Wales (49%). When combined with BBC nations/local services, the Corporation's share of listening rises to 57%. Global and Communicorp, which between them operate the Capital, Heart and Smooth networks in Wales, account for 19% of listening while Bauer, which owns Swansea Sound and The Wave, has 9% of the share of listening.

³⁹ 09:30-12pm Monday-Friday

Figure 31: Share of listening in Wales, by radio group

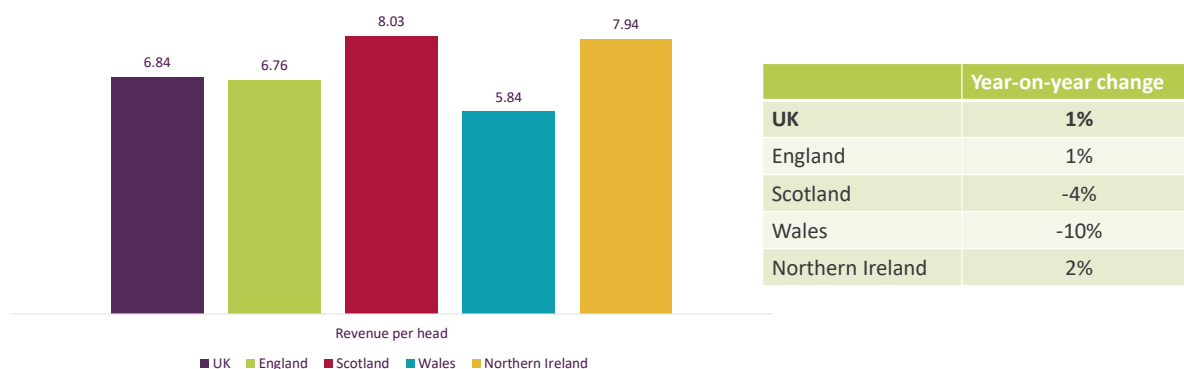


Source: RAJAR, All adults (15+), Q1 2019, BBC Radio Wales TSA

Commercial radio revenue for local stations decreased by 10% in 2018

Local analogue commercial radio stations in Wales generated £5.84 per head of population in 2018. This was the lowest of the UK nations.

Figure 32: Local / commercial radio revenue per head: 2018 (£)



Source: Ofcom/broadcasters. Note: These figures relate solely to relevant turnover reported against AL licences (local analogue commercial) and include local and national revenues and sponsorship, i.e. not only revenues relating to adverts aimed at the specific nation. YoY figures adjusted for CPI.