

Media nations: Wales 2021



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Overview

This *Media Nations: Wales* report reviews the main trends in the television and audio-visual sector as well as the audio industry in Wales.

The report provides updates on several datasets, including data collected directly from licensed television and radio broadcasters (for output, spend and revenue in 2020), as well as Ofcom's own consumer research and BARB data (for audience consumption).

Due to the Covid pandemic, some of the usual data sources – RAJAR (radio listening) and PSB Tracker (audience opinions) were not available this year.

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

Key points

TV services and devices

- Paid-for satellite and cable television services from Sky and Virgin Media were present in nearly half of homes in Wales (46%) as of Q3 2020.
- More than half of households in Wales (59%) have a subscription video-on-demand (SVoD) service from companies such as Netflix, Amazon, Disney+ and Now TV.
- Netflix is still the largest, with more than half (53%) of households having a subscription, followed by Amazon Prime Video (33%) and Disney+ (15%).
- The BBC iPlayer is the most popular broadcast video-on-demand (BVoD) player in Wales; it was watched in nearly two-thirds of homes (64%) at the beginning of 2021. The ITV Hub (54%) was the next most popular BVoD player, followed by All4 (44%) and My5 (30%).

Broadcast TV viewing

- People in Wales spent an average of 5 hours 6 minutes per day watching something on the television screen in 2020, up by 40 minutes on 2019.
- In 2020, broadcast TV viewing in Wales bucked the long-term trend of decline and increased for the first time since 2012.
- On average, people in Wales watched 3 hours 29 minutes of broadcast TV on the TV set per day in 2020, the second highest of all the nations (behind Scotland) and an 8-minute increase on 2019.
- In the week commencing 23 March, when the UK Prime Minister announced the first lockdown, average daily viewing of broadcast television peaked at 3 hours 58 minutes in Wales.
- Viewing declined as lockdown restrictions were eased, but as national lockdown restrictions tightened again from October, viewing climbed to a second peak in December, as people in Wales spent most of the holiday period at home.
- Older people in Wales continue to watch more broadcast TV than younger viewers. Those aged 55+ watched 5 hours 59 minutes on average a day in 2020, up by 7% compared to 2019, while those aged 16-24 watched just 64 minutes of broadcast TV a day, up 3% compared to 2019.

Spending on programming for and from Wales

- There was a 22% decrease in spending on first-run content for viewers in Wales in 2020, with spend on non-news/non-current affairs decreasing the most at 30%. Non-news/non-current affairs accounts for the largest share of first-run spend (50%) in Wales.
- BBC hours of first-run content in Wales dropped by 2% in 2020 to 616 hours. Overall, news content makes up the largest amount of the BBC's output for Wales, comprising 61% of first-run hours.
- Some 7.5% of qualifying network spend on the PSB channels was on Wales-based productions in 2020.

Radio and audio

- Eight in ten adults in Wales listen to radio every week.
- Nearly six in ten homes in Wales have smart speakers (57%). The Amazon Echo is by far the most popular type (found in 72% of homes in Wales that have a smart speaker).
- The most-cited requests among users were to play music via a streaming service, such as on Spotify (70%), or to listen to a live radio station (61%).
- It was a challenging year for the commercial radio sector. Radio revenues per head in Wales fell by 29% in 2020 to £3.92, the lowest across the UK nations.

TV services and devices

Introduction

Long-established television platforms such as Freeview, which is available through digital terrestrial television (DTT), satellite (from either Sky or Freesat) and cable (Virgin Media) are still the main channels for delivering entertainment services into people's homes.

These platforms rely on different infrastructure to deliver their services. Freeview uses a network of transmitters across Wales to deliver television services into people's homes through a rooftop aerial. These services are widely, though not universally, available across Wales. Satellite is universally available¹ while cable coverage is available mainly in built-up urban areas.

However, the main trend in recent years has been the rapid rise of new subscription video-on-demand (SVoD) services such as Netflix, Amazon Prime Video and Disney+, and this continued throughout 2020.

Although these SVoD services are mainly taken in addition to content on other platforms, they are having a hugely disruptive effect on the sector, gaining viewing share and affecting how and where people are watching TV-like content.

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

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 2020.² 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 2020. Paid-for satellite accounts for most of these, with Virgin Media's cable service present in just 10% of Welsh households in Q3 2020, up from 7% in Q1.

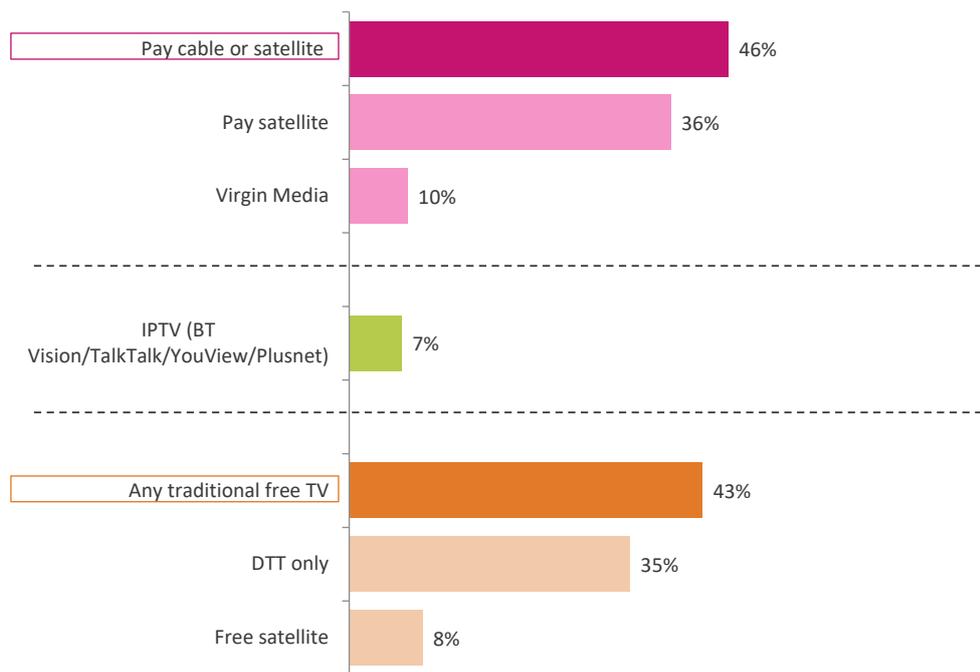
DTT services only (delivered through an aerial) account for most free TV viewing (35%), with free satellite present in just 8% of homes, most likely through Freesat. Forty-three per cent of households in total had only DTT or free satellite.

Only a small proportion of homes in Wales (7%) 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.

¹ Based on the availability of a line-of-sight path to the satellite

² BARB Establishment Survey Q3 2020.

Figure 1: Take-up of TV platforms in Wales



Source: BARB Establishment Survey Q3 2020

Subscription video-on-demand

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

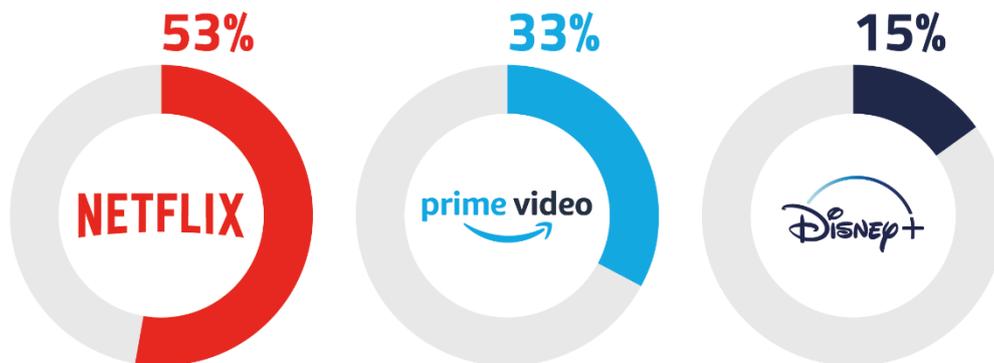
More than nine in ten (93%) of homes in Wales had an internet connection at the start of 2021 (82% of homes had fixed broadband).

A combination of factors made 2020 a landmark year for subscription video-on-demand (SVoD), both in the UK and internationally; total global SVoD subscriptions increased by an estimated 300 million, passing the one billion threshold to reach 1.18 billion.

Disney+ has become the third most popular subscription video-on-demand service in Wales

In Wales, subscription video-on-demand services (SVoDs) saw an uplift in 2020, with 59% of households subscribing to at least one of them. Netflix is still the largest; more than half (53%) of households have a subscription, followed by Amazon Prime Video (33%) and Disney+ (15%).

Figure 2: Use of SVoD services in Wales (% of households)



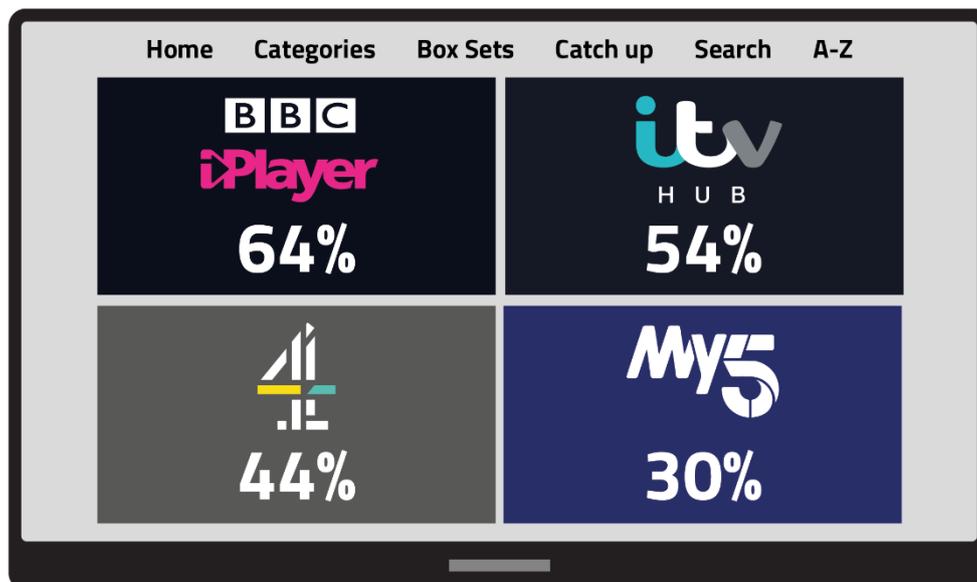
Source: BARB Establishment Survey Q3 2020

Broadcaster video-on-demand

BBC iPlayer is the most popular PSB service among viewers in Wales

The major broadcasters – the BBC, ITV, Channel 4, S4C and Channel 5 – have their own online players. These broadcaster video-on-demand players are also proving popular with viewers. The most popular, the BBC iPlayer, was watched in over six in ten Welsh homes (64%) at the beginning of 2021. The ITV Hub (54%) is the next most popular BVoD player, followed by All4 (44%) and My5 (30%).

Figure 3: Use of main broadcaster video-on-demand (BVoD) services in Wales (households)



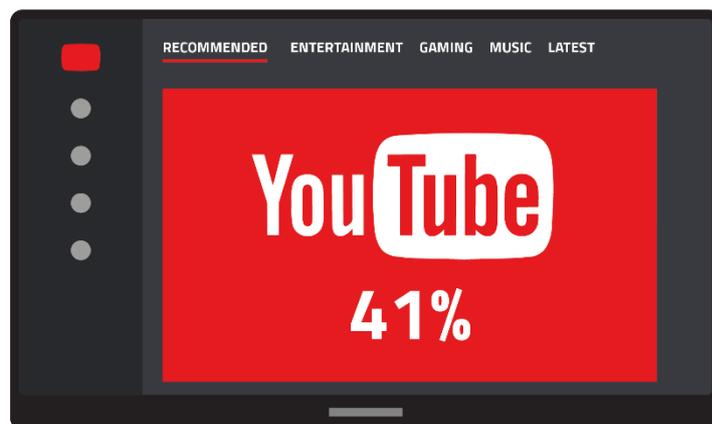
Source: Ofcom Technology Tracker 2021

Four in ten homes in Wales use YouTube

Research carried out for Ofcom's *Online Nation 2021* report³ showed that UK adult internet users spent an average of 3 hours 37 minutes a day online on computers, tablets and smartphones in 2020; nine minutes more than in 2019⁴.

In addition, people in the UK spent an average of 1 hour 21 minutes a day in 2020 watching online services on connected TVs – whether for video-on-demand viewing, online gaming or watching YouTube or TikTok.

About four in ten households (41%) in Wales used YouTube to watch programmes, shows or films at the beginning of 2021.⁵ This figure could therefore exclude other types of content such as short clips.



³ https://www.ofcom.org.uk/_data/assets/pdf_file/0013/220414/online-nation-2021-report.pdf

⁴ Comscore MMX Multi-Platform, Total Internet, Age 18+, monthly average 2019 and 2020, UK

⁵ Ofcom Technology Tracker 2021

TV viewing trends

The pandemic led to increases in all forms of TV viewing in Wales

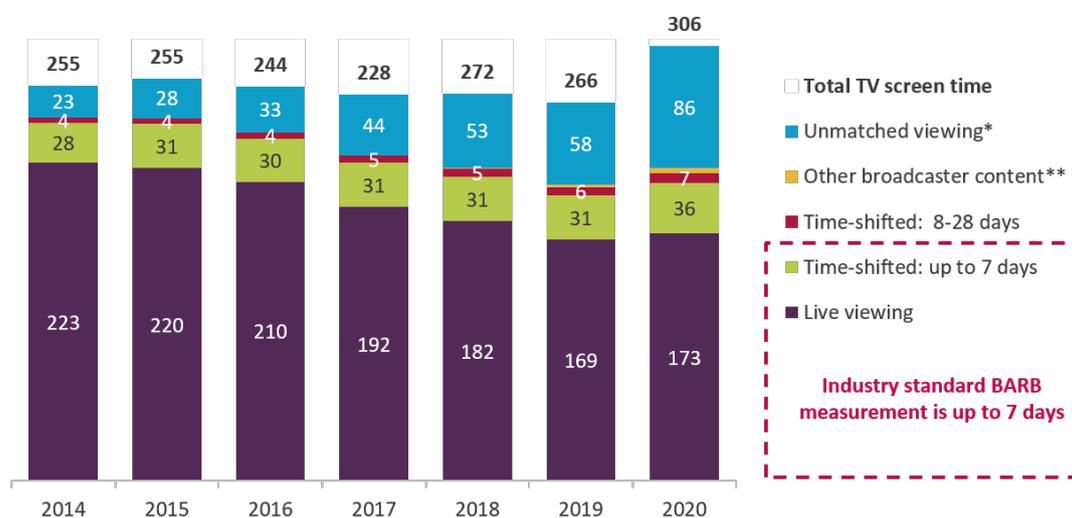
Government lockdown restrictions in response to Covid-19 affected all aspects of the broadcasting sector in Wales in 2020. As the public stayed at home, they turned to their television to keep them entertained and updated on news about the pandemic.

Total viewing on the television screen in Wales was up by 40 minutes compared to 2019, at an average of 5 hours 6 minutes per person per day. The bulk of this time was still spent watching broadcast TV (3 hours 29 minutes), for which viewing increased by 8 minutes compared to 2019. This increase reversed a long-term trend of continual decline in broadcast TV viewing and can largely be attributed to the pandemic.

However, much of the rise in total viewing came from non-broadcast services on the TV set (classified as ‘unmatched’ by television measurement agency BARB and including YouTube, gaming, and streaming services like Netflix and Amazon Prime), which had increased by 50% since 2019 to 1 hour 26 minutes.

And yet, despite the increase in total broadcast TV viewing time during 2020, the proportion of people watching broadcast TV on average in a week (average weekly reach⁶) remained below 2019 levels for every month of 2020. The average weekly reach for all measured broadcast TV in Wales was 84.5% in 2020, compared to 86.1% in 2019.

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



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

⁶ Reach criteria for all broadcast TV: 15+ consecutive minutes.

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

Trends in TV viewing during the year largely mirrored Covid-19 restrictions

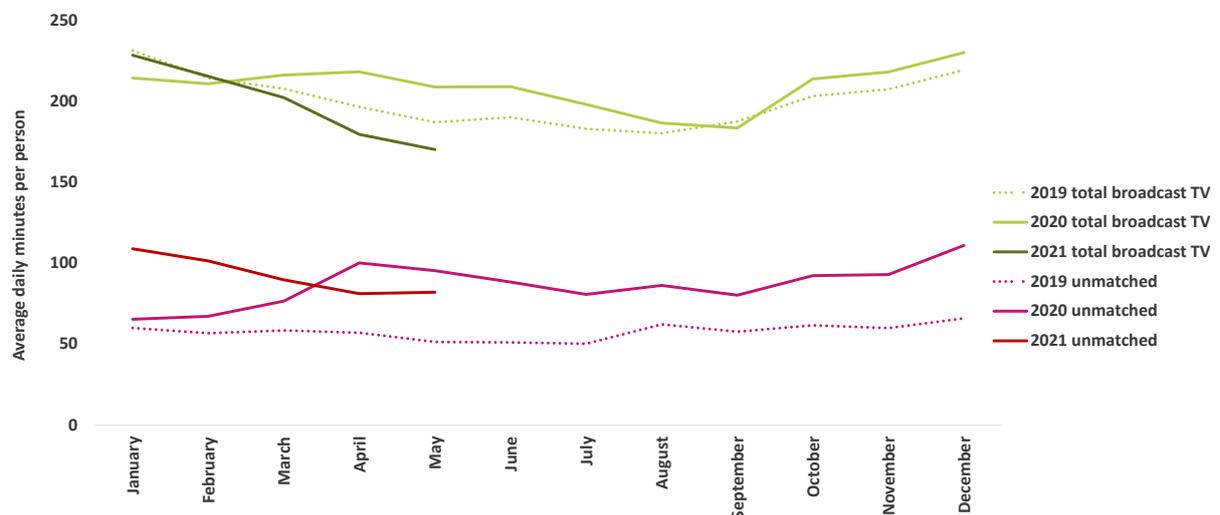
Viewing figures from the end of March 2020 onwards reflected the changing behaviour of viewers as the nation moved through the pandemic.

In the week commencing 23 March, when the UK Prime Minister announced the first lockdown, average daily viewing of broadcast television peaked at 3 hours 58 minutes in Wales.

Viewing remained relatively high throughout April (up by 22% on April 2019), but declined as lockdown restrictions eased and viewing of news programming reduced. However, except for September, each remaining month of 2020 had higher broadcast TV viewing levels than in 2019. As national lockdown restrictions tightened again from October, viewing climbed to a second peak in December, as people in Wales spent most of the holiday period at home. In January and February 2021 when schools and colleges were moved to online learning and other strict restrictions were in place in Wales, viewing remained high. As some restrictions were lifted viewing decreased, falling below 2020 and 2019 levels in March, April and May.

Unmatched viewing retained much of the uplift it achieved in the first lockdown and remained consistently higher in 2020 than in 2019. This was largely due to the increased popularity of subscription streaming services such as Disney+ and Netflix. Unmatched viewing peaked in December, with people in Wales watching an average of 1 hour 51 minutes of unmatched viewing per day (up 68% year on year). At the beginning of 2021 unmatched viewing remained higher than in previous years, until April, when it dropped below the 2020 level.

Figure 5: Total broadcast TV and unmatched viewing (daily mins per person) in Wales



Source: BARB 7-day consolidated viewing. All individuals (4+). BBC Wales area

BBC Cymru Wales

The Welsh Government press briefings conveying important public information were broadcast live as part of BBC *Wales Today's* coverage on BBC One Wales. Documentary makers also provided unique insights into the story of the pandemic and how public services were responding. *Wales in Lockdown* was a special series which captured initial lockdown experiences across the country. *Critical: Coronavirus in Intensive Care* was another powerful documentary, given exclusive access to the ICU at the Royal Gwent Hospital in Newport. Pupils and parents turned to BBC Bitesize to supplement virtual lessons, and with resources to support the Welsh curriculum, bilingual daily lessons for Welsh schoolchildren were developed from January onwards in partnership with S4C.

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.

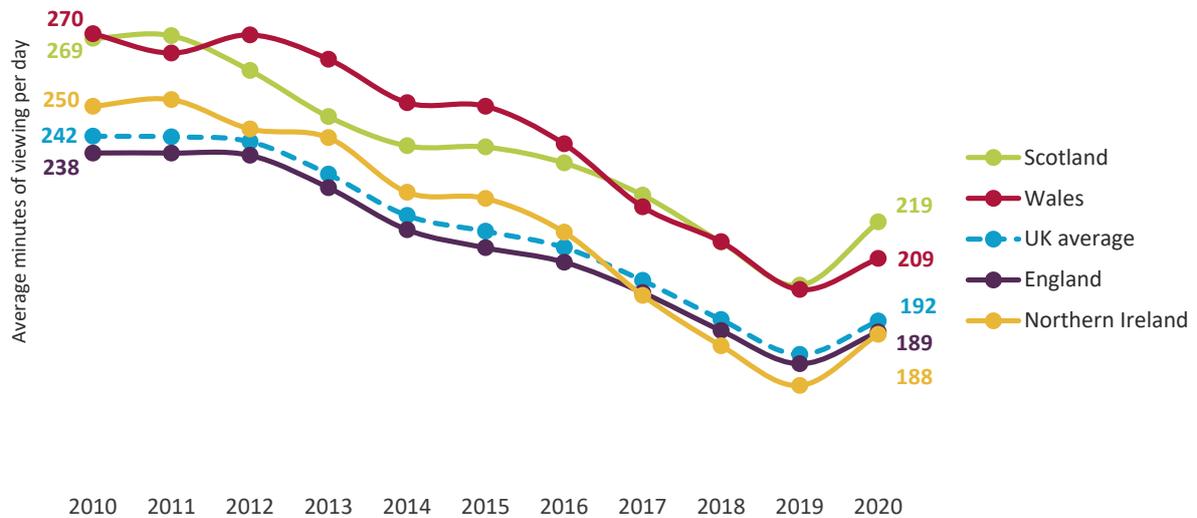
Unless otherwise stated, figures quoted are for seven-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast on TV (live viewing) as well as from recordings on digital video recorders (DVRs) and through catch-up player services (e.g.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

Data included in this section are for the calendar year 2020, and therefore reflect the different viewing patterns that resulted as people in the UK dealt with the Covid-19 pandemic and associated government restrictions.

Viewing of broadcast TV in Wales in 2020 was the second highest of all the UK nations

At 3 hours 29 minutes, viewing of broadcast TV on the TV set per day in 2020 was second highest of all the UK nations. However, the lockdown-driven year-on-year increase in daily viewing of broadcast TV in Wales was the smallest among the UK nations, with total average minutes per person per day increasing by 4.1% between 2019 and 2020, compared to the UK average of 5%.

Figure 6: Average daily minutes viewed per person, by nation: 2011-2020

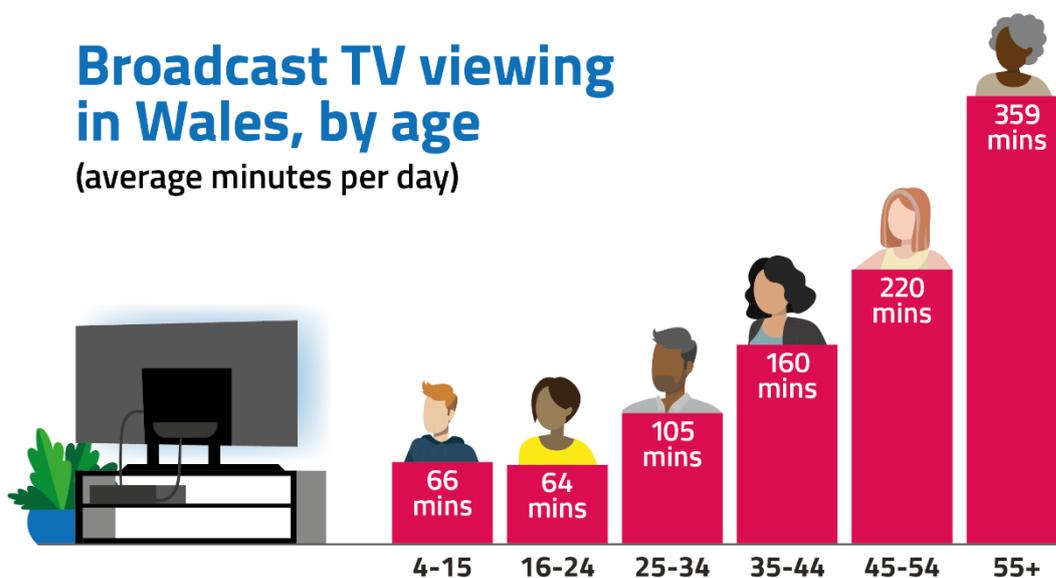


Source: BARB. BBC areas, all individuals (4+).

Older viewers drove the increase in broadcast TV viewing in Wales – but unmatched viewing increased among all age groups

As in the rest of the UK, older people in Wales continue to watch more broadcast TV than younger viewers. In 2020, the over-54s watched an average of 5 hours 59 minutes of broadcast TV per person per day, up by 7% compared to 2019. This dropped to 3 hours 40 minutes for the 45-54 age group, an increase of 2% on 2019. The greatest proportional increase in viewing, however, was among the 35-44 age group, who watched 8% more broadcast television in 2020 than in 2019.

Figure 7: Average daily minutes viewed, by age group



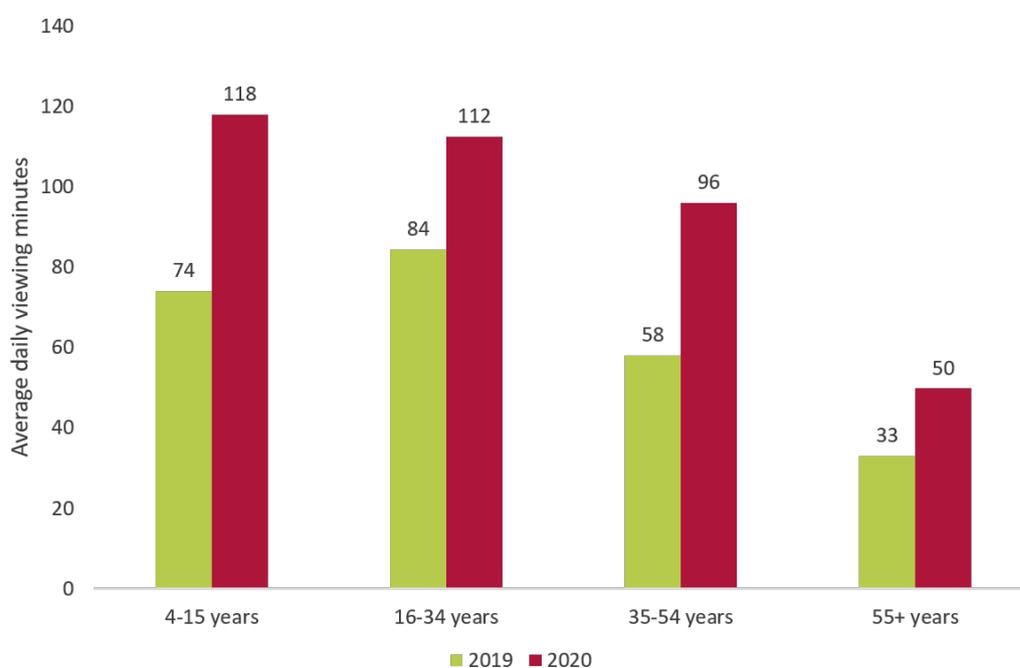
Source: BARB. BBC areas, all individuals (4+)

Younger people in Wales watched more non-broadcast TV on the television set than older viewers, although viewing increased among all age groups in 2020. Children (aged 4-15) watched more than any other age group, at 1 hour 58 minutes per day, up by 59% since 2019. Over 54s watched the least, at 50 minutes per day, although viewing also increased significantly among this age group, up by 52% since 2019.

The greatest proportional increase in unmatched viewing was among 35-54 year-olds, with viewing up by 66% to 1 hour 36 minutes in 2020. The smallest proportional increase was among 16-34 year-olds, with unmatched viewing up 33% on 2019 to 1 hour 52 minutes.

In contrast, broadcast viewing declined by 15% among 25-34 year-olds, dropping to 1 hour 45 minutes on average per day. Young people continued to watch less broadcast television in general, with children aged 4-15 watching 66 minutes on average per day (a decrease of 1% on 2019), and those aged 16-24 watching 64 minutes (an increase of 3% on 2019).

Figure 8: 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.

***I'm a Celebrity... Get Me Out of Here!* was the most-viewed TV programme of 2020**

I'm a Celebrity... Get Me Out of Here! – filmed in Gwrych Castle in Wales due to the pandemic – was the most-watched programme of 2020. The second episode of the show, airing on ITV Cymru Wales, achieved an average audience of just over one million.



The *Prime Ministerial Statement* of 10 May, in which the UK Prime Minister announced a provisional roadmap for the easing of restrictions, was the second-most-viewed TV programme, with an average audience of 861,000. The announcement of the lockdown on 23 March in a BBC News Special was also in the top five, as was *An Address by Her Majesty the Queen*.

BBC One and ITV Cymru Wales dominated the rankings, taking all but one of the top 20 spots, the exception being Channel 4's *Great British Bake Off*.

Figure 9: Top 20 most-watched programmes in Wales: 2020

Rank	Programme Title	Channel	Date	Average 000s	Share %
1	<i>I'm a Celebrity... Get Me Out of Here!</i>	ITV Cymru Wales	16/11/2020	1,003	56.3
2	Prime Ministerial Statement	BBC One	10/05/2020	861	58.5
3	BBC News Special	BBC One	23/03/2020	820	48.0
4	An Address by Her Majesty The Queen	BBC One	05/04/2020	709	51.9
5	Ant and Dec's Saturday Night Takeaway	ITV Cymru Wales	21/03/2020	653	53.5
6	Six Nations Rugby	BBC One	01/02/2020	644	72.2
7	BBC Wales Today	BBC One	10/05/2020	641	46.7
8	Britain's Got Talent	ITV Cymru Wales	18/04/2020	623	47.7
9	The Salisbury Poisonings	BBC One	14/06/2020	578	45.6
10	Six Nations Championship	ITV Cymru Wales	07/03/2020	564	58.7
11	Strictly Come Dancing	BBC One	14/11/2020	558	49.5
12	Des	ITV Cymru Wales	14/09/2020	557	44.2

13	Vera	ITV Cymru Wales	12/01/2020	552	35.1
14	Death in Paradise	BBC One	09/01/2020	531	39.7
15	The Great British Bake Off	Channel 4	06/10/2020	528	37.8
16	White House Farm	ITV Cymru Wales	12/02/2020	524	38.9
17	Silent Witness	BBC One	27/01/2020	523	33.2
18	Happy New Year Live!	BBC One	31/12/2020	522	45.2
19	Call The Midwife	BBC One	23/02/2020	517	34.2
20	Gordon, Gino and Fred: Road Trip	ITV Cymru Wales	02/04/2020	511	37.8

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

What is public service broadcasting?

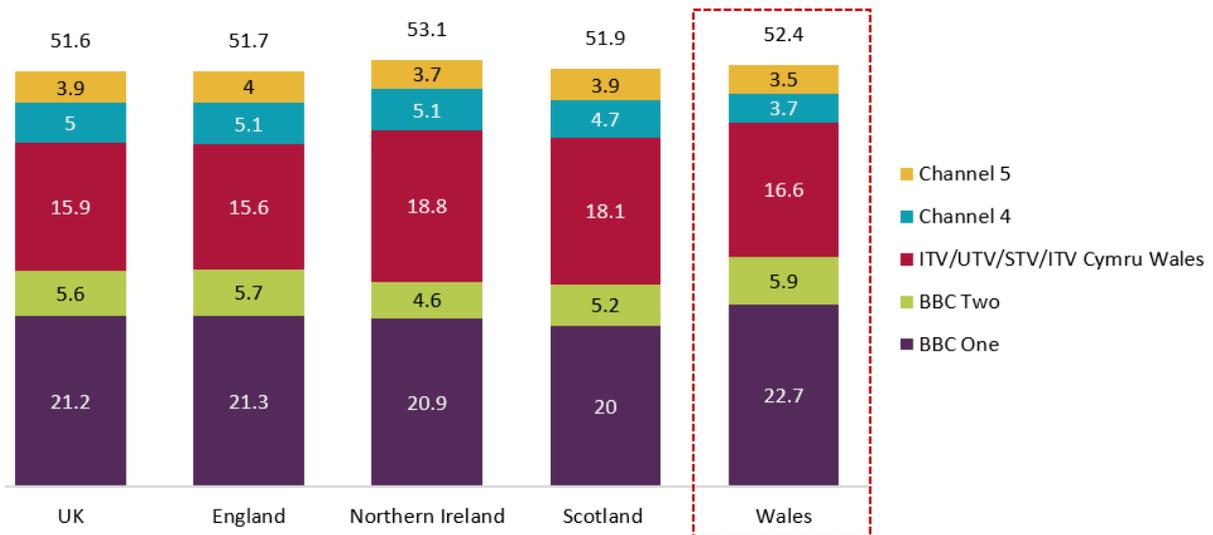
Public service broadcasting is provided in Wales by the BBC, ITV (holder of the Channel 3 licence in Wales), S4C, Channel 4 Corporation (C4C) and Channel 5. While all the BBC and S4C television services are PSB, only the main channels of the other broadcasters are. In return for providing PSB services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

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

The five main PSB channels in Wales had a combined share of 52.4% of the total broadcast TV audience in Wales in 2020, the highest of the UK nations. This was also higher than in any other UK nation when including BBC portfolio channels and S4C – 57.1% in 2020.

The PSB share in Wales Ireland has increased since 2019, when the main five PSBs achieved a share of 51.7%. BBC One had the highest audience share of any individual PSB channel at 22.7%; this was higher than BBC One's share in the other nations.

Figure 10: Percentage share of total TV viewing in the nations of the UK for the five main PSB channels: 2020



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

Light entertainment

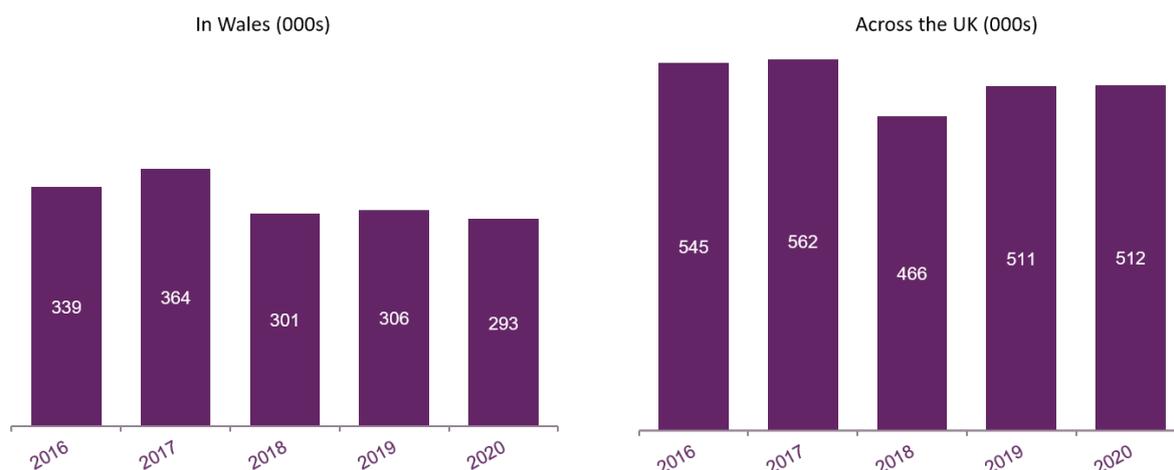
A couple living in Aberhosan in Powys made headline news in September last year. There had been a broadband outage in the village at 7am every day for the past 18 months, and despite numerous attempts, engineers had been unable to resolve the issue. An investigation revealed a burst of electrical interference in the village at 7:00 each day which was traced to a property in the village. It was then found that the elderly couple switched on their old TV set at that time every day to watch *Good Morning Britain*, thereby causing the broadband problem. The couple were offered a new HD TV so that they could continue watching *Good Morning Britain*.

S4C's reach fell in Wales, but increased slightly across the UK in 2020

The reach of Welsh language broadcaster S4C in Wales decreased in 2020, with an average of 293,000 viewers in Wales watching S4C on television for at least three consecutive minutes in a typical week. This is a 4.3% decrease on 2019.

Across the UK, however, the channel's reach increased by 2% across the UK as a whole, with just over half a million viewers tuning into S4C in a typical week.

Figure 11: Average weekly reach (000s) of S4C, individuals: 2010-2020



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

Small Screen: Big Debate

The future of public service broadcasting remains the subject of great public and political interest in Wales. Engagement from stakeholders with our Small Screen: Big Debate consultation has conveyed a widely-held view that public service media (PSM) content made in Wales for Welsh audiences in both languages needs to be not only safeguarded but enhanced.

Small Screen: Big Debate has already been the subject of discussion by Members of the Senedd, members of Ofcom's Advisory Committee for Wales and the PSM providers – S4C, BBC Cymru/Wales and ITV Cymru Wales. The Welsh Parliament's Culture, Welsh Language and Communications Committee took evidence on Small Screen: Big Debate from Ofcom colleagues and the Chair of the Advisory Committee for Wales. The Ofcom Wales team has hosted a range of events to capture the views of stakeholders in Wales. The future of public service broadcasting in Wales featured prominently in evidence sessions by the broadcasters to the Welsh Parliament's Culture, Welsh Language and Communications Committee's [inquiry into the COVID-19 outbreak and its impact on culture, the creative industries, heritage, communications and sport](#).

S4C's position on Virgin EPG in Wales

S4C's position on Virgin's EPG in Wales was changed from 166 to 104 in January 2021⁷, a welcome enhancement to its prominence and matching its higher position on Freeview (SD) and DSat EPGs. The expectation was that a more conspicuous slot on the Virgin EPG's first page, among other PSBs in Wales, would enhance S4C's reach and hours of viewing in cable homes in Wales. According to S4C's own research, moving up the EPG has had a beneficial effect on viewing patterns.

⁷ <https://www.s4c.cymru/en/press/post/41174/s4c-moves-to-channel-104-on-virgin-media-in-wales/>

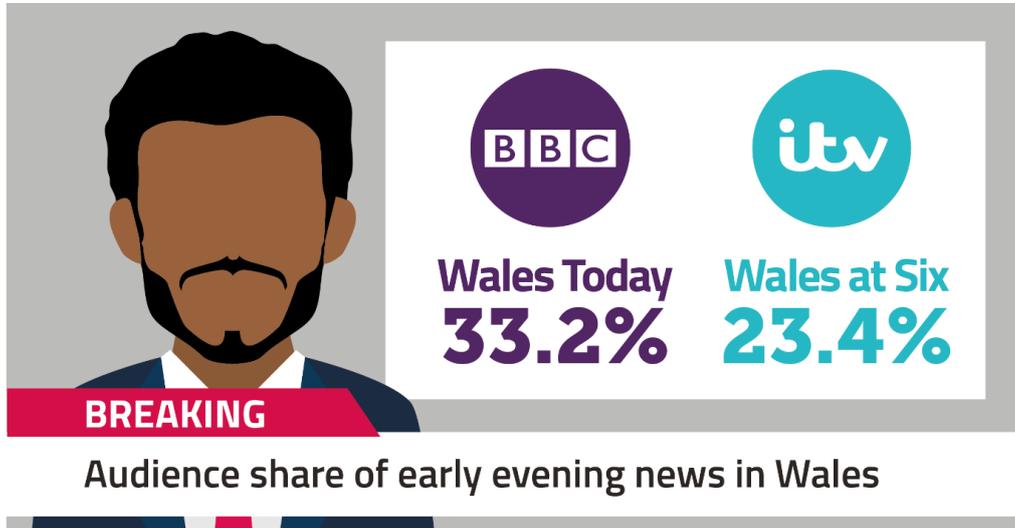
Around 210,000 people, or 8% of people aged 4+ in Wales, live in homes served by Virgin cable. Within such homes, S4C's weekly reach in 2020 was 8,000, which at 4% was considerably lower than S4C's average weekly reach (10%) among all people in Wales. In the first half of 2021, however, S4C's weekly reach in cable homes has more than doubled to 19,000, or 9% of people in cable homes in Wales. This is only slightly lower than the 11% reach for S4C across Wales in the first six months of 2021. Over the same period, hours of viewing to S4C in cable homes increased by about 75%. While this is not quite as much of an increase as the doubling seen for weekly reach, it still represents an acceleration from previous levels.

Cable homes in Wales generally have a younger age profile than homes with Freeview and tend to be located in less Welsh-speaking, urban areas. This has enabled S4C to expand its audience beyond its traditional core viewers in Wales. While S4C might well have increased its weekly reach in cable homes by about 1,000 in any case, matching the increase in reach in other homes in Wales, its higher EPG position in Wales could have resulted in about 10,000 additional viewers each week.

The pandemic led to a surge in news viewing

News viewing across the UK increased in 2020, as the public sought information on the unfolding pandemic and changing government restrictions. In Wales, the average audience share of BBC One's evening news bulletin, *Wales Today*, was 33.2%, up from 25.5% in 2019. Meanwhile, the average audience share of viewing of ITV's *Wales at Six* was 23.4%, up from 21.7% in 2019.

Figure 12: Audience share % of BBC One Wales' and ITV Cymru Wales' early evening news: 2020



Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures run by programme title, weekdays and include the +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's UK-wide evening news had a higher audience share in Wales than in other nations

The BBC's UK-wide early evening news bulletin, *BBC News at Six*, gained an average audience share of 33.9%, higher than in any other UK nation. In contrast, the average audience share of the *ITV Evening News* in Wales was lower than the UK average in 2020, at 20.4%.

News, and new services

In April 2021, S4C increased its news provision, employing its own journalists for the first time, and creating its own digital news service.⁸ S4C's news app was launched in partnership with the weekly magazine *Golwg*, *ITV Cymru Wales* and *BBC Cymru Wales*.

In response to the pandemic, and the associated need for news and information on Covid-19, the Welsh Government's press conferences were streamed live on S4C News' Facebook page. This attracted 3.7 million viewing sessions on S4C News' Twitter and Facebook accounts in 2020/21 – an increase of 388% on the previous year and a 735% increase in hours watched. It also involved the production of original news stories and re-packaged content from S4C's news programme.

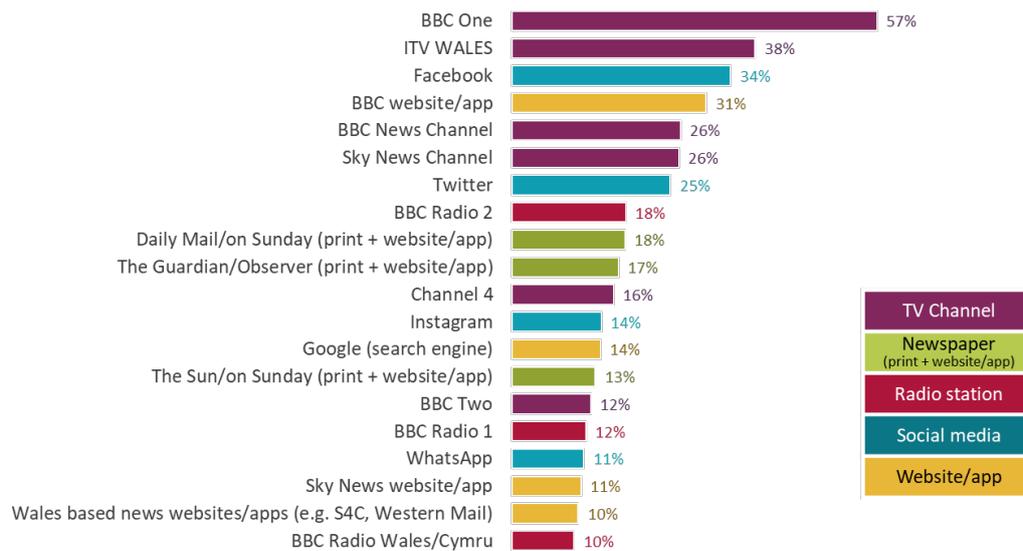
To support Welsh-language education and learning, in January 2021 more than 80 hours of educational programmes for children were provided to the Welsh Government's Hwb, and support was given to the BBC's Bitesize programming on TV. This educational provision on Hwb is planned to increase. A trial of local television has been launched in partnership with *Teli Môn*, and two other pilot schemes, in Carmarthenshire and north east Wales, are now under way, as S4C gauges audience appetite for local content in Welsh.

TV is the most-used source of news for people in Wales

Three-fifths of adults in Wales (57%) use BBC One for news, two-fifths (38%) use *ITV Wales* and a third (34%) use Facebook and/or the BBC website/app (31%).

⁸ <https://www.s4c.cymru/en/press/post/42660/s4c-launches-new-digital-news-service/>

Figure 13: Top 20 sources of news in general in Wales: 2021



Source: Ofcom News Consumption Survey 2021 - online sample only. Base: All adults 16+ in Wales – 2021=252
 *2020 data not shown as sample size too low. Note: data are not comparable to data in previous nations' reports, due to Covid-19 enforced methodological changes.

Two in five 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. Two in five adults who follow news claim to be 'very interested' in news about Wales (41%), rising to 87% who are 'very' or 'quite' interested.

As shown below, adults in Northern Ireland and Scotland are the most likely to say they are 'very interested' in news about their nation, whereas those in England and Wales are more likely to be 'quite interested'.

Figure 14: Level of interest in news about own nation, by nation: 2021



Source: Ofcom News Consumption Survey 2021 – combined CATI and online sample. Base: All adults 16+ who follow news in 2021 - Total=4499, England=3046, Scotland=518, Wales=466, Northern Ireland=469. Note: data are not comparable to data in previous nations' reports, due to Covid-19 enforced methodological changes.

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

Network news and current affairs coverage of events in Wales has long been regarded as deficient by many politicians, academics, commentators and think-tanks in Wales. Much of this has centred around concern about a lack of coverage of Wales' progress in policy development and implementation, in comparison to England. Such examples have included the establishment of a Children's Commissioner, presumed consent on organ donation, the ban on smoking in public places, and the 5p charge for the use of plastic bags, all of which were introduced in Wales before England.

Industry commentators have also argued that networked news programming often reports the introduction of measures applicable only in England as if they apply across the whole of the UK. This is particularly the case in those policy areas where there is greatest divergence – health, education and social policy. The Covid-19 pandemic exacerbated this issue, with commentators arguing that various network news programmes often failed to distinguish between measures that are relevant in England and in other parts of the UK.

The Broadcasting Code requires that network news and current affairs programmes present information accurately: failure to explain which measures are applicable where is regarded as a breach of the Code. In its letter to broadcasters on 22 May 2020, Ofcom included the following text:

In particular, we strongly advise you to take particular care when broadcasting, for example:

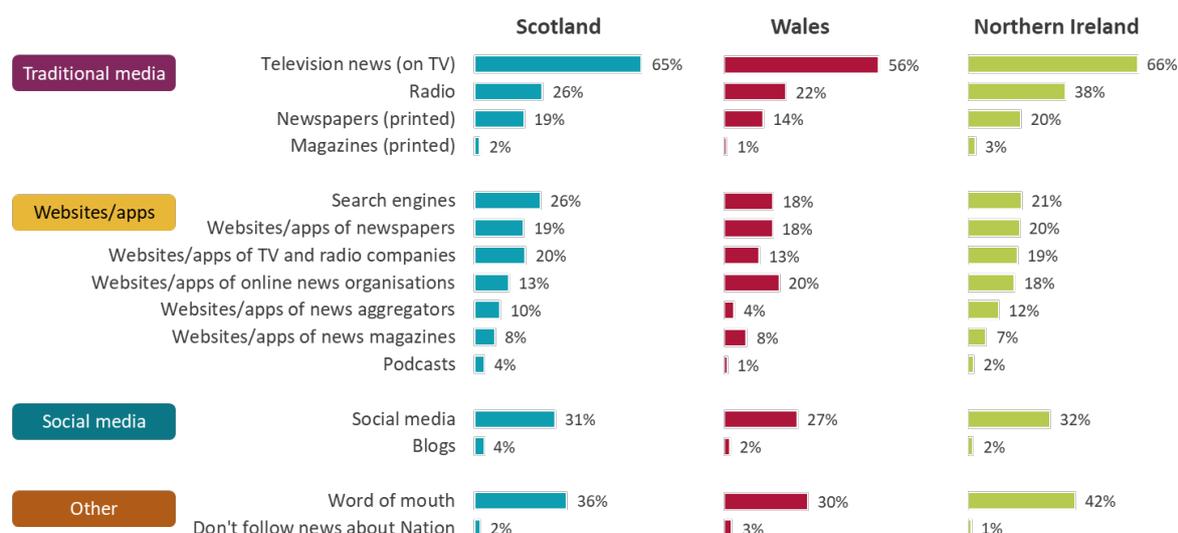
- *statements about public health advice on the Coronavirus which may not apply to all four nations in the UK, given the variations in official guidance between the nations. Care should be taken to ensure that viewers and listeners are made aware in an appropriate manner of the different approaches taken by public authorities in England, Wales, Scotland and/or Northern Ireland in areas such as social distancing requirements.*

Ofcom subsequently commissioned the School of Journalism, Media and Culture at Cardiff University to undertake research on 'Devolved Issues on Network News'.

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 across the nations; 22% of adults in Wales reported using the radio as a news source, compared to 38% in Northern Ireland.

Figure 15: Platforms used to access news about own nation, by nation: 2021



Source: Ofcom News Consumption Survey 2021 – combined CATI and online sample. Base: All adults 16+ who follow news – Scotland=518, Wales=466, N Ireland=469. Note: data are not comparable to data in previous nations’ reports, due to Covid-19 enforced methodological changes.

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

BBC One (33%) and ITV Wales (25%) are the first and second most-used sources for news about the nation, followed by Facebook (18%) and the BBC website/app (17%). Eleven per cent of people in Wales used any Wales-based news site/app for news about their nation.

Figure 16: Sources used to access news about own nation: 2021

England		Scotland		Wales		Northern Ireland	
BBC One	33% ▼	STV	36%	BBC One	33%	UTV	50%
ITV	20% ▼	BBC One	26%	ITV WALES	25%	BBC One	45%
Facebook	15%	BBC website/app	22%	Facebook	18%	BBC website/app	26%
BBC website/app	13% ▲	Facebook	20%	BBC website/app	17%	Facebook	26%
		Twitter	15% ▲	Any Wales based news site/app	11%	BBC Radio Ulster/Foyle	14%
		BBC Scotland TV	12% ▼	BBC Radio Wales/Cymru	8%	Any NI based daily newspaper	13%
		Google (search engine)	11%	Twitter	8%	Cool FM	13%
		BBC Radio Scotland	9%			U105	12%
		Any Scotland based daily paper	8%			Any NI based news website/app	12%
						Twitter	10%
						BBC News Channel	9%
						The Belfast Telegraph	7%
						Google (search engine)	7%
Don't follow Nation news	6%	Don't follow Nation news	3%	Don't follow Nation news	3%	Don't follow Nation news	0%

Source: Ofcom News Consumption Survey 2021 – online sample only. Green/red triangles indicate statistically significant differences between 2021 and 2020 online samples. Base: All adults 16+ using TV/newspapers/radio/internet/magazines for news - England=2408, Scotland=290, Wales=242, Northern Ireland=243. Only sources with an incidence of >6% in each nation are shown. Note: data not comparable to data in previous nations’ reports, due to Covid-19 enforced methodological changes.

TV programming for and from Wales

Introduction

The pandemic has had marked effects on content investment and production across the UK. Social distancing restrictions first stopped content production, and then increased costs once production resumed. This has had an impact both on broadcasters and on commissioners seeking to maintain content pipelines, and on producers ensuring productions can continue in a Covid-safe manner.

Unsurprisingly, growth in the production sector slowed in 2020, but overall the industry looks well-placed to recover. However, the pandemic is likely to exacerbate some already existing trends in the sector, such as inflationary production costs, revenue challenges for the UK's public service broadcasters, and consolidation in the independent production sector.

For production in the nations and regions, restrictions meant that some productions could not take place during lockdown measures, or were delayed. This impacted some of the broadcasters' regional production targets for 2020, such as ITV's weekly hours of non-network programming for Wales. More information on broadcaster performance against these quotas can be found in Ofcom's PSB Annual Compliance Report.⁹

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 22% decrease in spending on first-run content for viewers in Wales in 2020, with spend on non-news/non-current affairs decreasing the most at 30%. Non-news/non-current affairs accounts for the largest share of first-run spend (50%) in Wales.

BBC hours of first-run content in Wales dropped by 2% in 2020 to 616 hours. Overall, news content makes up the largest amount of the BBC's output for Wales, comprising 61% of first-run hours.

Wales is an important source of production for PSB content shown across the UK. Some 7.5% of qualifying network spend on the PSB channels was on Wales-based productions in 2020.

⁹ <https://www.ofcom.org.uk/tv-radio-and-on-demand/information-for-industry/public-service-broadcasting>

S4C – Sianel Pedwar Cymru

S4C is a unique public service that provides audio-visual content in Welsh on television and through other digital platforms. 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, tastes and genre preference.

S4C tries to make sure that it meets the needs of all communities in Wales. During this year, it employed its first Diversity and Inclusion Officer to ensure that S4C and its supply chain sector reflect the whole of Wales. S4C supports Ofcom's work on diversity in the sector and works closely with its inclusion team.

At the beginning of the year, S4C's distribution services moved to BBC Cymru Wales' new Central Square complex in Cardiff. Broadcast feeds for all platforms are distributed from here, as is S4C's online player, Clic. The first content to be transmitted was S4C's children's service, Cyw, and coverage of the 2021 Senedd elections was also hosted from Central Square.

S4C currently receives £74.5m from the licence fee, £6.85m from the Department for Digital, Culture, Media and Sport (DCMS) and a small amount of commercial income. Following the recommendations of a UK Government-sponsored independent review in 2019, from 2022 onwards all of S4C's public funding will come from the licence fee. This is the first time that S4C has had to apply for long-term funding from a single source such as this. It has submitted a plan to DCMS to enable further investment in its digital output, and to expand its services in a way that will secure the future of the Welsh language across global platforms.

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 2020 terms.

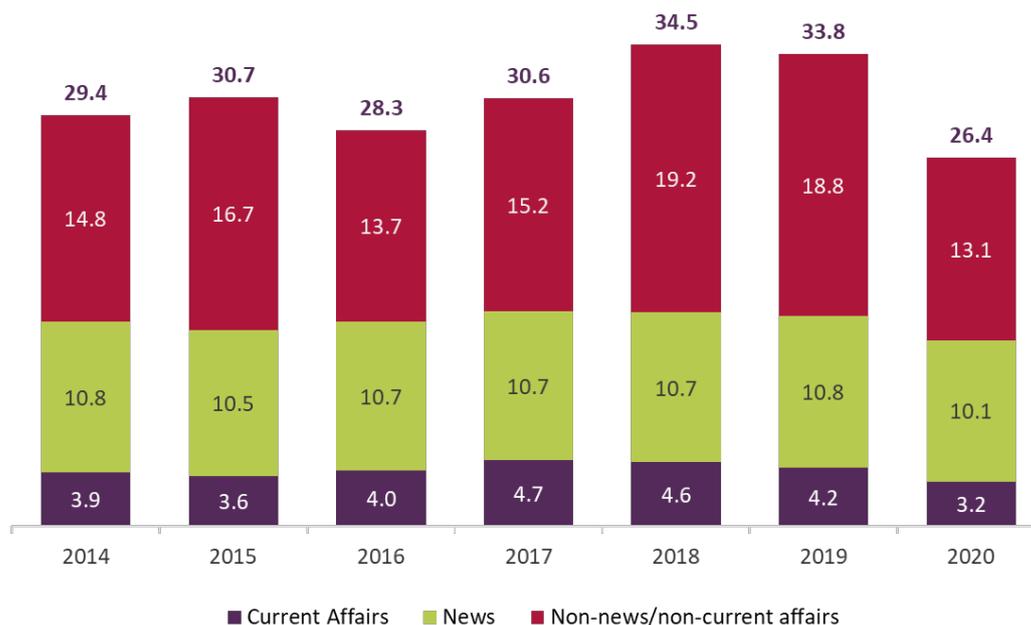
Spend on programming for Wales

PSB spend on first-run content for Wales fell across all genres in 2020

There was a 22% decrease in spending on first-run content for viewers in Wales in 2020. Of the total £26.4m spend, the majority went towards non-news/non-current affairs, at £13.1m.

Non-news/non-current affairs had the largest relative decline in first-run spend, decreasing by 30% year on year to £13.1m. PSB spend on news programming for Wales fell by just 7%.

Figure 17: PSB spend on first-run UK-originated content for Wales, by genre (£m)



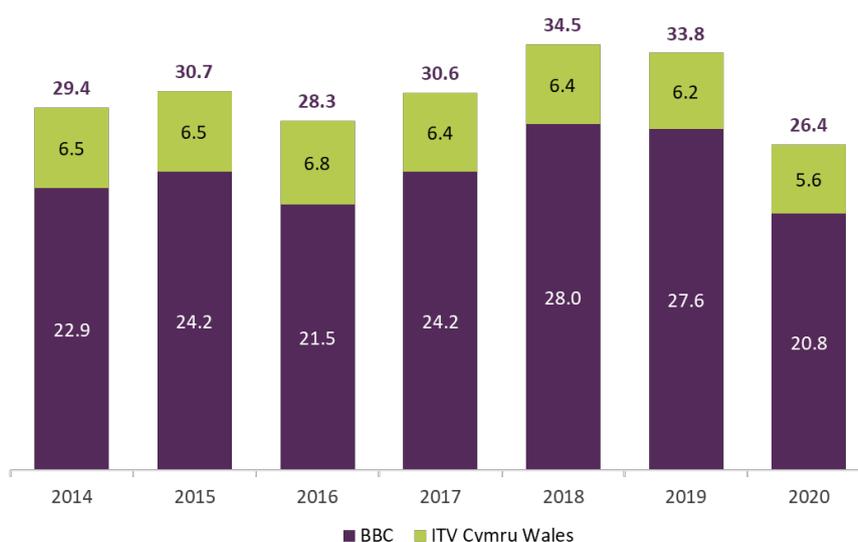
Source: Ofcom/broadcasters. Note: Figures are expressed in 2020 prices. Excludes spend on S4C output.

BBC and ITV Cymru Wales spend on first-run content for Wales fell in 2020

The decrease in spend on first-run content is driven by the BBC, whose spend for Wales fell by 25% since 2019. In monetary terms, this is a decline of £6.6m to £20.8m.

Spend by ITV on first-run content for Wales also decreased in 2020, down by 9%.

Figure 18: BBC and ITV Cymru Wales spend on non-network first-run UK-originated content for Wales (£m)



Source: Ofcom/broadcasters. Note: Figures are expressed in 2020 prices. Excludes spend on S4C output.

Local programming requirements / commitments

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

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

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

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

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

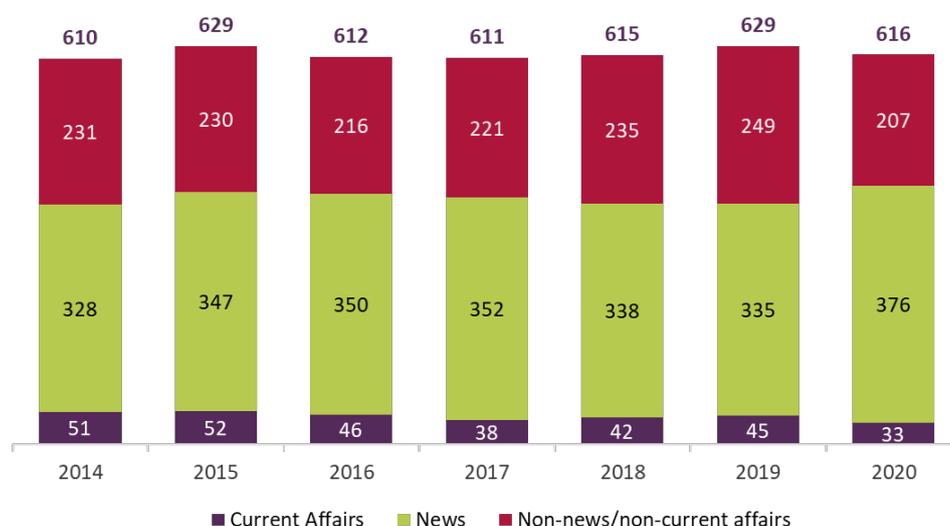
- in respect of BBC One Cymru Wales, at least 275 hours are allocated to news and current affairs programmes; and at least 65 hours are allocated to non-news programmes;
- in respect of BBC Two Cymru Wales, at least 175 hours are allocated to non-news programmes; and
- in respect of BBC One Cymru Wales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

BBC hours of first-run content in Wales dropped by 2% in 2020 to 616 hours

The decline in hours has been driven by current affairs and non-news/non-current affairs. The largest decrease has been for current affairs, dropping by 12 hours to reach 33 hours (27%).

Overall, news content makes up the largest amount of the BBC's output for Wales, comprising 61% of first-run hours, up from 53% in 2019.

Figure 19: BBC hours of first-run UK-originated content for Wales, by genre



Source: Ofcom/broadcasters.

BBC Cymru Wales

In March 2021, the BBC announced a six-year plan to strengthen its presence across all four nations, with 20 network drama and comedy series to be set in Wales, Scotland and Northern Ireland over the next three years. The majority of the BBC network TV production will be produced outside London (at least 60% by 2027) and the BBC has stated that over the next six years it will use online personalisation to ensure that Welsh language content is more prominent and easier to access. In addition, Wales will become the BBC's centre for excellence for climate and science journalism.

Throughout April and early May, news teams provided comprehensive coverage and scrutiny of the Senedd elections for audiences in Wales and across the rest of the UK. The BBC's TV election results coverage in Wales attracted an audience of about 1.2 million individuals over the election weekend, nearly half the adult population in Wales (47%). Traffic to BBC Wales News online content over the election weekend peaked at 1 million unique browsers on Saturday 8 May.

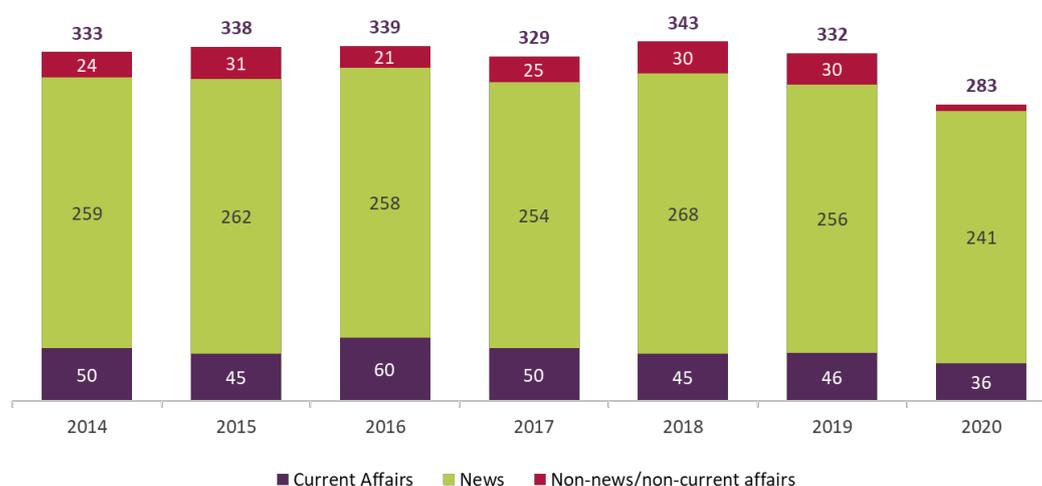
The Director of BBC Cymru Wales, Rhodri Talfan Davies, has been appointed the BBC's director of nations, with responsibility for leading all work serving nations and local audiences across Scotland, Wales, England and Northern Ireland. Davies will report to director-general Tim Davie and join the new, smaller executive committee, but will continue as director of BBC Wales alongside his new role. Rhuanedd Richards has been appointed Director of Content and Services and will oversee the development of all programming and content across TV, radio and online, in both Welsh and English.

ITV Cymru Wales hours of first-run content for Wales have fallen year on year, with 283 hours of programme output in 2020

Most of ITV Cymru Wales output is news content, comprising 85% (241 hours) of first-run programming on the channel.

The decrease in hours has been across all genres. The largest fall has been for non-news/non-current affairs, dropping by 24 hours to reach six hours (80%).

Figure 20: ITV Cymru Wales hours of first-run UK-originated content for Wales, by genre



Source: Ofcom/broadcasters.

ITV Cymru Wales

ITV's three-part true crime mini-series *Pembrokeshire Murders*, broadcast in early January 2021 proved a ratings success. The launch episode was watched by 11.2 million people in the first week of broadcast – the biggest new ITV drama launch since *Lewis* in 2006. With a consolidated 37.4% share for the premiere, it was double ITV's Monday 9pm slot average (18.7%). The drama was based on a book co-authored by ITV Cymru Wales journalist and presenter Jonathan Hill, and this led to the commissioning of the network drama. It was made by World Productions, part of ITV Studios, in association with Cardiff-based Severn Screen. The drama, distributed internationally by ITV Studios, has, at the last count, been bought by almost 30 territories worldwide. The inside story of the investigation was told through a network documentary produced by ITV Wales, *The Pembrokeshire Murders: Catching the Gameshow Killer*. It told a uniquely Welsh story for a UK audience and brought in a consolidated audience of 5.7 million viewers, the biggest crime factual audience since 2013. ITV played an important role in the investigation, working in co-operation with Dyfed-Powys Police on the release of information regarding the investigation, and in providing crucial evidence from the game show *Bullseye* on which the main suspect had appeared days before he murdered two holidaymakers in Milford Haven.

The 2021 Senedd Election was an election like no other, given the Covid restrictions under which ITV Wales journalists were operating. It dominated the channel's news output and ITV Wales' programming schedule in April and early May, much of it under the banner *Wales Decides*. Political Editor Adrian Masters fronted *Wales Decides: The ITV Debate*, an hour-long live, prime-time special broadcast, as well as four prime-time programmes profiling the party leaders. Other highlights included three special *Wales Decides* constituency profiles, presented by Rob Osborne, and five episodes of the Welsh language political programme *Y Byd yn ei Le* with Guto Harri on S4C. Election results were carried live on Friday 7 May from many of the key constituencies and counts, in four hours of special programming, and across the day on the ITV Wales website and social media channels.

ITV Cymru Wales provides a variety of current affairs and factual content for S4C, ranging from long-running series such as the investigative programme *Y Byd Ar Bedwar* to short-form reactive digital content such as Grid for the Hansh platform. Annually, ITV acquires about 30 hours of Dim content from S4C, alongside the hours secured by the ITV Studios company Boom Cymru. ITV Cymru Wales became a partner of S4C's news app and website in April 2021, helping to provide vital plurality to this service. The production team shares and packages ITV Wales news content every day in Welsh for S4C's digital service, illustrating its success in creating new content for new audiences on new platforms. The news app already has a strong following and has received 3.7 million views.

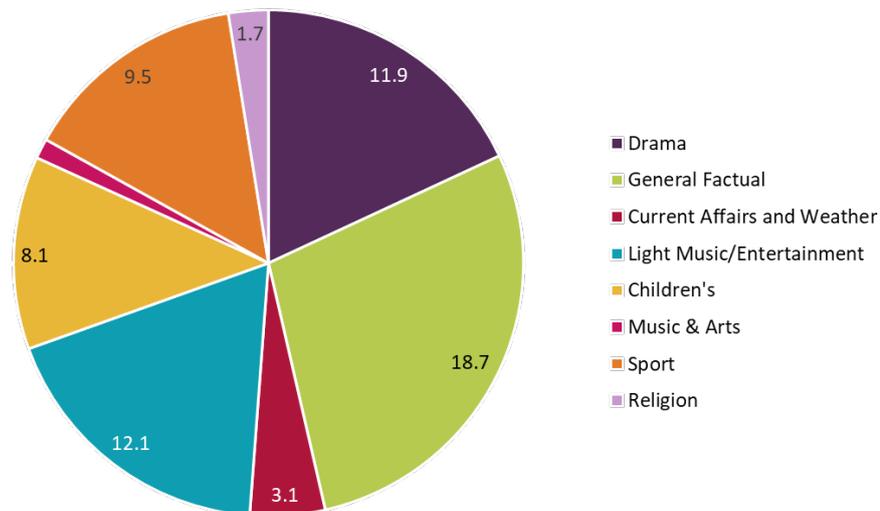
For the past three years, ITV Cymru Wales has partnered with S4C in a journalist traineeship scheme to help two young journalists develop a career through the medium of the Welsh language. The trainees create bespoke digital current affairs content for the Hansh, under the Sbin brand, mainly on Twitter, Instagram and TikTok. The bespoke coverage produced by the team for the Senedd election in May 2021 was highly successful in providing simple, educational and engaging content for young voters, while also filling a gap in the public service remit for young people in Wales. The team also secured funding from the BFI's Young Audiences Content Fund to produce *Taswn i'n Brif Weinidog Cymru* (If I was the First Minister of Wales) and a range of content aimed at new 16- and 17-year-old voters.

S4C spent £66m on first-run commissions broadcast in 2020-21, across eight genres

The majority of spend went towards general factual (£18.7m) programming, followed by light music/entertainment (£12.1m) and drama (£11.9m), comprising over half of the total S4C spend on first-run commissions.

A significant amount of spend also went towards sport (£9.5m), with the remainder funding content in the children's, current affairs and weather, religion, and music and arts genres.

Figure 21: S4C spend on first-run commissions: 2020-21 (£m)



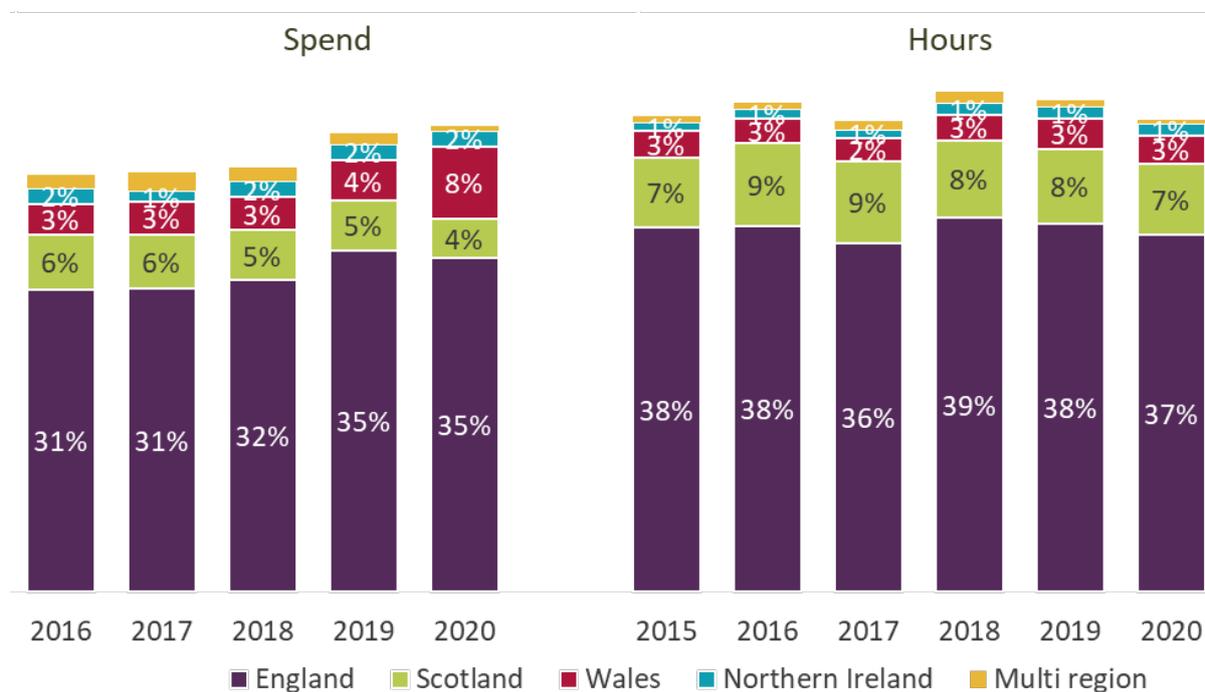
Source: Ofcom/broadcasters. Note: Figures are expressed in 2020 prices.

Network content produced in Wales

Public service broadcasters producing and commissioning programmes to be first broadcast on their network TV channels must make sure these programmes are made in a range of places around the UK. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours and 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, 7.5% of qualifying first-run network spend was allocated to programmes qualifying as Wales productions, and 2.9% of hours.

Figure 22: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2016-2020



Source: Broadcasters / Ofcom.

Creative Wales

Creative Wales is an internal Welsh Government agency which supports the development of the fast-growing, sustainable and inclusive creative industries in Wales. Its mission is to support home-grown talent and attract international creative projects through funding, providing specialist services and signposting to the choice of facilities, skilled crew and talent that exists across Wales. In doing so, it is strengthening the industry in the long term and creating opportunities for future generations.

Now in its second year, Creative Wales continues to work closely with creatives across the screen, music, digital and skills sectors, offering businesses emergency and development funding and high-level Welsh Government guidance and support. The delivery of the first phase of the Cultural Recovery Fund supported 646 businesses and 3,500 individuals with funding of £63m. In early 2021, an extension to the Cultural Recovery Fund to the value of up to £30m was announced, offering extra financial support to organisations and freelancers as they continue to adapt and respond to the challenges they face following the pandemic.

The screen and digital sectors in Wales have had significant successes recently, including the development of *Fix Up The City*, an augmented reality experience using the latest creative tech, and an impressive slate of high-profile TV and film productions currently being made in Wales including *Havoc*, a film for Netflix starring Tom Hardy and Forest Whitaker; the third series of *His Dark Materials* created by Bad Wolf Studios, and *Willow*, a fantasy TV series by LucasFilm for Disney+.

As the industry moves into a period of recovery, more opportunities are created for the industry. A recent report published by Clwstwr shows that Cardiff is the third largest TV and film production hub, closely behind Manchester and London, and the screen sector in Wales as a whole is busier than it has ever been.¹⁰

Creative Wales is moving into a new era, with a focus on promoting inclusivity and diversity across the industry, to ensure that there are exciting opportunities for creatives to develop their skills and talent. A programme of development funding will be rolled out via Creative Wales over the coming months to support new projects. Creative Wales will also play an important role in the Festival UK 2022 (working title) programme of events, supporting National Theatre Wales' Collective Cymru commission as it represents Wales on the global stage.

S4C's contribution to the economy

During the pandemic, S4C helped the creative economy in Wales as it sought to support the livelihoods of workers in the sector across the nation. Independent economic research by Arad Research, published in April 2021, details the impact S4C has had on the Carmarthen area since moving its headquarters to the 'Yr Egin' centre at the University of Trinity St David's. According to Arad's research, S4C produced an economic impact of £197.4m on the UK economy in 2019-20.¹¹ For every £1 of income received by S4C, an economic impact of £2.03 was produced, with the majority of this in Wales. Additionally, S4C's expenditure generated further demand and employment, supporting about 2,334 workers and freelancers in the United Kingdom, of whom an estimated 2,229 were based in Wales and 245 in Carmarthenshire.

PSBs have reduced the proportion of their network content made in Wales, but spend increased compared to 2019

When taken as a whole, PSBs' proportion of qualifying hours made in Wales reduced in 2020, down from 3.2% in 2019 to 2.9%. However, spend on qualifying productions made in Wales increased, from 4.2% to 7.5%. This was largely driven by an increase in spend in Wales from ITV, mainly coming from the relocation of *I'm a Celebrity ... Get me out of Here!*.

Alongside the other PSBs, the BBC, which is generally responsible for the majority of qualifying network content made in Wales, maintained the proportion of its network spend in Wales at 8.2% in 2020, while the proportion of hours reduced to 4.6%.

The BBC continues to make drama series in Wales, including *Doctor Who* and *His Dark Materials*, the second series of which was broadcast in 2020. New titles in 2020 filmed in Wales included specialist factual titles, such as *Our Finest Hours*, and music programmes, such as *Annie Nightingale: Bird on the Wireless*.

Figure 23: Proportion of qualifying network production in Wales, by PSB: 2016-2020

		2016	2017	2018	2019	2020
BBC	Spend (%)	5.8	6.7	6.3	8.2	8.2
	Hours (%)	4.3	4.4	4.6	5.4	4.6
ITV	Spend (%)	0.1	0.01	0.01	0.1	6.6
	Hours (%)	0.1	0.1	0.1	0.1	1.1
Channel 4	Spend (%)	2.8	2.2	3.4	2.4	2.3
	Hours (%)	2.4	2.7	4.2	4.6	4.3
Channel 5	Spend (%)	0.3	0.4	0.2	1.4	0.3
	Hours (%)	0.4	0.5	0.2	0.5	0.3

Source: Broadcasters / Ofcom.

¹⁰ (Clwstwr Creative Industries Report No. 2: The media sector in the Cardiff Capital Region - driving economic growth through audiovisual activities | Clwstwr)

¹¹ <https://www.s4c.cymru/en/about-us/page/43160/publications/>

Exploring the devolution of broadcasting: how can Wales get the media it needs?

In March 2021 the Culture, Welsh Language and Communications Committee at the Senedd published the report *Exploring the devolution of broadcasting: how can Wales get the media it needs?* This report builds on previous reports, detailing five years of work in this area, together with its regular scrutiny of work undertaken with the BBC, S4C, Ofcom and others.

The main recommendations of the report included the need for greater broadcasting responsibilities for Wales; the establishment of an ongoing central fund to support news journalism, which is accountable and provided on an 'arm's-length' basis; devolution of powers to Wales over S4C; and other issues relating to public service broadcasting in the Welsh language.

Radio and audio

Introduction

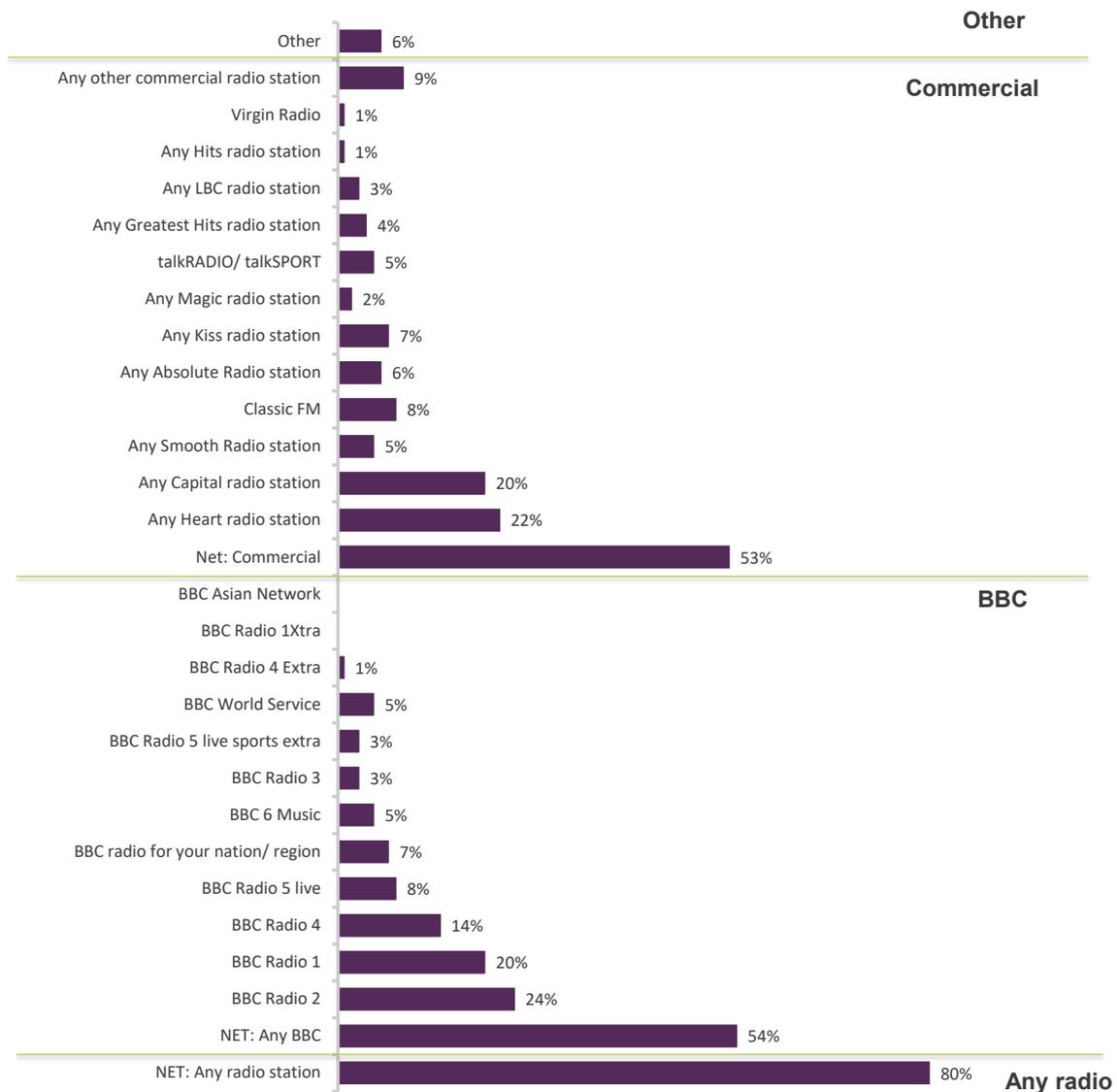
Due to the coronavirus pandemic and ensuing restrictions, the radio industry measurement body RAJAR suspended its fieldwork from the end of Q1 2020. As a result, we are unable to present the same extent of radio consumption data as in previous years. Instead, we have drawn from a range of Ofcom's own, syndicated and third-party consumer research to provide a snapshot of audio consumption in 2020, though it should be noted that these are not directly comparable to RAJAR.

Eight in ten people listen to the radio

Radio continues to be popular in Wales, with eight in ten people saying they had listened to the radio in the past week. BBC and commercial services are equally popular, each reaching just over half of all adults. UK-wide stations continue to fare well, with BBC Radio 2 being the most popular, according to research carried out in March 2021.

These findings are consistent with figures from previous years provided by RAJAR but which are unavailable this year for the reasons outlined above.

Figure 24: Weekly radio station reach in Wales: 2021

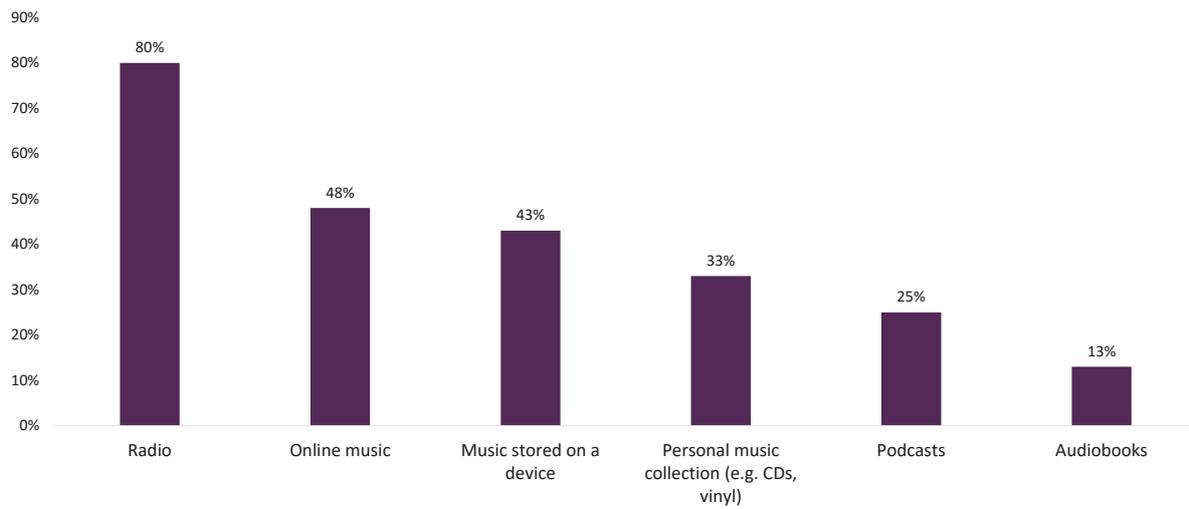


Source: Ofcom Audio Survey 2021. Q2. Which, if any, of these radio stations have you listened to in the last 7 days? n=2287. Base: UK online adults 16+, fieldwork 3-7 March 2021

One in four adults in Wales listen to podcasts

Listening to the radio is by far the most popular audio activity in Wales followed by listening to online music, done by less than half of adults in Wales each week. Podcasts are listened to by one in four adults in Wales each week.

Figure 25: Audio listened to each week in Wales

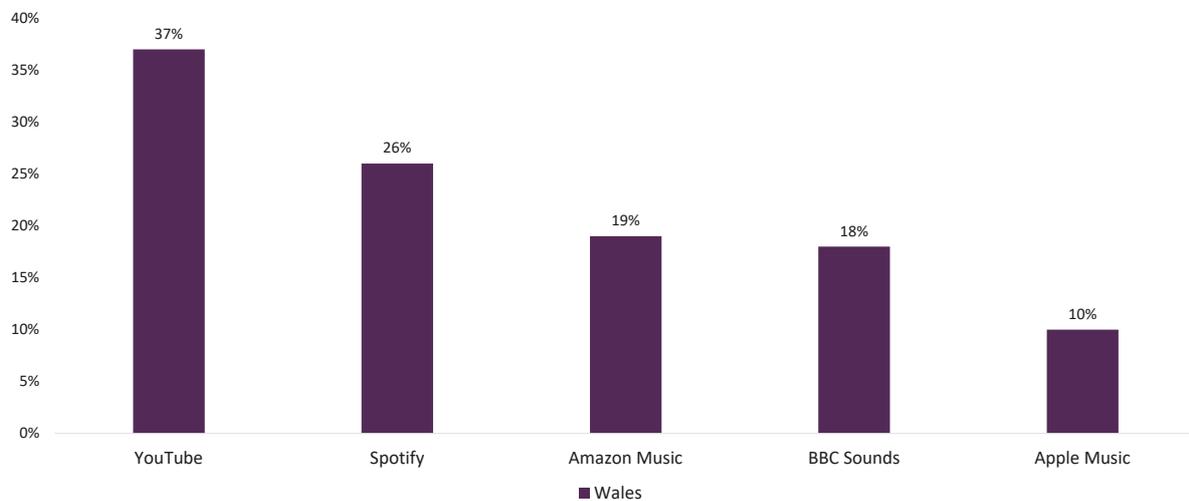


Source: Ofcom Audio Survey, March 2021.

Q1. How often, if at all, do you do any of the following? Q2. Which, if any, of these radio stations have you listened to in the last 7 days?.

YouTube is the most popular platform for listening to any online audio content, used by almost two-fifths of adults in Wales.

Figure 26: Platforms used weekly for any audio in Wales



Source: Ofcom Audio Survey, March 2021.

Ofcom awards first small-scale DAB radio multiplex licences for Wales

Cardiff and the Welsh Valleys will now be able to have a range of new radio services, following Ofcom's award of small-scale radio multiplex licences to Cardiff DAB Ltd and GTFM (South Wales) Ltd.

Small-scale DAB will expand local digital radio coverage and ensure that listeners in the area can tune into a diverse range of radio services on the digital audio broadcasting platform.

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

GTFM (South Wales) Ltd was awarded the licence to operate the multiplex for the Welsh Valleys in March 2021; Cardiff DAB Ltd was awarded the licence to operate the multiplex for Cardiff in May 2021. Successful applicants have 18 months from the date of the award to launch the service.

Multiplex licences are currently being advertised by Ofcom for Rhyl, Ruthin & Mold and Wrexham (the closing date for applications is 01 September). Multiplex licences will be advertised towards the end of the year for a further 25 locations across the UK, including Llandudno, Betws y Coed and Swansea.

A small-scale radio multiplex service can provide about ten stereo radio stations (and about 20 stereo services if DAB+ is used).

Nearly six in ten homes in Wales have smart speakers

A significant amount of new digital listening is done through smart speakers; nearly six in ten homes in Wales have them (57%). The Amazon Echo is by far the most popular type (found in 72% of homes in Wales which have a smart speaker).

The most-cited requests by users were to play music via a streaming service, such as on Spotify (70%), or to listen to a live radio station (61%). Around four in ten users in Wales use smart speakers to get weather reports (41%), while 36% use them to search for information, 35% as an alarm/personal reminder and 25% for news reports.

DAB radios are another important way for people to listen to radio – 40% of households in Wales have a DAB set in their home, compared to 39% in Scotland and 36% in Northern Ireland.¹²



¹² Ofcom Technology Tracker 2021

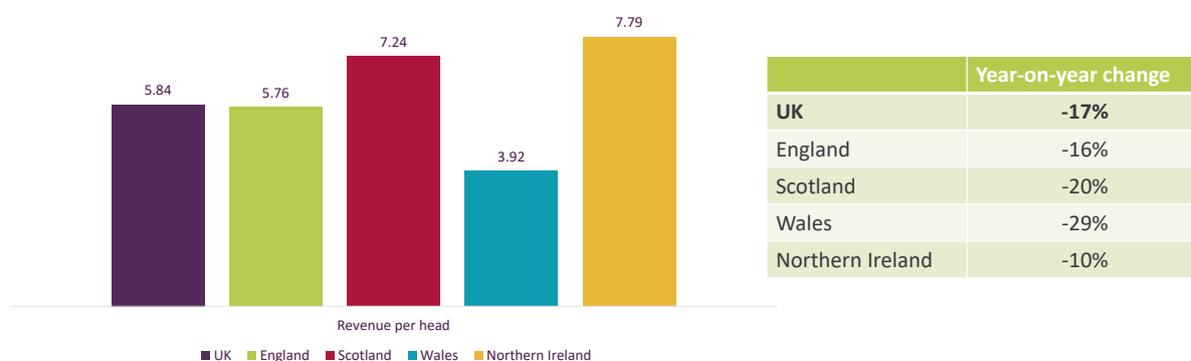
Community radio

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

Commercial radio revenue for local stations decreased by 29% in 2020

Local analogue commercial radio stations in Wales generated £3.92 per head of population in 2020, a fall of 29% on the previous year and the lowest of all the UK nations.

Figure 27: Local/commercial radio revenue: 2020



Source: Ofcom/broadcasters. NB: These figures solely relate to relevant turnover reported against analogue licences (local analogue commercial) and include local and national revenues and sponsorship i.e. not only revenue that relates to adverts aimed at the specific nation. YoY figures adjusted for CPI at 2020 prices.