



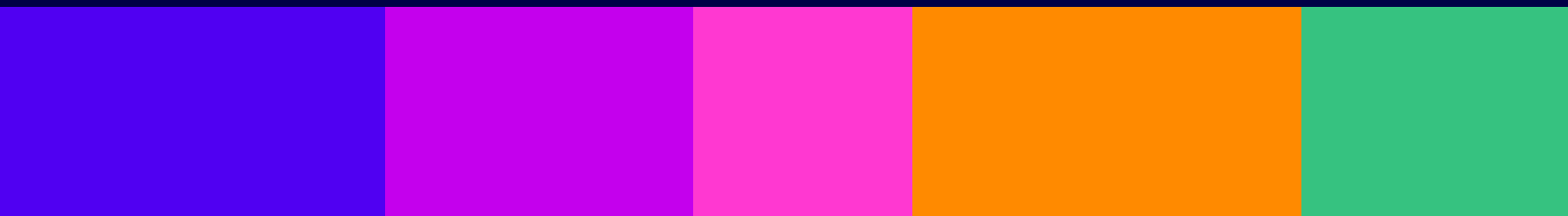
Media Nations

Wales 2024



Published 31 July 2024

[Welsh version available: Cyfryngau'r Genedl: Cymru 2024](#)



Contents

Overview	3
Introduction	3
Key findings	3
TV and video	4
Market developments	4
TV services and devices	6
Viewing trends	8
Video-on-demand viewing trends	15
News sources	18
TV programming for and from Wales	21
Radio and audio	26
Market developments	26
Radio availability and coverage	27
Commercial radio revenues	28
Live radio listening in Wales	29
Online listening in Wales	34

Overview

Introduction

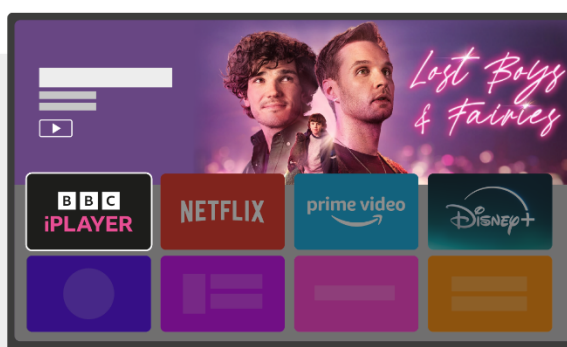
This *Media Nations: Wales* report reviews key trends in the media sector and sets out how audiences are served in Wales. We adopt a cross-platform perspective, reviewing broadcast TV and radio, as well as digital delivery, including online video and audio streaming.

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

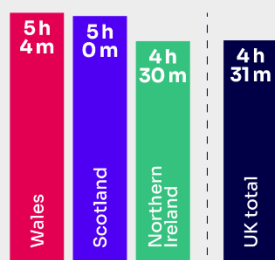
In addition to this Wales report, there are separate reports for the [UK](#) as a whole, [Northern Ireland](#), and [Scotland](#).

Key findings

The most-used PSB on-demand service was BBC iPlayer (65%)



Daily time spent watching video



Two international rugby games featured in the top 10 programmes in Wales in 2023

Rugby World Cup:
Wales v Australia
Six Nations:
Scotland v Wales



Weekly reach of radio in Wales was 89.2%



Almost a quarter of all radio listening in Wales was online (24.5%)



Sources used: Barb, RAJAR, Ofcom VoD Survey 2024 combined online and CATI.

TV and video

Market developments

Creative Wales

Creative Wales is the Welsh Government's agency tasked with supporting the growth of the creative industries in Wales. In May it announced the successful applicants of its £840,000 Development Fund, to support the development of new projects from Welsh creators, with the ambition of giving them a greater chance of being commissioned and produced. Among the recipients awarded funding are Carlam Ltd, Boom Cymru, Little Wander, Avalanche Productions, Hello Deer Studios Ltd and Rondo.

Future of public service broadcasting (PSB)

The future of public service broadcasting is a current topic of debate in Wales. Both the Welsh Affairs Committee in Westminster and the Senedd's Culture, Communications, Welsh Language, Sport and International Relations Committee conducted in-depth enquiries on broadcasting in Wales during the year, with Ofcom giving evidence to both the [Westminster](#) and [Senedd](#) committees. These contributed to the debate on the future of PSB in Wales.

In October 2023, the Welsh Affairs Committee published its [report](#) and concluded that while programmes made in Wales about Wales are vital, reform of PSB is crucial.

In March 2024, the Senedd Culture Committee published its report [State of Play: Broadcasting in Wales](#), following its enquiry into PSB. It too recognised the importance of broadcasting in portraying and shaping Welsh identity.

The Committee made a number of recommendations to Ofcom. In [response](#), we explained that we are soon to embark on the latest review of public service media (PSM). Our review will have a specific focus on what audiences value most, including their perceptions of news. It will also examine how to sustain PSM content over the next decade and beyond, and how PSM content reflects and represents all parts of the UK as audience viewing habits change.

More broadly, the Expert Panel established by the Welsh Government to explore the creation of a shadow Broadcasting and Communications Authority for Wales took evidence from a broad range of stakeholders, including Ofcom. It recommended that the Welsh Government establish an Advisory Body to provide further guidance on broadcasting and communications and to inform policy in Wales.

Media Act

During the year the UK Government's Media Bill passed through its scrutiny stages and received Royal Assent in May 2024. Among other provisions, the Act broadens S4C's remit to include digital and online services, allows S4C to offer its content on a range of platforms, and removes the geographical restrictions that have limited S4C's ability to provide services outside Wales. It also provides a statutory footing to the new unitary board and audit arrangements recommended by the independent review of S4C.

Welsh programme commissions in 2023

BBC Cymru Wales

Drama was a key feature of BBC Cymru Wales' output during this period, with five major titles broadcast on BBC One across the UK.

These programmes included *Steeltown Murders*, set in the Neath and Port Talbot areas, which attracted 5.7 million viewers across the UK. *Men Up* dramatised the trials of a male impotency drug in south Wales, while crime drama *Wolf* drew an audience of 4.1 million viewers across the UK. *The Way*, the directorial debut from actor Michael Sheen, also proved popular, while *Lost Boys and Fairies* delivered a memorable adoption story. BBC Cymru Wales' first co-commission with BBC Network, *Mammoth*, followed the story of PE teacher Tony Mammoth.

The Rugby World Cup was also covered by BBC Wales, with every Wales game available to listen to live on BBC Sounds, BBC Radio Wales and BBC Radio Cymru as well as the *Scrum V Rugby* podcast.

ITV Cymru Wales

Sport is a vital part of Welsh national identity and ITV Cymru Wales sought to bring people together around important sporting and cultural events such as the 2023 Men's Rugby World Cup. The tournament was made available to watch free of charge, and the Wales vs Argentina game drew a peak audience across the UK of 4.1 million, with 86% of the available TV audience in Wales watching the game on ITV.

Following ITV's 2022 launch of its new streaming service, ITVX, 2023 saw the launch of a dedicated ITV Cymru Wales 'rail' (content area) on the service, showcasing ITV Cymru Wales' programming, news and journalism to audiences in Wales and across the UK.

In early 2023 ITV Cymru Wales received a RTS Cymru Wales Award for Best Factual Programme for *Miscarriage: The Hidden Loss*. The programme was fronted by ITV Cymru Wales' *Wales at Six* presenter Andrea Byrne, who shared her own experience of miscarriage with the aim of breaking down some of the stigma which surrounds it.

The channel's long-standing current affairs series *Y Byd ar Bedwar* featured a number of investigations including a special investigation on the FIFA World Cup in Qatar.

S4C

S4C provides its audiences with Welsh-language content that reflects Wales in all its diversity.

Sport remains a cornerstone of S4C's services. Last autumn, S4C provided Welsh rugby fans with coverage of the 2023 Rugby World Cup in France, as well as free-to-air coverage of Wales women's matches throughout the WXV rugby competition.

While the Wales men's football team wasn't successful in reaching the UEFA European Championship in 2024, Welsh football fans were able to watch the qualification campaign in Welsh on S4C. S4C also continued to broadcast a range of other sports including the Tour de France, the World Rally Championship rallies, and the Welsh Triathlon Series.

S4C provided a number of drama series. These included the honest and blunt portrayal of motherhood in *Anfamol*, the trials and tribulations of prisoners and prison officers in *Bariau*, and the fragile world of mental health and grief in *Creisis*.

The co-production between S4C and BBC Cymru Wales, *Pren ar y Bryn* (*Tree on a Hill*), a dark comedy-drama, highlighted the commitment by both broadcasters to work together on creating

productions filmed back-to-back in Welsh and English. For S4C's younger audiences the mid-form drama series *Y Coridor* explored the mysterious disappearance of Willow, a secondary school pupil.

S4C's service for young children, Cyw, has continued to provide important opportunities to watch and enjoy learning about the world through the Welsh language, with series such as *Ne-wff-ion* and *Cywion Bach*. In the autumn, *Newyddion Ni* was launched, a new news programme for children and young people offering news and sports stories in an accessible way across a range of platforms.

Welsh learners are an important audience for S4C, and it provides a broad range of programmes including *Iaith ar Daith*, to help learn the language, and entertainment series like *Goglebocs Cymru* and *Am Dro!*, featuring clear and easy-to-follow language. S4C Clic, and the S4C Learn Welsh website offer suitable content suggestions, and these resources support both formal and informal language study.

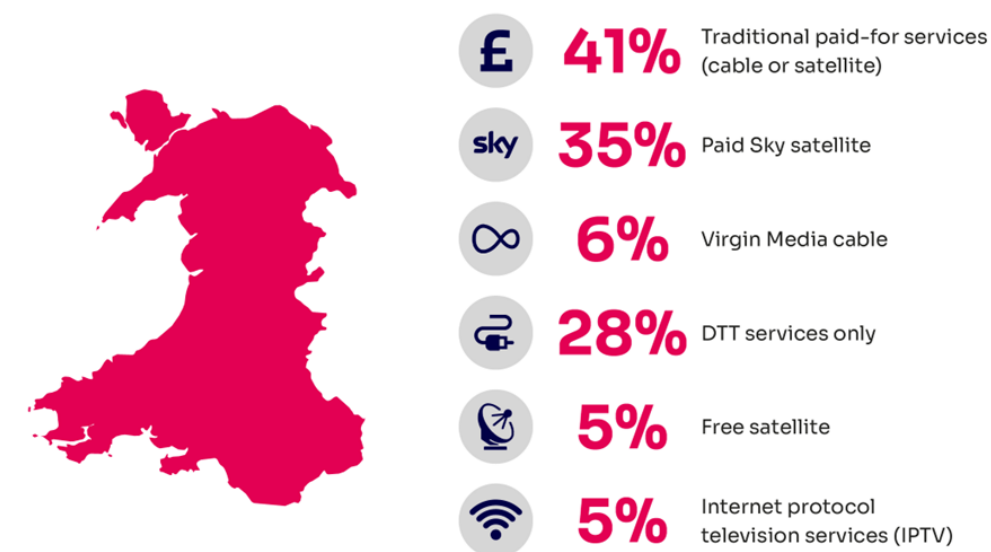
TV services and devices

Four in ten households in Wales received a paid-for TV service in Q1 2024

In Q1 2024 TV sets remained ubiquitous in households in Wales, with 96% having a TV set, higher than the UK average (94%). The number of households with traditional paid-for satellite or cable television remained stable year on year at 41%, compared to a decline of 3pp across the UK as a whole. Paid-for TV households remained dominated by paid satellite services, with 35% of households paying for a Sky subscription, stable since 2023.

Digital terrestrial (DTT) services only (delivered through an aerial) continued to be the primary means of subscription-free TV viewing, present in 28% of homes. Households receiving an internet protocol television service (IPTV) remained at 5% and those receiving free satellite services from Freesat or Sky fell from 7% to 5%, broadly in line with the UK average.

Figure 1: Take-up of TV platforms in Wales: Q1 2024



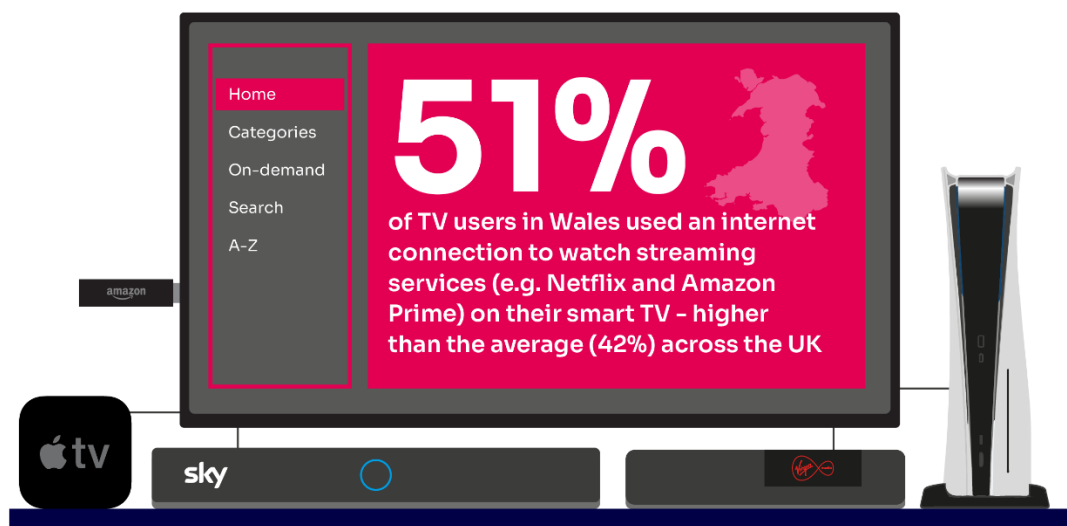
Source: Barb Establishment Survey Q1 2024. 'DTT services only' means households with an aerial only and not cable, satellite or IPTV. IPTV includes BT Vision, TalkTalk or YouView. In the 2023 report this included Plusnet – this service is no longer available and has been removed from the survey.

Eight in ten TV users in Wales had a connected TV in 2024

There are 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 Media or BT. External devices such as streaming sticks and games consoles can also provide internet access to TV sets.

Measured in the first half of 2024, eight in ten (84%) TV users in Wales with an internet connection at home had a connected TV, broadly in line with the UK average (73%). TV users in Wales were more likely to use an internet connection to watch streaming services (e.g. Netflix and Amazon Prime, often found on the menu or home screen) on their smart TV than in the UK overall (51% compared to 42%).

Figure 2: Connected TVs in Wales: 2024



Source: Ofcom Technology Tracker 2024. Question T6: Do you or does anyone in your household use the internet to watch content on your TV set using any of these methods?. Base: TV-watching households with an internet connection they use. Total UK (3,497), Northern Ireland (410), England (2192), Scotland (453) and Wales (442).

Broadband in Wales

More than nine in ten (93%) homes in Wales had an internet connection, as measured in the first half of 2024, while 87% had fixed broadband.¹ In 2023, superfast broadband services (offering download speeds of at least 30 Mbit/s) were available to 96% of all homes in Wales. Of these, seven in ten homes (73%) were using a superfast service, up from 71% in 2022. Full-fibre services were available in 55% of households in Wales in 2023, while take-up in those homes was 31%. Full-

¹ Ofcom Technology Tracker 2024.

fibre availability increased to 61% of households in Wales at the beginning of 2024.²

Viewing trends

Total in-home audiovisual viewing

Wales watched the most video content of all the nations in 2023

On average, people in Wales watched 5 hours 4 minutes of video content per day in 2023, the highest among the UK nations. This was 20 minutes more per day than in 2022, and a larger year-on-year increase than in any other nation. TV content from broadcasters – which includes live TV, recorded TV and broadcaster video-on-demand (BVoD) – accounted for 56% of this time (2 hours 51 minutes), on a par with Scotland. Within this, live viewing made up a smaller proportion compared to other UK nations (38%), and BVoD accounted for more viewing time than in other nations, at 26 minutes. People in Wales spent 16% (47 minutes) of their total video time on subscription video-on-demand (SVoD) and advertising video-on-demand (AVoD) services, and 16% on video-sharing platforms.

Figure 3: Total in-home daily video viewing minutes per person, by platform and nation: 2023



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network. 'Broadcaster content' includes live TV, recorded playback and BVoD. 'Other TV set usage' includes viewing to some SVoD/AVoD/VSP that cannot be definitively measured, as well as some unmeasured broadcast channels, some EPG/menu browsing, viewing when the audio is muted, piracy, unmeasured box-sets/pay-per-view content, and non-video internet activity through a PC or other device connected to the TV. 'SVoD/AVoD' excludes viewing of NOW, which is captured within BVoD along with Sky Go/Sky TV On Demand (these two services stream the same content, so measured viewing cannot be separated).

² Ofcom analysis of provider data. Please refer to [Connected Nations 2023 UK report](#), [Connected Nations Wales 2023](#) and [Connected Nations update: Spring 2024](#) for more information.

Broadcast TV viewing in Wales

Where our data comes from

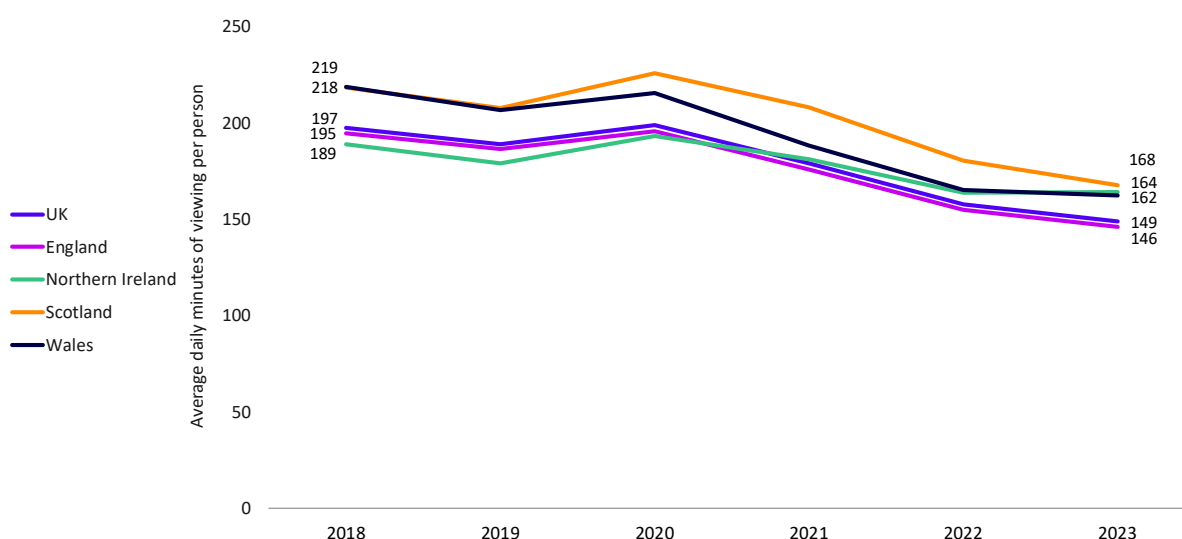
Most of the viewing data comes from Barb Audiences Ltd (Barb), the industry's standard for measuring what people watch. This includes viewing of broadcast TV through TV sets and via devices attached to TV sets, such as computers, streaming devices and set-top boxes. It also includes some viewing for online streaming services and for devices not connected to the TV being watched at home via WiFi. Barb does not capture out-of-home viewing to SVoD services or video-sharing platforms.

Unless otherwise stated, Barb figures quoted for broadcast TV are for 28-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast (live viewing) as well as from recordings on digital video recorders (DVRs) and through online BVoD services (e.g. BBC iPlayer, ITVX and Sky Go/Sky TV On Demand) up to 28 days after the first broadcast (time-shifted).

The rate of decline for broadcast TV viewing in Wales slowed in 2023

On average in 2023, people in Wales spent 2 hours 42 minutes per day watching broadcast TV on the TV set, the third most of any nation in the UK. This was three minutes less than in 2022, putting the average Wales viewing time lower than Northern Ireland for the first time. Except for Northern Ireland, where average viewing remained steady year on year, Wales had the smallest proportional decline of all the nations (1.9%), 3.7 percentage points (pp) smaller than the average UK decrease.

Figure 4: Average daily minutes broadcast TV viewing per person, by nation: 2018-2023

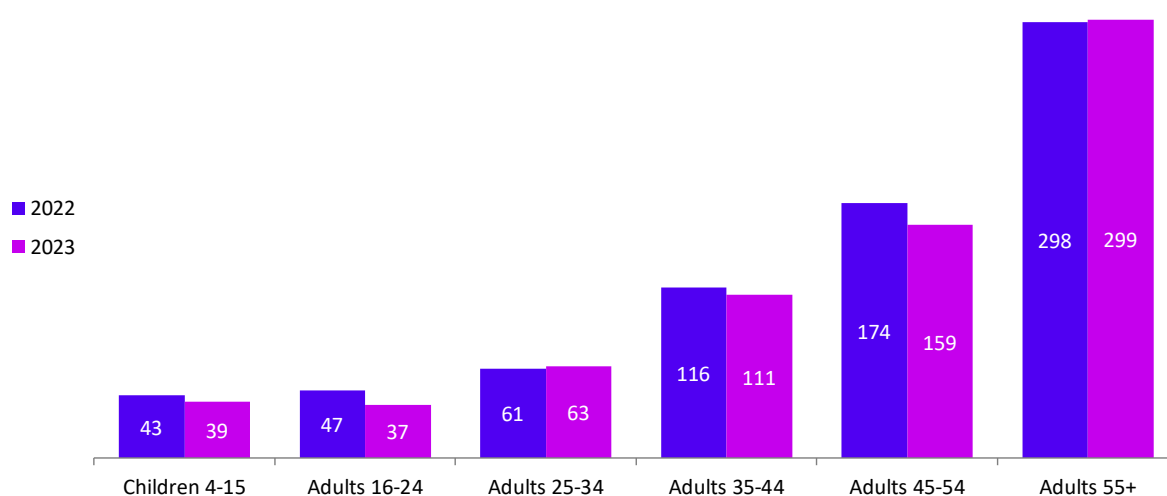


Source: Barb 28-day consolidated. Individuals (4+), TV sets only.

Broadcast TV viewing among adults aged 25-34 and the over-54s remained stable

In line with the general trend across the UK, older people in Wales watch more broadcast TV on a television set than younger viewers. The over-54s watched more than any other age group, at an average of 4 hours 59 minutes per day, steady since 2022. This contrasted with the UK and Scotland, where viewing decreased by 3% and 4%, and Northern Ireland, where it increased by 4.2%. Adults in Wales aged 25-34 watched an average of 1 hour 2 minutes of broadcast TV per day, a similar amount to 2022. In contrast, broadcast TV viewing among this age group in the UK and Scotland decreased by 12% and 22%. In line with the UK and the other nations, those in Wales aged 16-24 watched the least, at an average of 37 minutes per day, down by 21.5% since 2022.

Figure 5: Average daily minutes of broadcast TV viewing in Wales, by age group: 2022-2023



Source: Barb 28 days consolidated, TV sets only. Small year-on-year differences in minutes are often not statistically significant.

Special events, entertainment, drama and rugby union dominated the most-viewed TV programmes in Wales in 2023

The *New Year's Eve Fireworks*, with an average audience of 722,000 viewers, and the penultimate episode of hit drama *Happy Valley* (series 3 episode 5), with 656,000 viewers, both on BBC One, topped the list of the most-watched programmes in Wales in 2023. Third place went to the Rugby World Cup group match between Wales and Australia, which Wales won 40-6, attracting an average audience of 610,000 viewers on ITV1 Cymru Wales.

Wales and Northern Ireland were the only two nations in which rugby union appeared in the top ten most-viewed programmes. The popularity of rugby in Wales brought two games into the top ten: in seventh place was a *Six Nations Rugby* broadcast on BBC One, with an average audience of 515,000, ending in a win for Scotland over Wales (35-7).

Alongside *Happy Valley*, the other dramas among the most viewed in Wales were *Death in Paradise* (series 12 episode 1), with 545,000 viewers, *Beyond Paradise* (the launch episode of the spin-off series), with 519,000 viewers and *The Gold* series 1 episode 1, with 491,000 viewers, all on BBC One, and occupying fourth, sixth, and ninth places respectively.

Entertainment programmes such as BBC One's *Eurovision Song Contest*, with an average audience of 522,000, and ITV1 Cymru Wales's *I'm a Celebrity... Get Me Out of Here!* (511,000) took fifth and

eighth places, and part of BBC One's Coronation coverage, averaging 481,000 viewers, was in tenth place.

Figure 6: Top ten most-watched programmes in Wales: 2023

Rank	Title	Channel	Date broadcast	Average audience (000s)	Share* (%)
1	New Year's Eve Fireworks	BBC One	31/12/2023	722	61.7
2	Happy Valley	BBC One	29/01/2023	656	39.5
3	Rugby World Cup	ITV1 Wales	24/09/2023	610	53.5
4	Death in Paradise	BBC One	06/01/2023	545	47.2
5	Eurovision Song Contest	BBC One	13/05/2023	522	63.2
6	Beyond Paradise	BBC One	24/02/2023	519	44.4
7	Six Nations Rugby	BBC One	11/02/2023	515	57.2
8	I'm a Celebrity... Get Me Out of Here!	ITV1 Wales	19/11/2023	511	47.3
9	The Gold	BBC One	12/02/2023	491	33.0
10	The Coronation of The King and Queen Camilla (afternoon)	BBC One	06/05/2023	481	50.7

*Source: Barb 28-day consolidated including catch-up and on demand, on TV sets and other devices using the home's WiFi network, individuals 4+. Highest-performing episode of each title only, so does not include the second most-watched episode of Happy Valley (5 February on BBC One), for example. Includes +1 channels where applicable. *Share denotes the programme's audience as a percentage of the total audience for broadcast TV in the slot that the programme was on.*

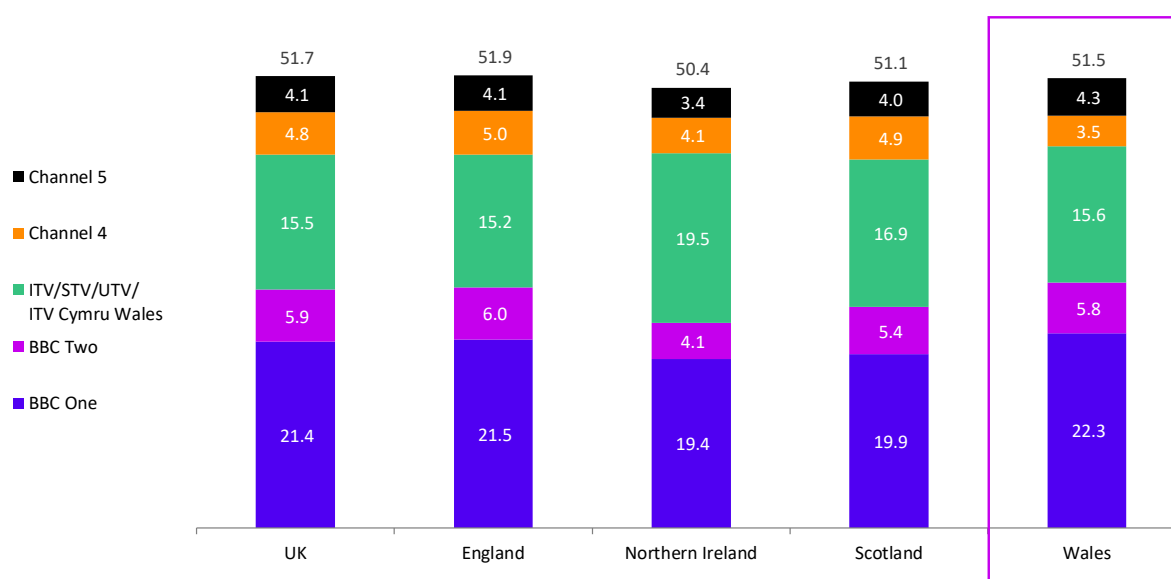
The main five PSB channels accounted for more than half of total broadcast viewing

What is public service broadcasting?

Public service broadcasting (PSB) is currently provided in Wales 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.

In 2023, the main five PSB channels accounted for a combined 51.5% share of the total broadcast TV audience in Wales. This was a slight decrease from 52.6% in 2022. BBC One had the highest audience share of any individual PSB channel, at 22.3%, while Channel 4 had the lowest, at 3.5%, which was also the lowest among the UK nations. The audience shares of BBC One and Channel 5 in Wales are the highest among the UK nations.

Figure 7: Share of broadcast TV viewing for the five main PSB channels, by nation: 2023 (%)



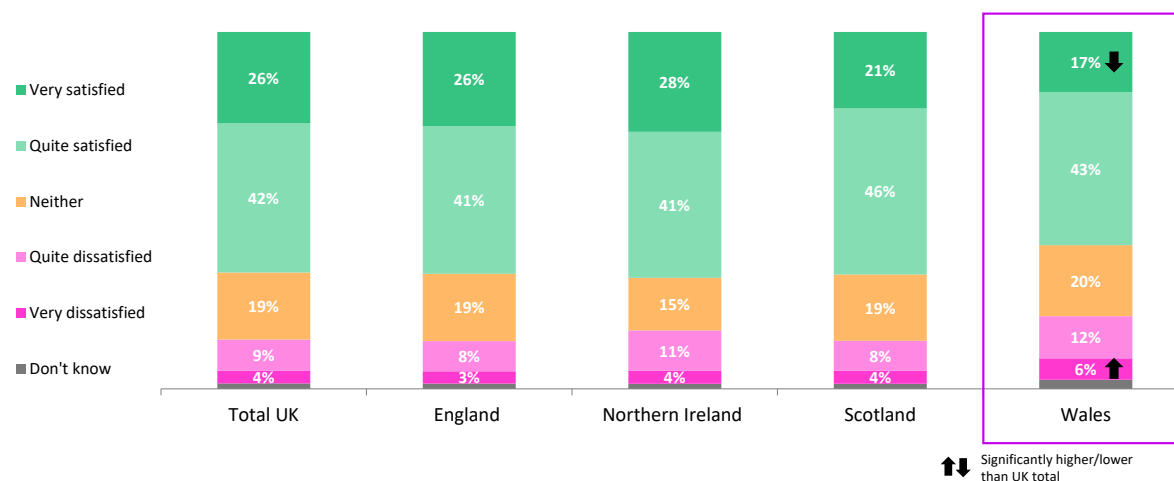
Source: Barb. BBC areas, all individuals (4+), TV sets only. Excludes any +1 channels. S4C is also a PSB channel and had a share of 1.3% in Wales in 2023.

Audience attitudes and sentiments to PSBs

Overall, three in five PSB viewers in Wales say they are satisfied with PSB channels

Ofcom's Public Service Media (PSM) Tracker found that in Wales, three in five (60%) PSB viewers³ said they were satisfied with PSBs overall; lower than the UK total (67%). About one in five (18%) said they were dissatisfied, also higher than the UK total (12%). Both satisfaction and dissatisfaction have changed since 2022⁴ and we will continue to monitor this.

Figure 8: Satisfaction with PSBs overall, UK total and by nation: 2023



Source: Ofcom Public Service Media Tracker 2023. Question 28. 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 who have watched PSB channel/service in last 6 months, Total UK (2,841), Northern Ireland (230), England (2,029), Scotland (293) and Wales (289). Note, not showing percentage labels under 4%.

About four in five PSB viewers in Wales are satisfied with Channel 4 and BBC One

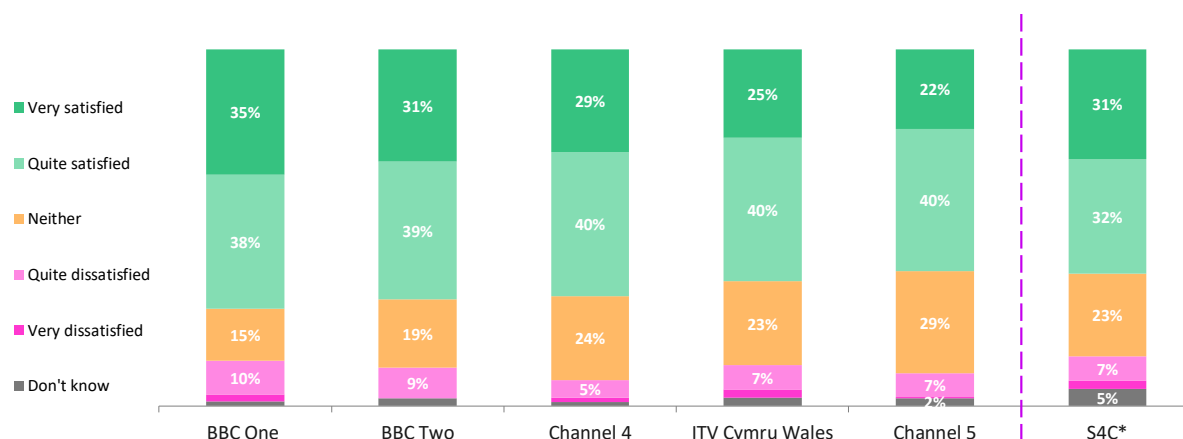
When asked to consider PSB channels individually, around seven in ten viewers said they were satisfied with BBC One (73%), BBC Two (70%) and Channel 4 (69%). Slightly lower proportions said the same for ITV Cymru Wales (65%) and Channel 5 (62%). There were decreases in 2023 in satisfaction for Channel 4 and Channel 5, compared to 2022, and for ITV Cymru Wales compared to 2021⁵, we will continue to monitor this.

³ Ofcom Public Service Media Tracker 2023 defines PSB viewers as all who have watched a PSB channel/service in the last six months.

⁴ Ofcom Public Service Media Tracker, Wales: NET satisfied: 2021 72%, 2022 69%, 2023 60% and NET dissatisfied: 2021 10%, 2022 10%, 2023 18%.

⁵ Ofcom Public Service Media Tracker, Wales: Channel 4 NET satisfied: 2022 80%, 2023 69% and Channel 5 NET satisfied: 2022 74%, 2023 62%. For ITV Cymru Wales NET satisfied: 2021 76%, 2022 69%, 2023 65%.

Figure 9: Satisfaction with individual channels: 2023



Source: Ofcom Public Service Media Tracker 2023. Question 23. 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 who have watched... in last 6 months, BBC One (257), BBC Two (229), Channel 4 (249), ITV Cymru Wales (193), Channel 5 (210), S4C* (314). *Please note, S4C based on UK respondents as base size in Wales too low to report on. Also note, not showing percentage labels under 3%.

Trusted and accurate UK news is considered one of the most important elements of PSB in Wales

In 2023, the PSM Tracker asked respondents⁶ to consider the three most important attributes for PSBs to deliver to society overall. About half (48%) of audiences in Wales ranked *'trusted and accurate UK news'* in their top three. This was followed by *'a wide range of different types of programmes'* (43%), *'programmes that help me to understand what is going on in the world today'* (28%) and *'programmes that are relevant to me'* (28%).

Viewers in Wales think that the PSBs deliver well on programmes made for UK audiences

Two-thirds (66%) of PSB viewers in Wales said that PSBs overall performed *'well'*⁷ on providing *'programmes made for UK audiences'*. About three in five viewers in Wales felt that PSBs provided *'well'* *'broadcast events that bring the nation together for a viewed sharing experience'* (63%) and *'programmes which feature people from different backgrounds'* (60%).

Having increased in 2022, the proportion of viewers who felt PSBs did well in delivering *'a wide range of different types of programmes, such as drama, comedy, entertainment or sport'* has returned to its 2021 level (2021 65%; 2022 75%; 2023 64%).

When looking at PSB attributes relating to representation and the local area, over half of viewers said that PSBs delivered well on *'programmes that are relevant to me'* (55%), *'regional programmes that keep me informed about my area'* (55%) and *'programmes that feature Wales'* (52%). Slightly lower proportions felt that PSBs delivered *'well'* on *'programmes that feature people like me'* (46%).

There was some variation in attitudes towards individual PSB channels; for example, viewers in Wales were less likely than the UK total to say that Channel 4 TV channels delivered *'well'* on

⁶ This question was asked of all respondents who completed the survey online, excluding those who completed it over the telephone.

⁷ The Ofcom Public Service Media Tracker uses questions asking respondents to say how *'well'* or *'badly'* different elements are being provided, using a 1-10 scale where 1 means extremely badly and 10 means extremely well. When referring to *'well'* throughout this report, it is a NET of scores 7 to 10.

‘regional programmes that keep me informed about my area’ (25% vs 32%). For ITV Cymru Wales and ITV TV channels, viewers were more likely than the UK total to say they delivered ‘well’ on ‘programmes that feature Wales’ (53% vs 46%).

S4C is seen to deliver well on trusted and accurate UK news and programmes that are different to other providers

Around three in five (63%) UK viewers⁸ said they were satisfied with S4C, in line with previous years, while seven in ten (69%) said the same of S4C Clic.

Three in five said that S4C delivered ‘well’ on *‘trusted and accurate UK News’* (60%), *‘programmes that are different in their approach to other providers’* (60%) and *‘programmes that feature my region/ country’* (59%). S4C Clic had similar delivery scores across most statements, but was seen as delivering particularly well on statements such as *‘programmes that feature my region/country’* (71%), *‘broadcast events that bring the nation together for a viewed sharing experience’* (68%), *‘programmes that are different in their approach to other providers’* (67%) and *‘programmes that feature people like me’* (67%).⁹

Video-on-demand viewing trends

Viewers have a wide choice of subscription services

In Wales, the proportion of households who received SVoD services rose in Q1 2024, with 70% of households receiving at least one service, up from 63% in Q1 2023.¹⁰

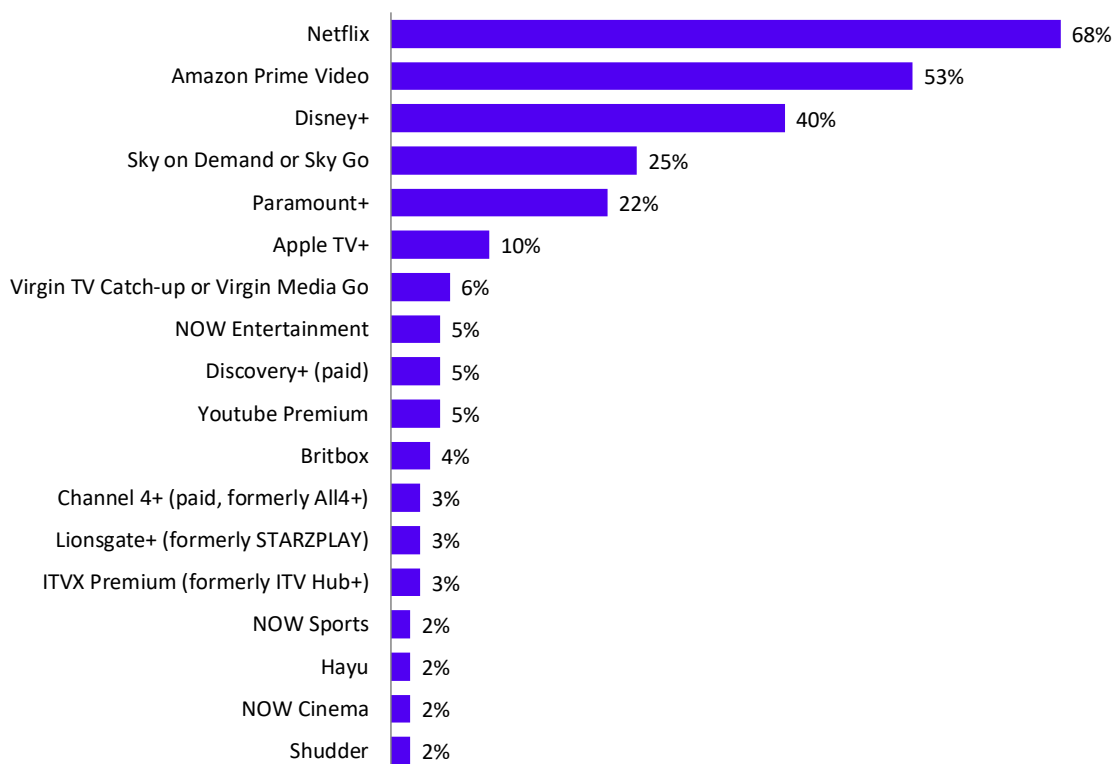
Claimed usage, from Ofcom’s VoD Survey, shows that Netflix is the most popular SVoD service in Wales, followed by Amazon Prime Video and Disney+, but there are also many smaller SVoD services available to viewers in Wales. These include services such as NOW and Apple TV+, and genre specialist services such as Shudder (horror) and Hayu (reality TV). Claimed use of Paramount+ doubled in Wales year on year and is higher than in the other nations.

⁸ We are reporting our UK findings here, as the base size of respondents in Wales for S4C and S4C Clic is too low.

⁹ Ofcom Public Service Media Tracker 2023.

¹⁰ Barb Establishment Survey Q1 2024. This year, there were changes to the Barb Establishment Survey questionnaire to better capture passive subscriptions (such as those bundled with Sky’s packages, which do not require a separate subscription). This resulted in the household penetration of Discovery+ and Paramount+ rising sharply.

Figure 10: Claimed use of SVoD services used to watch programmes, films or other video in Wales: 2024

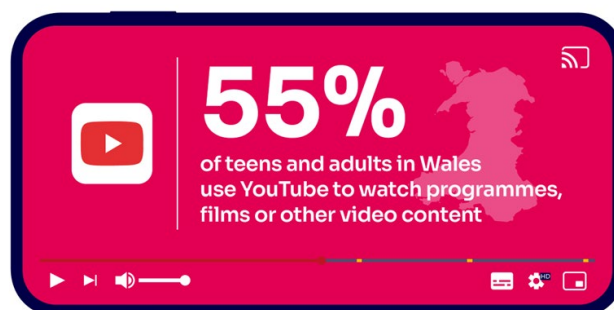


Source: Ofcom VoD Survey 2024. Combined online and CATI adults/teens aged 13+, Wales. Services personally used in the past three months (fieldwork February – March 2024). Note: in the 2023 Media Nations reports we reported the claimed reach figures for these services using only the online sample. This year's figures are therefore not comparable due to using the fuller online and CATI sample.

Ofcom's PSM Tracker shows that levels of satisfaction with SVoD services remain high; around four in five viewers in Wales say they are satisfied with Netflix (85%) and Disney+ (83%), and Amazon Prime (80%).¹¹

Fifty-five per cent of teens and adults in Wales claim to have used YouTube to watch programmes, films or other video content in the three months before the fieldwork, in line with the other nations.¹²

Short videos are the most popular type of video consumed on YouTube in Wales. Sixty-three per cent of online teens and adults claimed to watch short videos (15 minutes or less) that were not YouTube Shorts in the three months before the fieldwork, and 46% watched YouTube Shorts (videos of 60 seconds or less). Thirty-seven per cent claimed to have



¹¹ Ofcom Public Service Media Tracker 2023.

¹² Ofcom VoD Survey 2024 (online and CATI sample). Note: some YouTube figures appear different between the nations, but the figures are not significantly different to each other.

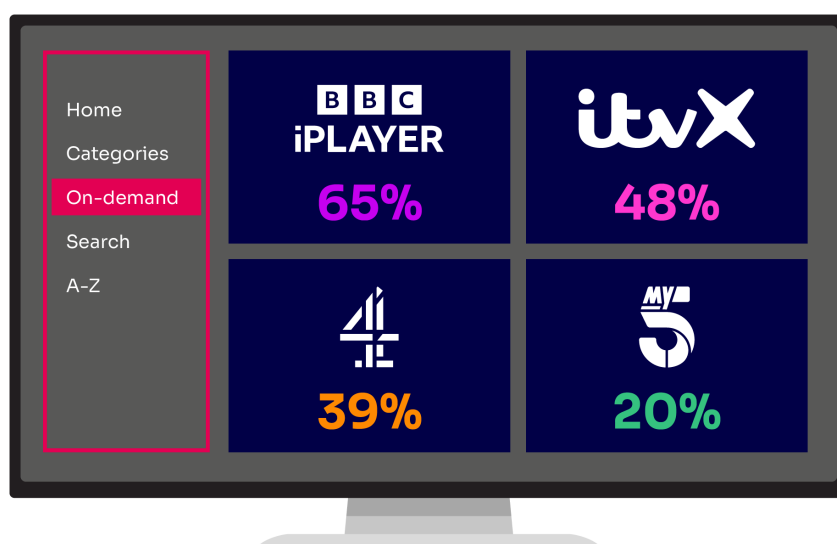
watched YouTube videos longer than 15 minutes (but not full-length programmes or films) and only 12% reported having watched full length programmes or films on the platform.¹³

BBC iPlayer remains the most popular PSB VoD service in Wales

Ofcom's VoD survey found that nearly nine in ten (89%) of adults and teens in Wales said they had used a free-to-view video-on-demand service (any streaming service not behind a paywall, including YouTube and BBC iPlayer).

Claimed use of all the PSB VoD services in Northern Ireland remained stable year on year. Sixty-five per cent of adults and teens in Wales said they had used BBC iPlayer in three months before the fieldwork, with 39% using Channel 4 streaming, and one in five using My5 (20%) in the same period. Just under half of people in Wales said they had used ITVX (48%).

Figure 11: PSB video-on-demand services used to watch programmes, films or other video in the past three months: 2024



Source: Ofcom VoD Survey 2024 combined online and CATI adults/teens aged 13+, Wales. Claimed reach for services personally used in the past three months (fieldwork February – March 2024). Note: in the 2023 Media Nations reports we reported the claimed reach figures for these services using only the online sample. This year's figures are therefore not comparable, due to using the fuller online and CATI sample.

Overall, audiences in Wales are satisfied with BVoD services

When asked to consider their satisfaction with the different BVoD services, more than three-quarters (78%) of viewers in Wales said they were satisfied with BBC iPlayer, and about two-thirds said the same for ITVX or ITVX Premium¹⁴ (67%). Slightly lower proportions said they were satisfied with Channel 4 or Channel 4+ streaming service (63%) and My5 (64%).

¹³ Ofcom VoD Survey 2024 (online sample). Note: the 'short videos' category does not include 'YouTube Shorts'. YouTube Shorts are videos of 60 seconds or less. Similarly, long videos do not include full-length programmes and films.

¹⁴ At the time of fieldwork for the Public Service Media Tracker, Channel 4's BVoD service was called All 4 or All 4+ and ITV's BVoD was ITV Hub or ITV Hub+.

In Wales, BVoD viewers¹⁵ said they used BVoD services ‘to catch up on programmes that I have missed on TV’ (61%), so they could ‘watch what I want, when I want’ (51%), ‘to access older or archive programming’ (37%) and ‘to watch specific programmes or box-sets’ (36%). The most frequently cited reasons for not using BVoD services related to preferring other services, not being interested in the programmes available, or not having access to the service.

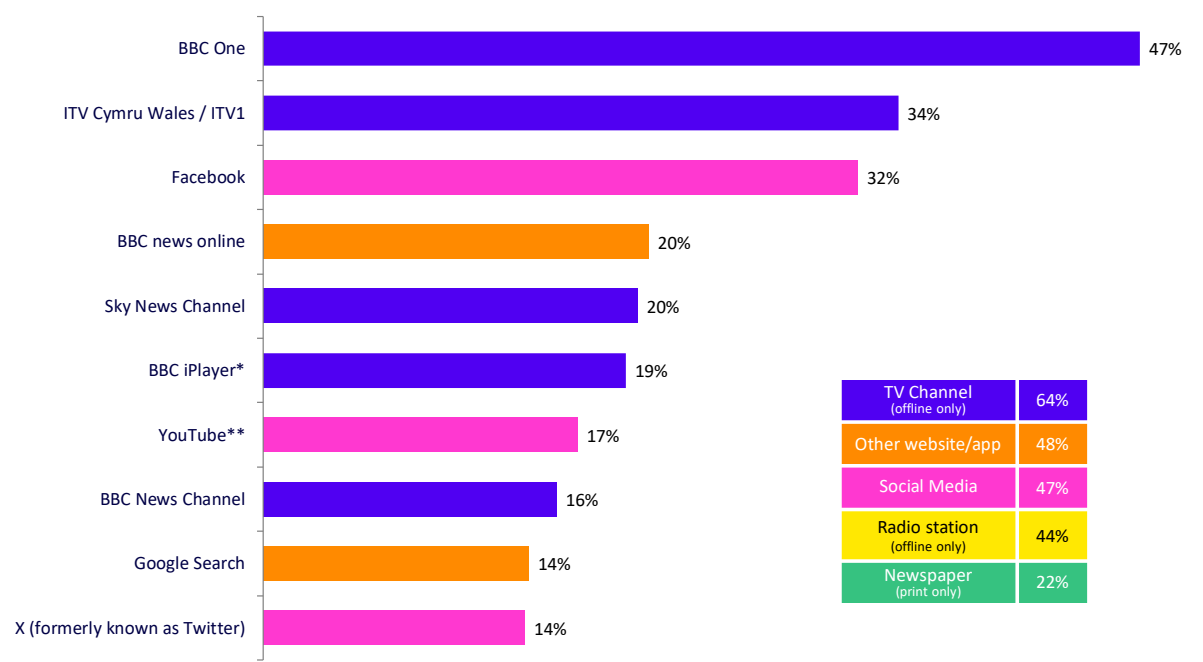
News sources

Most-used news sources in Wales

Ofcom’s News Consumption Survey found that just under half of people 16+ in Wales (47%) used BBC One for news in general, making it the most-used news source, followed by ITV Cymru Wales (34%). Other TV channels in the top ten included Sky News Channel and the BBC News Channel. Social media ranked highly too, with Facebook the third most popular source of news (32%), while X (formerly Twitter) ranked joint tenth at 14%. BBC Radio 2 was the top radio station cited (11%) but did not make the top ten. No newspapers made the top ten.

The survey also collected figures relating to use of video-on-demand services. The most popular of these was BBC iPlayer; just under a fifth of people 16+ (19%) in Wales used this service for news. ITVX and Channel 4 also appeared in the top 20 news sources, both used by 11%.

Figure 12: Top ten sources of news in general in Wales: 2024



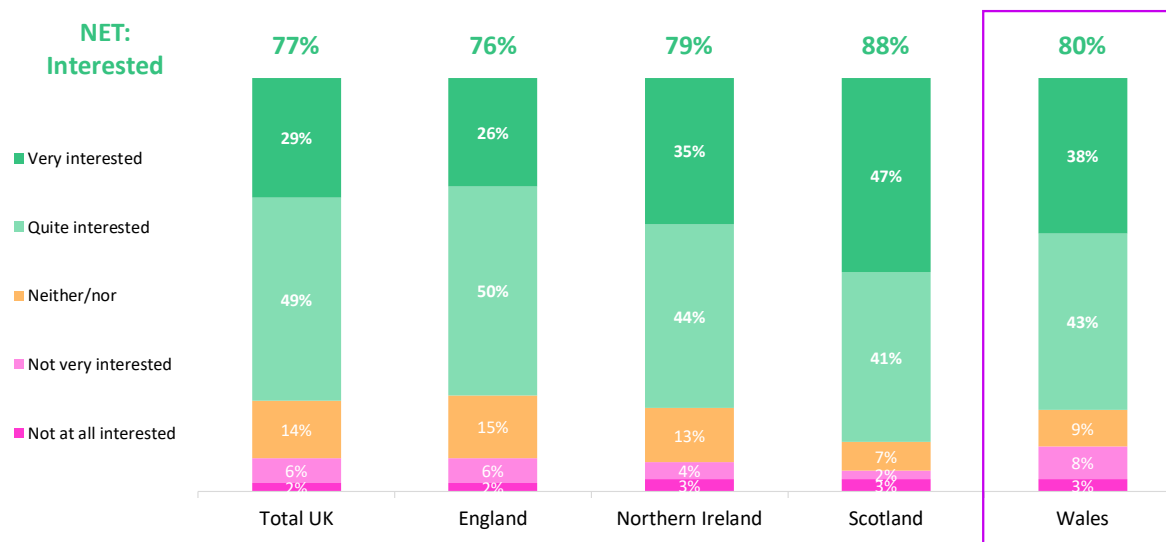
Source: Ofcom News Consumption Survey 2024 – COMBINED F2F & ONLINE sample. Question: C1. Which of the following platforms do you use for news nowadays? Question: D2a-D8a. Thinking specifically about <platform>, which of the following do you use for news nowadays? Base: All people 16+ in Wales – 2024=671. *BBC iPlayer added in 2023. **YouTube moved from ‘other online’ to ‘social media’ in 2024 and figures are therefore not comparable with 2023.

¹⁵ BVoD viewers are defined as those who have watched at least one BVoD service in the past six months.

18

There is a significant amount of interest in news about Wales among people who live there. Just under two-fifths of those who follow news claim to be ‘very interested’ in news about Wales (38%), rising to 80% who are ‘very’ or ‘quite’ interested. As shown below, people aged 16+ in Northern Ireland, Scotland and Wales are more likely to say they are ‘very interested’ in news about their nation than the UK average.

Figure 13: Level of interest in news about own nation, by nation: 2024



Source: Ofcom News Consumption Survey 2024 – Combined F2F and ONLINE sample Question: F3. How interested are you in news about your NATION/REGION? Base: All people 16+ who follow news 2024 - Total=5,250, England=3,404, Scotland=647, Wales=635, Northern Ireland=564.

BBC One (31%) and ITV Cymru Wales (23%) were the first and second most-used sources for news about the nation, followed by Facebook (18%), Wales-based online news (11%) and BBC online news (11%). A ‘long tail’ of sources for news about the nation was also seen, including many under 5%.

Figure 14: Sources used to access news about own nation: 2024

England		Northern Ireland		Scotland		Wales	
BBC One	26%	BBC One	36%	BBC One	27%	BBC One	31%
Facebook	16%	UTV	34%	STV	27%	ITV WALES	23%
ITV1	16%	BBC Radio Ulster/ Foyle	19%	Facebook	21%	Facebook	18%
BBC news online	7%	Facebook	15%	BBC news online	10%	Any Wales based news sites/apps	11%
Instagram	6%	Cool FM	13%	BBC Scotland TV	8%	BBC news online	11%
BBC News Channel	5%	BBC news online	11%	Instagram	7%	BBC Radio Wales	6%
WhatsApp	5%	X (formerly Twitter)	8%	Clyde 1/ Forth 1/ West Sound/ Tay FM/ Northsound/ MFR	7%		
X (formerly Twitter)	5%	Any NI based news sites/apps	6%	BBC Radio Scotland	6%		
YouTube	5%	RTE Channels/Virgin Media One	6%	X (formerly Twitter)	6%		
		The Belfast Telegraph	5%	Sky News Channel	6%		
		U105	5%	BBC News Channel	5%		
				YouTube	5%		
Don't follow region news	11%	Don't follow Nation news	2%	Don't follow Nation news	3%	Don't follow Nation news	9%

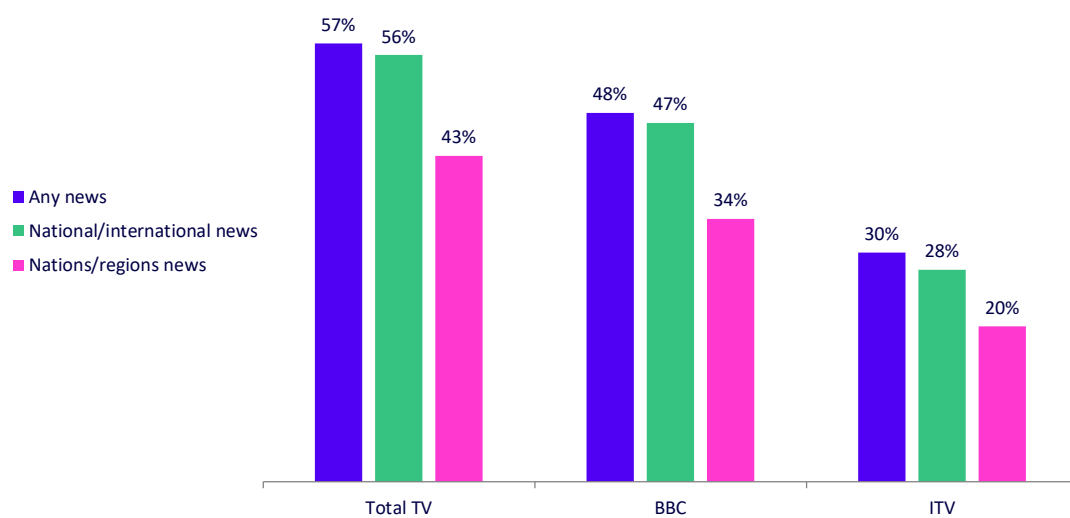
Source: Ofcom News Consumption Survey 2024 – COMBINED F2F & ONLINE sample Question: F6. From which of the following sources do you get news about what is going on in NATION/REGION nowadays? Base: All people 16+ using TV/newspapers/radio/online/magazine for news 2024 – England=3,340, Scotland=632, Wales=627, Northern Ireland=545 Only sources with an incidence of 5%+ in each nation are shown.

Viewing of news from the nations/regions

More than half (57%) of people aged 16+ in Wales viewed TV news in 2023, with an average of 57% watching any news content on any channel. Three-quarters of these news viewers also viewed nations/regions news.

Viewers in Wales showed a strong preference for news on the BBC rather than ITV Cymru Wales, with 48% watching news on the BBC compared with 30% using ITV Cymru Wales. The disparity was greatest for national/international news, where the BBC's programmes had a 19 percentage point lead over ITV Cymru Wales. This was also true for nations/regions news, where it had a 14 percentage point lead.

Figure 15: Average weekly reach for news in Wales, by broadcaster: 2023



Source: Barb, all transmissions, 28-day consolidated, average weekly reach 3+ mins %, people 16+. Region: BBC Wales. Genre: nations/regions news; UK/international news. National/international news refers to network news programmes which contain the same content UK-wide. Nations/regions news refers to news programmes that are broadcast from and to England, Northern Ireland, Scotland or Wales, or regions within those nations. Programme examples include BBC Wales Today and ITV News Wales at Six.

TV programming for and from Wales

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.

How we present financial data

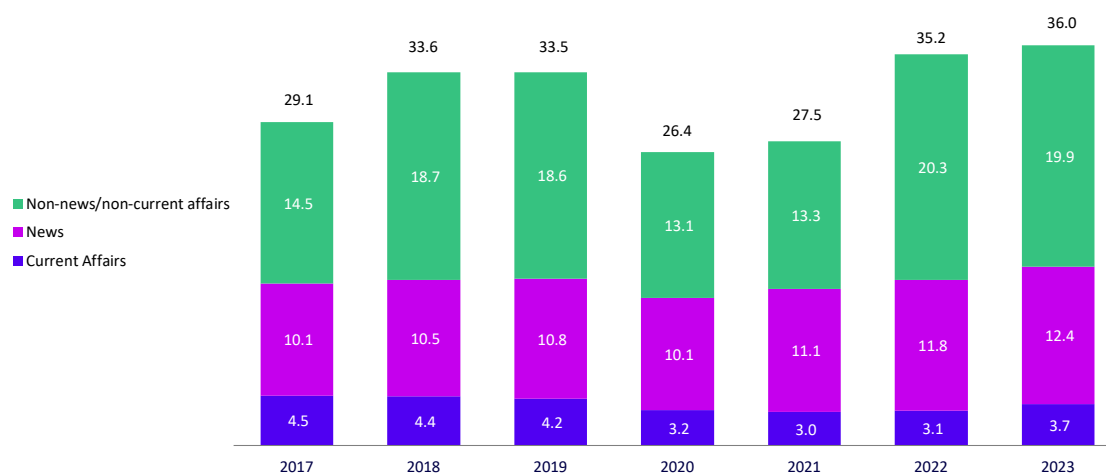
Financial data quoted in this report is presented in nominal terms, meaning that historical data has not been adjusted to account for inflation. In our [interactive report](#), users can view financial data in either nominal or 'real' (CPI-adjusted) terms, with users easily able to switch between the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

PSB spend on first-run content for Wales increased by 2%

Of the total £36.0m spend in 2023 on first-run programming made in Wales for viewers in Wales, the majority (£19.9m) went towards non-news/ non-current affairs. This was slightly lower than in 2022 (-2.1%) but much higher than in the Covid-affected years of 2020 and 2021 and also higher than in pre-Covid years.

Current affairs had the largest relative growth in first-run spend, increasing by 18.9% year on year to £3.7m. PSB spend on news programming for Wales increased by 6% for the second year in a row.

Figure 16: PSB spend on first-run UK-originated content for Wales, by genre: 2017-2023 (£m)

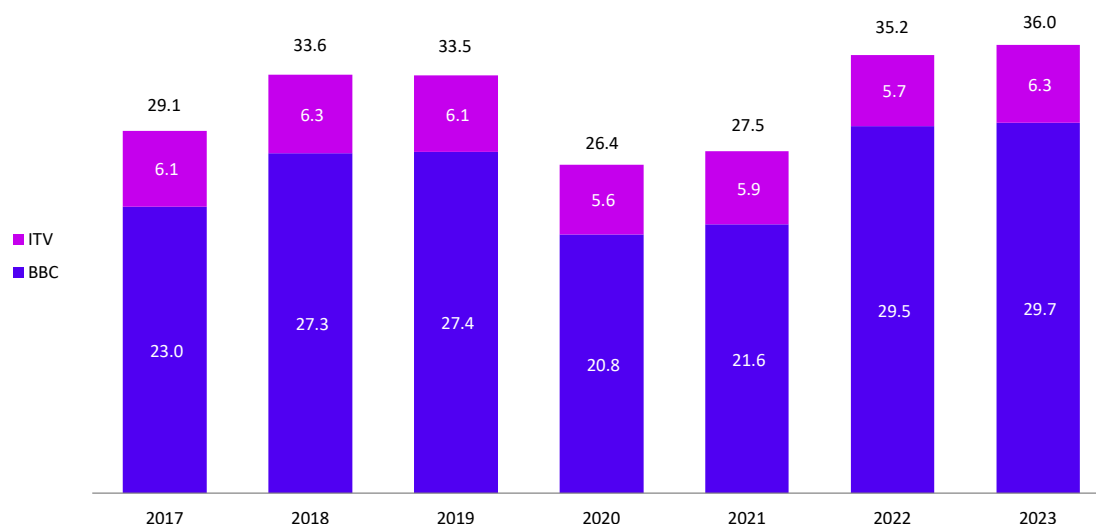


Source: Ofcom/broadcasters.

PSB spend on first-run content for Wales rose in 2023

The increase in spend on first-run content is driven by the BBC, whose spend for Wales increased from £29.5m in 2022 to £29.7m in 2023 (up 0.9%). As shown by the combined PSB totals above, this primarily came from non-news and non-current affairs programming.¹⁶ Spend by ITV on first-run content for Wales increased in 2023, by 9.6%.

Figure 17: BBC and ITV Cymru Wales spend on non-network first-run UK-originated content for Wales: 2017-2023 (£m)



Source: Ofcom/broadcasters.

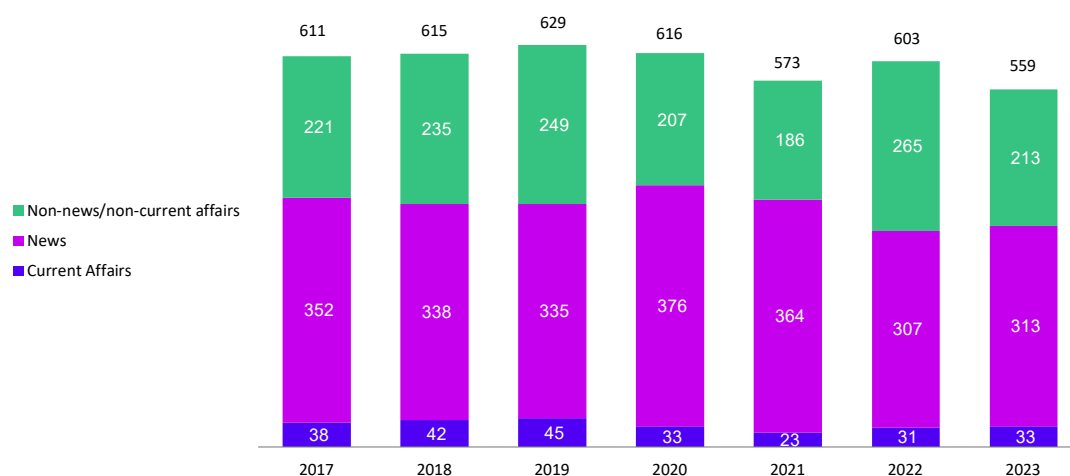
BBC hours of first-run content in Wales declined by 7% to 559 hours

This decline in hours has been driven by non-news/ non-current affairs, which had the largest proportional decrease of -19.6%, or 52 hours. Both news and current affairs hours increased: current affairs by 2 hours (6.5%) and news by 6 hours (2.0%).

Overall, news content makes up the largest amount of the BBC's output for Wales, comprising 56% of first-run hours.

¹⁶ This may include some co-commissions between BBC network and non-network services. In 2022, if such programmes were broadcast on regional opts first, the spend is captured as part of the BBC's regional programming spend.

Figure 18: BBC hours of first-run UK-originated content for Wales, by genre: 2017-2023



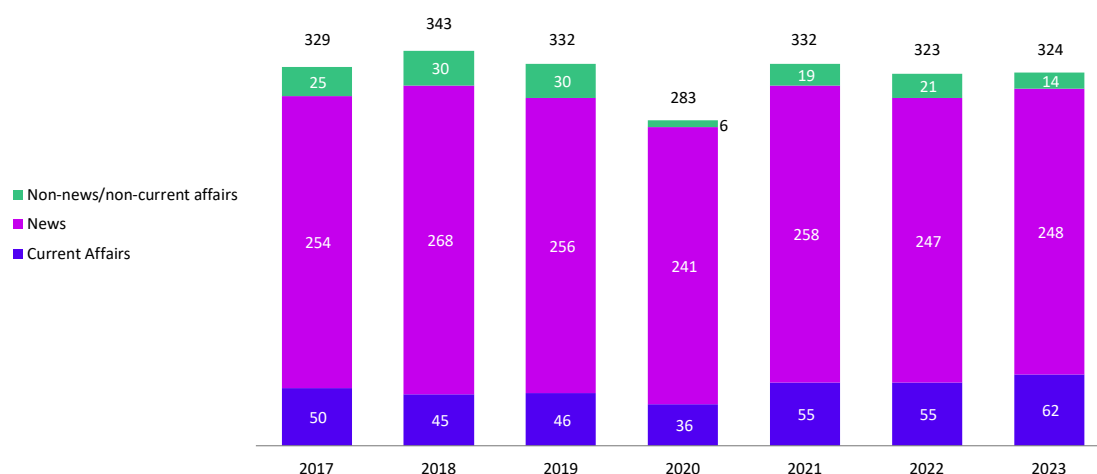
Source: Ofcom/broadcasters.

ITV Cymru Wales' hours of first-run content for Wales was steady year on year, with 324 hours of programme output

The vast majority of ITV Cymru Wales output is news content, comprising 77% (248 hours) of first-run programming on the channel. News provision held steady year on year, up by 0.4%.

The largest rise was for current affairs hours, which increased by 7 hours (12.7%). Non-news non-current affairs hours decreased by 7 hours (33.3%).

Figure 19: ITV Cymru Wales' hours of first-run UK-originated content for Wales, by genre: 2017-2023



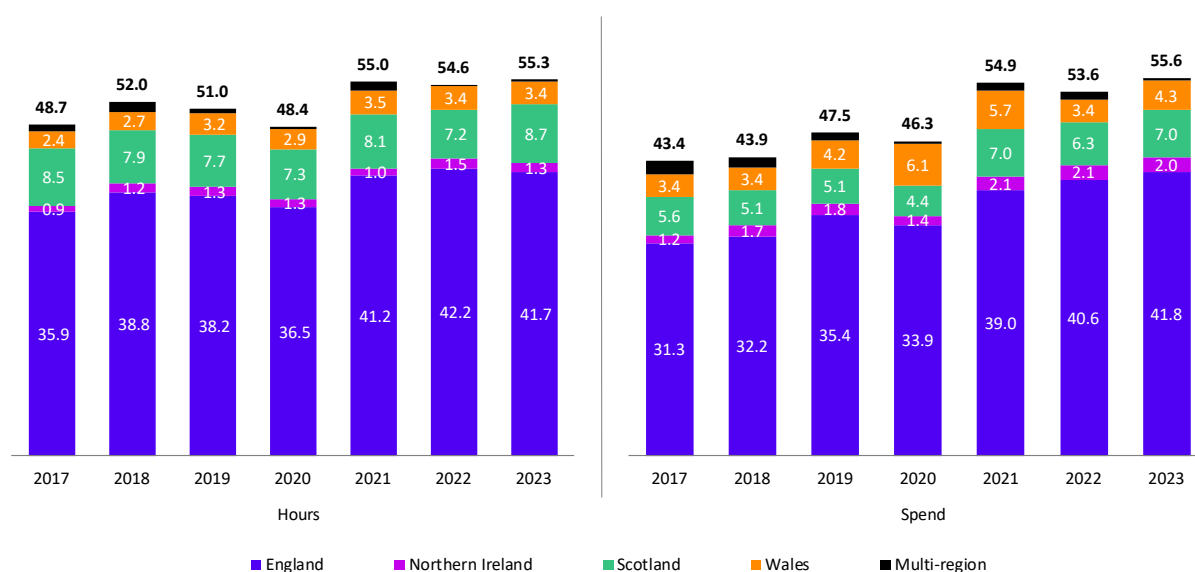
Source: Ofcom/broadcasters.

Network content produced in Wales

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

Across all the PSBs, 4.3% of qualifying first-run network spend was allocated to programmes qualifying as Wales productions, an increase on 2022, and 3.4% of qualifying first-run network hours were allocated to Wales productions, in line with the previous year.

Figure 20: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2017-2023 (%)



Source: Ofcom/broadcasters.

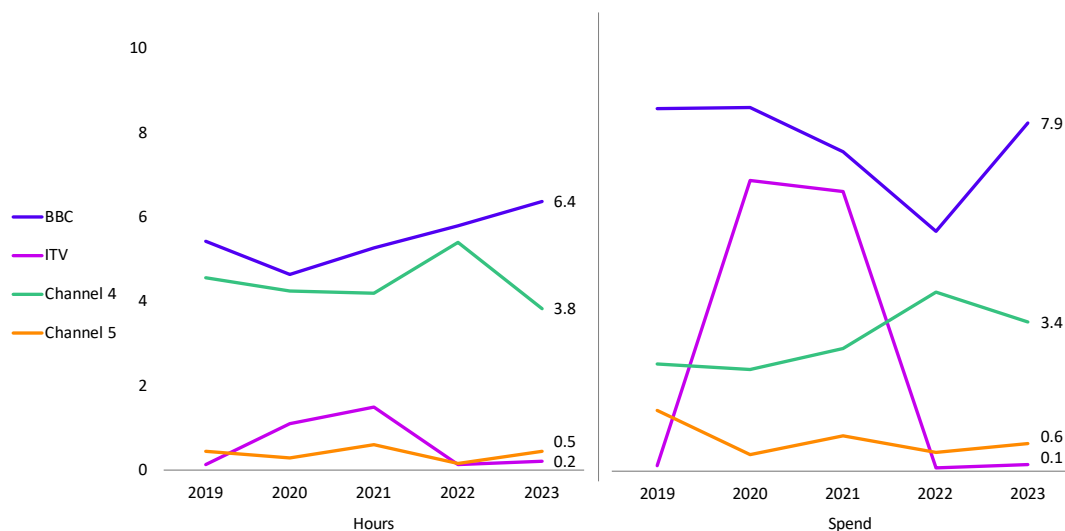
Proportions of spend in Wales increased in 2023

The BBC, which produces the largest proportion of qualifying network content in Wales, increased its network spend in Wales to 7.9% in 2023, while increasing its proportion of hours to 6.4%. Key productions in 2023 included dramas *His Dark Materials* and *Wolf* as well as the *Doctor Who* 60th Anniversary Special. In addition, the BBC manages several arts and music productions from Cardiff, the Six Nations coverage, including the women's competition, as well as long-running drama series *Casualty* and *Doctor Who*.

Network production in Wales for Channel 4 decreased in 2023: network hours decreased to 3.8% and spend decreased to 3.4%. Titles produced in Wales include factual entertainment and leisure titles *Handmade: Britain's Best Woodworker*, *Sarah Beeny's New Life In The Country* and comedy *The Change*.

The proportion of qualifying hours and spend allocated to Wales by ITV remained low, following 2022's reduction, when *I'm a Celebrity... Get Me Out of Here!* returned to filming in Australia.

Figure 21: Proportion of qualifying network production in Wales, by PSB: 2017-2023 (%)



Source: Ofcom/broadcasters.

Radio and audio

Market developments

BBC Cymru Wales

In January 2024 Ofcom approved a request from the BBC to extend its broadcast hours on Radio Cymru 2 from 25 to 61.5 hours each week, making it a UK Public Service station in its own right. BBC Radio Cymru 2 began broadcasting its extended hours in March; it must offer content that is of interest and relevance to audiences in Wales and provide regular and daily news bulletins.

BBC Radio Wales relaunched its breakfast show during this period with presenters James Williams and Dot Davies bringing in-depth coverage of key events, including the departure of Mark Drakeford and the election of Vaughan Gething as First Minister. These events were also covered extensively on BBC Wales's news outlets.

Radio Wales and Radio Cymru have introduced opt-out (nation- or region-specific programmes inserted in network feeds) news bulletins for listeners. Audiences who receive their signal from transmitters in north Wales, including from Blaenplwyf, which serves Pen Llŷn, will receive bespoke news about north Wales. Audiences in south Wales will receive news about south Wales.

As part of the BBC's ongoing commitment to serving the whole of the UK, it announced that Radio 1's Sam and Dani would be located in Central Square in Cardiff for the *Weekend Breakfast Show*. They were followed by presenter Huw Stephens, who now hosts Radio 6 Music's afternoon show from the same broadcast hub. A number of podcasts were also delivered by BBC Wales's audio teams, including *Death of a Codebreaker* and *The Crossbow Killer*.

Small-scale DAB

There are now three small-scale DAB multiplexes on air in Wales, with a fourth due to be launched. The Cardiff multiplex currently carries 11 programme services, and the Wrexham multiplex nine. Gwent Digital Broadcasting Ltd launched its services on the Newport and Chepstow multiplex at the beginning of July, and a South Pembrokeshire and North Pembrokeshire multiplex will begin broadcasting later this year.

As part of the sixth round of small-scale DAB licensing, Ofcom has advertised a multiplex licence for Bridgend, and re-advertised the licence for Swansea. The previous Swansea awardee was unable to launch its service within the required 18-month timeframe.

Community radio

There are nine community radio services broadcasting in Wales: BGfm; Bro Radio; Calon FM; GTfm; Mon FM; Radio Cardiff; Rhondda Radio; Tircoed; and Sound. Of these, Bro Radio is available on DAB+ covering Cardiff and the eastern parts of the Vale of Glamorgan.

Established in 2020, [Community Digital Sound Service \(C-DSP\) licences](#) are designed to provide a low-cost route for community, local or specialist music services to broadcast on digital radio in a smaller geographic area than the larger, city- or region-wide multiplexes.

The Community Radio Fund continues to support the core costs of running Ofcom-licensed community radio stations and now welcomes applications from C-DSP services which are

broadcasting on a small-scale multiplex.¹⁷ During 2023-24 five C-DSP services received funding from the Fund. These were: Radio Cardiff, Bro Radio, Rookwod Sound, Crest Community Radio and Wrexham Premier Radio.

Radio availability and coverage

Radio services in Wales are provided by the BBC and by the commercial and community radio sectors.

The BBC’s UK-wide services are available throughout Wales on AM/FM and DAB radio. The BBC also operates three Wales-wide services: BBC Radio Wales and BBC Radio Cymru, which are broadcast on FM and DAB, and BBC Radio Cymru 2, which is broadcast on DAB.

As of March 2024, there were two national commercial stations, 15 local commercial stations and nine community radio stations broadcasting on AM/FM in Wales. Fifty-six national commercial stations were broadcasting on DAB, unchanged since last year, while the number of local commercial stations broadcasting on DAB stood at 32.

Figure 22: Number of commercial and community radio services in Wales, by broadcast technology: March 2024

	AM/FM	DAB
UK-wide Commercial	2	56
Local Commercial	15	32
Community	9	N/A

Source: Ofcom. Note: the number of services on commercial multiplexes listed here includes all commercially-licensed services carried on each multiplex, so a service may be counted more than once. Not all services are available in each location. Community Radio licences are analogue licences, but holders of these licences may also hold a commercial DSP (digital sound programme) licence to simulcast their licensed Community Radio service on a DAB multiplex. The data in the table relates to UK-wide and local multiplexes only. C-DSP licences allow for a community radio service to be broadcast on a designated small-scale DAB multiplex.

DAB coverage across Wales remained unchanged since 2023, with more than nine in ten homes (92.2%) covered by BBC DAB services, and eight in ten (82.6%) covered by local DAB services. Small-scale DAB coverage in Wales grew by just over 2 percentage points to 17.6% in March 2024.

¹⁷ The Community Radio Fund is administered by Ofcom on behalf of the DCMS, which provides the fund.

Figure 23: DAB coverage as of March 2024

		BBC	Commercial			Small-scale
			Digital One	Sound Digital	Local DAB	
UK	Homes	97.4%	91.7%	82.6%	92.0%	25.6%
	Major roads	87.4%	80.2%	72.6%	76.8%	NM
England	Homes	98.4%	94.8%	86.7%	93.4%	25.2%
	Major roads	94.5%	93.9%	89.8%	87.4%	NM
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%	32.1%
	Major roads	79.3%	86.9%	55.0%	87.8%	NM
Scotland	Homes	95.3%	81.7%	69.0%	85.4%	32.1%
	Major roads	69.1%	45.5%	33.6%	45.6%	NM
Wales	Homes	92.2%	67.5%	56.9%	82.6%	17.6%
	Major roads	78.1%	53.3%	37.7%	60.9%	NM

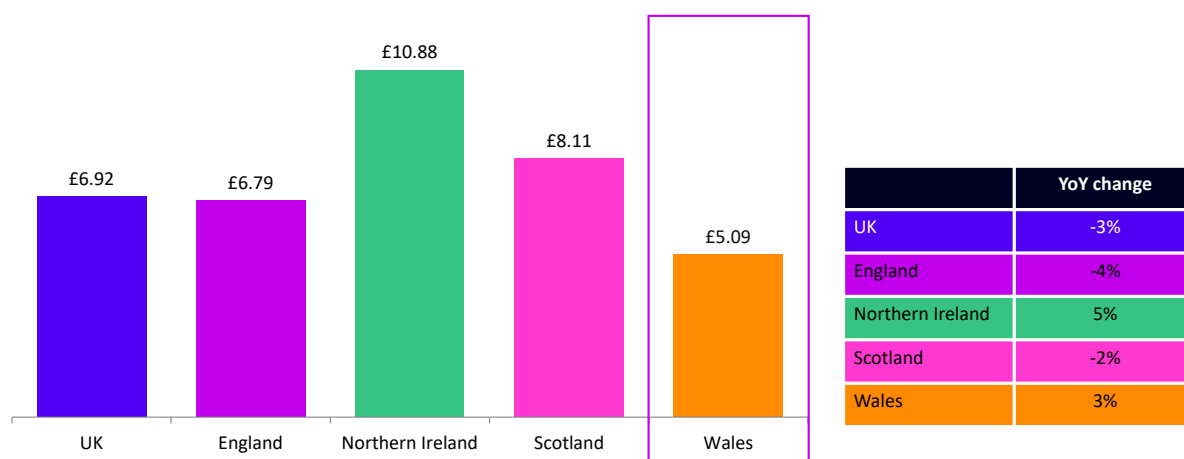
Source: Arqiva, BBC, Ofcom. Note: Coverage of small-scale DAB is measured on a homes-only basis. 'NM' denotes levels are not measured.

Commercial radio revenues

Per-capita commercial radio revenues grew in Wales between 2022 and 2023

Per-capita commercial local radio revenues grew by 3% year on year in Wales, although at £5.03 per person, this was still below the UK average of £6.92.

Figure 24: Per-capita commercial radio revenues, by nation: 2023 (£)



Source: Ofcom, broadcaster returns. These figures solely relate to total relevant turnover reported against AL licences (local analogue commercial) and in relation to advertising include both local and national advertising revenues, i.e., not only the revenues which relate to adverts aimed at the specific nation. As mid-year 2023 population estimates were not available at the time of publication, 2022 mid-year population data has been used for both 2022 and 2023.

Live radio listening in Wales

Where our data comes from

Our figures for reach and share of listening to different audio types come from IPA TouchPoints, and figures on live radio listening come from RAJAR. Both sources refer to adults as those aged 15+ so we have used this terminology here.

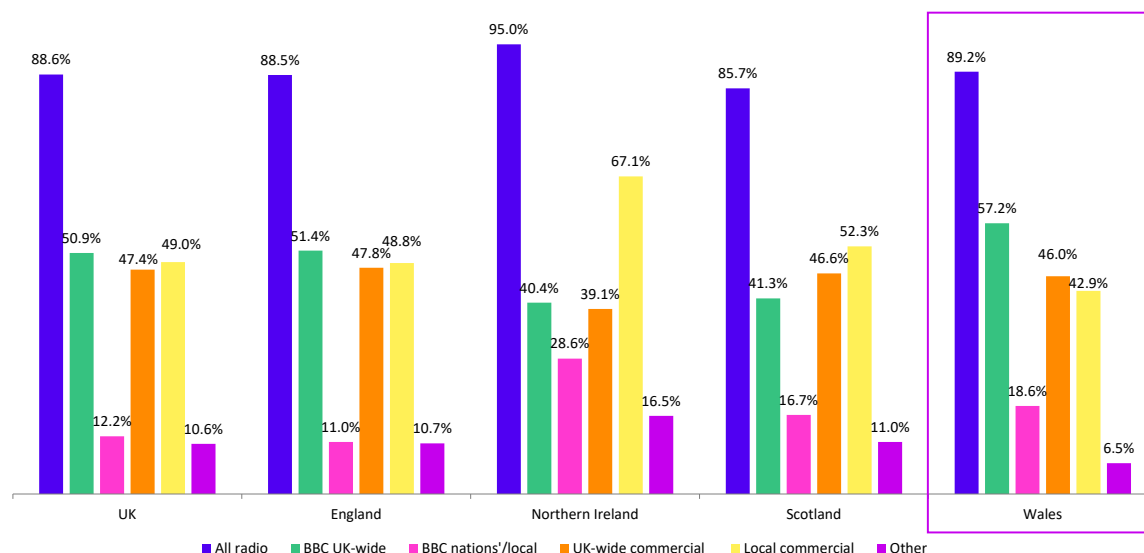
Weekly reach and listening are higher in Wales than in the UK as a whole

Radio continues to be strong in Wales, with just under nine in ten adults (89.2%/ 2.3 million) tuning in each week. Not only is weekly reach fractionally higher than across the UK as a whole, but people in Wales also tend to listen for slightly longer, averaging 20.9 hours week compared to the UK average of 20.5 hours.¹⁸

BBC UK-wide stations are performing particularly well

Figure 25 shows the reach of the different broadcast sectors in 2024 and how they vary by nation. Over half of people in Wales (57.2%) listen to UK-wide BBC stations at least once a week, higher than in any other UK nation and across the UK as a whole. The reach of BBC nations'/ local stations in Wales (18.6%) is broadly aligned with Scotland (16.7%) and higher than the UK average (12.2%), while Northern Ireland continues to be an outlier, attracting a much higher reach across both local sectors.

Figure 25: Weekly reach of radio, by sector and nation: Q1 2024



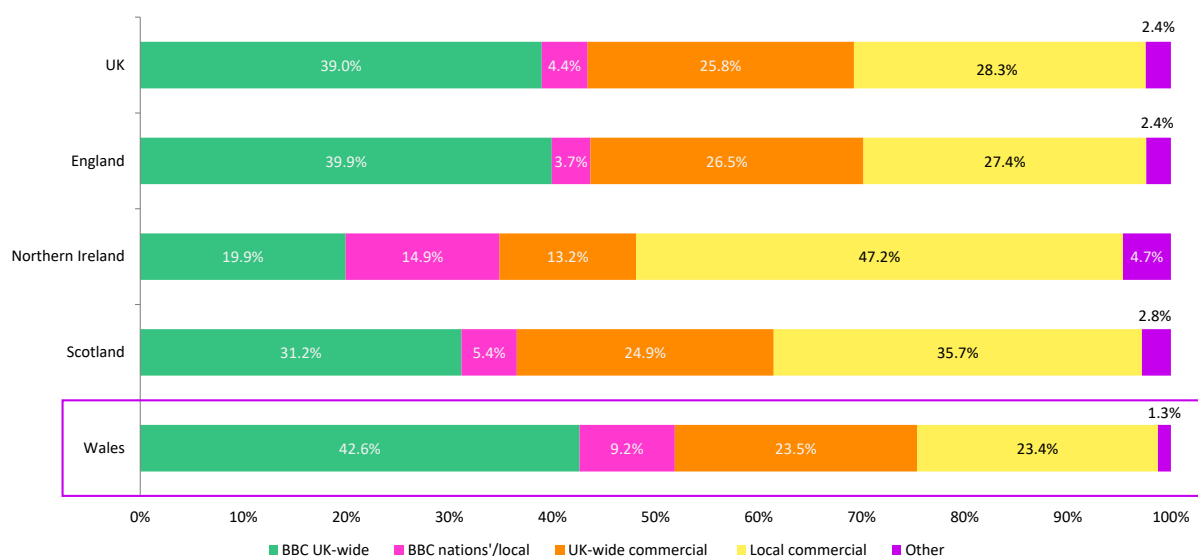
Source: RAJAR Q1 2024; All Radio TSA, BBC Radio Ulster TSA, BBC Radio Scotland TSA, BBC Radio Wales TSA, BBC Local Radio in England TSA. Weight: Automatic weighting.

¹⁸ RAJAR Q1 2024.

BBC radio accounts for the majority of radio listening in Wales

In contrast to Northern Ireland and Scotland, BBC radio performs well in Wales, accounting for the majority (51.9%) of total radio listening. Most of this listening is to UK-wide BBC stations, with nations’/ local stations (Radio Wales, Cymru and Cymru 2) accounting for 9.2% of hours. A smaller proportion of listening is to local commercial stations; lower than in the other parts of the UK (as illustrated in Figure 26).

Figure 26: Share of radio listening, by sector and nation: Q1 2024

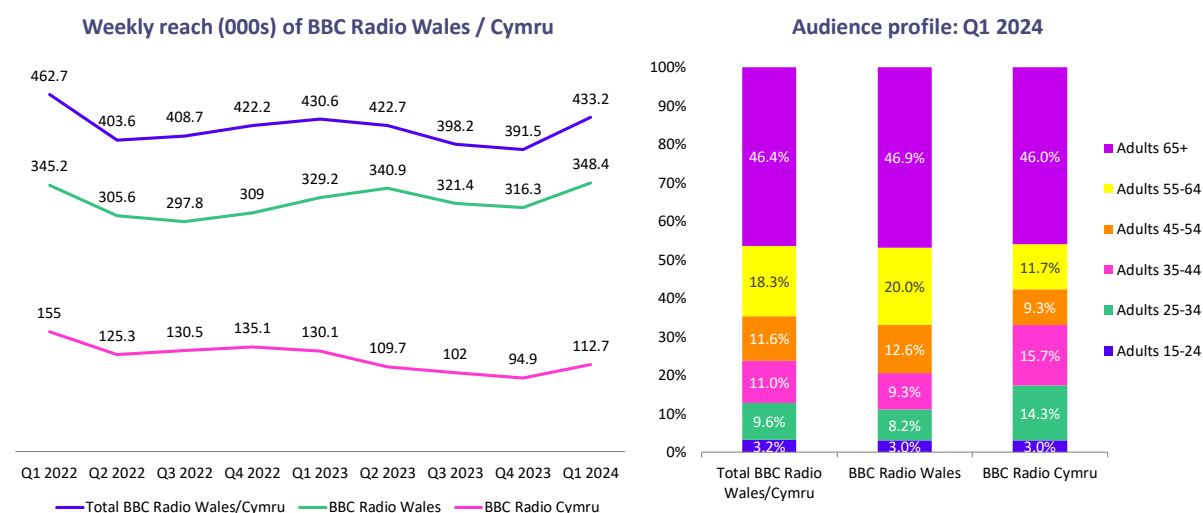


Source: RAJAR Q1 2024; All Radio TSA, BBC Radio Ulster TSA, BBC Radio Scotland TSA, BBC Radio Wales TSA, BBC Local Radio in England TSA. Automatic weighting.

Reach of BBC Radio Wales and Radio Cymru increases to highest levels since spring 2022

After a dip during 2023, BBC Radio Wales’ audience figures have begun to recover. BBC Radio Cymru has a younger age profile than BBC Radio Wales: a third of its listeners are aged under 45 compared to a fifth of BBC Radio Wales listeners (33.0% vs 20.5%). BBC Radio Cymru’s audience are also more likely to be in higher socio-economic groups: 64.5% ABC1 vs 45% for BBC Radio Wales. Only 8% of BBC Radio Wales’ audience also listen to BBC Radio Cymru, while a quarter of BBC Radio Cymru listeners also listen to BBC Radio Wales (24.7%).

Figure 27: Weekly reach and audience profile for BBC Radio Wales / BBC Radio Cymru, by age



Source: RAJAR; BBC Radio Wales TSA; six-month weighting. Note: BBC Radio Cymru 2 is not included as a separate station on RAJAR but its figures are included within BBC Radio Cymru.

Drilling down to the station level, we can see that BBC radio stations are popular across Wales, but it is worth noting the slight variations by area. Heart, owned by Global, was the only UK-wide commercial station to feature in the top five across Wales in Q1 2024, with no Bauer-owned stations making an appearance due to Bauer's limited presence in Wales. BBC Radio Cymru was the fourth most popular station in North Wales, while BBC Radio Wales and BBC Radio 1 took the fourth and fifth spots in the south, and across Wales as a whole, respectively.

Figure 28: Top five stations / networks by area and by market share: Q1 2024

Area	Rank	Station	Market share %	Broadcaster
Across Wales	1	BBC Radio 2	18.0	BBC
	2	BBC Radio 4	11.4	BBC
	3	Heart (UK)	8.8	Global
	4	BBC Radio Wales	5.5	BBC
	5	BBC Radio 1	4.7	BBC
North Wales	1	BBC Radio 2	20.0	BBC
	2	BBC Radio 4	14.6	BBC
	3	Heart (UK)	6.3	Global
	4	BBC Radio Cymru	5.6	BBC
	5	Smooth (UK)	5.4	Global
South Wales	1	BBC Radio 2	17.1	BBC
	2	Heart (UK)	9.9	Global
	3	BBC Radio 4	9.8	BBC
	4	BBC Radio Wales	6.3	BBC
	5	BBC Radio 1	4.7	BBC

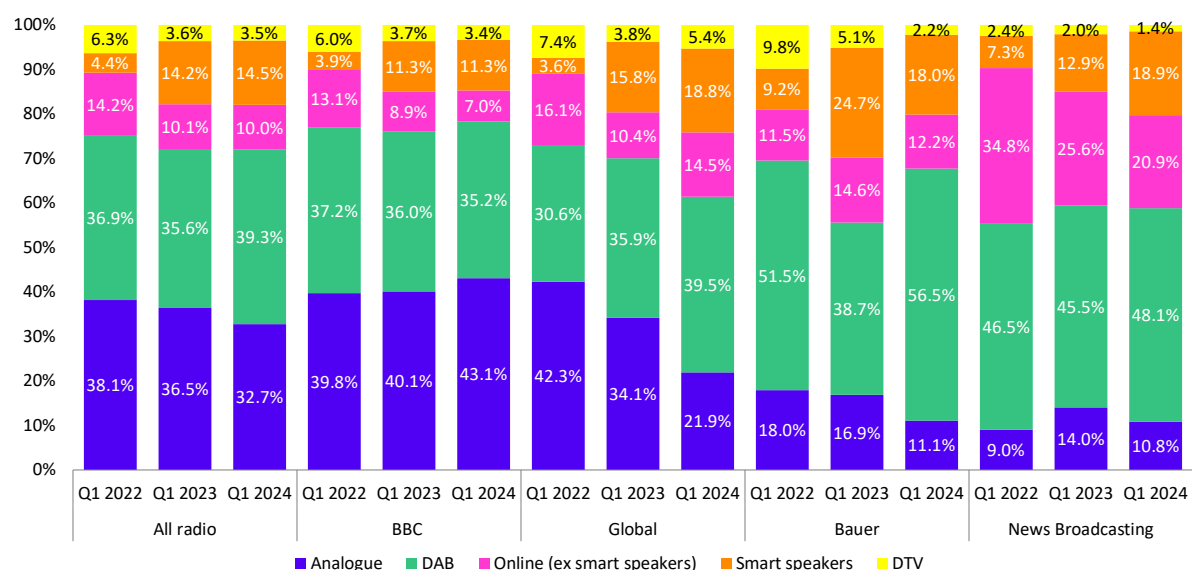
Source: RAJAR Q1 2024; BBC Radio Wales TSA; Heart North Wales TSA; Heart South Wales TSA; Automatic weighting.

A quarter of radio listening in Wales is online, the majority of this via smart speakers

The gradual shift to online listening continues, with smart speakers, smartphones and other internet-enabled devices now accounting for just under a quarter (24.5%) of all radio listening in Wales. Approximately two-thirds of all online listening to radio is via smart speakers. This figure is higher for the commercial broadcasters Global (18.8%), Bauer (18.0%) and News Broadcasting (19.9%), and lower for the BBC, at 11.3%.

Amid this growth in online listening, DAB and analogue radio remain resilient in Wales. DAB accounted for just under four in ten radio hours (39.3%), over 6pp clear of AM/FM's share of 32.7%.

Figure 29: Share of radio listening by platform and broadcast group, Wales: 2022-2024

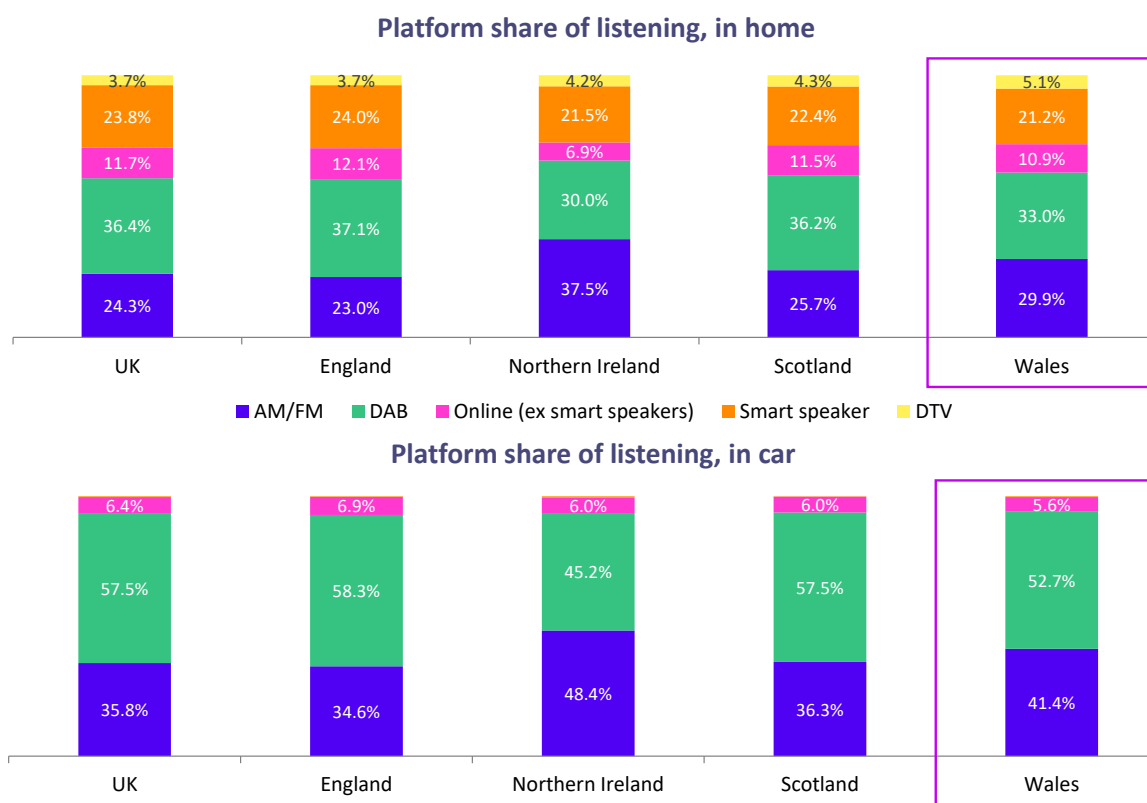


Source: RAJAR, BBC Radio Wales TSA.

The majority of in-car listening in Wales is now via DAB, while just over a fifth of in-home listening is via smart speakers

Looking at in-home listening hours, smart speakers' share of listening increases to 21.2% (compared to the average of 14.5% across all locations i.e. in-home, in-car and at work/elsewhere). In cars, the majority of listening is now via DAB (52.7%). A year ago, in-car listening was more evenly split between AM/FM (48.7%) and DAB (45.8%). This increase, at nearly seven percentage points, puts the platform's share of radio listening in Wales more in line with the average across the UK, although DAB's share is still lower than the UK average (57.5%).

Figure 30: Platform share of in-home and in-car listening, by nation: Q1 2024



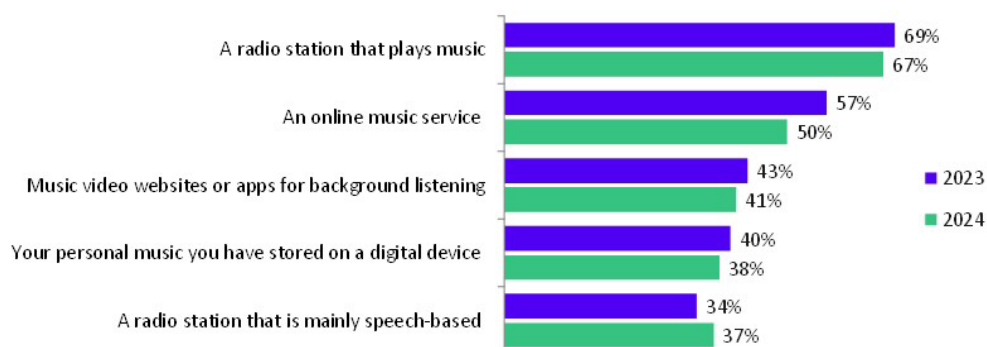
Source: RAJAR Q1 2024; All Radio TSA; BBC Local Radio in England TSA; BBC Radio Ulster TSA, BBC Radio Scotland TSA; BBC Radio Wales TSA; six-month weighting.

Online listening in Wales

Listening to music radio was the popular weekly audio activity in Wales, followed by music streaming

Looking more broadly at all forms of audio across devices, online music services (such as Spotify, Apple and Amazon) are the second most popular audio format after listening to music radio. Just over two-thirds of adults in Wales listen to music radio (67%) and half (50%) listen to an online music service at least once a week.

Figure 31: Weekly reach of audio activities: adults 15+ in Wales: 2024 vs 2023

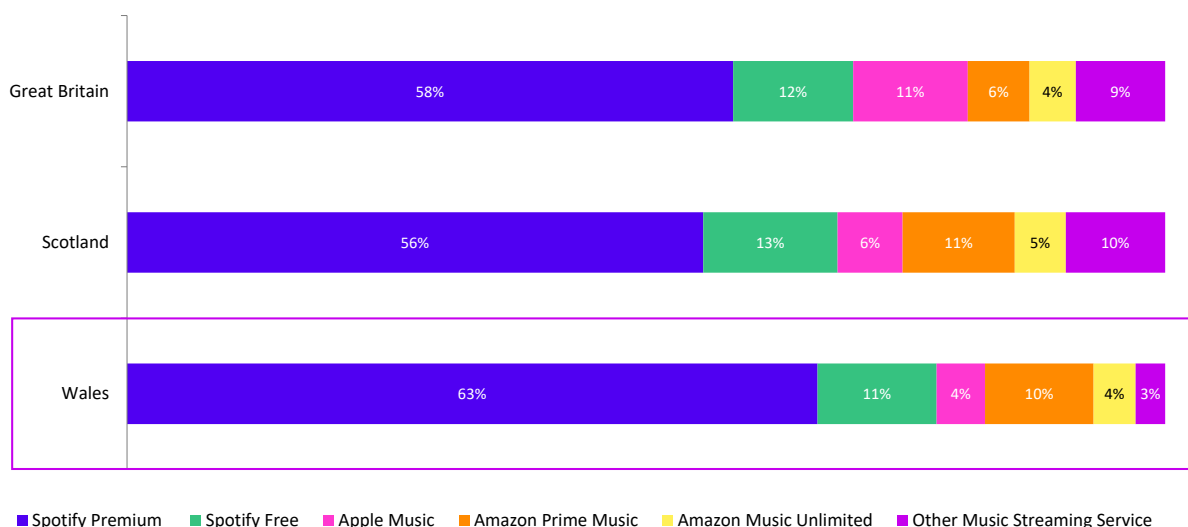


Source: Ofcom Audio Survey 2023. Q1: How often, if at all, do you listen to any of the following? Base: All adult respondents (2023 weighted base: 107. 2024 weighted base: 158). NET: Weekly.

Spotify accounts for nearly three-quarters of music streaming in Wales

Focusing on music streaming, Spotify Premium accounted for the majority (63%) of total time spent streaming music in Wales in 2023/24 – five percentage points higher than the average across Great Britain as a whole (58%). Including the ad-supported free tier (Spotify Free), which accounted for 11%, Spotify's total share of music streaming time in Wales was 74% in 2023/24. Amazon Music was the next most popular platform, accounting for 14% of time spent music streaming, followed by Apple Music at 4%.

Figure 32: Share of time spent music streaming, by platform: adults in GB, Scotland and Wales

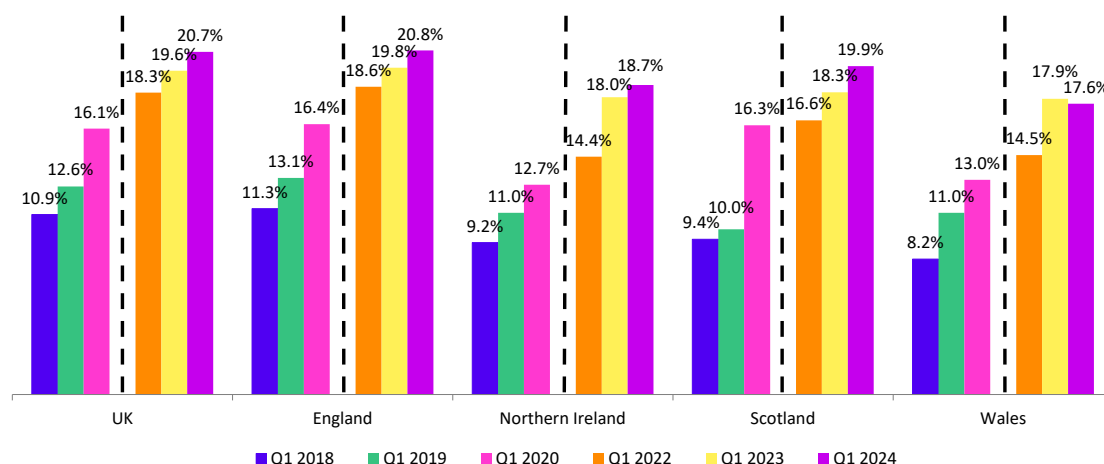


Source: IPA TouchPoints Superhub 2023/24; adults 15+.

Growth in podcast listening in Wales stalled in Q1 2024, with less than one in five adults listening each week

Podcasts are slowly but surely becoming a fixture of the average audio diet, but less than one in five (17.6%) adults in Wales listened to them once a week in Q1 2024. This is lower than the UK reach figure of 20.7%, and a slight decline from Q1 2023 (17.9%) but still more than double the 2018 figure (8.2%).

Figure 33: Weekly reach of podcast listeners, by nation: 2018-2024



Source: RAJAR; dotted lines indicate suspension of fieldwork due to the Covid-19 lockdowns. This led to subsequent changes in methodology, so comparison with previous quarters should be made with caution.

More than four in ten households in Wales have a smart speaker, while a quarter have a DAB radio set in the home

Just over four in ten households (45%) in Wales have a smart speaker, in line with the UK as a whole (41%).¹⁹ Amazon continues to be the most popular brand by far, with nearly nine in ten homes with smart speakers having an Amazon Echo (87%), followed by the Google Home / Google Nest at 13%. The most popular place to have a smart speaker is the living room, with just over half of all smart speaker owners having one here (51%), followed by the kitchen (42%) and bedroom (38%). In comparison, just over a quarter (26%) of households in Wales have a DAB radio at home and half (50%) have one in the car, with overall household penetration of DAB radios at 59%.

¹⁹ Ofcom Technology Tracker 2024.