

# Media nations: Wales 2022



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# Overview

This *Media Nations: Wales* report reviews key trends in the media sector and sets out how audiences are served in Wales. We adopt a cross-platform perspective, including broadcast TV and radio, as well as digital delivery including online video and audio streaming.

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

In addition to this Wales report, there are separate reports for the [UK as a whole](#), [Northern Ireland](#) and [Scotland](#), as well as an [interactive report](#) containing an extensive range of data. A version of this report is also available in [Welsh](#).

## What we have found, in brief

### Overall viewing of TV and video in Wales has fallen from its pandemic peak

- The average amount of time people in Wales spent watching TV and video content in 2021, across all devices, was 4 hours 33 minutes per person per day, down 33 minutes on 2020, which was more heavily influenced by Covid-19 restrictions, but up on 2019.
- Time spent watching TV from broadcasters in Wales fell by 12.6% compared to 2020, the largest proportional decrease of any UK nation, illustrating that the long-term trend of decline in overall viewing of broadcasters' content, seen over the past decade, has resumed.
- Despite the decrease since 2020, however, people in Wales spent 3 hours 8 minutes per day watching broadcast TV on the TV set in 2021, more than the UK average.
- Take-up of subscription video-on-demand (SVoD) services rose in Q1 2022 with 71% of households in Wales subscribing to at least one, up from 64% in Q4 2021.
- Broadcaster video-on-demand (BVoD) services had comparable levels of reach to SVoD, with most consumers using multiple streaming services. BBC iPlayer was the most popular streaming service in Wales, used by 77% of online adults and teens.
- Social video platforms are also competing for viewing time and are particularly popular among younger age groups. Internet users in Wales aged 15+ spent on average 34 minutes per day on TikTok, the most of any nation, and 39 minutes per day on Facebook and Messenger in March 2022.

## **There is broad satisfaction with public service broadcasting among those who watch it in Wales**

- In 2021, the main five PSB channels accounted for a combined 54.9% share of the total broadcast TV audience in Wales, up from 53.6% in 2020.
- Audiences in Wales are broadly satisfied with PSB, with seven in ten (72%) of those watching PSB channels in the past six months saying so, and only one in ten (9%) saying that they are dissatisfied.
- Trusted and accurate news is considered by audiences in Wales to be the most important attribute of PSB, followed by *'a wide range of different types of programmes'* and *'programmes that help me understand what is going on in the world today'*.
- Following production challenges at the height of the pandemic, spend on first-run content for viewers in Wales increased by 4% in 2021, to £27.5m, with the majority going towards non-news/non-current affairs.
- BBC hours of first-run content in Wales dropped by 7% in 2021 to 573 hours; this decline was across all genres.
- Of the spend outside London by PSB channels, 5.7% was on Wales productions in 2021, down from 6.1% in 2020. However, the proportion of qualifying network hours increased from 2.9% in 2020 to 3.5% in 2021.

## **The ways in which people access and listen to radio and audio content in Wales continues to evolve**

- In 2021 nine in ten adults in listened to the radio in Wales for an average of 22 hours each week, with BBC network radio stations continuing to have the largest market share.
- Online radio listening maintains its share of overall listening, but smart speakers do not seem to have made the same impact in Wales as they have across the UK on a whole; just 4% of overall listen in Wales, compared to 10% in the UK.
- This is despite people in Wales being more likely than the average for households across the UK to have a smart speaker in their home (45% vs 39%).
- Listening to live radio on a radio set was higher for adults in Wales, at 74% of adults compared to 65% of adults in Great Britain. In contrast, weekly reach of music streaming and online radio was lower than the GB average.
- Per-capita commercial radio revenues in Wales grew by 16% between 2020 and 2021.

# TV: services, devices and trends

Following 2020, when TV and video viewing habits were significantly impacted by the Covid-19-related restrictions, trends in 2021 and early 2022 indicate the resumption of the long-term pre-pandemic trend, as well as the lasting impact of long periods of lockdown. Although most types of viewing have fallen from the unprecedented levels of 2020, people are spending an increasing proportion of their viewing time watching on-demand content, including services provided on a subscription basis (e.g. Netflix), free-to-view from broadcasters (e.g. BBC iPlayer) and on social video platforms (e.g. YouTube).

This chapter draws on data from audience-measurement and ratings agencies, and consumer surveys, to evidence and provide commentary on continuing shifts in audiences' TV and video viewing habits and preferences.

## Traditional TV platforms

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

Television sets are an established presence in our homes; more than nine in ten households in Wales (97%) had a TV set in Q1 2022.<sup>1</sup> But the services accessed on our televisions are changing, mainly because of the amount of content that is being delivered and accessed through the internet.

Traditional paid-for television services such as satellite (mainly Sky) and cable services (Virgin Media) were present in just under half of homes in Wales (46%) in Q1 2022. Paid-for satellite accounts for most of these, with Virgin Media's cable service present in just 7% of Welsh households in Q1 2022, down from 10% in Q4 2021.

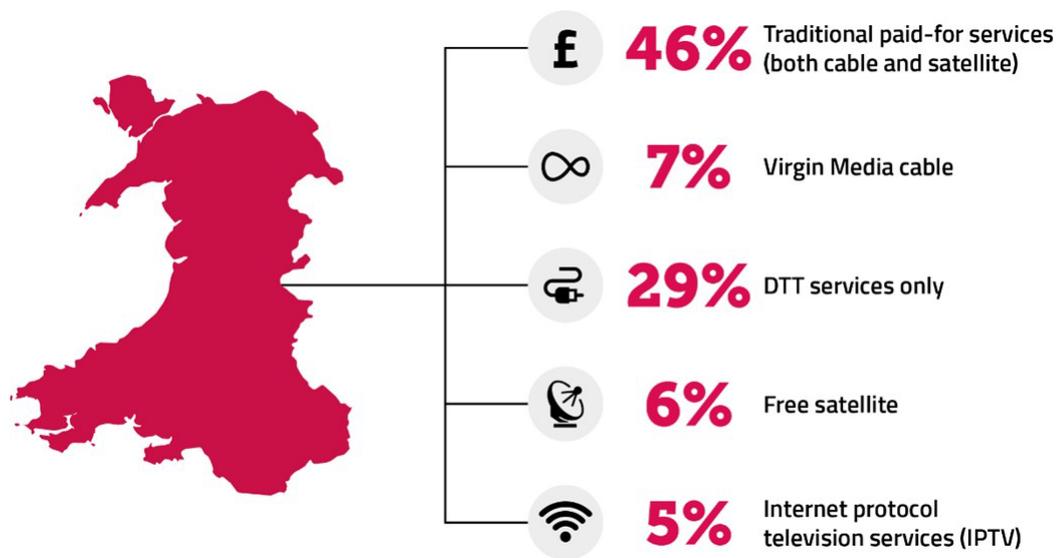
DTT services *only* (delivered through an aerial) account for most free TV viewing (29%), with free satellite present in just 6% of homes in Wales, through Freesat.

Only a small proportion of homes in Wales (5%) had an internet protocol television service (IPTV). These are delivered through set-top boxes from providers including TalkTalk and BT, and offer a Freeview service alongside pay-TV channels, delivered through an internet connection.

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<sup>1</sup> BARB Establishment Survey Q1 2022.

**Figure 1: Take-up of TV platforms in Wales**



Source: BARB Establishment Survey Q1 2022.

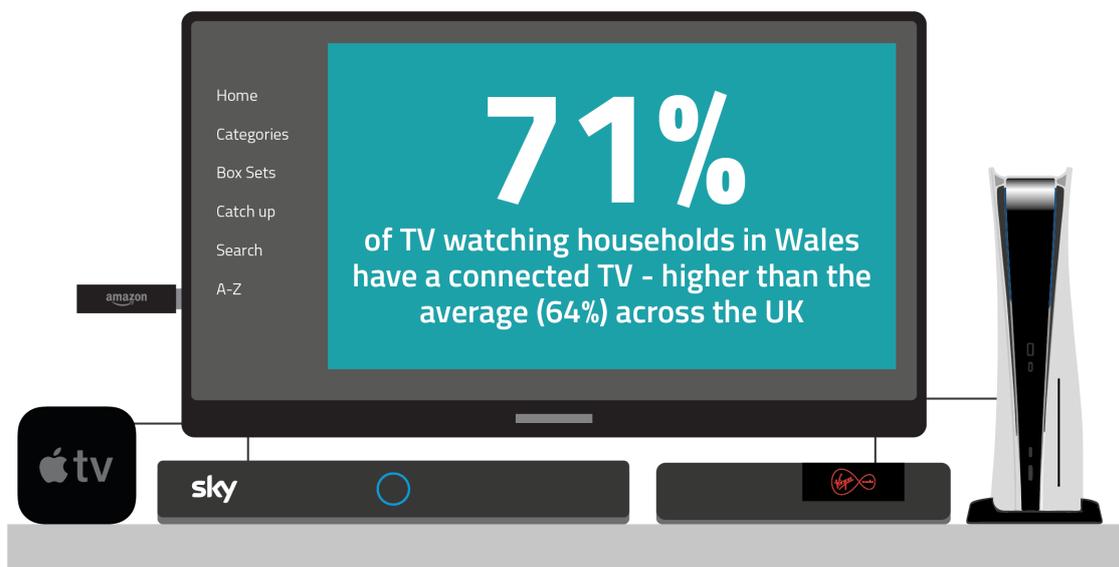
### TV users in Wales are more likely than the UK average to have connected TVs

There are a several ways in which TV users in Wales can connect their TVs to the internet. This can be through a 'smart' TV that connects directly to the internet, or through set-top boxes provided by pay-TV providers like Sky, Virgin or BT. External devices such as streaming sticks and games consoles can also provide internet access to people's TV sets.

In 2022 seven in ten (71%) TV users in Wales had a connected TV, using one of these methods. This was higher than the average across the UK, where 64% of TV homes had a connected TV.<sup>2</sup>

<sup>2</sup> Ofcom Technology Tracker 2022.

**Figure 2: Connected TVs in Wales**



Source: Ofcom Technology Tracker 2022.

### Broadband take-up in Wales

More than nine in ten (94%) homes in Wales had an internet connection at the beginning of 2022; 88% had fixed broadband.<sup>3</sup> In terms of speeds, as at December 2021, 94% of all homes in Wales could access broadband (download speeds of at least 30 Mbit/s). Of these, two-thirds of homes were using a superfast service, an increase from 55% in 2020. Take-up of full-fibre services in Wales, where they were available, was 24%.<sup>4</sup>

## Video on demand

### Strong growth in SVoD households continues in Wales

In Wales, subscription video-on-demand services (SVoDs) saw an uplift in Q1 2022, with 70% of households subscribing to at least one of them, up from 63% in Q4 2021.<sup>5</sup>

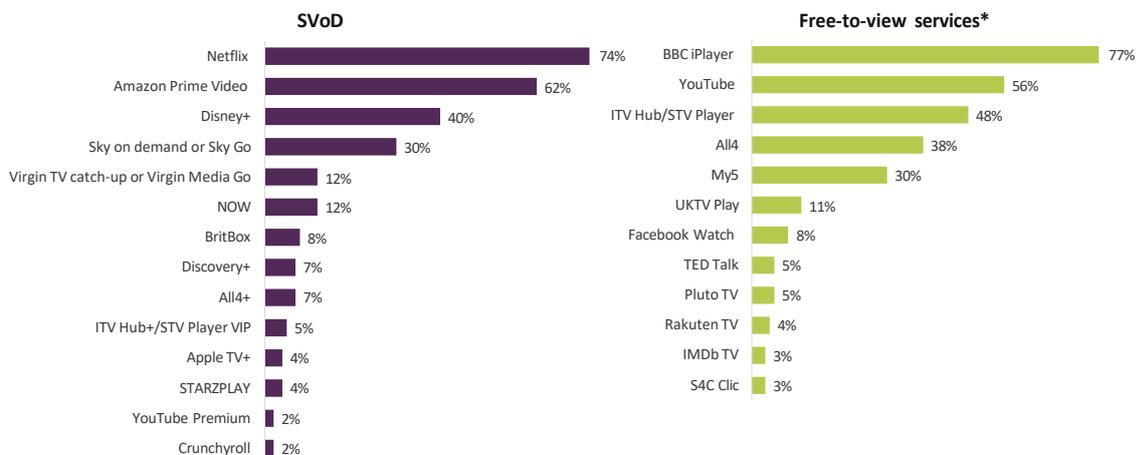
There is growing choice for viewers in ,the range of services they can subscribe to. Netflix remains the most popular SVoD service in Wales, followed by Amazon Prime Video and Disney+, but there is also a huge variety of smaller SVoD services in Wales which collectively have significant reach. This includes services such as NOW, and genre specialist services such as Crunchyroll (anime).

<sup>3</sup> Ofcom Technology Tracker 2022.

<sup>4</sup> Ofcom, Connected Nations 2021: Wales report.

<sup>5</sup> BARB Establishment Survey Q1 2022.

**Figure 3: Video-on-demand services used in Wales to watch programmes, films or other video**



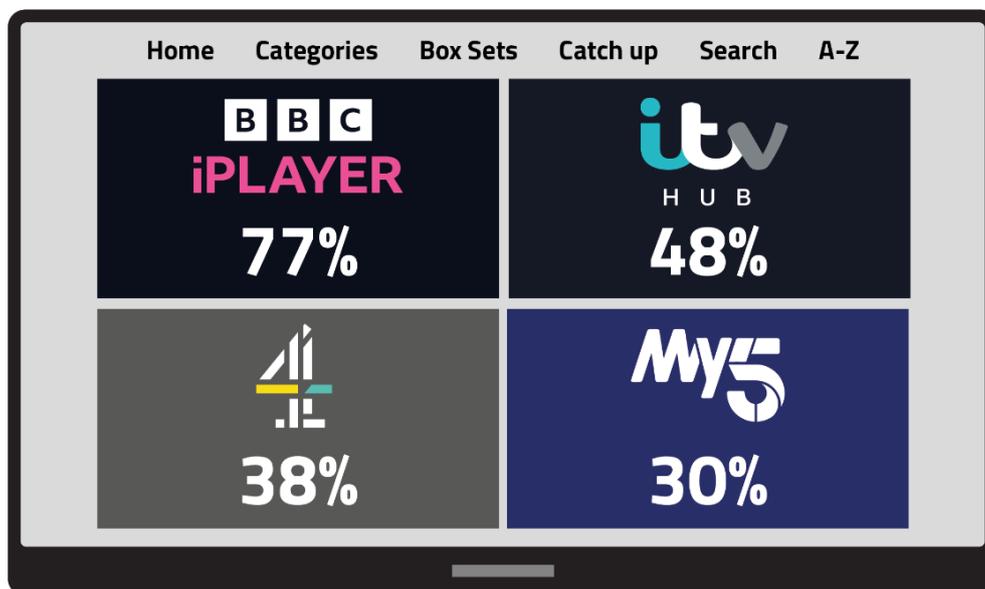
Source: Ofcom VoD Survey 2022. Online adults/teens aged 13+, Wales. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 171. Fieldwork conducted 22-28 February 2022. \*Payment of licence fee required to use BBC iPlayer. NOW includes NOW Entertainment, NOW Cinema and NOW Sports.

**BVoD has comparable levels of reach to SVoD, with most consumers using multiple streaming services**

According to Ofcom’s VoD survey, nearly nine in ten (93%) online adults and teens in Wales used a free-to-view service (any streaming service not behind a paywall, including YouTube).

VoD services from the public service broadcasters made up four of the top five most popular free-to-view platforms for watching programmes, films and other video. BBC iPlayer (77%) was first, followed by ITV Hub/ STV Player (48%), All4 (38%) and My5 (30%).

**Figure 4: PSB video-on-demand services used to watch programmes, films or other video in the past three months**



Source: Ofcom VoD Survey 2022. Online adults/teens aged 13+, Wales. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 171. Fieldwork conducted 22-28 February 2022. \*Payment of licence fee required to use BBC iPlayer.

Outside the PSB services, YouTube was also popular, with over half of people in Wales using it.<sup>6</sup> YouTube’s lower reach in this context may be explained by its large volume of short-form content and creator videos, which users do not associate with traditional ‘programmes’.

### **Watching sport online: BBC iPlayer is the most popular for watching live or catch-up sports content**

BBC iPlayer was the most popular online video service for watching live or catch-up sports content, by some margin, with Amazon Prime Video second.

SVoD services are buying more and more sports rights, both in the UK and globally; Amazon streams sports such as Premier League football matches, has significant tennis coverage including ATP, WTA and the US Open, and the Rugby Nations Cup. Following a bid for rights in 2022, it will also show weekly Champions’ League matches from the 2024/25 season onwards.

Sports content from Netflix and Disney+ is currently limited to sports documentaries in the UK, rather than live or catch-up sports content, but these providers’ entry into live and catch-up sports

<sup>6</sup> Ofcom VoD Survey 2022.

cannot be discounted, and reports indicate that Netflix has recently bid for the rights to stream Formula 1.<sup>7</sup>

**Figure 5: UK top ten online video services used by adults and teenagers who watched live or catch-up sports in the past three months, by UK nation: February 2022**

Online video service	England	Scotland	Wales	Northern Ireland
BBC iPlayer	25%	26%	24%	24%
Amazon Prime Video	18%	13%	23%	17%
ITV Hub/STV Player	10%	8%	10%	12%
YouTube (excludes clips)	8%	8%	9%	4%
Sky Sports (including NOW and Sky Go)	12%	6%	13%	13%
BT Sport	8%	6%	5%	11%
Facebook	9%	4%	7%	3%
All4	5%	2%	3%	4%
Twitch	3%	1%	2%	1%
Discovery+	3%	0%	4%	2%

Source: Ofcom VoD Survey 2022. Online adults/teens aged 13+. Question: Q2a. Which if any, of these online services have you personally used to watch live or catch-up sports events in the past 3 months? Base: England 1718; Scotland 176; Wales 171 and Northern Ireland 163. Fieldwork conducted 22-28 February 2022.

## Audience satisfaction with subscription streaming services is high

Of those who have used the service in the last six months, four in five (81%) viewers in Wales said they were satisfied with Netflix, and about three-quarters said they were satisfied with Amazon Prime Video (75%).

<sup>7</sup> What's On Netflix, [Netflix Reportedly Bids for Formula 1 Rights But Loses to Disney's ESPN](#), 27 June 2022.

**Figure 6: Audience satisfaction with selected subscription streaming services**



Source: Ofcom PSM Tracker 2021, Q39. Satisfied Summary - Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services? Base: All those in Wales who have watched platform in last 6 months (base size for each service in chart) (N.B. not all services shown here).

Netflix was seen as delivering well on being ‘easy to find my way around’ (84%), ‘easy to find something I want to watch’ (81%), offering ‘a wide range of different types of programmes, such as drama, comedy, entertainment or sport’ (79%) and ‘appeal[ing] to a wide range of different audiences’ (79%). Amazon Prime Video was also seen to deliver well on ‘appeal[ing] to a wide range of different audiences’ (79%) and on ‘a wide range of different types of programmes, such as drama, comedy, entertainment or sport’ (74%).

For people in Wales, the main reason for watching subscription streaming services was for their content; this included high quality, range and specific genres that audiences favoured.

***“I wylio ffilmiau, ac yn achos YouTube yn benodol I ganfod gwybodaeth neu sut I fynd ati i gyflawni tasg benodol.” [To watch films, and in the case of YouTube specifically, to find information or how to go about completing a specific task]. Male, 65-74***

***“They have a variety of shows for different audiences.” Female, 16-24***

***“Always have good series and films on there - can binge-watch whole series in one go instead of waiting for weekly episode. No adverts.” Female, 45-54***

Among those who had not watched selected subscription streaming services in the past six months, the main reasons for not using them related to cost; this might either be not wanting to pay, the cost of the service, or not wanting to pay for more services than they already had. Some mentioned the content, saying the programming was not of interest to them, while others struggled to access the service at all (for instance, due to poor internet).

***“Because we had to cancel our Netflix subscription because we could not afford to keep it going.” Male, 55-64***

***“No interest and cost. I pay for Amazon, I am not going to pay for another subscription service that has, basically, the same content.” Male, 55-64***

## TV viewing in Wales

### Where our data comes from

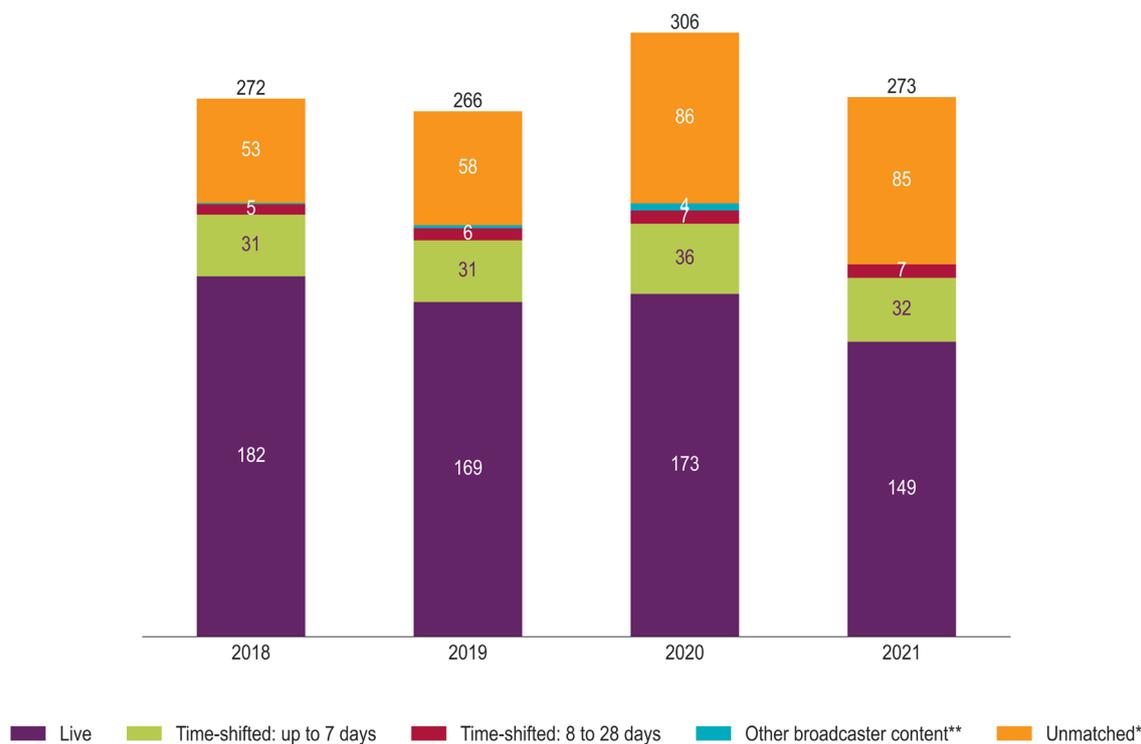
TV screen viewing data and analysis in this section uses data from the Broadcasters' Audience Research Board (BARB), a nationally representative panel of 5,300 homes across the UK providing the official broadcast TV measurement for the industry. This includes all viewing of broadcast TV through a television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

Unless otherwise stated, figures quoted are for 28-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast on TV (live viewing) as well as from recordings on digital video recorders (DVRs) and through catch-up player services (e.g. apps on smart TVs) up to 28 days after the first broadcast (time-shifted).

### **People in Wales spent 4 hours 33 minutes on average each day watching TV in 2021**

Total video viewing on the television screen in Wales decreased by 33 minutes compared to 2020, to an average of 4 hours 33 minutes per person per day. Sixty-nine per cent of this time was spent watching broadcast TV (3 hours 8 minutes), this was down by 27 minutes since 2020. The largest contributor to the decline in total viewing came from broadcast TV, which declined by 12.6% year on year. The average weekly reach for all measured broadcast TV in Wales in 2021 was 80.7%, compared to 85.9% in 2020.

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



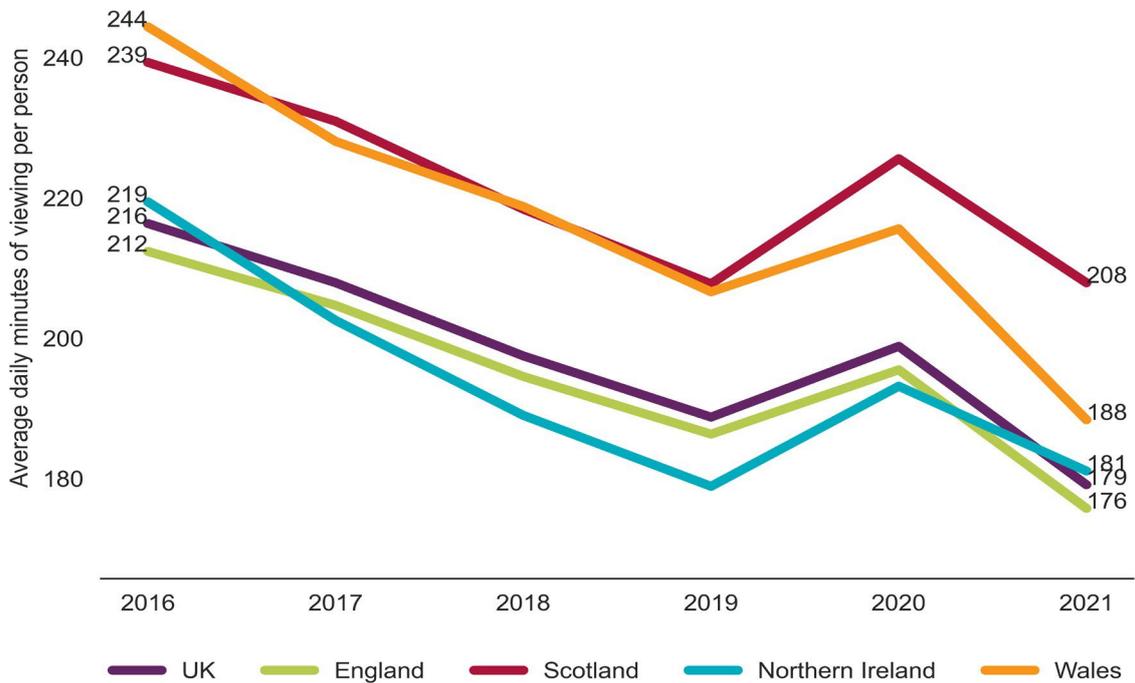
Source: BARB. All individuals (4+). Average minutes of viewing/day. Unmatched = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs, SVoD, YouTube, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded. \*\*Other broadcaster content = content viewed on measured broadcasters' BVoDs and AVoDs that has not broadcast on linear television channels, for example, BVoD exclusives and historical box sets.

### **Wales watched the second most broadcast TV of any UK nation in 2021**

On average, people in Wales spent 3 hours 8 minutes per day watching broadcast TV on the TV set in 2021, the second highest of any UK nation.

However, Wales experienced the largest decrease in daily viewing of all the UK nations. Proportionally, this was a 12.6% decrease between 2020 and 2021, compared to the UK average decrease of 9.9%.

**Figure 8: Average daily minutes viewed per person, by nation: 2016-2021**



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

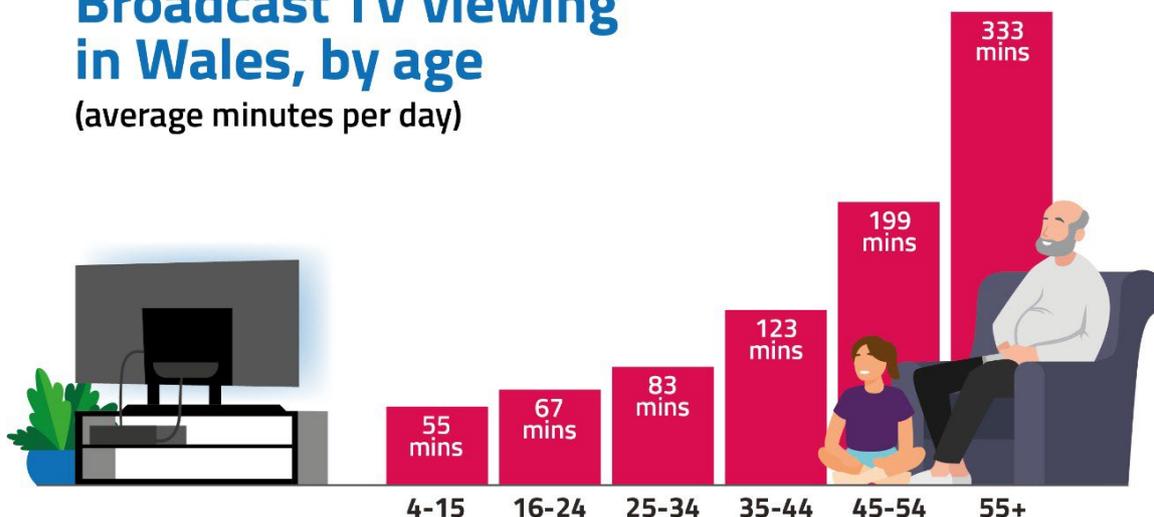
### Broadcast viewing decreased among all age groups

Older people in Wales watched more broadcast TV on the television set than younger viewers. The over-54s watched more than any other age group, at an average of 5 hours 33 minutes per day, down by 8.8% since 2020. Those aged 4-15 watched the least, at an average of 55 minutes per day, down by 22.8% since 2020.

Figure 9: Average daily minutes viewed, by age group

## Broadcast TV viewing in Wales, by age

(average minutes per day)

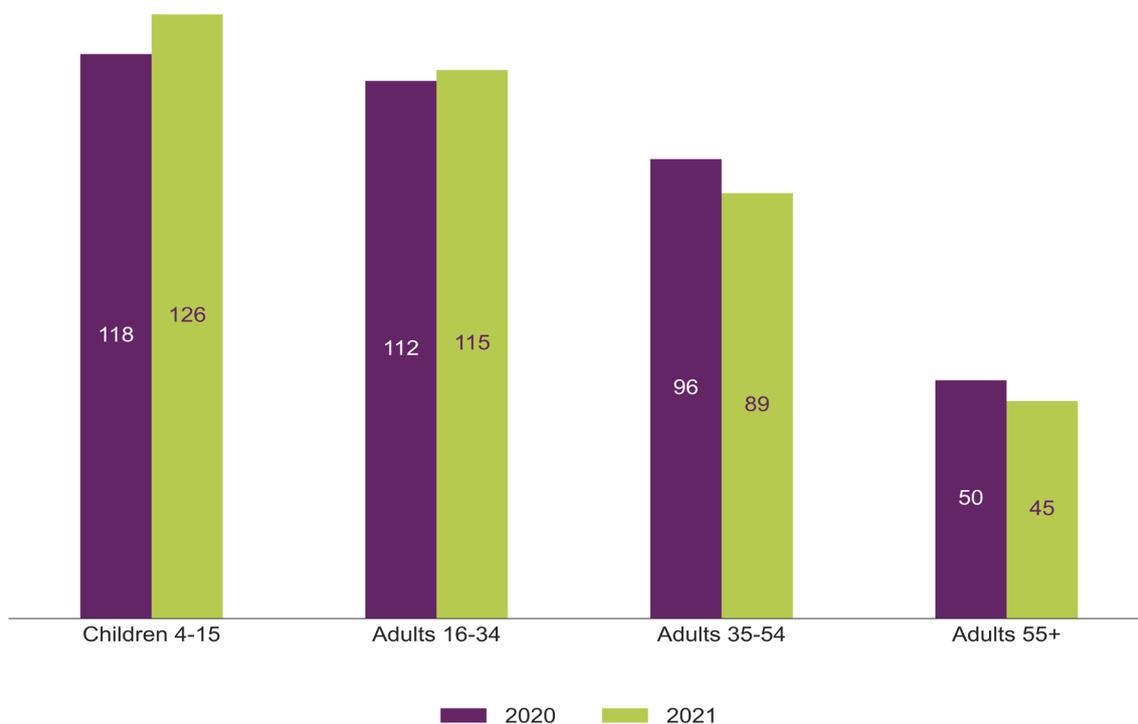


Source: BARB. BBC areas, all individuals (4+).

Younger people in Wales watched more non-broadcast TV on the television set than older viewers (non-broadcast services on the TV set are classified as ‘unmatched’ by television measurement agency BARB and include YouTube, gaming, and streaming services like Netflix and Amazon Prime). The greatest proportional increase in unmatched TV viewing was among the 4-15 age group, who watched an average of 2 hours 6 minutes per person per day in 2021, 7.0% more than in 2020. Viewing increased by 2.0% among 16-34-year-olds, to an average of 1 hour 55 minutes.

On the other hand, unmatched viewing declined by 8.7% among over-54s, dropping to an average of 45 minutes per person per day. Viewing also declined among 35-54-year-olds, down by 7.4% to 89 minutes on average per day.

**Figure 10: Average daily minutes of unmatched viewing time per person in Wales, by age**



Source: BARB. BBC Wales area. Unmatched viewing = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs, SVoD, YouTube, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded.

### **The Six Nations Rugby was the most-viewed show in Wales in 2021**

The Six Nations Rugby broadcast on BBC One was the most-viewed programme in Wales in 2021, with an average audience of 890,000. The match ended with a win for France over Wales (32-30). Wales were also playing in the Six Nations Championship a week later (this was the fourth most-watched programme), where Wales beat Italy with a score of 48-7. The broadcast, which aired on ITV Wales, had an average audience of 757,000.



The most-viewed episode of a drama programme was from *The Pembrokeshire Murders*.<sup>8</sup> Based on a true story, the three-part series was filmed on location in Wales.

<sup>8</sup> Image: ITV Cymru Wales

**Figure 11: Top ten most-watched programmes in Wales: 2021**

Rank	Programme Title	Channel	Date	Average 000s	Programme Share
1	<i>Six Nations Rugby</i>	BBC One	20/03/2021	890	64.3
2	<i>The Pembrokeshire Murders</i>	ITV Wales	11/01/2021	873	53.4
3	<i>Line of Duty</i>	BBC One	02/05/2021	770	60.5
4	<i>Six Nations Championship</i>	ITV Wales	13/03/2021	757	65.0
5	<i>I'm A Celebrity... Get Me Out of Here!</i>	ITV Wales	21/11/2021	662	48.5
6	<i>Euro 2020</i>	BBC One	11/07/2021	616	55.4
7	<i>Oprah with Meghan and Harry</i>	ITV Wales	08/03/2021	610	43.4
8	<i>Death in Paradise</i>	BBC One	07/01/2021	579	42.6
9	<i>Vigil</i>	BBC One	19/09/2021	571	43.0
10	<i>Bloodlands</i>	BBC One	21/02/2021	559	39.1

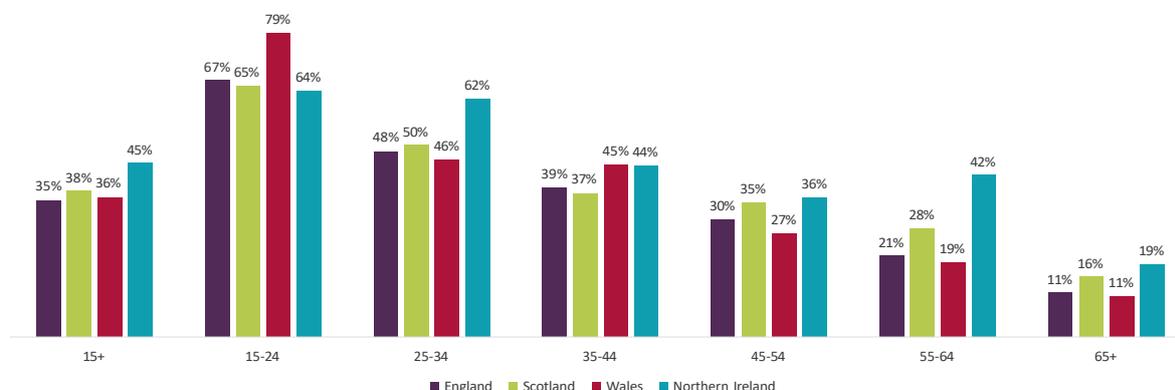
Source: BARB consolidated to 28 days. Highest occurring episode on individual channels.

## Social video in Wales

### Young adults in Wales who visited TikTok in March 2022 spent over an hour on the platform per day, more than in the other UK nations

TikTok is continuing to grow, reaching 36% of adult internet users in Wales in March 2022. It is particularly popular among younger adult users, with 79% of online 15-24-year-olds in Wales visiting the platform.

**Figure 12: UK nation online adult reach of TikTok, by age: March 2022**



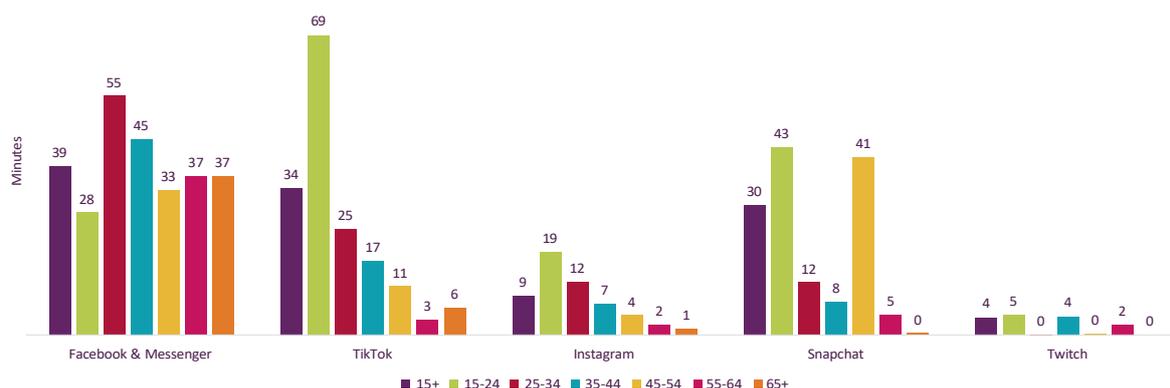
Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 March – 31 March 2022, adults age: 15+, UK nations. Note: TV set and smart display use not included.

Adult TikTok visitors in Wales spent on average about 34 minutes per day on the platform in March 2022, almost as much as adult visitors spent on Facebook and Messenger (39 minutes per day).

Unlike the other UK nations, and the UK average, where adult visitors' time spent on Facebook and Messenger increases with age, people aged 25-34 in Wales spent more time on Facebook and Messenger than any other adult age group. And 15-24-year-old visitors to TikTok, Instagram and Snapchat spend more time on these platforms than older visitors. In March 2022, almost 281,000 15-24-year-old TikTok visitors in Wales spent more than an hour (about 69 minutes) on TikTok per day, while the 324,000 Snapchat visitors aged 15-24 spent on average 43 minutes per day. In comparison, online visitors aged 15-24 to Facebook (including Messenger) and Instagram spent 28 and 19 minutes per day respectively.

In July 2021, TikTok increased its maximum video length from one minute to three minutes, and by October, the average video length was two minutes; this may be contributing to the increased time spent on TikTok.<sup>9</sup>

**Figure 13: Time spent per day by online adults in Wales to selected social video platforms, by age: March 2022: (minutes)**



Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 March – 31 March 2022, adults age: 15+, Wales. Note: TV set and smart display use not included. Custom-defined list by Ofcom. Please note, time spent relates to time spent on platform, which can include viewing video, communicating, scrolling or any other activity. At present YouTube time spent is not measurable using Ipsos Iris, see [UK report](#) for information on YouTube. Outlier use by panellists in 45-54 age group for Snapchat has probably skewed duration measurement.

## News sources in Wales

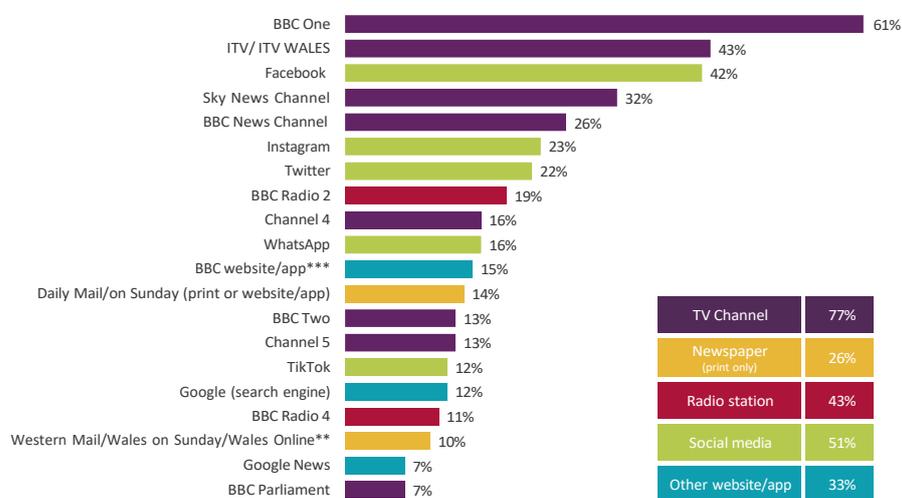
### BBC One was the most-used source for news in Wales

Six in ten adults in Wales (61%) use BBC One for news in general, making it the most-used news source, followed by ITV Wales (43%). Other TV channels in the top ten included Sky News Channel, BBC News Channel and Channel 4. Social media ranked highly too, with Facebook the third most

<sup>9</sup> TikTok newsroom, [Discover more ways to create, connect and be entertained with longer videos on TikTok](#), October 2021.

popular source of news (42%), Instagram the sixth most popular (23%) and Twitter (22%) seventh. BBC Radio 2 was the top radio station cited (19%). No newspapers made the top ten.

**Figure 14: Top 20 sources of news in general in Wales: 2022**



Source: Ofcom News Consumption Survey 2022 – Combined F2F and online sample. Base: All adults 16+ in Wales - 2022 W2\*=337. \*2022 W1 data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic. \*\*Wales Online website/app added in 2022. \*\*\*Includes Welsh language version.

## Almost half (46%) of adults in Wales say they are ‘very interested’ in news about their nation

There is a significant amount of interest in news about Wales among people who live there. Almost half of adults who follow news claim to be ‘very interested’ in news about Wales (46%), rising to 83% who are ‘very’ or ‘quite’ interested. As shown below, adults in Wales, Northern Ireland and Scotland are the most likely to say they are ‘very interested’ in news about their nation.

**Figure 15: Level of interest in news about own nation, by nation**



Source: Ofcom News Consumption Survey 2022 – Combined F2F and online sample. Base: All adults 16+ who follow news 2022. W2\* - Total=2708, England=1758, Scotland=332, Wales=329, Northern Ireland=289. \*2022 W1 data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic.

### Reporting of Wales and Welsh issues on network news and current affairs

The Covid-19 pandemic brought devolution to the fore of UK politics and further raised questions over network news and current affairs coverage on devolved issues, particularly in policy areas where there is the greatest divergence such as health, education and social policy.

To look into this issue further, Ofcom commissioned research and published an independent report examining how the main TV news providers (the PSBs and Sky) reported devolved policy issues in their flagship bulletins.<sup>10</sup> The report found:

1. Largely as a consequence of Covid-19, coverage of devolved issues has improved compared to similar studies in 2015 and 2016.
2. Interviews with senior news editors revealed that newsrooms have become increasingly conscious of reporting devolved policy differences in network news. There was agreement among all editors of the need for signposting in reports, so that audiences will understand whether an issue is relevant to all, or some of, the UK nations. However, they also acknowledged the challenges of capturing the complexity of devolution in time-limited bulletins.
3. Devolution was a potentially relevant factor in approximately 40% of the news items assessed during the study. Of these, roughly three in five reports made some reference to devolution, while two in five contained no signposting about relevance in different parts of the UK – e.g. an interview with the Secretary of State for Education about Covid measures in schools made no reference to the fact that these rules applied only in England.

<sup>10</sup> [Reporting the nations and devolved issues on network news](#)

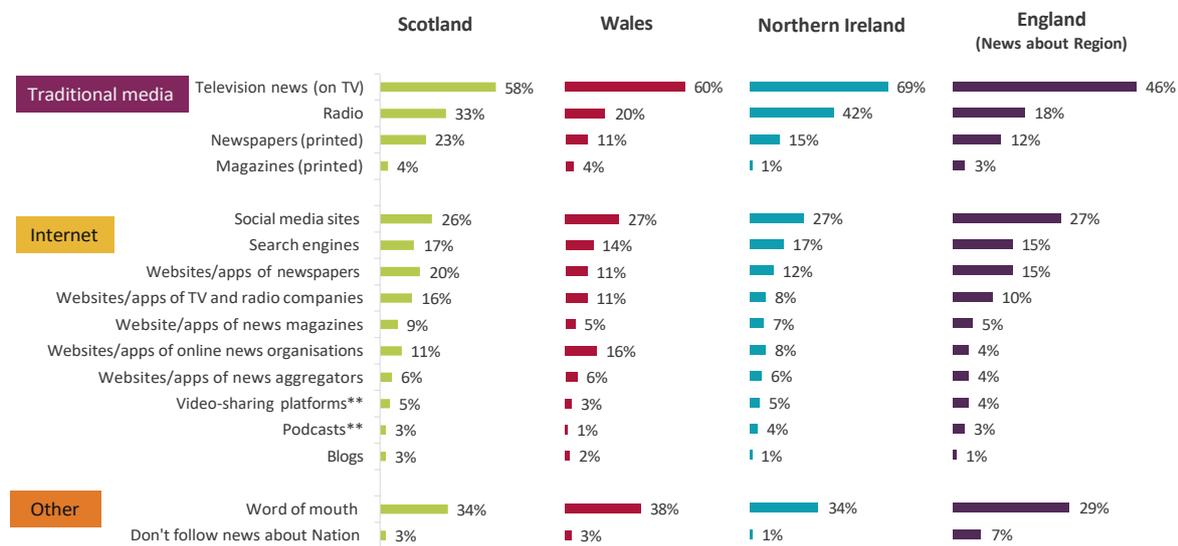
4. BBC TV news reporting supplied far more references to devolved powers than other network news providers, while BBC online news signposted the relevance of devolved issues more explicitly than television news.

5. Overall, despite an increase in the coverage of the devolved institutions since 2015, missed opportunities to explain different Government decisions across the nations remain.

## Television is the most popular way for people to access news about their own nation

While television was by far the most popular way for people in all UK nations to access news about their own nation, the use of radio varied significantly by nation; 20% of adults in Wales reported using the radio as a news source, compared to 42% in Northern Ireland.

Figure 16: Platforms used to access news about own nation, by nation: 2022



Source: Ofcom News Consumption Survey 2022 – combined F2F & online sample. Base: All adults 16+ who follow news 2022 W2\* - England=1758 Scotland=332, Wales=329, Northern Ireland=289. \*2022 W1, and 2021, data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic. \*\* Added in 2022.

## BBC One and ITV Wales are the most-used sources of news about Wales

BBC One (46%) and ITV Wales (28%) were the first and second most-used sources for news about the nation. This was followed by Facebook (21%), while other online sources were used by less than 10% for this purpose.

**Figure 17: Sources used to access news about own nation: 2022**

England		Scotland		Wales		Northern Ireland	
BBC One	31% ▼	STV	31%	BBC One	46%	UTV	47%
ITV	18% ▼	BBC One	26%	ITV Wales	28%	BBC One	38%
Facebook	17%	Facebook	15%	Facebook	21%	Facebook	18%
BBC website/app	8%	BBC website/app	10%	BBC website/app**	8%	BBC Radio Ulster/Foyle	13%
BBC News Channel	6% ▲	BBC Scotland TV	9%	Twitter	6%	BBC website/app	11%
Twitter	5%	Twitter	8%	Any Wales based news sites/apps	6%	Cool FM	10%
		BBC Radio Scotland	7%	BBC Radio Wales/Cymru	5%	U105	6%
		BBC News Channel	6%	BBC News Channel	5%	Twitter	6%
		Bauer local commercial radio	6%			The Belfast Telegraph	5%
		Instagram	6% ▲			Any NI based news website/app	5%
		Any Scotland based daily newspaper	5%				
		Any Scotland based news sites/apps	5%				
		Sky News Channel	5%				
Don't follow region news	10%	Don't follow Nation news	5%	Don't follow Nation news	6%	Don't follow Nation news	2%

Source: Ofcom News Consumption Survey 2022 – Combined F2F and online sample. Base: All adults 16+ using TV/Newspapers/Radio/Internet/Magazine for news 2022 W2\* - England=1727, Scotland=326, Wales=325, Northern Ireland=287. \*2022 W1 data not shown because face-to-face fieldwork was not possible during the Covid-19 pandemic. \*\* Includes Welsh language version. Only sources with an incidence of 5%+ in each Nation are shown. Green/red triangles indicate statistically significant differences between 2022 and 2020 (at 99% confidence level).

# Public service broadcasting

## Introduction

Public service broadcasting (PSB) is an intervention, designed by Parliament, to ensure that UK audiences can enjoy a wide range of high-quality TV programmes that meet people's needs and interests as citizens and individuals.

Under the current framework, specified PSB services must collectively fulfil certain statutory purposes and individually meet a set of service-specific requirements.<sup>11</sup> When describing the public service channels taken together, the term 'public service broadcasting' (PSB) is used. The term 'public service media' is a broader term which was used in Ofcom's review, [Small Screen: Big Debate](#), to reflect the fact that audiences are no longer limited to 'broadcast' channels and can watch content from the public service broadcasters on a range of broadcast and online services.<sup>12</sup>

### Legislative reforms proposed to safeguard the future of public service broadcasting in the UK

In July 2021, Ofcom made recommendations to the UK Government on the future of the public service media (PSM) system for the next decade. The recommendations marked the conclusion of Ofcom's Small Screen: Big Debate – an in-depth review of the future of PSM.

The UK Government recently set out its vision for the broadcasting sector in a White Paper ahead of the forthcoming Media Bill.<sup>13</sup> Among other things, the paper explains the UK Government's intention to implement some of the key recommendations of our Small Screen: Big Debate review. These include a simplified remit, a new prominence regime for PSB online services on the major connected TV platforms, and greater flexibility for PSBs in how they deliver their obligations, including through their online services.

This chapter provides an update on key data relating to PSBs, including trends in audience viewing and a breakdown of output and content spend by PSB networks. It also provides an overview of findings from Ofcom's proprietary PSM Tracker, examining audience perceptions of, and satisfaction with, public service media.

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<sup>11</sup> See [Annex 8. PSB regulatory framework](#) regarding the PSB regulatory Framework, including the PSB remits and the service-specific requirements for the individual PSB providers.

<sup>12</sup> During our [Small Screen: Big Debate](#) review, several respondents questioned the concept and scope of public service media and suggested it should be clearly defined in legislation. We agreed with the need for clarity and considered 'PSM' as the best way to describe public service content delivered through a range of platforms including broadcast TV and online services.

<sup>13</sup> [Up next - the government's vision for the broadcasting sector](#), April 2022.

## Public service broadcasting in Wales

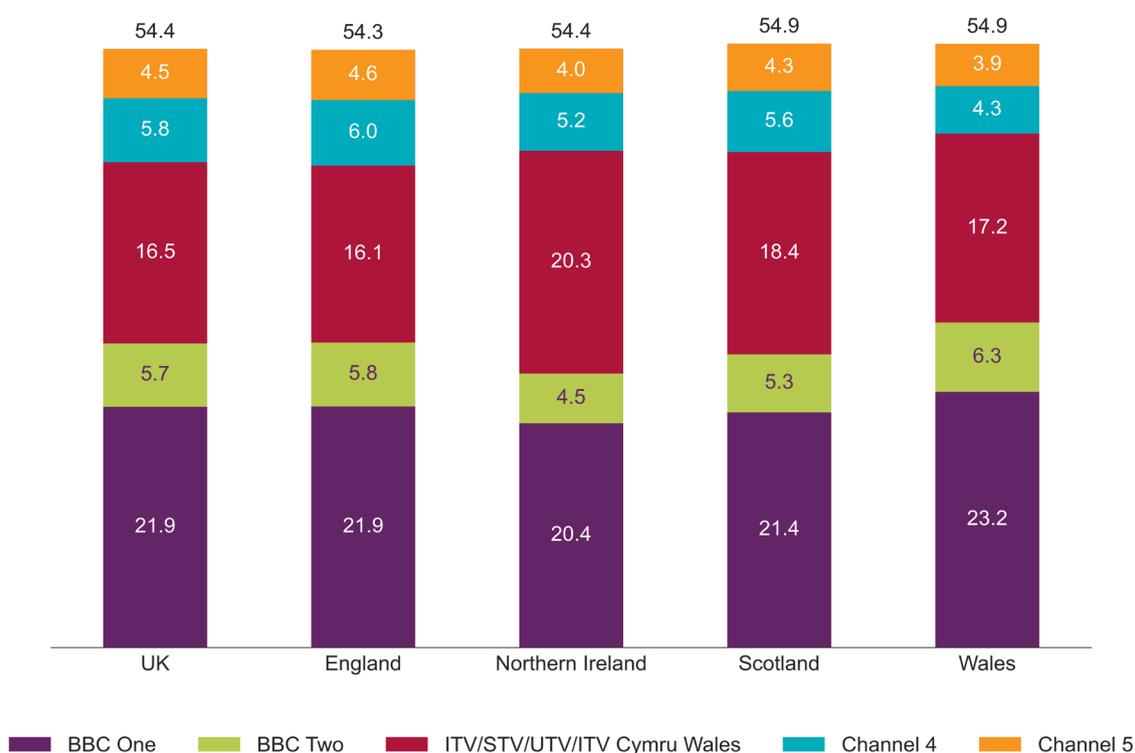
In Wales, public service broadcasting is currently provided by the BBC, ITV (holder of the Channel 3 licence in Wales), S4C, Channel 4 Corporation (C4C) and Channel 5. Although all the BBC and S4C TV services are PSB channels, only the main channels of the other broadcasters are. In return for providing 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 for the BBC and S4C, the licence fee.

## PSB viewing trends

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

In 2021, the main five PSB channels accounted for a combined 54.9% share of the total broadcast TV audience in Wales. This was up from 53.6% in 2020. BBC One had the highest audience share of any individual PSB channel across all nations, and this was highest in Wales at 23.2%. Channel 5 had the lowest audience share of any individual PSB channel, at 3.9%.

**Figure 18: Percentage share of total TV viewing for the five main PSB channels, by nation: 2021**



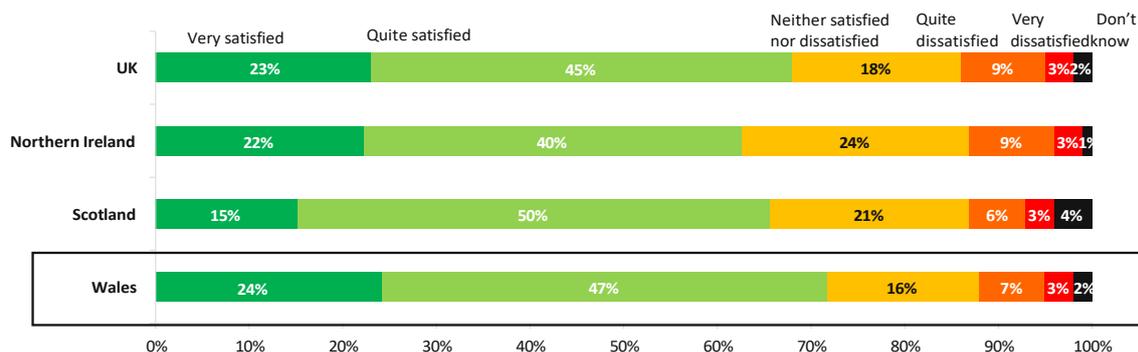
Source: BARB. BBC areas, all individuals (4+). Excludes any +1 channels. S4C not included here to allow comparison between nations.

## Audience attitudes towards PSBs in Wales

### Overall, audiences in Wales are satisfied with PSB channels

In Wales, seven in ten (72%) of those who had watched a PSB channel in the past six months said they were satisfied with it; only one in ten (10%) said they were dissatisfied.

**Figure 19: Audience satisfaction with PSB services overall**

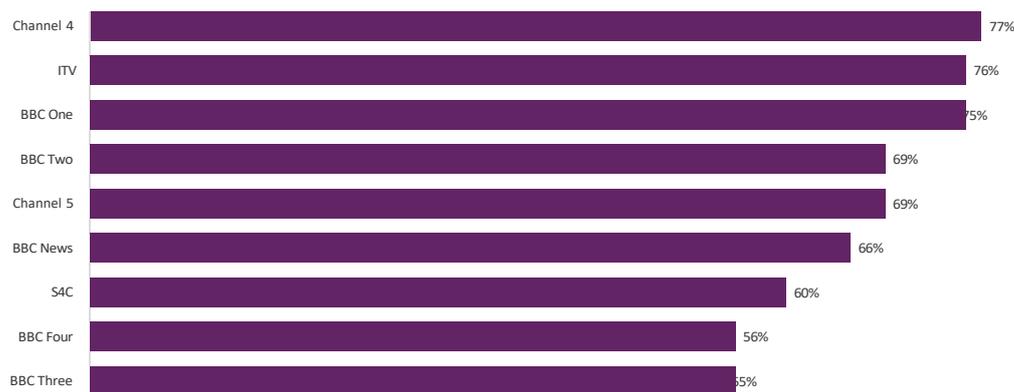


Source: Ofcom PSM Tracker 2021, Q28: And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined they provide the different elements asked about in the previous question? Base: All in country who have watched any PSB channel or service in last 6 months (Northern Ireland=317, Scotland=291, Wales=301, UK=2917).

### Three-quarters of PSB viewers are satisfied with Channel 4, ITV and BBC One

When asked to consider PSB channels individually, about three-quarters said they were satisfied with Channel 4 (77%), ITV (76%) and BBC One (75%). About seven in ten said the same of BBC Two and Channel 5 (both 69%).

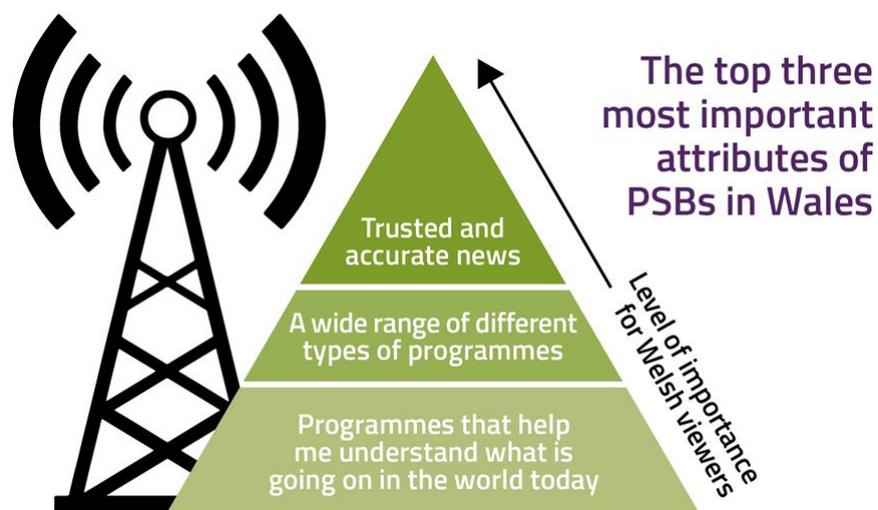
**Figure 20: Audience satisfaction with individual PSB channels**



Source: Ofcom PSM Tracker 2021, Q23. Satisfied Summary - Thinking about some of the specific channels you have watched in the last 6 months, overall, how satisfied or dissatisfied are you with these TV channels? Base: All those in Wales who have watched the channel in the last 6 months.

## For those in Wales, trusted and accurate news is the most important attribute of PSB

Figure 21: The top three most important attributes of PSBs in Wales



Source: Ofcom PSM Tracker, Q27. We now want you to think what you feel is most important for 'public service broadcasters'. For each set of 5 options, please select the one you feel is most important to society overall, and which would be the least important? Base: All respondents in Wales who completed online: Total (316).

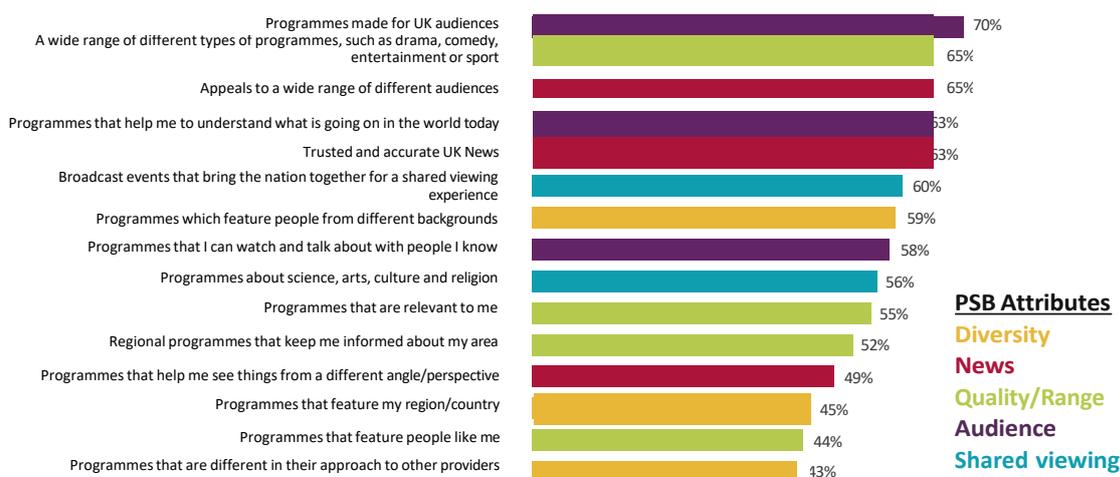
Among people in Wales<sup>14</sup>, 'trusted and accurate UK news' was seen as the most important element of PSB for society, mirroring the overall UK findings. This was followed by 'a wide range of different types of programmes, such as drama, comedy, entertainment or sport', and 'programmes that help me understand what is going on in the world today'. Regional/national programming is more important in Wales than in the UK overall; 'regional programmes that keep me informed about my area' and 'programmes that feature Wales'<sup>15</sup> are rated more highly in Wales.

Seven in ten PSB viewers in Wales said they thought PSBs overall delivered well on 'programmes made for UK audiences' (70%). About two-thirds said that they delivered well on 'a wide range of different types of programmes, such as drama, comedy, entertainment or sport' (65%) and 'appeals to a wide range of different audiences' (65%).

<sup>14</sup> This question was asked of all respondents who completed the survey online, excluding those who completed it over the telephone.

<sup>15</sup> For respondents in England, the phrasing was 'programmes that feature my region', for Scotland 'programmes that feature Scotland, and for Northern Ireland 'programmes that feature Northern Ireland'.

**Figure 22: Delivery of PSB attributes for PSB channels overall**



Source: Ofcom PSM Tracker 2021, Q26. Well (7-10) Summary - How well or badly would you say they provide ...? Base: All those in Wales who have watched PSB channels or services in the last 6 months (n=301).

Questions about individual broadcasters revealed differences of opinion about the delivery of the PSB attributes for audiences in Wales. Among those who had watched in the past six months, BBC TV channels were seen as doing well at delivering ‘programmes that help me understand what is going on in the world today’ (66%), ‘programmes made for UK audiences’ (65%) and ‘broadcast events that bring the nation together for a shared viewing experience’ (63%).

For ITV channels, seven in ten (68%) said they delivered well on ‘programmes made for UK audiences’ and three in five for ‘a wide range of different types of programmes, such as drama, comedy, entertainment or sport’ (61%). Channel 4 TV channels were seen as performing well on ‘programmes made for UK audiences’ (62%) and ‘programmes that feature people from different backgrounds’ (53%). For Channel 5 TV channels, half (51%) said they performed well on ‘programmes made for UK audiences’.

## **S4C – Sianel Pedwar Cymru**

S4C is a unique public service broadcaster that provides audio-visual content in Welsh on television and through the most popular digital platforms including YouTube, Facebook and the BBC iPlayer. As the only Welsh-language public service of its kind, it aims to offer content that meets the requirements of a wide range of different audiences, in terms of age, taste, Welsh language ability and genre.

### **Funding**

Since 2013 the BBC has been responsible for providing, from the licence fee, most of the public funding for S4C. DCMS also contributes £6.7m directly from its own budget. From April 2022 all S4C's public funding is being provided from the licence fee, and this arrangement will continue until the end of the current Royal Charter. The Government has also agreed to increase S4C's budget by £7.5m for the duration of this period, bringing the total budget to £91.5m.

### **Contributed programming**

In addition to this funding, the BBC supplies S4C with a minimum of 520 hours of broadcast TV programmes per year (at a current cost of £19.4m p.a.). This is known as 'the contributed programming' supply; the number of hours supplied by the BBC each year is a statutory requirement set out in section 58.1 of the Broadcasting Act 1990. The current supply of programming from the BBC includes live rugby, 'Pobol y Cwm' (a soap opera), Newyddon (news) and coverage of Wales' largest cultural festival, the National Eisteddfod. The agreement between S4C and the BBC regarding the contributed programming is currently under review and is likely to be modified in the wake of the Government's proposed Media Bill.

### **Independent review of S4C**

In March 2019 DCMS published its response to the independent review of S4C, which recommended radical changes to the way the service operates, including: updating the remit of S4C to enable it to develop and build its digital capacity; removing the current geographic restriction to Wales; a change to a unitary board model; enabling it to work with the Welsh Government on the aim of increasing the number of Welsh speakers to a million by 2050; and giving it greater commercial freedom. Much of this requires primary legislation, but in its acceptance of the review's recommendations, DCMS encouraged S4C to implement the changes immediately. Much of this has by now happened – for example, S4C's Shadow Unitary Board now operates in accordance with the review's recommendations, although this needs to be formally incorporated into legislation in the Media Bill.

### **Sports**

Sports is a key genre in S4C's content provision. It broadcast a total of 437 hours during 2021-22, including each of Wales' matches in the Six Nations. Securing broadcast rights to Welsh sporting events is a priority for S4C and this is often achieved by securing secondary rights from another broadcaster, or sometimes by securing the primary rights itself. Working in partnership with Sky, S4C has broadcast Welsh-language coverage of matches that were broadcast in English on the Sky platform. Recently it acquired the rights to Welsh international football matches between 2022 and 2024, but at present has no agreement for matches between 2024 and 2027.

## A majority of S4C viewers in Wales say they are satisfied with it

Three in five viewers of S4C (60%) over the past 6 months said they were satisfied with it; however, a small proportion were dissatisfied (9%), while three in ten (28%) were neutral on this measure.

When asked about how well S4C was delivering on different PSB elements, regional/national programming emerged as one of the best-delivered areas. Three-quarters said they rated ‘programmes that feature Wales’ highly (75%), with two-thirds (67%) rating ‘regional programming that keeps me informed about my area’ well.

Among those who had not watched in the past six months, one of the main reasons for audiences choosing not to watch S4C is because they do not speak Welsh, or don’t speak it fluently enough to engage with television programming, and some do not want to use subtitling. Other reasons include the available programming not interesting them, or their not watching live TV.

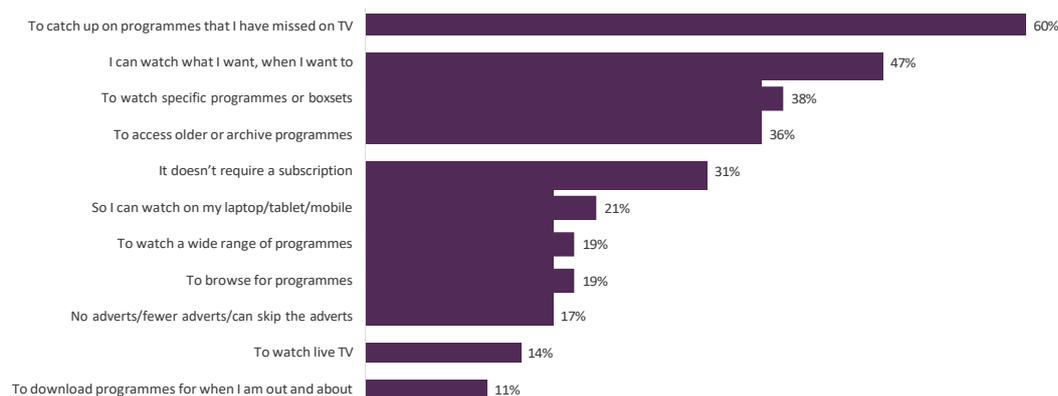
**“I don’t speak Welsh so rarely bother checking it out. Plenty of other channels to choose from.” Female, 55-64**

**“I am not fluent in Welsh and cannot read subtitles when watching TV.” Female, 16-24**

## Audiences are generally satisfied with the BVoD services provided by PSBs

Seven in ten (71%) respondents in Wales said they thought it important that PSBs provide catch-up, on-demand or streaming services. The main reasons for using BVoD services were to catch up on programming (60%), and the convenience of watching programmes whenever they wanted to (47%). Watching specific programmes or box-sets (38%) and accessing older or archive programming (36%) were the next most popular reasons.

**Figure 23: Reasons for using BVoDs in Wales**



Source: Ofcom PSM Tracker 2021, Q33. Why do you use these services? [NB- Coded responses to open question] Base: All those in Wales who watched BVoD channel in past 6 months: (265).

When asked about BVoD services, three-quarters (76%) said they were satisfied with BBC iPlayer, with slightly lower figures for All4 (69%), ITV Hub (69%) and My5 (64%).<sup>16</sup>

<sup>16</sup> These figures include satisfaction with the paid-for equivalents All4+, ITV Hub+.

**Figure 24: Audience satisfaction with BVoD services**



Source: Ofcom PSM Tracker 2021, Q39. Satisfied Summary - Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services? Base: All those in Wales who have watched platform in last 6 months (N.B. not all services listed here due to low base size).

In Wales, among those who had watched in the past six months, BBC iPlayer was seen as delivering particularly well for ease of use; seven in ten (72%) said it delivered well on ‘*provid[ing] services that are easy to find my way around*’ and ‘*easy to find something I want to watch*’. It was also seen as doing well on providing ‘*a wide range of different types of programmes, such as drama, comedy, entertainment or sport*’ (72%) and ‘*programmes made for UK audiences*’ (69%).

For ITV Hub, about two-thirds said it delivered well on ‘*a wide range of different types of programmes such as drama, comedy, entertainment or sport*’ (67%) ‘*appeals to a wide range of different audiences*’ (65%) and ‘*programmes made for UK audiences*’ (64%).

Just over two-thirds say that All4 delivers well on ‘*appeals to a wide range of audiences*’ (68%) and ‘*easy to find something I want to watch*’ (65%) It delivers particularly well on elements related to distinctiveness; ‘*programmes that help me see things from a different angle/perspective*’ (56%) and ‘*programmes that are different in their approach to other providers*’ (56%).

Over half say that My5 delivers well on ‘*provides services that are easy to find my way around*’ (56%) and ‘*programmes made for UK audiences*’ (56%) as well as ‘*a wide range of different types of programmes, such as drama, comedy, entertainment or sport*’ (53%)

Among those who had not watched selected services in the past six months, the main reason given for not watching BVoD services was because of the content available on them. Other reasons included preferring other services, not being aware of a service or having difficulty using the service. For the small number of responses that mentioned S4C Clic, not speaking Welsh was a reason.

***“I don’t have much interest in them. I have enough to choose from without them.”***

**Female, 75+**

***“My TV doesn’t have the capabilities.”*** Female, 65-74

## TV programming for and from Wales

The BBC and ITV Cymru Wales provide programming specifically for viewers in Wales across a range of genres, but most notably news output. There was a 4% increase in spending on first-run content for viewers in Wales in 2021, with spend on news increasing the most, at 10%. Non-news/non-current affairs accounts for the largest share of first-run spend (48%) in Wales.

BBC hours of first-run content in Wales dropped by 7% in 2021 to 573 hours. Overall, news content makes up the largest amount of the BBC's output for Wales, comprising 64% of first-run hours.

Wales is also an important source of production for PSB content shown across the UK. In 2021, 5.7% of qualifying network spend on the PSB channels was on Wales-based productions.

### 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.

Financial data quoted in this report is presented in nominal terms, meaning that historical data has not been adjusted to account for inflation. In our interactive report, users can view financial data in either nominal or 'real' (CPI-adjusted) terms, with users able to easily switch between the two.

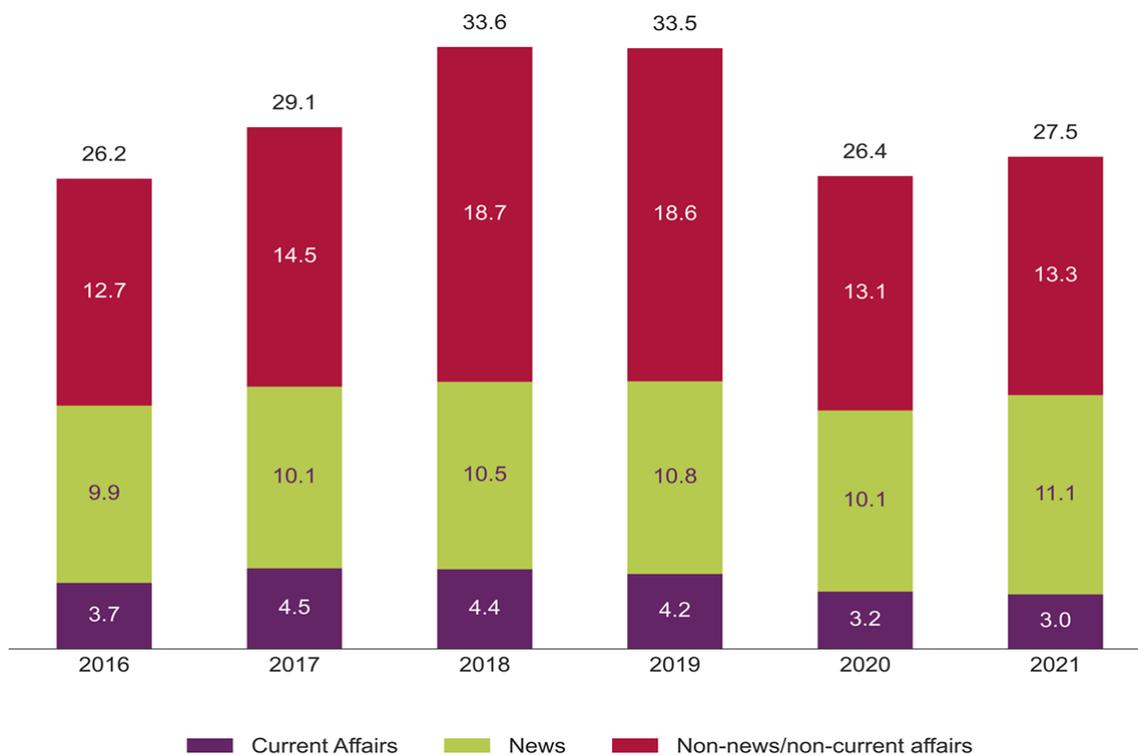
Our use of nominal data in the written reports provides a straightforward view of the market in terms commonly used. For those who wish to analyse how inflation has historically affected the value of the industry, the CPI-adjusted series in our interactive report provide an indicative measure.

### PSB spend on first-run content for Wales rose for news and non-news/non-current affairs programming in 2021

There was a 4% increase in spending on first-run content for viewers in Wales in 2021. Of the total £27.5m spend, the majority went towards non-news/non-current affairs, at £13.3m; a year-on-year rise of £0.2m.

News had the largest relative growth in first-run spend, increasing by 10% year on year to £11.1m. However, PSB spend on current affairs programming for Wales has decreased by 5%.

**Figure 25: PSB spend on first-run UK-originated content for Wales, by genre (£m)**

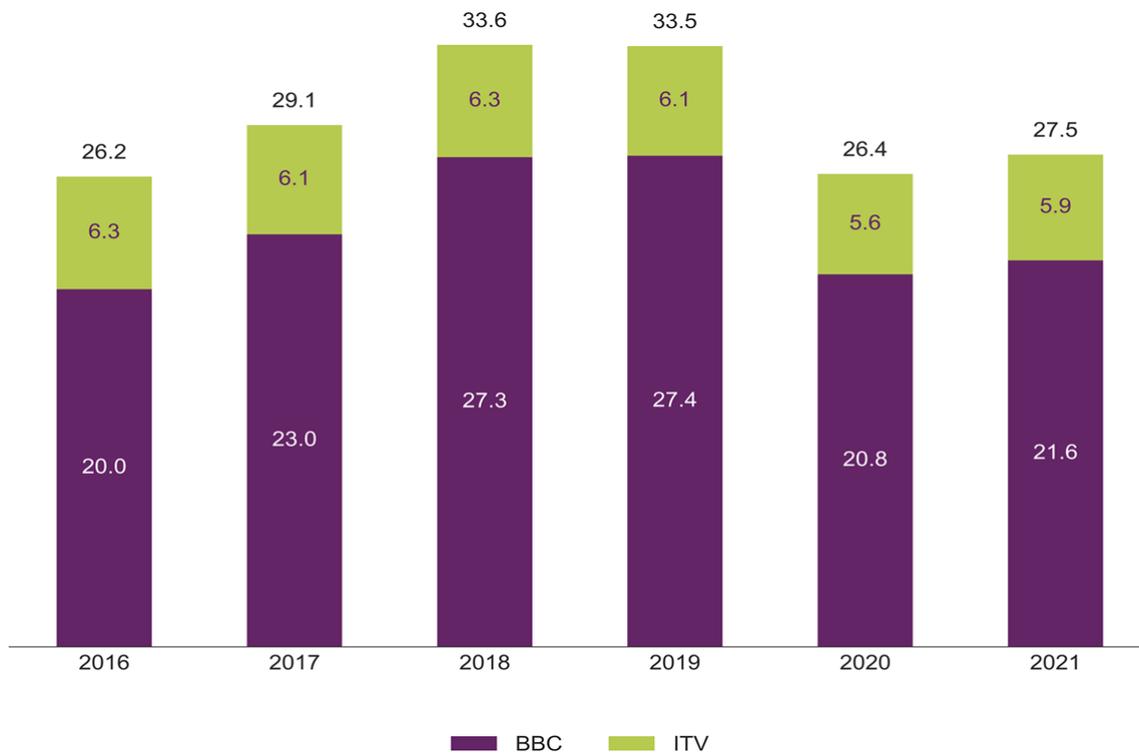


Source: Ofcom/broadcasters.

**Both BBC and ITV and increased their spend on first-run content for Wales in 2021**

The largest proportional increase in spend on first-run content was by ITV, whose spend for Wales rose by 5% since 2020. In monetary terms, this is a growth of £0.3m to £5.9m. Spend by BBC on first-run content for Wales also increased in 2021, by 4%.

**Figure 26: BBC and ITV Cymru Wales spend on non-network first-run UK-originated content for Wales (£m)**



Source: Ofcom/broadcasters.

## Ofcom looks to update its regulation of the BBC

What audiences want, and how they watch and listen to content, is changing. Ofcom's regulation should enable the BBC to respond to this changing behaviour to ensure it remains effective, now and in the future. In step with this, Ofcom published a consultation, *Modernising the BBC's Operating Licence*, in June this year. Underpinning the licence is the need for the BBC to provide content of interest and relevance to audiences in Wales, including a broad range of content that reflects Wales' culture. The consultation proposed:

- retaining the requirement on news for BBC One Wales and BBC Two Wales, and for at least 90% of first-run UK originations to be made in Wales;
- replacing hours of non-news programming quotas for BBC One Wales and BBC Two Wales with conditions regarding delivery of this content. This change aims to provide the BBC with more flexibility to deliver programming on iPlayer as well as on TV;
- introducing transparency requirements for delivering programming for the nations, requiring the BBC to set out its plans for providing a range of non-news and non-current affairs content for the nations in its Annual Plan, and then reporting on its delivery with its Annual Report;
- adding a requirement for provision of non-news and non-current affairs content, and transparency requirements, for BBC One Wales and BBC Two Wales; and
- requiring the BBC to set out its plans for providing a range of content for the nations on iPlayer and to report on delivery alongside its Annual Report.

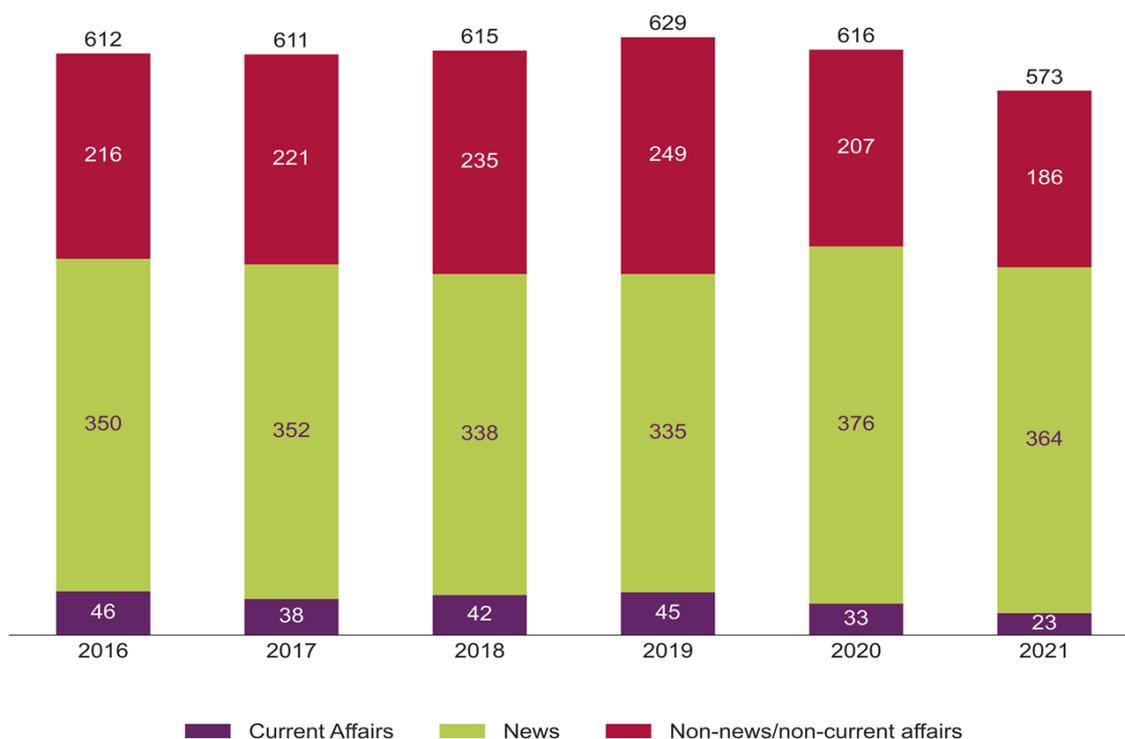
Ofcom will issue a final statement and an updated Licence, reflecting stakeholders' comments on our proposals, early next year.

## BBC hours of first-run content in Wales dropped by 7% in 2021 to 573 hours

The decline in hours has been across all genres. The largest proportional decrease has been for current affairs, dropping by 10 hours to 23 hours (30%).

Overall, news content makes up the largest amount of the BBC's output for Wales, comprising 64% of first-run hours. This is an increase since 2020, despite the slight drop in hours.

**Figure 27: BBC hours of first-run UK-originated content for Wales, by genre**



Source: Ofcom/broadcasters.

### BBC Cymru Wales Central Square

The production facility in Central Square is one of the most modern in the BBC estate and provides transmission facilities for all the BBC Cymru Wales and S4C content on television, radio and online. The BBC's centre of excellence for Climate and Science journalism, including BBC News' specialist Climate and Science team and BBC Radio's Science production team, are relocating to Cardiff. In addition, a new partnership was announced in December 2021 which will strengthen the network radio team in Wales, with Cardiff becoming a new Audio Hub for Wales and Bristol.

The BBC News at 6 and 10 o'clock, *Newsnight* and the *Today* programme on Radio 4 have broadcast from Central Square over the past year.

## BBC Cymru Wales and partnerships

The BBC and Creative Wales launched a new partnership during the year detailing how the two organisations will build on existing support and training for the industry, and how they will work together over the next three years with a view to establishing a long-term working partnership focused on building a sustainable TV sector in Wales.

The pandemic continued to affect Wales' cultural events across the country in summer 2021 and BBC Wales worked with partners such as the Urdd and the National Eisteddfod on new, innovative formats which brought cultural highlights to audiences via TV, Radio Cymru and online platforms.

As the BBC's Across the UK plan gathers pace, and the BBC brings its commissioning teams across network TV and the devolved nations together to deliver more ambitious creative projects, the new partnership approach delivered several programmes for both network and BBC Wales including *Hot Cakes* and *The Pact* as well as a growing slate of programmes for broadcast over the coming months.

### Content

BBC Cymru Wales' drama story continued last year with two major network drama productions. *The Pact*, a six-part series by Pete McTighe, produced by Cardiff-based Little Door Productions, was enjoyed by millions across the UK. A hard-hitting documentary, *A Killing in Tiger Bay*, was broadcast across the UK in September to critical acclaim; it told the story of one of the biggest miscarriages of justice in the UK. The three-part series focused on the shocking events following the murder of Lynette White in 1988.

BBC Wales followed the Wales football team, on all platforms, during the rescheduled UEFA European Football Championship finals, with coverage, commentaries and highlights as well as additional content for fans, including the transfer of *Elis James' Feast of Football* from podcast to TV. BBC Wales secured the rights for coverage of the women's football team as they vied for a place in the World Cup. There was also coverage of both men's and women's teams in the Six Nations championship.

### Renewing Channel 3 licences

ITV's Channel 3 licences are due to expire in December 2024. Under Section 229 of the Communications Act 2003, Ofcom submitted a report to the UK Government in June this year in anticipation of a new licensing round for Channel 3 services.<sup>16</sup> The purpose of this was to assess the capacity of existing licence holders to continue fulfilling their public service broadcasting obligations.

Ofcom concluded that there is a good case to proceed with the renewal of the licences, finding that:

- Channel 3 licence holders have a good track record of delivering public service content to audiences and are likely to continue doing so over the next licence period.
- The channels continue to be valued by audiences: almost half of all people in the UK watch Channel 3 each week and viewer satisfaction is high, at 75%.
- The licensees play an important role in the UK production sector.
- Channel 3 provides competition and an alternative voice to the BBC and plays a key role in providing plurality of news provision in Wales.
- The current licence obligations could be commercially sustainable in the next licence period but benefits are likely to reduce over time. Sustainability would be strengthened, however, by implementation of the Government's proposed legislative reforms to prominence regulation.

Currently, the regional Channel 3 licences include obligations to provide regional news and non-news content, with the volume of content required varying by licence. In Wales, ITV must make 5.5 hours of regional programming per week on average, of which 4 hours must be news. Of the remaining 1.5 hours, 47 minutes must be current affairs. The regional requirements help promote media plurality (providing competition to BBC regional news), support production in the nations and regions, and help to ensure a diverse range of programming for audiences.

### **ITV Cymru Wales' hours of first-run content for Wales grew year on year, with 332 hours of programme output in 2021**

The vast majority of ITV Cymru Wales' output is news content, comprising 78% (258 hours) of first-run programming on the channel.

The increase in hours has been across all genres. The largest proportional rise has been for non-news/non-current affairs, growing by 13 hours to reach 19 hours.

Recent programming highlights include ***A Year in the Beacons***, which was a co-commission between ITV Cymru Wales and ITV Network, chronicling life over the changing seasons in Wales' Brecon Beacons National Park.

**Figure 28: ITV Cymru Wales' hours of first-run UK-originated content for Wales, by genre**



Source: Ofcom/broadcasters.

## ITV Cymru Wales

### Partnership with Mencap Cymru

ITV Cymru Wales has launched a partnership with Mencap Cymru, with the aim of helping to remove barriers to disabled people seeking to work in the TV and broadcasting industry. As part of this partnership, ITV Cymru Wales hosted media training days for people supported by Mencap Cymru and their local groups, all of whom have a learning disability.

### Launch of *Backstage*

In June 2022, ITV Cymru Wales launched a dedicated arts programme showcasing talent from around Wales. The new series features extended interviews with some of Wales' up-and-coming artists; exclusive musical performances; and studio discussions with those involved in the Wales arts industry.

### Creative Wales

Creative Wales is an internal Welsh Government agency which supports the development of the creative industries in Wales. Its mission is to support home-grown talent and to attract international creative projects through funding, providing specialist services and signposting the facilities, skilled crew and talent that exists across Wales.

Creative Wales continues to work closely with creatives across the screen, music, digital and skills sectors, providing a range of support to help deliver its ambitions for the creative industries in Wales as the sector emerges from the Covid-19 pandemic. Development funding has been made available to both the screen and digital sectors; 23 screen projects have been awarded with £453,000, and £651,000 has been distributed through the Digital Development Fund. A new Production Fund was launched in May 2022 to support film, TV, games and animation projects being made in Wales. Also in 2021, Creative Wales entered into Memorandums of Understanding with the BBC and S4C to build on existing positive relationships and highlight opportunities for future joint working.

The screen and digital sectors in Wales continue to grow, with a number of high-profile productions currently being made, including *The Pact 2* from Little Door Productions and Hartswood's *Wolf*. In 2022 the £50m+ media.cymru project will launch with core funding from the 'strength in places' innovate UK fund, the Cardiff City Deal and Creative Wales. This is a five-year project to support research and development in the media sector in south-east Wales and will include the development of virtual production infrastructure at Seren Studios and a Wales-wide R&D fund for the creative industries.

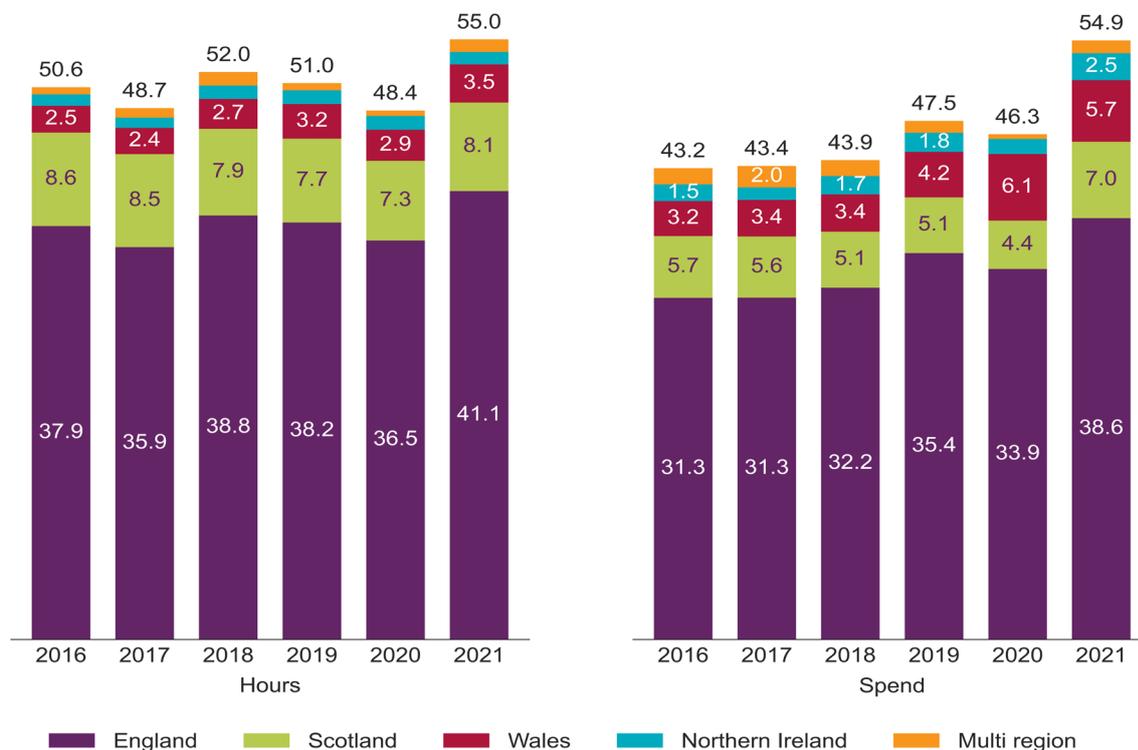
With the establishment of a Creative Skills Body, and the development of a skills action plan due to be published in the coming months, action is being taken to ensure that there are inclusive and accessible opportunities for creatives to develop their skills and talent. Fourteen skills projects have been supported, including the National Film and Television School (NFTS) Cymru Wales, CRIW, Culture Connect Wales and rad Cymru. Future priorities include encouraging the sector to become more environmentally sustainable. Current action includes partnering with the BFI, BAFTA Albert and Arup *Screen New Deal: Transformation Plan*, to carry out local data collection and mapping to help create a location-based transformation plan to decarbonise TV and film production.

## Network content produced in Wales

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

Across all the PSBs, 5.7% of qualifying first-run network spend was allocated to programmes qualifying as Wales productions, and 3.5% of hours.

**Figure 29: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2016-2021**

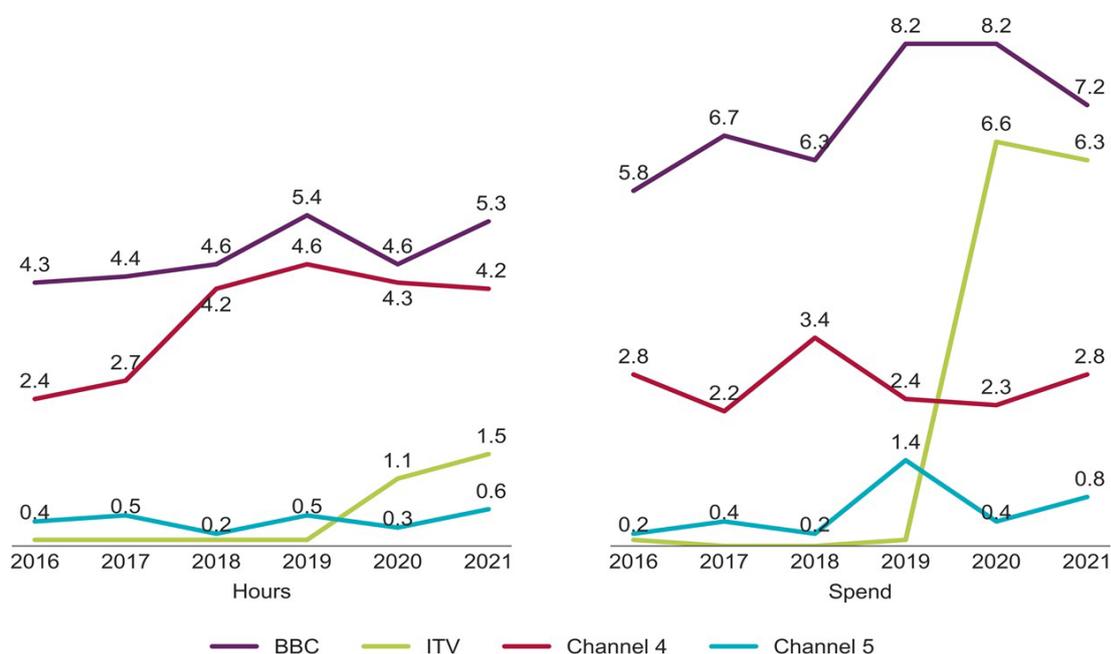


Source: Ofcom/broadcasters.

### PSBs have increased the proportion of their network content made in Wales

The proportion of the BBC's qualifying network spend allocated to Wales, which generally represents the main source of all PSB qualifying network content made in Wales, reduced to 7.2% in 2021. But this did not reflect reduced qualifying network spend in Wales in real terms, merely a proportional decrease. In fact the proportion of qualifying network hours made in Wales increased in 2021, to 5.3%. This included titles such as *Bargain Hunt*, *Casualty*, and new episodes of *Doctor Who*.

**Figure 30: Proportion of qualifying network production in Wales, by PSB: 2016-2021**



Source: Ofcom/broadcasters.

### Exploring the devolution of broadcasting

Following the Senedd elections in May 2021, the Welsh Labour Party found itself short of a working majority and opted to form a co-operation agreement with Plaid Cymru. The agreement covers a wide range of policy areas on which both parties have been of a similar opinion for some time, but the inclusion of the call for the devolution of broadcasting and communications came as a surprise to many, given that successive Labour governments in Wales have been consistent in their opposition to the devolution of broadcasting. The agreement states that both parties will: *“Explore the creation of a shadow Broadcasting and Communications Authority for Wales, to address our concerns about the current fragility in the media and attacks on its independence. This body would support the use of the Welsh language, particularly in digital and encourage media plurality. We believe broadcasting and communication powers should be devolved to Wales.”* It also includes a commitment to *“fund existing and new enterprises to improve Welsh-based journalism to tackle the information deficit.”* On 14 June, the Welsh Government announced the members of its Expert Panel on a Shadow Broadcasting and Communications Authority for Wales.

# Radio and audio

## Introduction

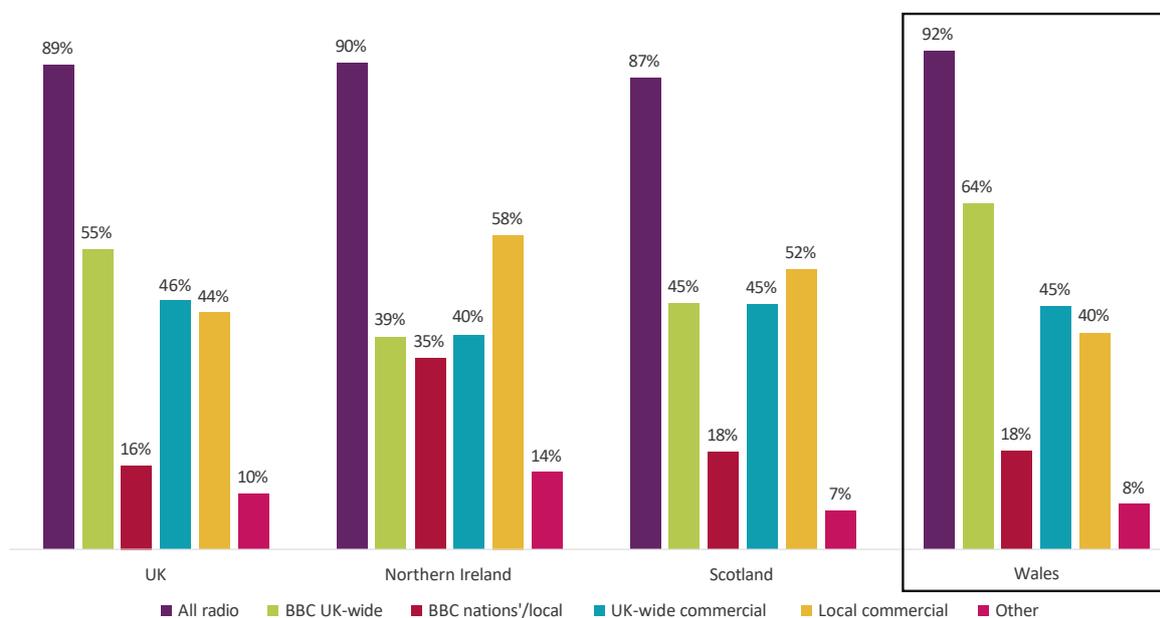
Radio continues to be popular in Wales, and alongside TV screen viewing and online activities, continues to account for a considerable amount of time spent on entertainment services. As in previous years, BBC services are more popular in Wales than in other UK nations, while Global has consolidated its position as the strongest commercial group in Wales.

Alternative methods of listening are not as prevalent in Wales as in other UK nations. Listening to live radio via a radio set is higher in Wales than in Great Britain, while the listening share via a smart speaker remains lower in Wales than in the UK as a whole.

## Nine in ten people listen to the radio

Radio continues to be popular in Wales, with more than nine in ten people saying they had listened to the radio in the past week. People listen to the radio for about 22 hours each week, with most of this listening being attributed to BBC radio services. In terms of overall reach, nearly seven in ten people listen to BBC radio weekly, with most of these people listening to BBC UK-wide stations (64%). BBC Radio Wales and BBC Radio Cymru reach about 18% of people each week. Slightly fewer people listen to commercial radio than BBC radio overall, at 63%. Local commercial services reach four in ten people in Wales compared to 45% for UK-wide commercial radio stations.

**Figure 31: Weekly reach by sector, by nation: Q1 2022**

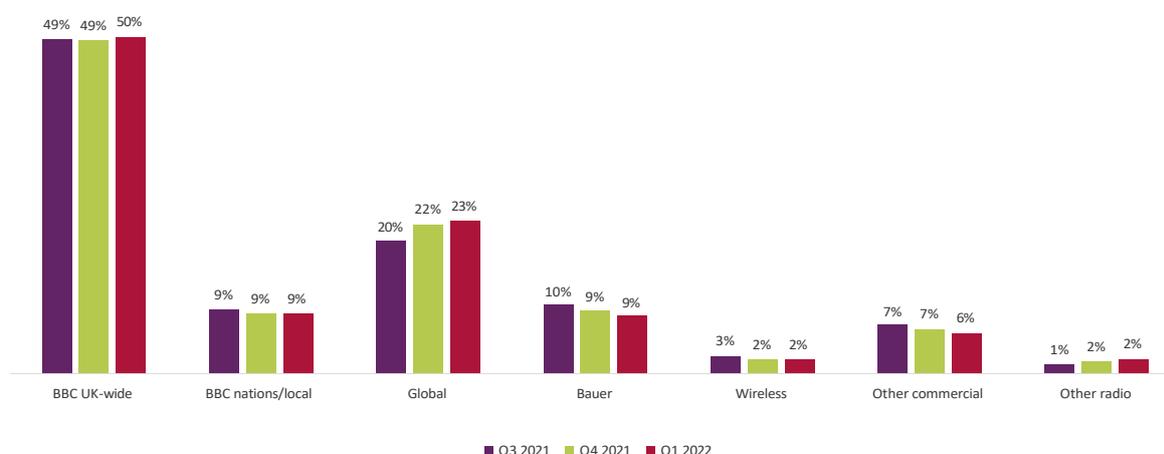


Source: RAJAR Q1 2022; Northern Ireland = BBC Radio Ulster; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA.

## Global consolidates its position as the strongest commercial group in Wales, accounting for more than a fifth of hours

About half of total radio listening hours is accounted for by BBC radio stations, the vast majority of this being attributed to BBC UK-wide radio stations. Global accounts for the greatest share of commercial radio listening, with 23% of total hours being to this group, including Capital Cymru, Capital North West and Wales, and Heart South Wales as its top performing station. This compares to 9% for Bauer, 2% for Wireless and 6% for other commercial radio stations.

**Figure 32: Share of listening, by radio group**



Source: RAJAR; BBC Radio Wales TSA.

## Digital listening in Wales

### Coverage of local DAB services in Wales was unchanged as of March 2022

Coverage of national DAB multiplexes in Wales has remained constant in recent years. While overall UK local DAB multiplex coverage grew slightly between March 2021 and March 2022, following the launch of local multiplexes in England, coverage for homes in in Wales remained steady at 82.6%.

**Figure 33: Coverage of DAB services: March 2022**

		BBC UK-wide	Commercial		
			Digital One	Sound Digital	Local DAB
UK	Homes	97.4%	91.7%	82.6%	92.0%
	Major roads	87.4%	80.2%	72.6%	76.8%
England	Homes	98.4%	94.8%	86.7%	93.4%
	Major roads	94.5%	93.9%	89.8%	87.4%
Scotland	Homes	95.3%	81.7%	69.0%	85.4%

	Major roads	69.1%	45.5%	33.6%	45.6%
Wales	Homes	92.2%	67.5%	56.9%	82.6%
	Major roads	78.1%	53.3%	37.7%	60.9%
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%
	Major roads	79.3%	86.9%	55.0%	87.8%

Source: Arqiva, BBC, Ofcom.

### Ofcom progresses its small-scale DAB licencing programme in Wales

Small-scale DAB is an innovative technology which provides a low-cost route for local commercial, community and specialist music services to broadcast on terrestrial digital radio to a relatively small geographical area.

It gives community radio, smaller commercial radio stations and new entrants an affordable pathway to terrestrial digital radio, ensuring the continued availability of a diverse range of radio services on the digital platform, which accounts for an increasing amount of radio listening. GTFM (South Wales) Ltd and Cardiff DAB Ltd were both awarded small-scale DAB licences in round one, and the multiplex licence for Wrexham was awarded to Wrexham DAB Ltd. in round two earlier this year. Ofcom is currently assessing the applications received for the Llandudno and Betws y Coed and Swansea (round three) licence areas.

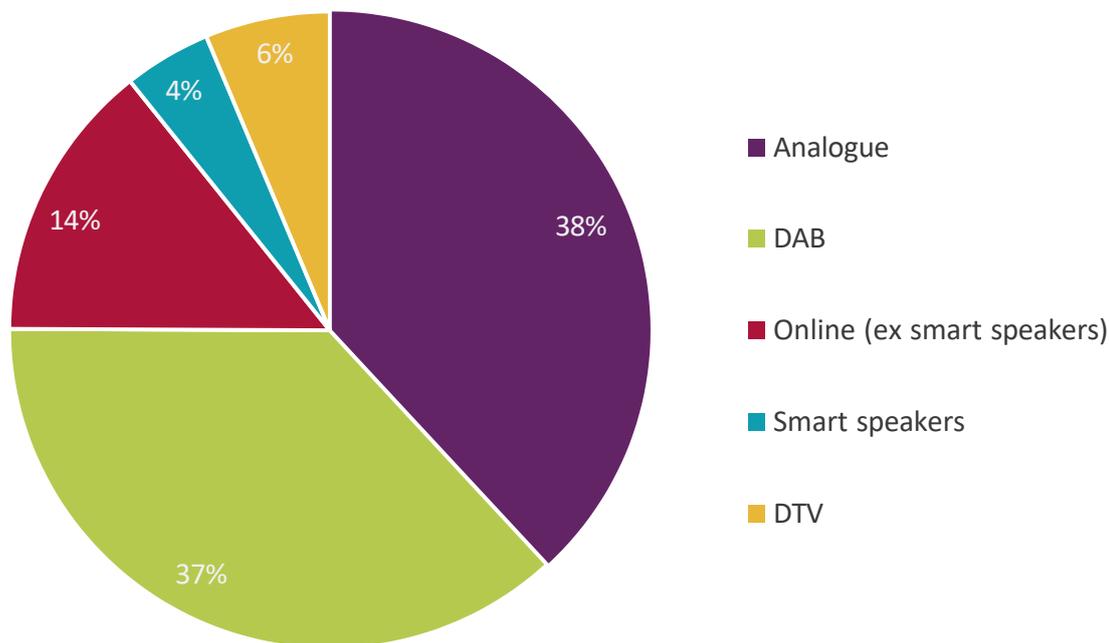
Ofcom advertised the round four licencing areas at the beginning of July; in Wales these include Anglesey & North Gwynedd, North Pembrokeshire and Newport & Chepstow. The licences will be awarded in a competitive process, with applications judged against specific statutory criteria.

### Online radio listening maintains its share of overall listening, but smart speakers have not had the same impact as they have on the UK overall

Already at relatively high levels, online listening maintained its share of overall listening at 18%. Interestingly, we see that at a UK level, smart speakers are making up a small but significant share of total listening, at 10% of total hours, but in Wales the device does not seem to have had the same level of impact on radio listening, accounting for about 4% of overall hours. This is despite smart speaker ownership levels being higher in Wales than in the UK overall: 45% of people aged 16+ have a smart speaker in their household, compared to 39% in the UK.<sup>17</sup>

<sup>17</sup> Ofcom Technology Tracker 2022.

Figure 34: Share of listening, by platform



Source: RAJAR Q1 2022; BBC Radio Wales TSA.

### BBC Cymru Wales

The BBC has announced its intention to increase Radio Cymru 2's broadcast hours from 15 hours a week to over 60 hours. BBC Radio Cymru will continue to broadcast its schedule on FM and on digital. BBC Radio Cymru 2 will be on air for up to 12 hours on digital, offering a mix of music-based programmes blended with some of Radio Cymru's entertainment programmes, broadcast simultaneously.

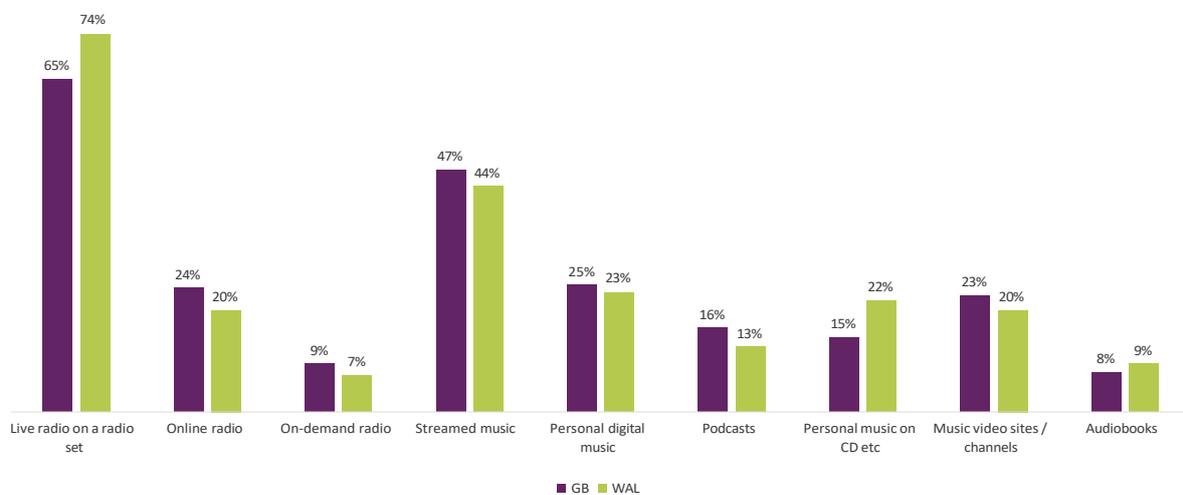
BBC Radio Cymru 2 launched in 2018 and has predominantly broadcast a breakfast show between 7.00 and 9:00 each morning. From autumn 2022 the intention is to broadcast a wide range of popular and contemporary music. BBC Radio Cymru 2 will aim to extend choice through the medium of Welsh and is specifically aimed at audiences who might not traditionally listen to Radio Cymru.

As part of its content for network radio, in 2021 BBC Wales continued to make *Composer of the Week* for Radio 3 and produced several documentary series for Radio 4 including *Young Farmers* and *Past Forward: a Century of Sound*, marking the BBC100 celebrations. The drama team worked with BBC Scotland to produce *United Kingdoms*, a major series of micro-dramas from writers and producers across the nations. Other drama highlights included *The Miser* for Radio 3, starring Toby Jones, to mark 400 years since Molière's birth. BBC Wales worked closely with BBC Radio 6 Music on the BBC Radio 6 Music Festival, which was broadcast from locations across Cardiff in March and featured a range of music and entertainment.

## Listening to live radio on a radio set was more popular among adults in Wales than in Great Britain

While the pattern is broadly similar, there are some notable differences in weekly reach of audio types between Wales and Great Britain as a whole. Listening to live radio on a radio set was higher for adults in Wales than in GB in 2022, at just under two-thirds of GB adults (65%) and just under three-quarters (74%) of those in Wales. The reach of personal music in analogue formats was also higher than for GB adults (22% vs 15%). In contrast, the weekly reach of streamed music and online radio was lower in Wales than in GB as a whole, perhaps due in part to the greater impact of smart speakers on online listening in the other nations, as mentioned above.

**Figure 35: Weekly reach of different types of audio: Wales vs GB adults aged 15+**

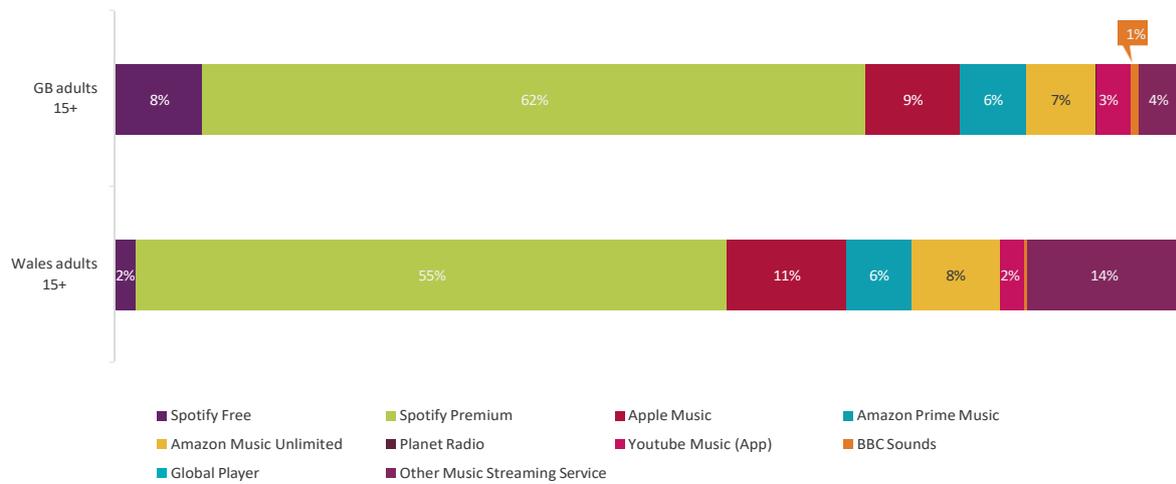


Source: IPA TouchPoints 2022 wave 1 – Jan-March 2022. Note: TouchPoints data exclude Northern Ireland.

## People in Wales are less likely than those in Scotland and England to stream music via Spotify

While Spotify accounted for the greatest share of time spent streaming music in 2022, this share was much lower in Wales than the GB average. In Wales, 57% of the time spent streaming music was spent listening to Spotify, compared to 70% more widely. Instead, those in Wales spend three times as long listening to other music streaming services, which are likely to include the YouTube main platform (14% vs 4%).

**Figure 36: Share of time spent music streaming, by platform: Wales vs GB**



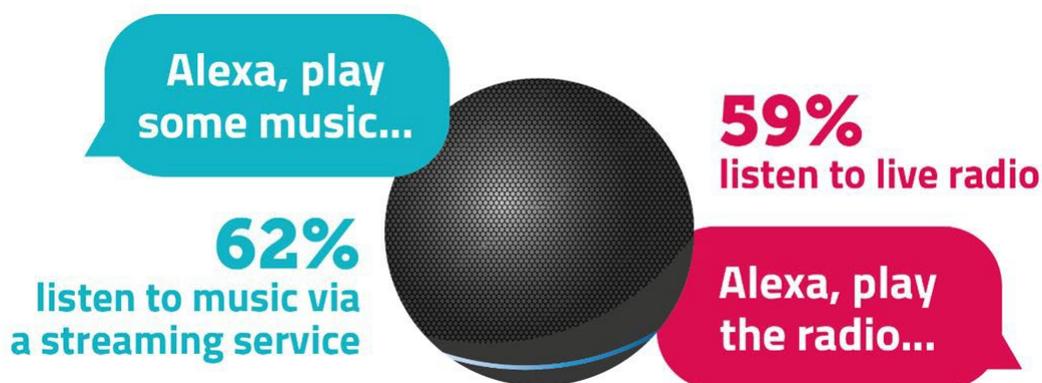
Source: IPA TouchPoints 2022 wave 1 – Jan-March 2022.

## People in Wales are more likely than people in the UK overall to have a smart speaker

Almost half (45%) of people aged 16+ in Wales have a smart speaker in their home, higher than the overall average for households in the UK (39%). The Amazon Echo is by far the most popular type (found in 82% of homes which own the device), followed by Google Home/Google Nest (16%).

Listening to music via a streaming service (62%) and listening to live radio (59%) were the most popular activities the smart speaker was used for. These were followed by: searching for information (39%), getting weather reports (36%) and using it as an alarm (29%). People in Wales were significantly less likely than those in the UK overall to use their smart speaker for catch-up radio (8% vs. 17%).

Figure 37: Smart speaker use in Wales

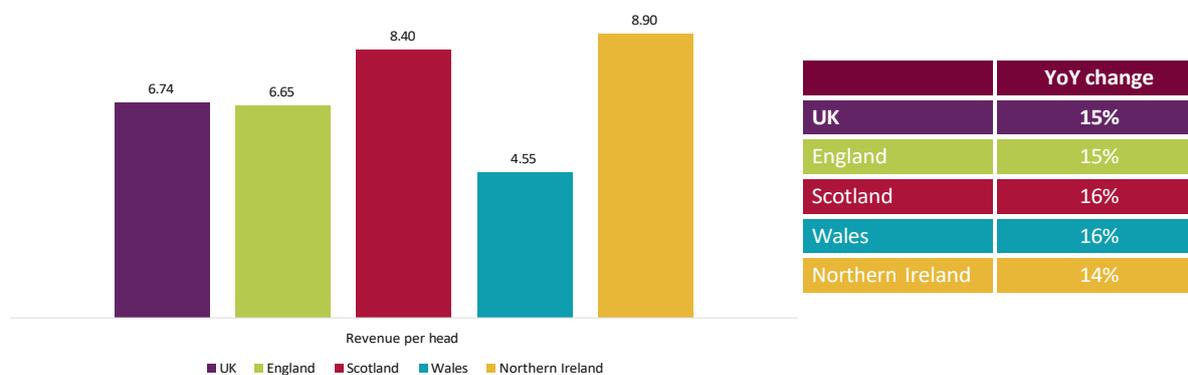


Source: Ofcom Technology Tracker 2022.

### Per-capita commercial radio revenue in Wales grew by 16% between 2020 and 2021

In 2021, per-capita commercial radio revenue in Wales was £4.55, an increase of 16% year on year.

Figure 38: Per-capita commercial radio revenue, by UK nation: 2021 (£)



Source: Broadcaster returns, Ofcom analysis. NB: These figures solely relate to relevant turnover reported against AL licences (local analogue commercial) and include local and national revenues and sponsorship i.e. it is not just revenues which relate to adverts aimed at the specific nation. As mid-year 2021 population estimates for were not available at the time of publication, 2020 mid-year population data has been used for both 2020 and 2021.