



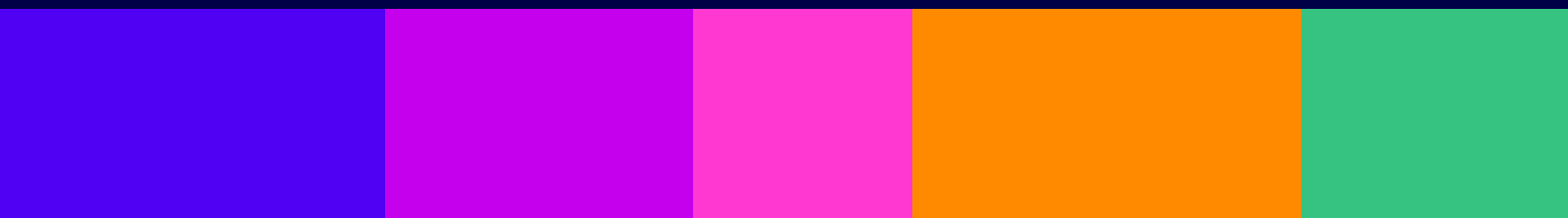
Media Nations

Wales 2026



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Overview

Introduction

This *Media Nations: Wales* report examines key trends across the media sector and explores how audiences in Wales are served. We take a cross-platform approach, covering broadcast TV and radio alongside digital services such as online video and audio streaming.

New this year, the report also includes analysis of device ownership and broader media consumption habits, providing context for our assessment of the TV & video and radio & audio sectors. The report draws on a range of data sources, including information collected directly from licensed television and radio broadcasters (covering output, spend and revenue), Ofcom's own consumer research, and Barb and RAJAR data (for audience consumption).

In addition to this Wales report, separate Media Nations reports are published for the UK as a whole, Northern Ireland and Scotland.

Key findings



63% of people in Wales saw news or information about the Senedd Cymru election on TV.

34% saw election news and information online.

BVoD viewing increased by 39% in adults 25–34.



KPop Demon Hunters was the most-watched title in Wales.

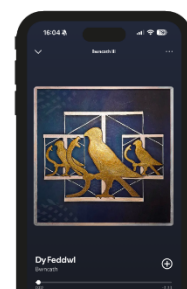
Averaging 1.3m viewers on TV.



74% of people in Wales view broadcast TV each week, the highest of all the UK nations



The most-used service for streaming music is Spotify with 44% of adults in Wales listening each week.



Media in context

Introduction

People consume a wide range of media, across multiple formats and devices. In this section we draw from a range of data sources to examine device ownership and media consumption by people in Wales, providing a background to our analysis of the TV and video, and the radio and audio sectors.

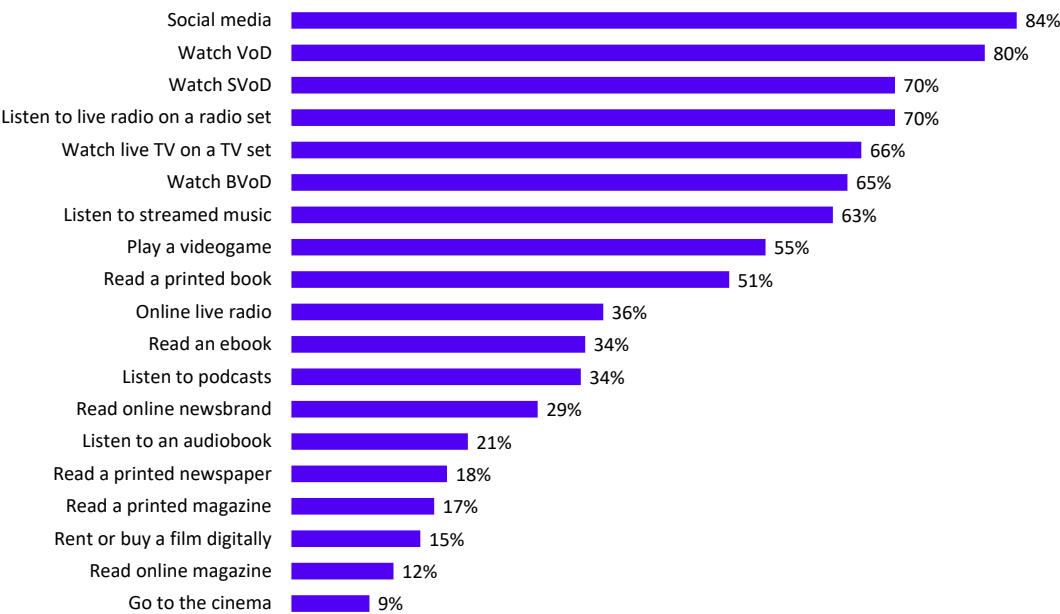
News is essential for keeping people informed about their local area, Wales, the UK and beyond. We explore the sources of news for people in Wales and also present some findings on people’s use of news in relation to the 2026 Senedd Cymru election.

Media and devices

Over eight in ten adults in Wales use social media at least once a month

People engage in a range of media activities, choosing medium, platform and content to match their current mood and interests. Listening to live radio on a radio set and watching live TV on a TV set are done by 70% and 66% of adults in Wales respectively on at least a monthly basis.¹ Using social media (84%) and watching a video-on-demand (VoD) service (80%) are even more common, with 65% watching broadcaster video-on-demand (BVoD) specifically. Over half of people in Wales play a video game or read a printed book at least once a month.

Figure 1: Monthly reach of selected media activities by adults in Wales: 2026



Source: IPA TouchPoints SuperHub 2026.

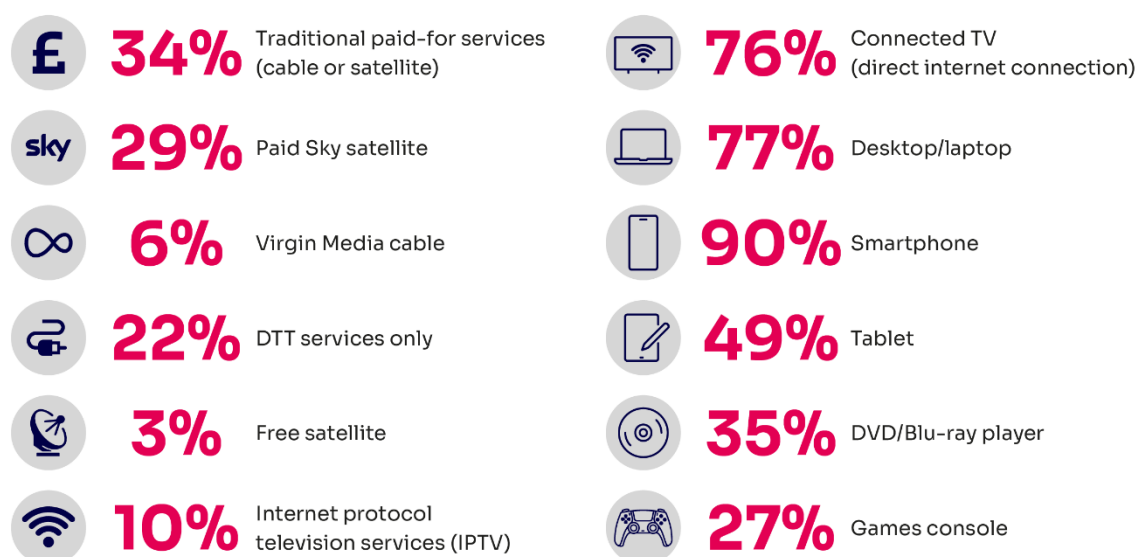
¹ We use monthly reach figures here from the IPA Touchpoints survey as this enables us to compare reach between different types of media. This may differ from, and not be directly comparable to, other media-specific or industry reach figures in this report such as those for TV (Barb) and radio (RAJAR).

More than one in three households in Wales receive a paid-for satellite or cable service

The proportion of households in Wales with at least one working TV set was 96% in Q1 2026, slightly more than the UK average of 93%. The proportion of households receiving traditional paid-for cable or satellite services fell slightly to 34%, down from 36% in 2025, but was the highest of any UK nation, ahead of the UK average of 30%. Households receiving paid-for Sky satellite services remained the highest of any UK nation at 29% compared to 21% across the UK.

Households receiving Internet Protocol television (IPTV) services, which are TV services delivered over the internet instead of through a traditional aerial, satellite or cable connection, rose from 7% in Q1 2025 to 10% in Q1 2026. The majority of these remained EE TV households (4.2%), but Sky Stream increased from negligible household penetration in Q1 2025 (<1%) to 3.6% in Q1 2026.

Figure 2: Take-up of TV platforms in Wales: Q1 2026



Source: Barb Establishment Survey Q1 2026. 'DTT services only' means households with an aerial only and not cable, satellite or IPTV. IPTV includes EE TV, TalkTalk, YouView, Sky Stream and Freely.

Ownership of connected TVs and other connected devices

Nine in ten households (90%) in Wales have a smartphone, broadly in line with the UK average of 92%. Three in four households (76%) have at least one TV connected directly to the internet,² also close to the UK average of 72%.

Games console ownership³ is the highest of any UK nation at 27%, slightly above the UK average of 25%. PlayStation consoles are the most common, in 14% of households, followed by XBOX at 12%. DVD or Blu-ray players are also more widely owned in Wales than elsewhere in the UK. They were present in just over a third of households (35%), compared with the UK average of 28%.

² This does not include TVs connected via other devices such as a dongle or games console.

³ Includes PlayStation 2/3/4/5, XBOX/360/One/Series S/Series X, or Nintendo Wii/Wii U/Switch/other.

Broadband in Wales

According to our [Connected Nations](#) reports, as of January 2026, 96% of all homes in Wales were in areas of superfast broadband availability (download speeds of at least 30 Mbit/s). Full fibre broadband – offering the fastest speeds – is now available to 81% of households in Wales, up from 74% in January 2025. Take-up of full fibre broadband rose from 39% in July 2024 to 49% in July 2025. Use of satellite connectivity also rose; the number of Starlink subscribers in Wales increased to over 7,500 in 2025 from about 5,000 in 2024.

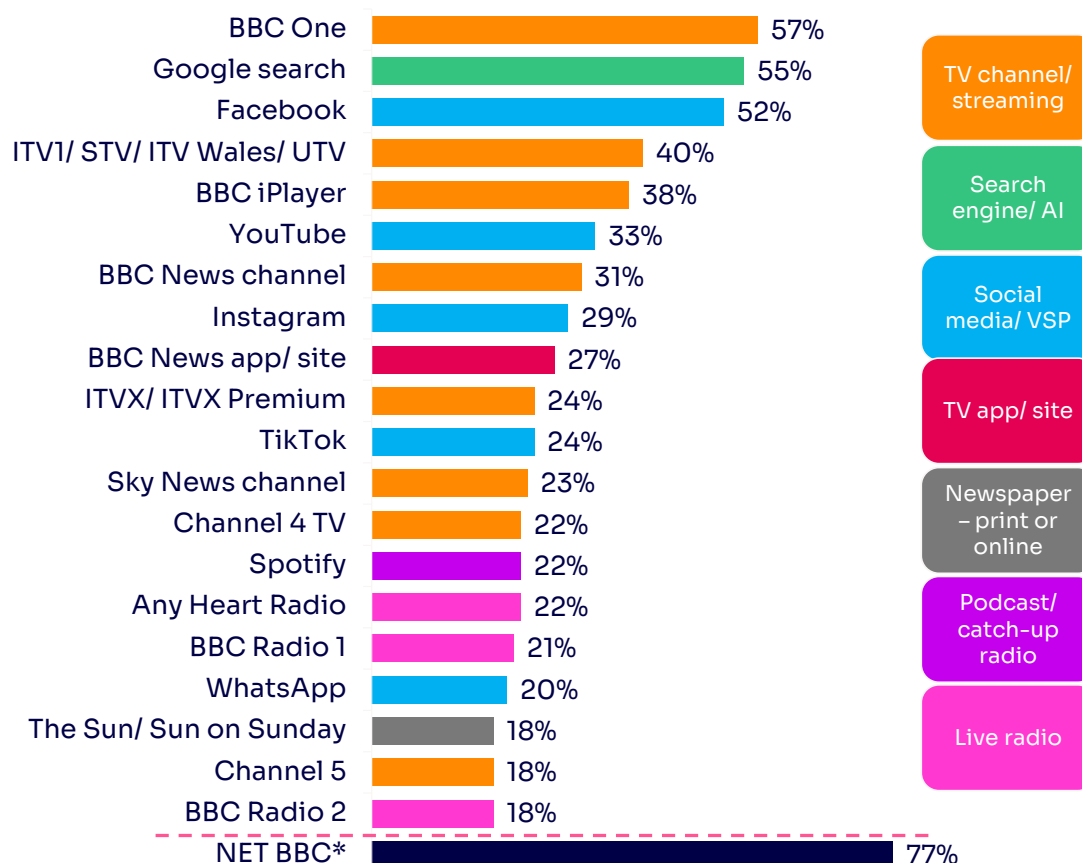
News

BBC One is the most common way to access news in Wales

Ofcom's News Consumption Survey found that BBC One is the most commonly used way to access news among people in Wales, with 57% of respondents in Wales saying they had used it in the past month for news. This was followed by Google Search (55%),⁴ Facebook (52%) and ITV1 (40%). The BBC News website or app was the most-used broadcaster website or app for news by people in Wales, used by 27% of respondents. Heart was the most-used radio station for news (22%), followed by BBC Radio 1 (21%). The Sun / Sun on Sunday was the most popular newspaper brand, used by 18% of those in Wales in the past month for news. Seventy-seven percent of those in Wales reported using any BBC source for news across its TV, online and radio news offerings, while 50% of those in Wales reported using any ITV source.

⁴ The survey methodology was changed with this year's News Consumption Survey, to first ask about ways of being informed or entertained more generally, then asking about specific ways of accessing news. This was done to better capture people's passive and incidental news consumption that may occur during daily life without their necessarily intentionally accessing news services. This has resulted in platforms like Google search being very prominent as ways of accessing news in general, although not featuring when asked, for example, about most important news sources. Data should not be compared directly with previous years.

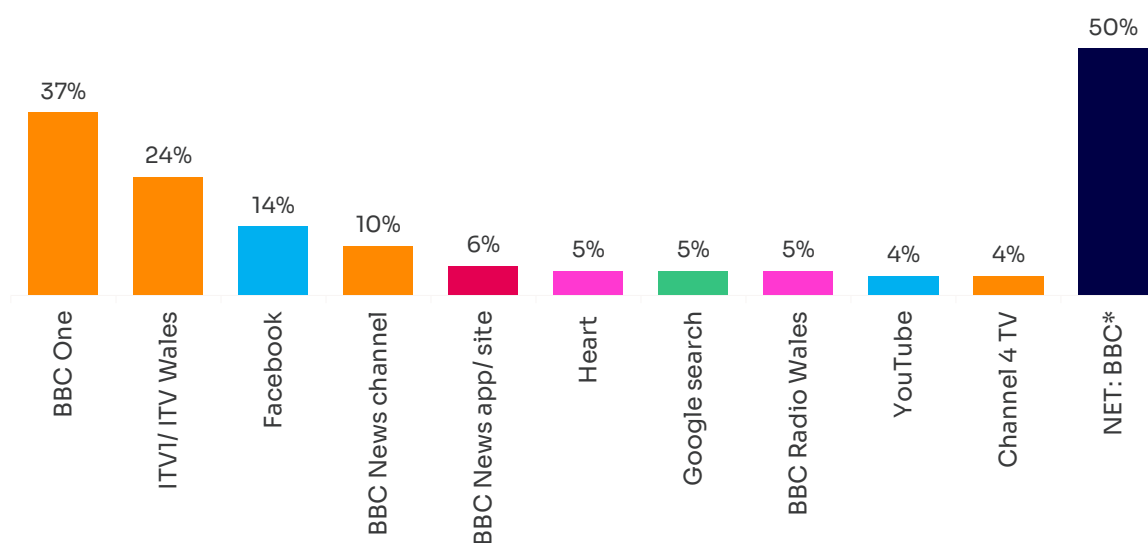
Figure 3: Top 20 ways to access news in the past month in Wales



Source: Ofcom News Consumption Survey 2026. Question: D1-D22. Which, if any, of the following [MEDIA TYPE] have you seen or heard news on in the last month? *NET BBC includes BBC TV/ BBC iPlayer, BBC apps/ sites, BBC Radio, BBC Sounds. Base: All adults in Wales (600).

BBC One was reported as the most common way of accessing news about Wales, with 37% of respondents in Wales indicating they used it for this type of news. This was followed by ITV1 (24%) and Facebook (14%). Fifty per cent of people in Wales used a BBC source for news about Wales, with top BBC sources for news about Wales including BBC One (37%), the BBC News channel (10%), BBC News online (6%) and BBC Radio Wales (5%).

Figure 4: Top ten ways to access news about Wales



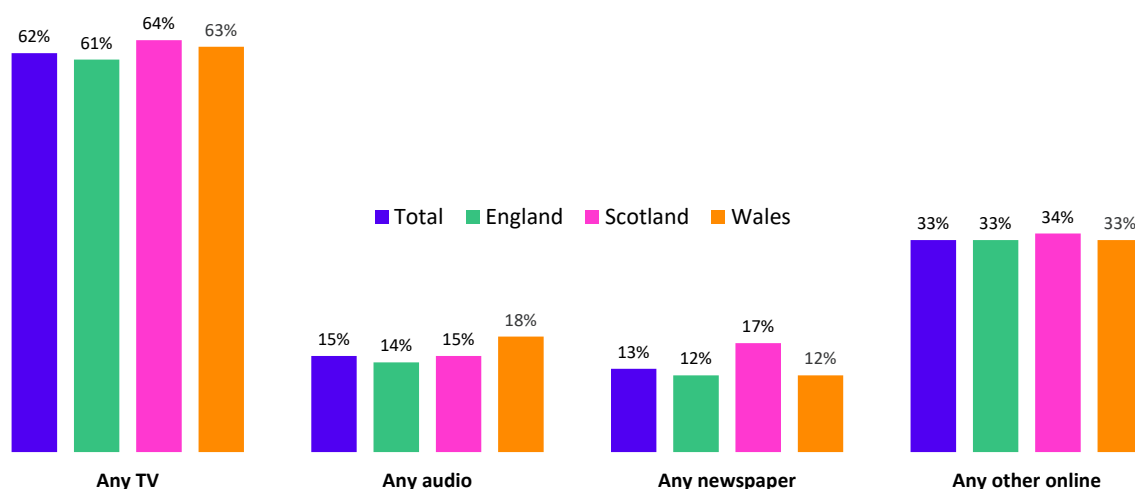
Source: Ofcom News Consumption Survey 2026. QF2. Looking at all of the sources of news that you have seen or heard news on in the last month, which of these have you seen or heard news on about what is going on in Wales? *NET BBC = BBC TV/ BBC iPlayer, BBC apps/ sites, BBC Radio, BBC Sounds. Base: Wales (600).

News and information about the Senedd Cymru election was most commonly seen on TV

On 7 May 2026, elections were held for the Senedd Cymru, the Scottish Parliament and 136 local authorities and five mayoralities in parts of England, the largest set of elections in the UK since the 2024 General Election.

Adults in Wales went to the polls to elect 96 Members of the Senedd Cymru (MS) across 16 multi-member constituencies, the first time this system has been used for Welsh elections. Our research found that 95% of adults in Wales were aware of the elections taking place for the Senedd Cymru. Overall, 63% of people in Wales who were aware of the elections had seen news and information about them on TV, with 33% seeing election news and information online.

Figure 5: Platforms where news and information about the elections on 7 May 2026 was seen

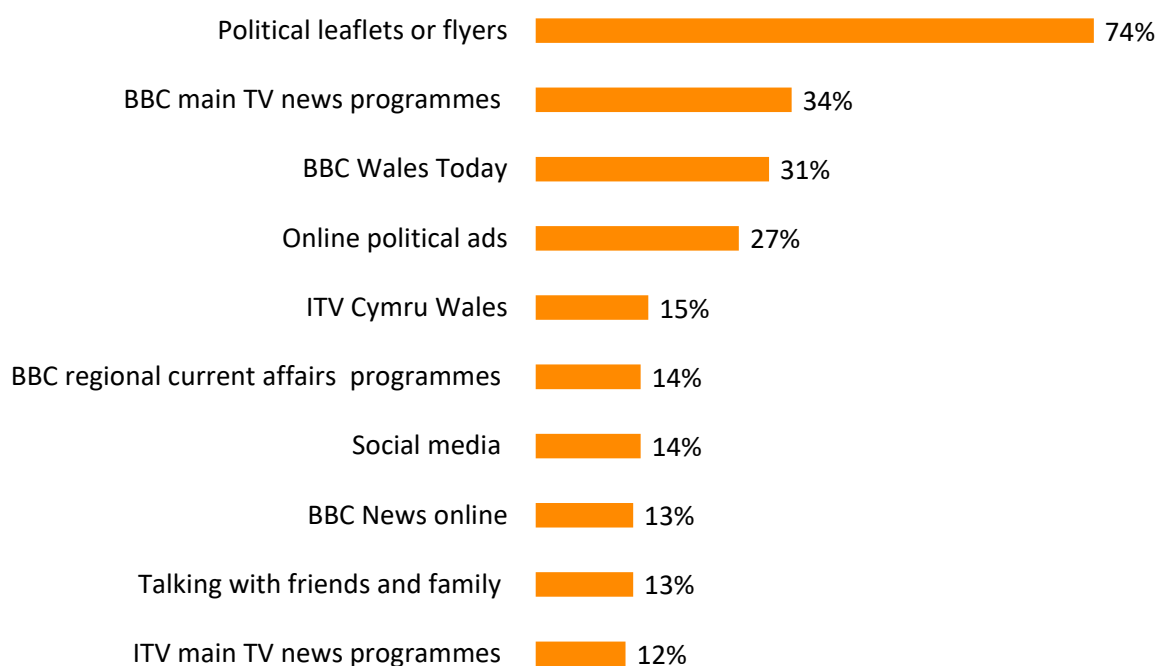


Source: Ofcom Local Election Survey. Q3A. Thinking about the weeks leading up to the [election], through which of the following sources, if any, did you see news and information about the election? Base: All aware of the 7 May elections (5550), all aware of elections in [region] England (3566), Scotland (1007), Wales (977).

Almost three-quarters (74%) of people aware of the election reported a political leaflet as a source of news or information. Online political ads were also a core part of the mix in informing the people of Wales about the 7 May elections (27%).

News about the elections was accessed most often on television, used by 63% of those in Wales aware of the election, although viewing was fragmented across multiple TV news sources: the main BBC TV news programmes (34%), *BBC Wales Today* (31%), *ITV Cymru Wales* (15%), and others. For ITV, the opposite was observed, with more respondents indicating they get their news regarding the election from *ITV Cymru Wales* than from UK-wide ITV news programmes. Looking at other ways of accessing news, 14% had seen election coverage on social media, 13% on BBC News online, with 4% saying they had seen it in any Welsh newspaper (printed or online).

Figure 6: Top ten ways of accessing news and information about the 7 May 2026 election in Wales



Source: Ofcom Local Election Survey. Q3A. Thinking about the weeks leading up to the Senedd Cymru or Welsh Parliament election, through which of the following sources, if any, did you see news and information about the election? Base: All aware of the 7 May election in Wales (977).

TV and video

Market developments

BBC Cymru Wales

News and current affairs continued to account for the largest share of BBC Cymru Wales' output, with a growing focus on digital and multi-platform journalism. Services include *BBC Wales Today*, *Politics Wales*, *Walescast* and *BBC Wales Investigates*. Coverage of the Senedd Cymru election was a significant part of its political programming.

The BBC also broadcast drama, factual and entertainment programming, including *Mr Burton and Death Valley*, *SOS Extreme Rescues*, *Saving Lives in Cardiff*, and *Crash Detectives*. BBC Wales, reported an average weekly online sports audience of about 2.5 million users, supported by coverage of men's and women's football.

BBC Partnerships

BBC Cymru Wales announced plans to commission and distribute more content for YouTube, as part of a partnership with the platform. In Wales, this includes a [development fund](#) for factual entertainment pilots aimed at 16-24-year-olds and designed specifically for YouTube.

In January 2026, the BBC and S4C [announced](#) a new streaming partnership, that will make S4C content more prominent on BBC iPlayer in Wales, with some content also available elsewhere across the UK. The partnership includes closer integration between services and additional features such as multiple live streams, personalisation features, and Welsh and English subtitles.

AI innovation

BBC Wales has been involved in a number of AI-related pilot projects, including work with the National Centre for Learning Welsh and the BBC's Responsible AI team, exploring how AI tools could support Welsh language learners.

S4C

In September 2025, S4C launched its new [five-year strategy](#), focused on growing audiences, digital services, and partnership working. S4C expanded its presence on digital platforms, including working with YouTube on news content and original comedy content.

Programming aimed at younger audiences included teen drama *Hafiach* which addressed issues affecting 13-16-year-olds, while *Yr Alwad* was a vertical-format drama created for TikTok. Children's programming included *Parc Glan Gwil* and *Help Llaw*, while *Bluey* became available in Welsh.

S4C provided coverage of the 2026 Senedd Cymru election, which included a party leaders' debate, election results programming and special editions of *Y Byd yn ei Le*. Election coverage was also available through digital news services from Newyddion S4C.

Sport remained a significant part of S4C's content including free-to-air coverage of international and domestic football and rugby. This included coverage of the UEFA Women's Euro 2025 tournament, which was the first time Wales' women had competed at a major international tournament. S4C also

broadcast other sporting events such as the Tour de France, World Rally Championship rallies and the Welsh Triathlon Series.

In 2026, S4C and Am, the online Welsh language digital culture platform supported by Arts Council Wales and Creative Wales, launched a [Community Film Fund](#) which will fund 15 short films in Welsh covering topics related to local communities. The content will be made available on Am as well as on S4C's digital platforms.

ITV Cymru Wales

ITV Cymru Wales continued to provide news and current affairs programming throughout the year. It covered the Senedd Cymru election including four polls produced in partnership with Cardiff University and YouGov.

ITV Cymru Wales continued to develop its digital journalism, across its own platforms and through content produced for S4C's *Hansh Dim Sbin*. Election coverage included online formats such as *Chippy Chats* as well as long-form programmes such as *Wales Decides: The Interviews*. ITV Cymru Wales reported its election coverage achieved more than seven million views on social platforms.

Its factual programming included *Proud* and *The Hospice: Caring to the End* and its returning title *Vanished Wales*, which uncovers stories of lost places and communities across Wales. ITV Cymru Wales also produced current affairs content for S4C including *Y Byd yn ei Le* and *Y Byd ar Bedwar*.

Creative Wales

Creative Wales, the Welsh Government's agency for the creative industries, has supported a range of productions including *Under Salt Marsh*, *Young Sherlock* and *The Other Bennet Sister*. On film, Creative Wales' supported *Mad Fabulous*, *Mr Burton* and Welsh language feature film, *Effi*.

The Creative Wales Public Interest Journalism Fund supported a number of strategic journalism projects, including the Cardiff University School of Journalism, Media and Culture [report](#) on media coverage of the 2026 UK election campaigns.

Viewing trends

Total in-home video viewing

Despite a decline in 2025, people in Wales watched more video content per day than any other UK nation

People in Wales watched an average 4 hours 52 minutes of video content at home per day in 2025, once again the highest among the UK nations despite a large decline of 16 minutes year on year. Broadcaster TV content – including live TV, recorded TV, and BVoD – fell by 14 minutes but was still watched more than in any other nation, accounting for 55% of total viewing time (2 hours 41 minutes). Live TV viewing declined the most, down by 11 minutes to 1 hour 43 minutes, while recorded TV was at 27 minutes, a 3-minute decline. BVoD viewing increased by less than in recent years, up 1 minute to 31 minutes, higher than the other nations.

Wales had the lowest viewing of video-sharing platforms (VSPs) of the devolved nations, with viewers averaging 50 minutes, a 3-minute increase year on year. Subscription video-on-demand (SVoD, e.g. Netflix) and advertising funded video-on-demand (AVoD e.g. Pluto TV) were still watched more in Wales than in the other nations, averaging 48 minutes per day, up 3 minutes on 2024, and accounting for 17% of viewing.

Figure 7: Total in-home daily video viewing minutes per person, by platform and nation: 2025



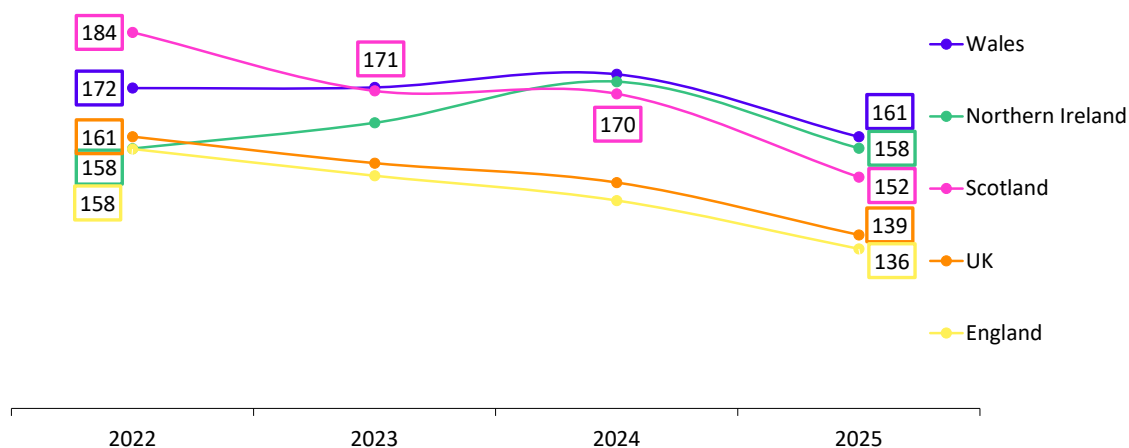
Source: Barb as-viewed on TV sets and other devices using the home's WiFi network. 'Broadcaster content' includes live TV, recorded playback and BVoD. 'Other TV set usage' includes viewing of some SVoD/AVoD/VSP that cannot be definitively measured, as well as some unmeasured broadcast channels, some 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).

Broadcaster TV viewing in Wales

After being stable for two years, viewing in Wales fell in 2025

Broadcaster TV viewing in Wales was 8% lower in 2025 than in 2024, in line with the UK average, bringing average daily viewing by all individuals aged 4+ in Wales to 2 hours 41 minutes. Despite this decline, Wales continues to record the highest viewing levels of any UK nation – a position it has held since 2023. However, since 2022, average daily viewing in Wales has decreased by 11 minutes.

Figure 8: Average daily minutes viewed of broadcaster TV per person, by nation: 2022-2025



Source: Barb, as-viewed. All individuals 4+, BBC areas, live + recorded playback and BVoD.

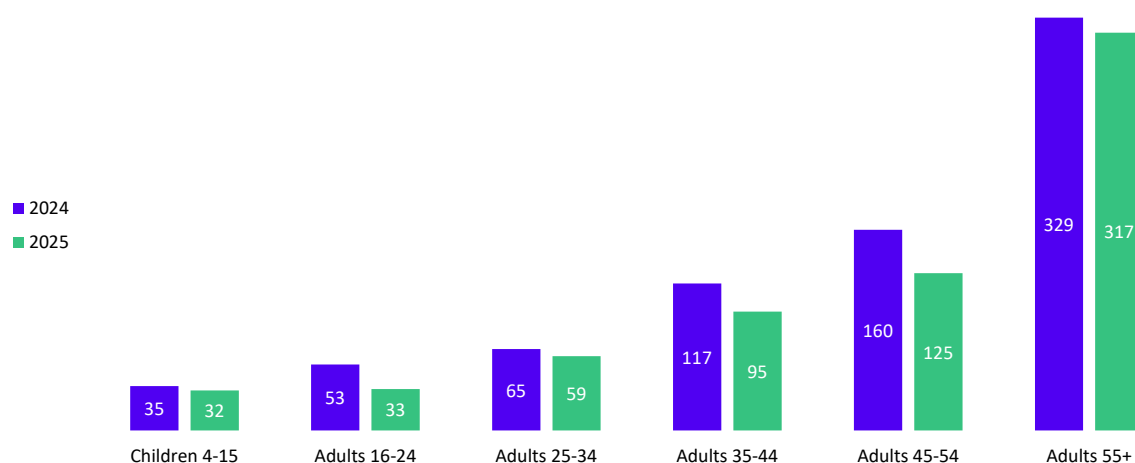
BVoD viewing increased by 39% among adults aged 25-34

All age groups in Wales saw a decline in time spent watching broadcaster TV in 2025. The steepest drop was among young adults aged 16-24, whose viewing fell by 37% compared with 2024, down to 33 minutes per person per day. This decline was driven by reductions in linear TV (live and recorded playback), which dropped by 45% to 17 minutes, and BVoD viewing, which fell by 28% to 16 minutes per day.

In contrast, older adults aged 55+ had a much smaller overall decline of 4%, with average viewing at 5 hours 17 minutes per day. This decrease was entirely due to a 6% fall in linear TV, as their BVoD viewing increased by 15% to 34 minutes per day.

While linear TV declined across all demographics, BVoD viewing grew among several groups, including 25-34s (+39%), children aged 4-15 (+28%), and adults aged 55+, though not enough to offset the fall in linear.

Figure 9: Average daily minutes of broadcaster TV viewed in Wales, by age group: 2024-2025



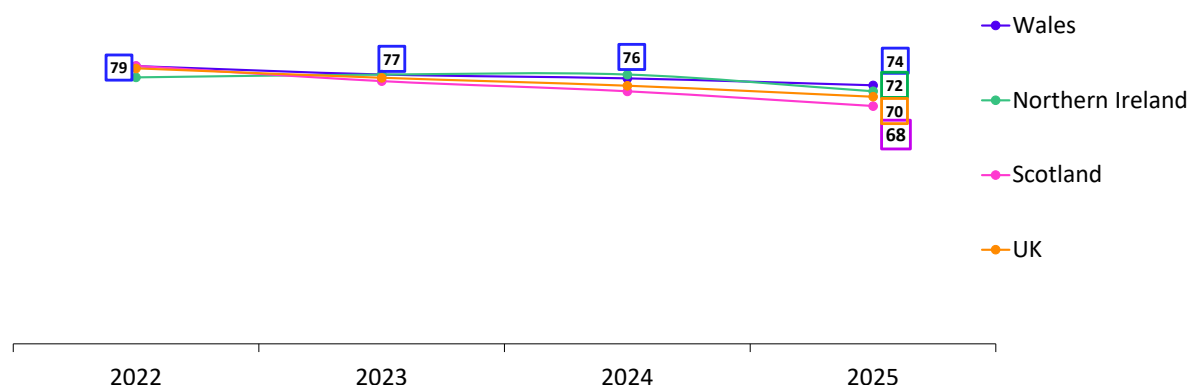
Source: Barb, as-viewed.

Reach of broadcast TV remains higher in Wales than in all other nations

The average weekly reach of broadcaster TV (live, recorded, and BVoD) was higher in Wales than in the other nations, at 74% in 2025. While all nations experienced a decline in 2025 compared with 2024, Wales had the smallest decrease, down just two percentage points, which is below the UK average decline of three percentage points.

The overall reduction in broadcaster reach was driven entirely by a fall in linear TV, which declined by six percentage points to 55%. In contrast, reach to BVoD increased by three percentage points to 49% among individuals aged 4+ in Wales – the largest increase of any nation.

Figure 10: Average weekly reach % of broadcaster TV, by nation: 2022-2025

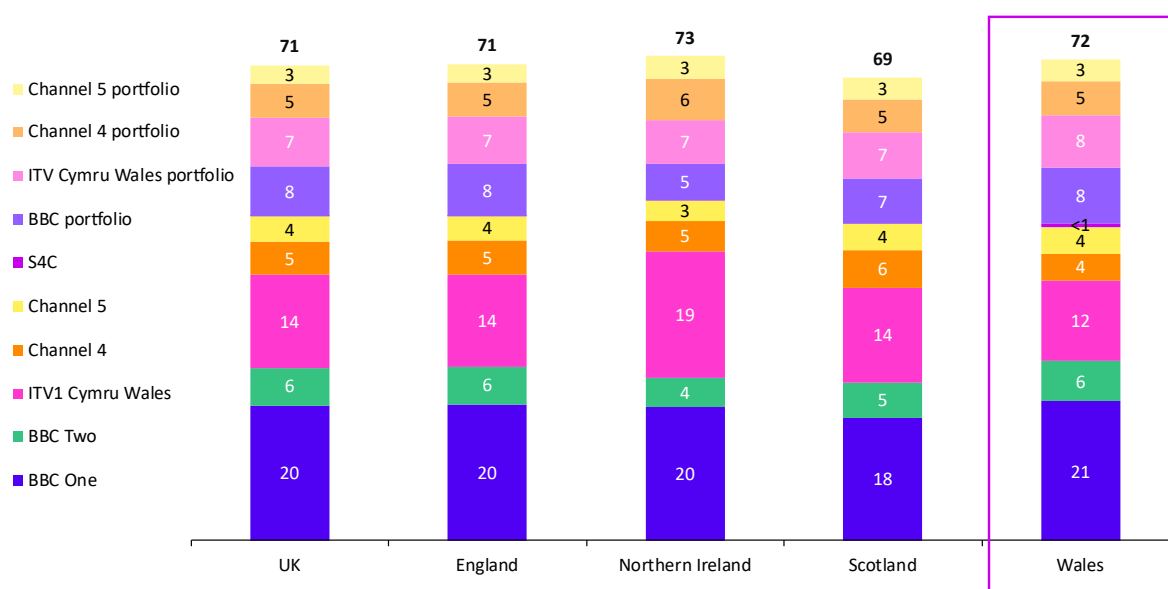


Source: Barb-as-viewed. All individuals 4+, BBC areas, live + recorded playback and BVoD. Reach criteria 15+ consecutive mins. Note: England figures not shown on the chart – they match the data for the UK as a whole.

The BBC continues to command the largest share of broadcaster TV viewing in Wales

In 2025, the PSBs and their portfolio channels, including BVoD services, accounted for a combined 72% share of the total broadcaster TV audience in Wales. The BBC remained the leading PSB group by viewing share, attracting 35% of the broadcaster TV audience, its highest share in any UK nation. This underlines the BBC's particularly prominent role in Wales.

Figure 11: Share (%) of broadcaster TV viewing for the PSBs' channels, by nation: 2025



Source: Barb as-viewed (all individuals 4+). Main channels include +1 channels where relevant. Portfolio groups include all other channels besides the main channel. Includes BVoD services.

Use of BVoD and SVoD services

In Q1 2026, the proportion of households in Wales subscribing to at least one SVoD service declined slightly, with 69% of households taking a subscription, compared with 70% in Q1 2025.⁵

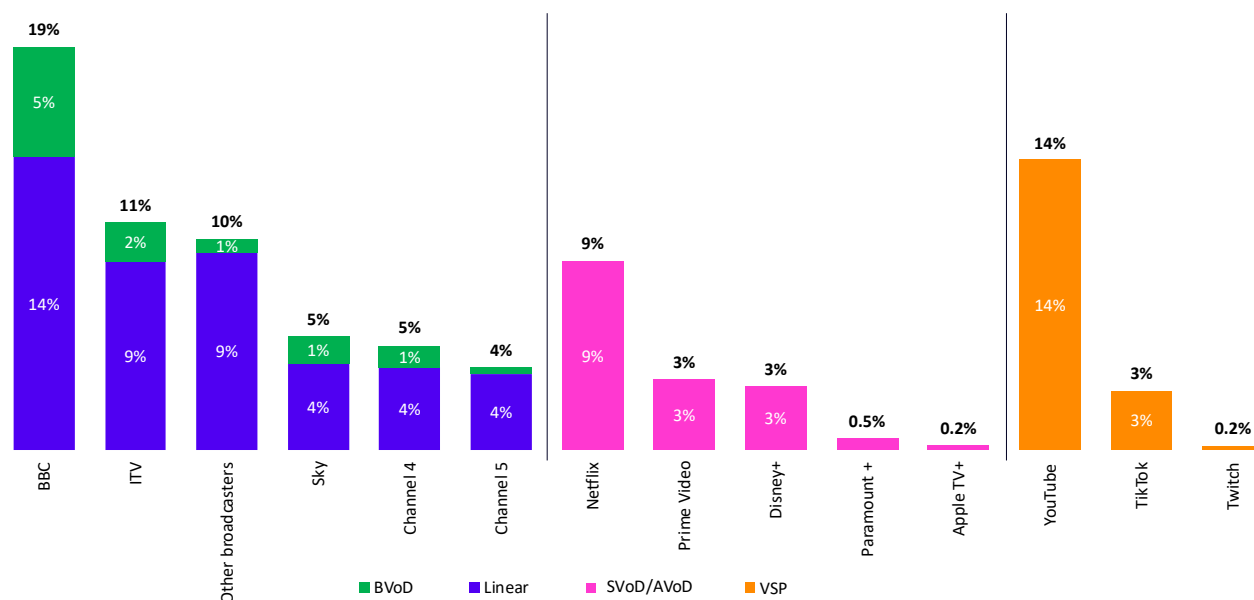
Netflix remained the most widely subscribed SVoD service in Wales, present in 61% of households, up marginally from 60% a year earlier. Amazon Prime Video was the second most subscribed service, although its household penetration fell from 47% to 45% over the period. Disney+ retained its position as the third-largest provider, with subscriptions in 26% of homes. Smaller SVoD services also maintained a foothold in the Welsh market, including Paramount+ (14% of homes), Discovery+ (11%) and Apple TV+ (8%).

In 2025, the BBC accounted for 19% of all in-home video viewing across devices by all individuals. Most of this viewing came from linear television, which contributed 14% of this total, down one percentage point year-on-year, while BVoD increased one percentage point, accounting for 5%. ITV attracted an 11% share of viewing, also driven primarily by its linear channels which fell one percentage point, while BVoD remained flat. Sky, Channel 4 and Channel 5 all remained stable year-on-year.

Netflix accounted for 9% of total in-home video viewing, up one percentage point on 2024. Disney+ fell by one percentage point, while Amazon Prime Video remained stable.

YouTube accounted for 14% of viewing, up two percentage points year-on-year, while TikTok and Twitch remained in-line with 2024.

Figure 12: Share of total video viewing for individual services in Wales; all individuals aged 4+: 2025



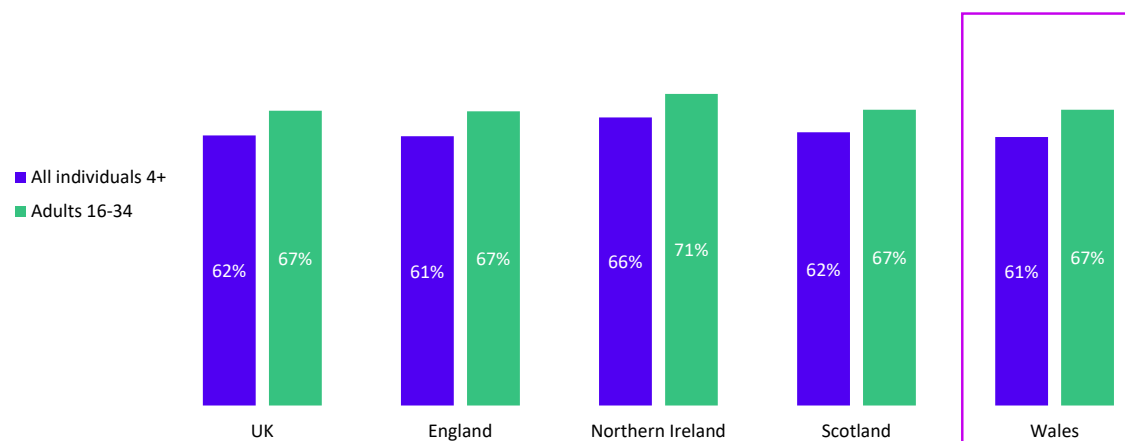
Source: Barb as-viewed on TV sets and other devices using the home's WiFi networks, all individuals 4+. 'Linear' includes broadcast content watched live or via recorded playback. Broadcaster services include all portfolio channels.

⁵ Barb Establishment Survey Q1 2025 & Q1 2026, includes households receiving free and paid subscriptions.

Almost two-thirds of people in Wales watch YouTube weekly, with an increasing proportion of viewing on the television set

Sixty-one per cent of individuals aged 4+ in Wales watched at least three minutes of YouTube per week in home, across all devices, in 2025. This figure increased to 67% among adults aged 16-34, although this was down marginally from 69% in 2024.

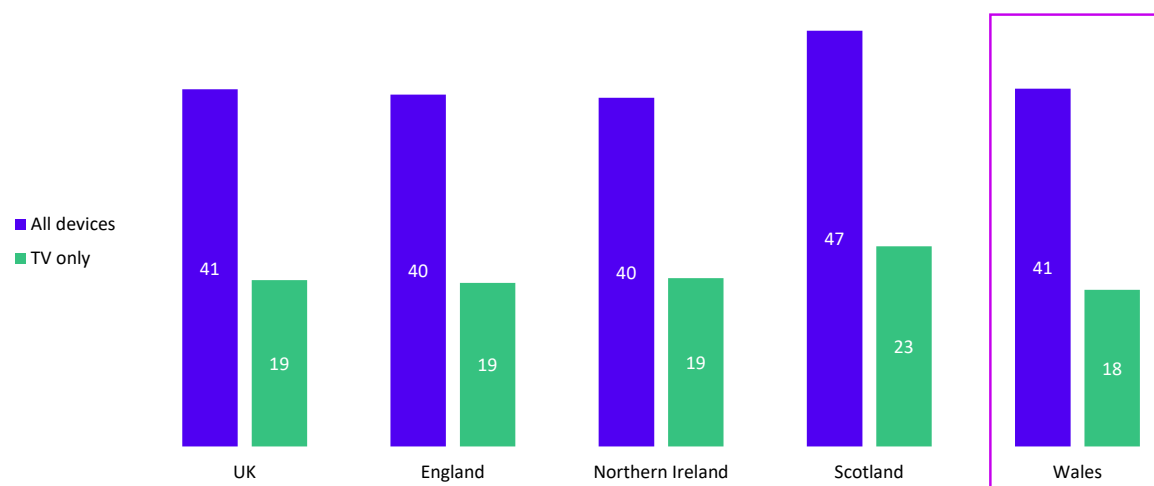
Figure 13: Average weekly reach (%) of YouTube, by nation: 2025



Source: Barb as-viewed, TV sets and other devices using the home's WiFi network. Reach criteria: 3+ consecutive minutes.

Individuals in Wales spent 41 minutes on average viewing YouTube across all devices in the home in 2025. The average time spent viewing YouTube on a TV set increased by 20%, from 15 minutes in 2024 to 18 minutes per day in 2025. Across the whole of 2025, among all individuals, 44% of in-home YouTube viewing in Wales was via a TV set, up from 41% in 2024.

Figure 14: Average daily minutes viewed of YouTube per person, by nation: 2025



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network.

According to Ofcom's VoD Survey, videos up to 15 minutes long were the most popular form of content viewed on YouTube in Wales, with 55% of adults and teens (aged 13+) in Wales reporting watching this form of content in the past three months. Four in ten (41%) of the same group claimed to have watched videos longer than 15 minutes, and the same number (41%) claimed to have watched YouTube Shorts in the same time period, which suggests that, in line with trends across the

nations, although short-form content continues to be popular, longer videos still appeal to many viewers.⁶

Most-watched genres, programmes and films in Wales

In Wales, viewing by those aged 4+ of the children's genre on broadcaster TV, increased more than any other genre in 2025 compared with 2024, up by 19% to 28 hours 47 minutes across the year. This growth was wholly driven by a 113% increase in BVoD viewing of the genre, while viewing via live and recorded playback declined by 36%.

Comedy had the largest decline, with overall broadcaster viewing falling by 21% to 20 hours 53 minutes. This was driven by a 28% decrease in linear TV viewing, alongside a 3% decline in BVoD viewing.

Arts and films had the strongest growth in linear TV viewing, increasing by 7% and 6% respectively. However, both genres experienced declines in BVoD viewing, with arts down by 15% and films down by 12%.

In Wales, Netflix's animated family film *KPop Demon Hunters* was the most-watched title of 2025, averaging 1.3 million viewers on TV sets. Streamers made up six of the top ten titles, and films dominated the list, accounting for seven titles.

BBC's one-off documentary *Gavin & Stacey: A Fond Farewell* ranked as the second most-watched title, averaging 899,000 viewers, and *The Celebrity Traitors* was the fourth most-watched title, averaging 745,000 viewers across BBC One and BBC iPlayer. This was followed by the first episode of British psychological drama *Adolescence*, averaging 719,000 viewers on Netflix.

Children's films accounted for six of the top ten, with two titles on BBC, two on Disney+ and the remainder on Netflix. Disney's 2006 animation *Cars* ranked number three with 847,000 viewers, seeing a resurgence in franchise popularity in 2025.

⁶ Ofcom VoD Survey 2026.

Figure 15: Top ten most-watched programmes/films in Wales (highest-performing episode per title): 2025

Rank	Title	Genre	Broadcaster/ Service	Episode	Audience (000s)
1	KPop Demon Hunters	Films	Netflix	Film (2025)	1,303
2	Gavin & Stacey: A Fond Farewell	Documentaries	BBC	2025	899
3	Cars	Films	Disney+	Film (2006)	847
4	The Celebrity Traitors	Entertainment	BBC	Series 1, Episode 4	745
5	Adolescence	Drama	Netflix	Series 1, Episode 1	719
6	The Thursday Murder Club	Films	Netflix	Film (2025)	710
7	Moana 2	Films	Disney+	Film (2024)	685
8	Wallace & Gromit: Vengeance Most Fowl	Films	BBC	Film (2024)	614
9	The Super Mario Bros. Movie	Films	Netflix	Film (2023)	609
10	The Snail and the Whale	Films	BBC	Film (2019)	605

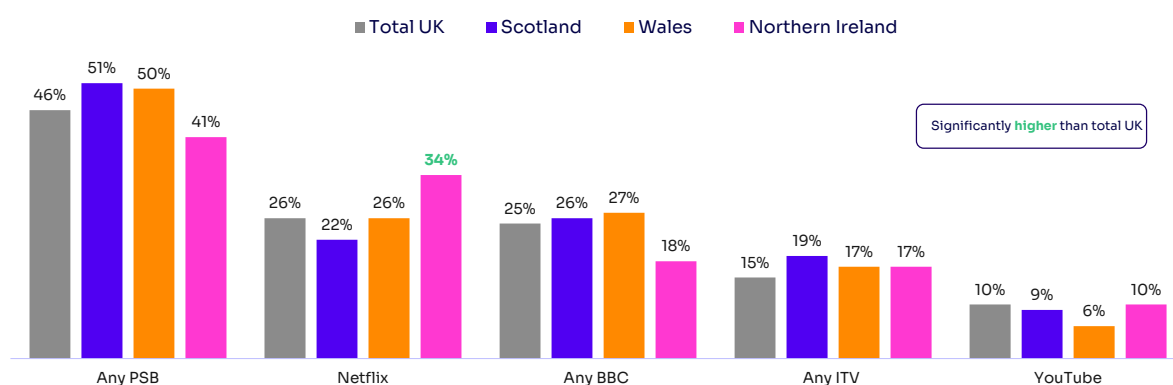
Source: Barb, as-viewed, all individuals aged 4+. TV sets only. Highest-performing episode per title based on total cumulative viewing across the whole year. The broadcaster figures include live viewing, recorded playback and BVOD. Only TV set analysis has been used because SVOD/AVOD programme figures are only available for TV sets.

Adults in Wales are most likely to say they would turn to the BBC or Netflix first, when thinking about what to watch

We asked respondents where they usually turned to first, when they were thinking about what they wanted to watch.⁷ Half of online adults in Wales said they usually turn to a PSM broadcaster first, followed by Netflix (26%). Those surveyed in Wales were as likely to turn to the BBC first (27%) as to Netflix.

⁷ Ofcom Adults' PSM Tracker 2025/26. Supplementary Survey.

Figure 16: Where audiences turn to first when thinking about what to watch



Source: Ofcom Adults' PSM Tracker 2025/26. Supplementary Survey. QA11. When thinking about what to watch, which one of these TV and video services do you usually turn to first? Base: All respondents (3050), Scotland (281), Wales (253), Northern Ireland (260).

Audience attitudes towards PSBs and BVoDs

Satisfaction with PSB

Seven in ten PSB viewers in Wales are satisfied with PSBs overall

According to Ofcom's Adults' PSM Tracker 2025/26,⁸ around seven in ten (68%) PSB viewers⁹ in Wales said they were satisfied with PSBs overall and 11% said they were dissatisfied; a further 19% were neither satisfied nor dissatisfied. This is broadly in line with last year's findings.¹⁰ All nations are in line with the UK average.¹¹

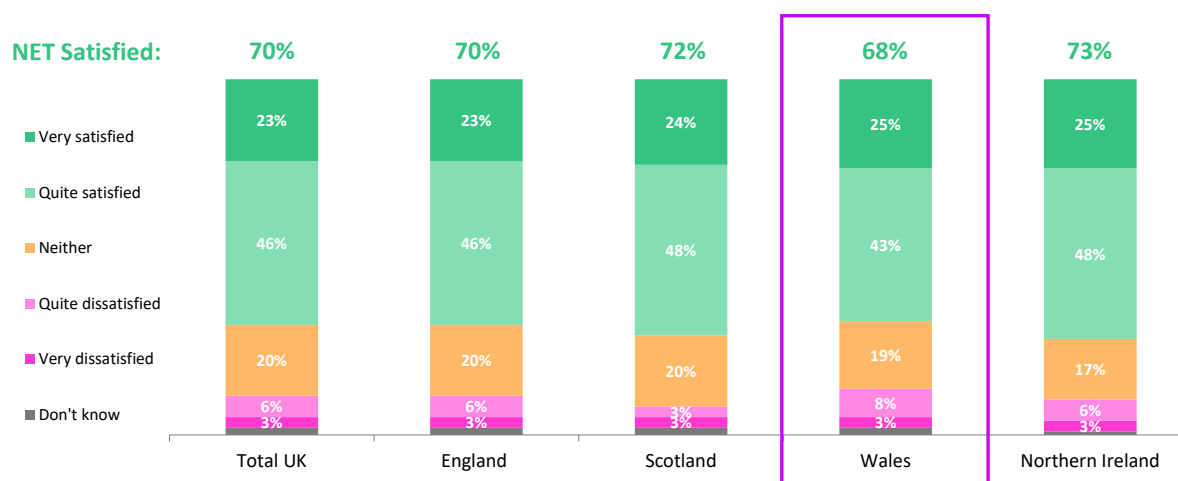
⁸ In 2025, following a review of the PSM Tracker and the BBC Performance Tracker, Ofcom combined them into one survey – the new Adults' PSM Tracker. As a result, changes were made to the methodology and questionnaire. For further information, please see the [Technical Report](#) for the new tracker.

⁹ Ofcom's Adults' PSM Tracker 2025/26 defines PSB viewers as all who have watched a PSB channel/service in the past six months.

¹⁰ Trends are indicative due to changes in methodology.

¹¹ There is no statistically significant difference in overall satisfaction for respondents in Wales compared to the UK average or to audiences in Scotland and Northern Ireland.

Figure 17: Adults' satisfaction with PSBs overall, UK total and by nation: 2025/26

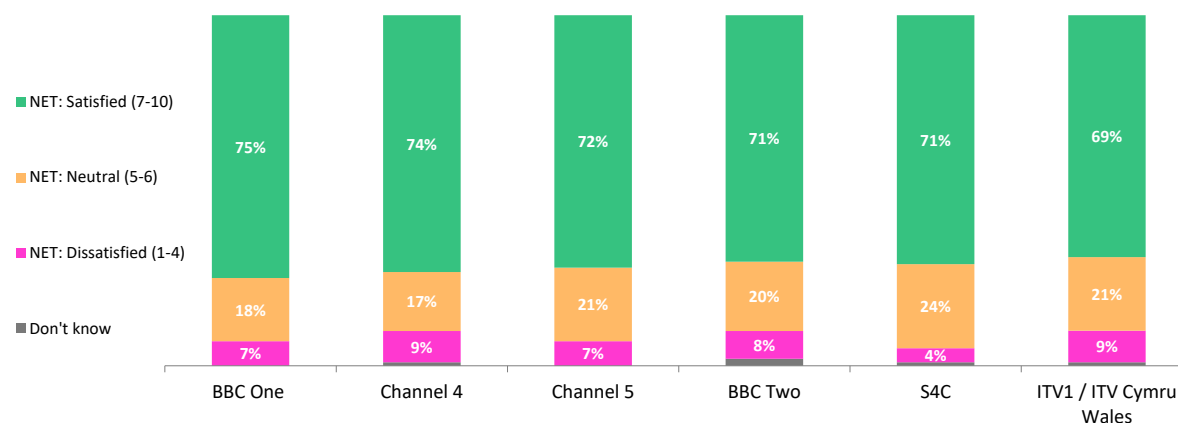


Ofcom Adults' PSM Tracker 2025/26. Main Survey. Question C15. And now, if you think about ALL the public service broadcasters combined - in other words, the BBC, ITV (ENGLAND) STV/ ITV (SCOTLAND) ITV Cymru Wales/ ITV (WALES) UTV/ ITV (NORTHERN IRELAND), Channel 4, Channel 5, and S4C... How satisfied are you that combined they provide the different areas asked about in the previous questions? Base: Those who have watched any PSB channels or on-demand services in the last 6 months, Total UK (4684), England (2530), Scotland (450), Wales (385) and Northern Ireland (319).

When asked to consider PSB channels individually, around three-quarters of viewers in Wales said they were satisfied with BBC One (75%) and Channel 4 (74%). Around seven in ten said they were satisfied with Channel 5 (72%), BBC Two (71%), S4C (71%) and ITV Cymru Wales/ITV1 (69%).

Focusing on BVoD services, around eight in ten viewers in Wales said they were satisfied with BBC iPlayer (80%) and ITVX or ITVX Premium (79%). Around three-quarters said they were satisfied with Channel 4 or Channel 4+ streaming (74%) or 5 streaming (73%).

Figure 18: Adults' satisfaction with individual channels: 2026/26



Source: Ofcom Adults' PSM Tracker 2025/26. Main Survey. Question QB1. On a scale of 1 to 10, where 1 means extremely dissatisfied and 10 means extremely satisfied, overall how satisfied or dissatisfied are you with these TV channels? Base: Those who have watched [broadcaster] in the last 6 months: BBC One (297), Channel 4 (233), Channel 5 (232), BBC Two (190), S4C (94) and ITV Cymru Wales/ITV1 (296).

In Ofcom's Children's PSM Tracker, we asked children aged 8-16 and the parents/guardians of younger children (aged 3-7) answering on their child's behalf, for their views on PSB TV channels.¹² We found that among children who watch PSB TV channels, just over six in ten (62%) said they 'liked' BBC TV channels, while over half (53%) liked ITV TV channels (including ITV Cymru Wales) or Channel 4 TV channels (54%). Just under half (48%) said they liked Channel 5 TV channels. Opinions of S4C among children were asked about in a [separate survey](#), so while not comparable to other PSBs, we found that 50% of children aged 7-18 who watch S4C said they liked it.

When looking at individual BVoD services, around two-thirds (65%) of children said they liked BBC iPlayer. Almost six in ten (59%) said they liked ITVX and just over half (53%) liked Channel 4's streaming service. Around two-fifths (42%) of children said they liked Channel 5's streaming service, 5. As was the case with TV channels, we asked about children's views on S4C Clic via a different survey, so while not comparable to the other BVoDs, we found that 51% of children who used S4C Clic or watched S4C on BBC iPlayer said they liked it.¹³

Adults in Wales consider *trusted and accurate UK news* to be one of the most important elements of PSBs

The PSM Tracker asked all adults what they considered to be the top three most important features for PSBs to deliver to society overall. Just under half (46%) of adults in Wales ranked '*trusted and accurate news*' in their top three, followed by '*high quality and creative programmes and content*' (42%) and '*a wide range of different types of programmes and content*' (37%).

For viewers in Wales, PSBs are seen to deliver *high quality and creative programmes and content* well

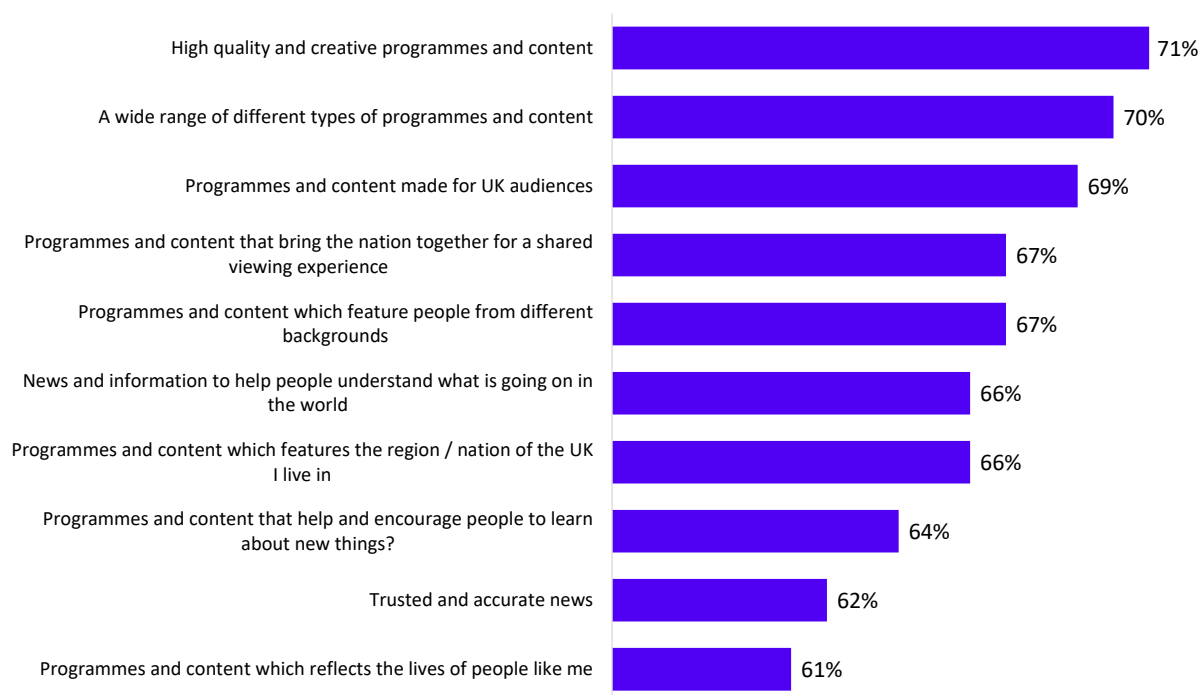
In terms of performance, PSBs overall are seen to deliver '*high quality and creative programmes and content*' (71%), '*a wide range of different types of programmes and content*' (70%) and '*programmes and content made for UK audiences*' (69%) 'well'¹⁴ by PSB viewers in Wales. Two-thirds of viewers in Wales said that PSBs delivered '*programmes and content which features the nation of the UK I live in*' (66%) well. About three in five (61%) viewers said PSBs provided '*programmes and content which reflects the lives of people like me*'.

¹² The sample for Ofcom's Children's PSM Tracker is children aged 3-16. For children aged 3-7 their parents/guardians answer the questions on their behalf while children aged 8-16 answer the questions themselves. Where we discuss the responses of children aged 3-16 throughout this report, we are referring to the answers of both the older children themselves (8+) and the parents/guardians of younger children (3-7).

¹³ Please note a low base size (78).

¹⁴ The Ofcom Adults' PSM Tracker uses questions asking respondents to say how 'well' or 'badly' different features 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.

Figure 19: Delivery of PSB features among adult PSB viewers: 2025/26



Ofcom Adults' PSM Tracker. Main Survey. QC13. Thinking about public service broadcasters combined - so the BBC, ITV (ENGLAND) STV/ ITV (SCOTLAND) ITV Cymru Wales/ ITV (WALES) UTV/ ITV (NORTHERN IRELAND), Channel 4, Channel 5, and S4C... How well or badly do the public service broadcasters combined provide... Base: Those who have watched any PSB channels or on-demand services in the last 6 months in Wales (385). Net rating 7-10.

When looking at the delivery of features by individual PSBs, combining both their TV channels and streaming services,¹⁵ we see some variation between them. The features rated the highest for PSBs overall are typically the same ones that are rated highly across individual PSBs, while 'programmes and content which reflects the lives of people like me' is typically rated lowest.

¹⁵ When asking respondents to rate PSBs for each attribute, we ask them to think about their TV channels and BVoD service combined (e.g. BBC TV channel *and* BBC iPlayer). In previous iterations of the PSM Tracker, respondents rated PSB TV channels separately to their BVoD service, so each PSB effectively had two different ratings for each attribute. The change in format of this question, alongside the methodology changes, means time series is not available, even indicatively.

Figure 20: Perceptions of PSBs (TV channels and BVoD) among adults in Wales: 2025/26

	BBC TV	ITV Cymru Wales/ITV	Channel 4	Channel 5	S4C
Programmes and content made for UK audiences	74%	71%	66%	67%	62%
A wide range of different types of programmes and content	70%	67%	64%	63%	64%
News and information to help people understand what is going on in the world	69%	64%	62%	58%	63%
Programmes and content which feature people from different backgrounds	69%	65%	68%	59%	63%
High quality and creative programmes and content	68%	66%	67%	67%	68%
Trusted and accurate news	67%	65%	61%	53%	72%
Programmes and content that bring the nation together for a shared viewing experience	65%	62%	58%	57%	65%
Programmes and content which feature the nation of the UK I live in	65%	64%	61%	55%	73%
Programmes and content that help and encourage people to learn about new things	62%	56%	58%	56%	64%
Programmes and content which reflect the lives of people like me	56%	59%	58%	55%	68%

Source: Ofcom Adults' PSM Tracker 2025/26. Main Survey. Question NC1-6. Thinking of [broadcaster] overall... How well or badly does [broadcaster] provide... Base: Those in Wales who have watched ... in last six months: BBC TV (338), ITV Cymru Wales/ITV (333), Channel 4 (259) and Channel 5 (249).

According to Ofcom's Children's PSM Tracker, children aged 3-16 in Wales who use PSBs agreed that, overall, they are delivering across different features. This includes around two-thirds saying that PSBs provide 'a wide range of programmes they enjoy' (67%), 'high quality programmes they enjoy' (66%) and 'programmes and content that helps them learn' (66%).

However, there are differences when looking at the PSBs individually. The BBC is rated highest across all aspects of delivery, most notably around seven in ten children said that it provides 'programmes and content that helps them learn' (72%) and 'programmes for children their age' (70%).

Figure 21: Perceptions of PSBs (TV channels and BVoD) among children in Wales: 2025/26

	BBC	ITV Cymru Wales/ITV	Channel 4	Channel 5
Programmes and content that helps them/ me learn	72%	50%	46%	50%
Programmes for children their/ my age	70%	54%	51%	52%
High quality programmes they/ I enjoy	69%	56%	54%	54%
A wide range of programmes they/ I enjoy	65%	57%	49%	54%
News and information that helps them/ me to understand what is going on in the UK and the world	65%	49%	44%	46%
Programmes that show children that live in the same part of the country as them/ me	59%	50%	48%	48%

Source: Ofcom Children's PSM Tracker 2025/26. Question C8a-d. Now thinking just about [PSB NAME], how much do you agree or disagree it provides the following things for your child/ for you? Base: Users of each service in Wales. BBC (606), ITV Cymru Wales/ITV (549), Channel 4 (469), Channel 5 (459).

As noted above, children's opinions about S4C were asked in a separate survey, so the findings for S4C are not comparable with other PSBs. Children in Wales (aged 7-18) who watched S4C were most likely to agree that it provides programmes and content that 'promote the Welsh language' (76%) and that are 'made for audiences in Wales' (68%). They were least likely to agree that S4C provides 'trusted and accurate news' and 'a wide range of different types of programmes and content' (both 51%).

Figure 22: Perceptions of S4C (TV channel and BVoD) among children in Wales: 2026

Wales	S4C
Programmes and content made for audiences in Wales	68%
Programmes and content which reflects the lives of people like me	57%
A wide range of different types of programmes and content	51%
High quality and creative programmes and content	53%
Trusted and accurate news	51%
Programmes and content that promote the Welsh language	76%
Programmes and content that help and encourage people to learn about new things	63%

Source: Ofcom survey of children in Wales aged 7-18. QPS11. How much do you agree or disagree that S4C provides the following things for you.. Base: S4C viewers (127).

Viewers of S4C say they watch it as it represents the culture and life in Wales and because it helps them learn the Welsh language

This year, we explored views on S4C in more detail in [two additional surveys](#) (an adults' survey and a children's survey) to work alongside the PSM Trackers.

Firstly, we asked adults in Wales who watch S4C¹⁶ why they watched it. The highest responses were for *'it represents the culture and life in Wales'* (36%), *'to help me learn Welsh'* (32%), *'it is the only Welsh language TV channel I know of'* (30%) and *'it is important to me to watch Welsh language content'* (29%). For adult S4C viewers, sport was the most common type of content watched (49%), followed by factual/documentaries (28%) and drama (26%). When we asked which programme was their favourite, rugby (15%) was the top answer.

When we asked children in Wales aged 7-18 who watch S4C why they watched it, the top response was *'to help me learn Welsh'* (31%), followed by *'I enjoy the TV programmes'* (28%) and *'it represents the culture and life in Wales'* (26%). In terms of the type of programmes children watch on S4C, just under four in ten (38%) children said animations/cartoons, 34% said entertainment/comedy, 30% chose educational content and 28% chose drama.

We also spoke to those who had watched S4C in the past but no longer watch it, to understand why they have turned away from the service. The top responses here were *'I'm not interested in Welsh language programmes'* (26%) and *'I prefer to watch other channels'* (23%). There was a similar picture among children: the top two responses among children aged 7-18 in Wales who used to watch the S4C TV channel but no longer do were: *'I prefer to watch other channels'* (31%) and *'I'm not interested in Welsh language programmes'* (30%).¹⁷ When we asked those who told us they had never watched S4C why that was, a language barrier was the most common reason. Among children, the top responses were: *'I don't speak Welsh well enough'* (41%) and *'I don't speak Welsh at all'* (37%). Similarly for adults: *'I don't speak Welsh at all'* (59%) was the top response, and *'I'm not interested in Welsh language programmes'* came second (35%).

Satisfaction with SVoD and VSPs

Viewers in Wales are highly satisfied with SVoD services and VSPs

Ofcom's Adults' PSM Tracker shows that levels of satisfaction with SVoD services are high. Over four in five were satisfied with NOW (86%), Disney+ (85%), Netflix (83%) and Amazon Prime Video (83%).

The Children's PSM Tracker shows that over nine in ten children in Wales (aged 3-16) who watch the service said they 'liked' Netflix (95%) and Disney+ (92%) followed by around four in five (81%) who said they liked Amazon Prime Video. Around two-thirds (65%) said they liked Apple TV+, Paramount+ and Sky On Demand, or Sky Go or Sky Kids. Over half (55%) said they liked NOW.

¹⁶ This includes S4C TV channels, S4C Clic and S4C on BBC iPlayer.

¹⁷ Please note: low base size.

In addition, we showed adults a range of features that PSBs are typically associated with and asked them to select which broadcasters and services they thought each description applied to. Respondents were able to choose as many broadcasters and services as they liked for each description. The BBC featured in the top three across most descriptions. The BBC ranks first in Wales for *'high quality'* (55%)¹⁸ and *'content that is relevant to me'* (53%).¹⁹ Netflix also does well, being associated with a majority of descriptions including *'offer[ing] a wide range of different types of content'* (57%),²⁰ *'innovative (introduces new ideas, programmes or formats)'* (45%)²¹ and *'offers something unique that I can't find elsewhere'* (41%).²²

¹⁸ Followed by Netflix (50%) and ITV (39%).

¹⁹ Followed by Netflix (51%) and ITV (43%).

²⁰ Followed by BBC (48%) and ITV (40%).

²¹ Followed by BBC (40%) and Channel 4 (38%).

²² Followed by BBC (30%) and Channel 4 (27%).

Figure 23: Proportion of online adults in Wales associating a particular service with the content descriptions

Statement	BBC	ITV Cymru Wales /ITV	Channel 4	Channel 5	Netflix	YouTube	Amazon Prime Video	NOW	Disney+
High quality	55%	39%	37%	29%	50%	23%	36%	12%	31%
Offers creative content	43%	35%	39%	31%	40%	32%	29%	10%	21%
Innovative (introduces new ideas, programmes or formats)	40%	31%	38%	29%	45%	25%	26%	9%	23%
Offers a different point of view from my own	33%	25%	27%	20%	22%	22%	15%	5%	10%
Offers a range of points of view	46%	34%	33%	28%	25%	26%	16%	7%	12%
Is impartial (not favouring one side over another)	33%	29%	23%	16%	25%	21%	15%	8%	11%
Content that is relevant to me	53%	43%	36%	31%	51%	37%	35%	10%	27%
Takes risks with content	21%	15%	34%	20%	32%	20%	19%	6%	7%
Offers a wide range of different types of content	47%	40%	37%	33%	57%	38%	38%	14%	28%
Offers something unique that I can't find elsewhere	29%	22%	27%	25%	41%	24%	26%	10%	20%
Trustworthy	42%	40%	31%	27%	30%	23%	24%	11%	19%
Inspires me to try new activities, hobbies or interests	26%	22%	17%	15%	22%	30%	15%	3%	7%

Source: Ofcom Adults' PSM Tracker 2025/26. Supplementary Survey. Question C1A. For each description, please select the logos of the broadcasters and services that you think each description applies to. Base size: All respondents in Wales (253).

First place
Second place
Third place

The tracker also asks adults to choose the broadcasters or streaming services that they think best provides different types of content. In Wales, the BBC tends to be selected most for best providing different types of content; this is similar to other nations and the UK overall. For example, eight in ten (80%) of all adults selected the BBC for best providing ‘news’, followed by ITV (54%) and Channel 4 (42%). Just over seven in ten (71%) selected the BBC for best providing ‘British drama’, followed by ITV (58%) and Channel 4 (38%). PSBs perform well for most of the genres we ask about, although Netflix, Amazon Prime Video and Disney+ are seen to best provide ‘USA comedy’ and ‘USA drama’ content for viewers in Wales and the wider UK.

Figure 24: Proportion of online adults in Wales associating a particular service with each genre

Genre	BBC	ITV Cymru Wales /ITV	Channel 4	Netflix	Channel 5	YouTube	Amazon Prime Video	NOW	Disney+
News	80%	54%	42%	4%	27%	10%	4%	7%	3%
British drama	71%	58%	38%	25%	34%	10%	15%	5%	7%
Current affairs programmes	63%	38%	37%	8%	20%	8%	7%	6%	3%
Documentaries	60%	33%	44%	38%	30%	16%	21%	7%	14%
British comedy	65%	50%	36%	20%	22%	12%	13%	7%	6%
Live sport	63%	46%	20%	6%	14%	7%	23%	15%	4%
Science & nature	59%	22%	25%	13%	20%	13%	13%	4%	12%
Children’s programmes	52%	32%	12%	31%	15%	21%	18%	6%	46%
Quizzes/ game shows	53%	62%	35%	8%	25%	7%	7%	3%	4%
Arts & music	47%	17%	20%	11%	16%	23%	11%	4%	7%
Religion	29%	9%	7%	7%	6%	9%	3%	2%	3%
USA drama	14%	12%	12%	53%	27%	12%	33%	15%	26%
USA comedy	11%	11%	14%	45%	19%	16%	28%	12%	22%

Source: Ofcom Adults’ PSM Tracker 2025/26. Supplementary Survey. Question C1A. For each type of programme, please select the logos of the broadcasters or services you think best provide that type of content. Please select as many or as few as you think that description applies to, or none. Base size: All respondents in Wales (253).

First place

Second place

Third place

TV and video content 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

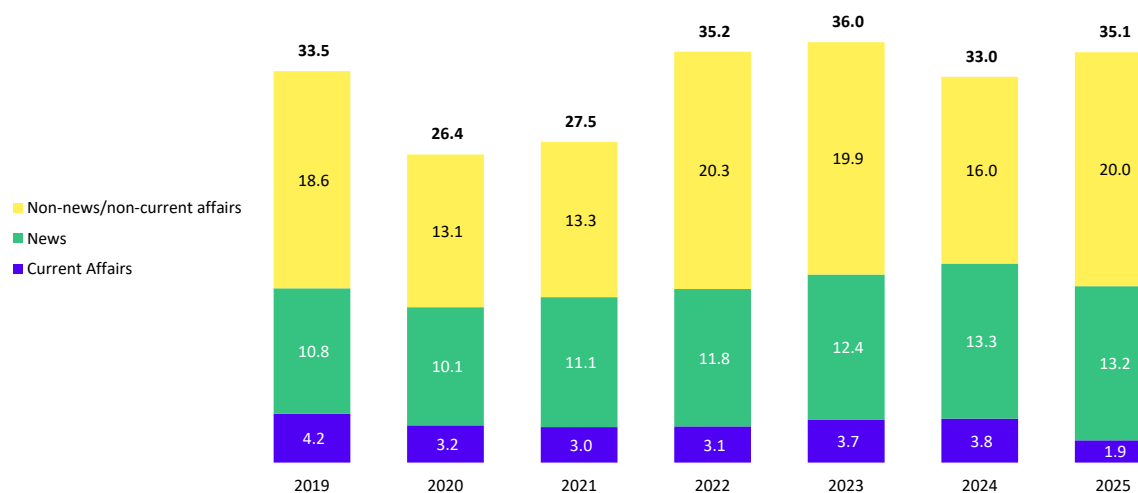
Financial data quoted in this report is presented in nominal terms, meaning that historical data has not been adjusted to account for inflation. In our interactive [Communications Market Report](#), users can view financial data in either nominal or 'real' (CPI-adjusted) terms, with users easily able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

PSB spend on first-run content for Wales increased by 6%

Of the total £35.1m spend in 2025 on first-run programming made in Wales for viewers in Wales, over half (£20m or 57%) went towards non-news/non-current affairs. This was the highest spend on this category of programming since 2022 (£20.3m).

Current affairs had the largest decline in first-run spend, down by 49.5% year on year to £1.9m. News spend fell fractionally by 0.6% to £13.2m, a sum still higher than in any other year from 2019 to 2023.

Figure 25: PSB spend (£m) on first-run UK-originated content for Wales, by genre: 2019-2025

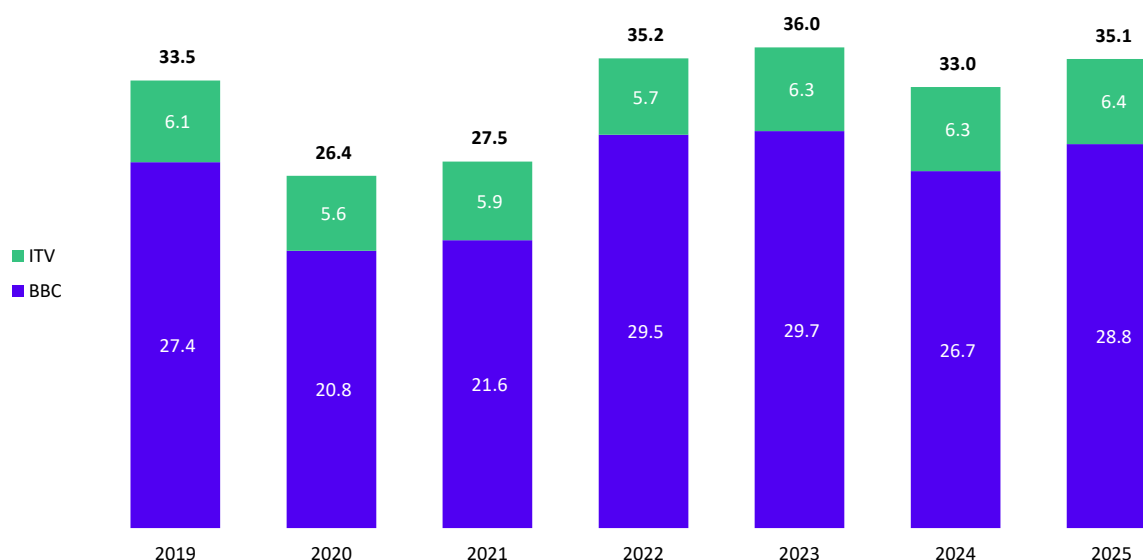


Source: Ofcom/broadcasters.

PSB spend on first-run content for Wales rose in 2025

The increase in spend on first-run content was driven by the BBC, whose spend for Wales increased from £26.7m in 2024 to £28.8m in 2025 (up 7.6%).²³ Spend by ITV on first-run content for Wales increased by 1.1% to £6.4m in 2025. As shown by the combined PSB totals above, the increases for both broadcasters were largely driven by non-news and non-current affairs programming.

Figure 26: BBC and ITV Cymru Wales spend (£m) on non-network first-run UK-originated content for Wales: 2019-2025



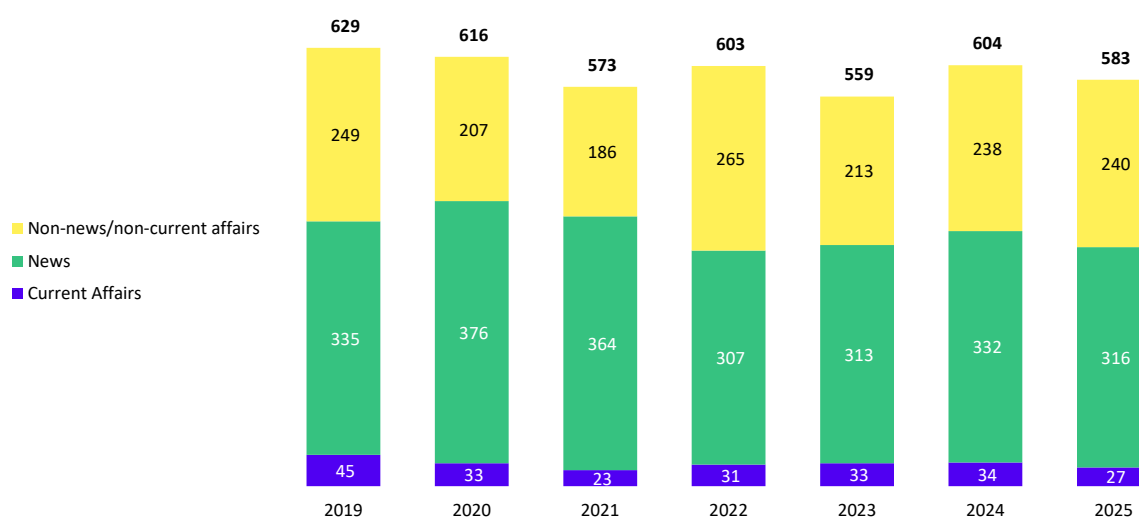
Source: Ofcom/broadcasters.

BBC hours of first-run content in Wales fell by 3% to 583 hours

In the year following the 2024 General Election, the decline in BBC output was largely driven by news, accounting for 16 of the 21 hours lost across all genres in 2025. However, news still made up 54% of BBC Wales output, a share that has remained relatively stable since 2022. Current affairs experienced the largest proportional drop (20.6%, or 7 hours) with fewer hours of *BBC Wales Live* and *Politics Wales*, while non-news/non-current affairs rose marginally by 0.8% (2 hours).

²³ This may include some co-commissions between BBC network and non-network services. From 2022, if such programmes were broadcast on regional opt-outs first, the spend is captured as part of the BBC's regional programming spend.

Figure 27: BBC hours of first-run UK-originated content for Wales, by genre: 2019-2025

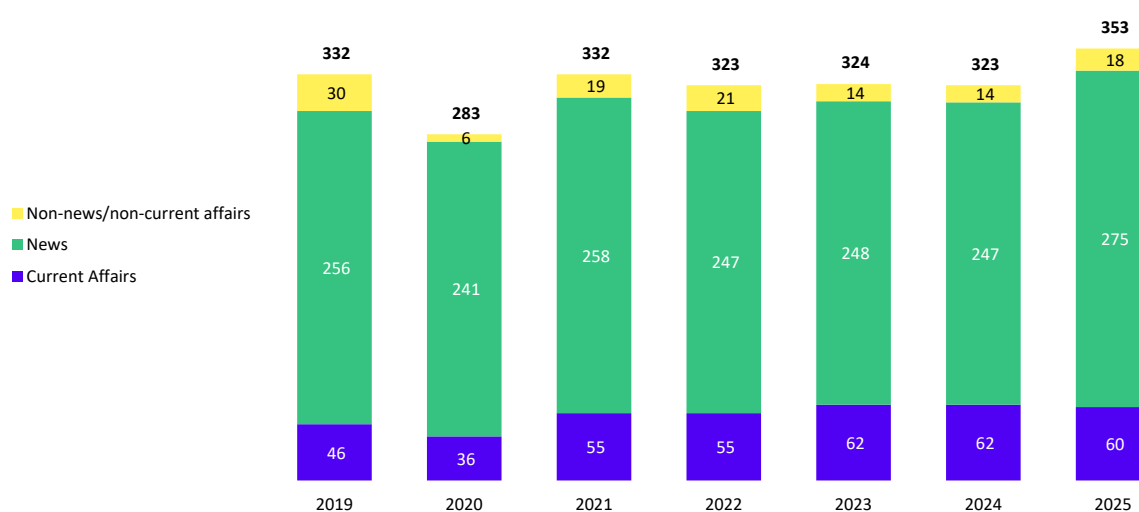


Source: Ofcom/broadcasters.

ITV Cymru Wales broadcast 353 hours of first-run content for Wales in 2025

News programming accounted for 78% (275 hours) of ITV Cymru Wales' first-run output in 2025. Current affairs represented 17% of output (60 hours), while non-news and non-current affairs programming made up 5% (18 hours). The balance of output across these categories has remained broadly stable over recent years, with news consistently accounting for the majority of first-run programming. Due to a methodological change introduced this year, ITV's 2025 output is not directly comparable with previous years.

Figure 28: ITV Cymru Wales' hours of first-run UK-originated content for Wales, by genre: 2019-2025



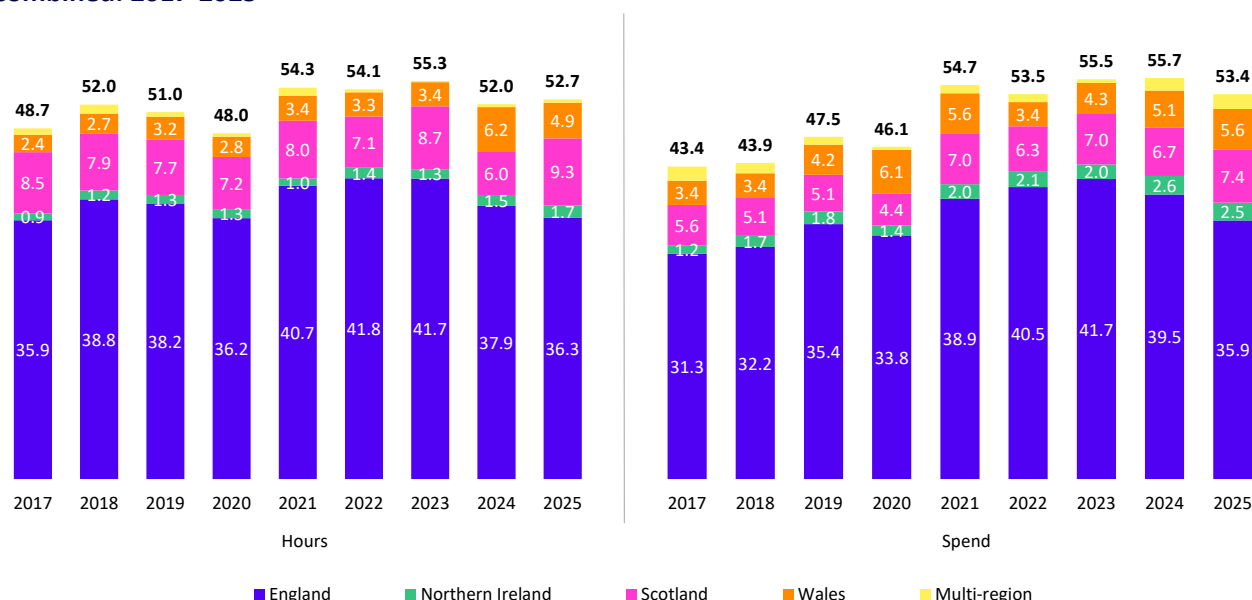
Source: Ofcom/broadcasters. As of 2025 there were adjustments in ITV methodology for calculating nations and regions output – as a result 2025 is not directly comparable to previous years.

Network content produced in Wales

Public service broadcasters (other than S4C) are required to make programmes in a range of places around the UK for broadcast on their network TV channels. The broadcasters have quotas relating to the proportion of qualifying hours and the proportion of qualifying spend that must be attributable to areas outside London.²⁴ The BBC has individual quotas for each of the UK nations, and Channel 4 has an out-of-England quota. ITV and Channel 5 are not specifically required to make content outside England.

Across all PSBs in 2025, 5.6% of qualifying first-run network spend was allocated to programmes qualifying as Wales productions – an increase both on 2024 and higher than every year since 2022. In contrast, the share of qualifying first-run network hours attributed to Wales productions fell from 6.2% in 2024 to 4.9% in 2025, a decrease of 1.3 percentage points.

Figure 29: Proportion (%) of qualifying network hours and spend outside London, all PSBs combined: 2017-2025



Source: Ofcom/broadcasters.

The BBC, Channel 4 and Channel 5 increased their proportions of spend in Wales in 2025

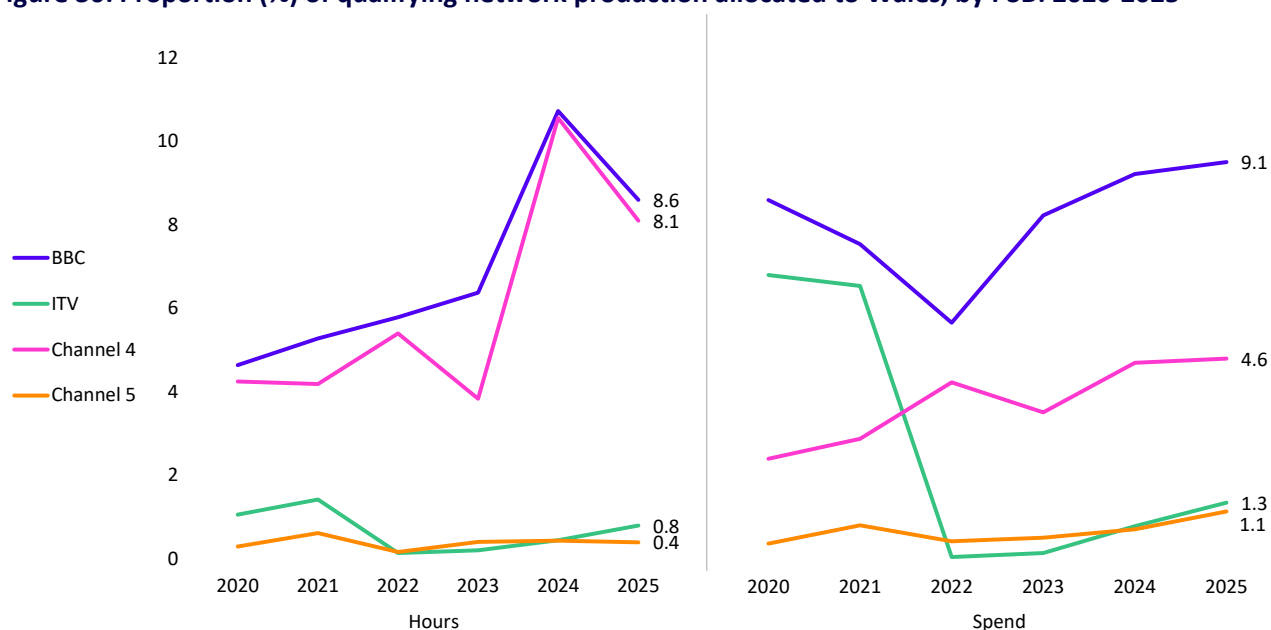
The BBC, which produces the largest proportion of qualifying network content in Wales, increased its proportion of spend allocated to Wales to 9.1% in 2025, while decreasing its proportion of hours to 8.6%. This increase in spend was driven by drama titles qualifying as made in Wales, which included *Dope Girls* and Doctor Who spin-off *The War Between the Land and the Sea*. Factual entertainment title *DIY SOS*, chess-based entertainment show *Chess Masters: The Endgame* and coverage of the Women's Rugby World Cup additionally contributed to spend allocated to Wales in 2025. Spend increases do not always translate to higher volume, however, with the BBC's allocated hours to Wales separately declining due to snooker production moving from Wales to Scotland.

²⁴ 'Qualifying' hours and spend refer to the total output and investment considered towards quotas. In the case of regional production quotas, this refers to first-run UK-originated programming, excluding news programming, acquisitions and self-promotional content.

In 2025, Channel 4 reflected the same trend for network production in Wales: a higher proportion of spend (4.6%) alongside a lower proportion of output (8.1%). One reason for the year-on-year hours decrease was that the Paralympic Games were held in 2024, production of which qualified as being made in Wales, thereby increasing that year's figure. Other examples of Channel 4 programmes qualifying as being made in Wales include returning comedy series *The Change* and property show *Worst House on the Street*.

The proportion of qualifying hours and spend allocated to Wales by ITV remains much lower than in 2020 and 2021, when, due to Covid-19, *I'm a Celebrity... Get Me Out of Here!* was filmed in Wales rather than Australia, although ITV's percentage of qualifying hours and spend have increased slightly since 2022. Channel 5's proportion of network spend allocated to Wales productions has increased over the past five years to 1.1%.

Figure 30: Proportion (%) of qualifying network production allocated to Wales, by PSB: 2020-2025



Source: Ofcom/broadcasters.

Radio and audio

Market developments

BBC Cymru Wales

BBC Cymru Wales provides radio services in English and Welsh through BBC Radio Wales, BBC Radio Cymru and BBC Radio Cymru 2. These services include news, music and speech programming. BBC Sounds continues to be an important distribution platform; in 2025/26, more than 75,000 weekly active accounts listened to BBC Wales content.²⁵

Small-scale DAB

Small-scale DAB continues to provide opportunities for smaller and specialist stations in Wales, including those broadcasting in the Welsh language. There are currently six small-scale DAB multiplexes on air in Wales: in Cardiff, Merthyr and Rhondda Cynon Taff, North Pembrokeshire, South Pembrokeshire, Newport and Chepstow, and Wrexham. The Swansea DAB awardee is required to begin transmitting its service no later than 27 September 2026.

Community Radio Fund

The Community Radio Fund continues to provide financial support to the sector. For the 2025-2026 funding round, the Department for Culture, Media and Sport (DCMS) made £900,000 available, with over £1m distributed, following additional allocations and returned funds. Earlier this year, Ofcom awarded funding to three stations in Wales: Bro Radio, Môn FM and Wrexham City Radio received funding that will provide support roles, training and wider sustainability projects in the sector.

Radio availability and coverage

National and local DAB coverage across Wales in March 2026 was at the same level as in the previous year. However, small-scale DAB coverage increased to 31.1% of homes in Wales, compared with 30.7% the previous year.

²⁵ BBC Cymru Wales data.

Figure 31: DAB coverage as at March 2026

		BBC	Commercial			Small-scale
			Digital One	Sound Digital	Local DAB	
UK	Homes	97.4%	91.7%	82.6%	92.0%	52.7%
	Major roads	87.4%	80.2%	72.6%	76.8%	Not Measured
England	Homes	98.4%	94.8%	86.7%	93.4%	55.8%
	Major roads	94.5%	93.9%	89.8%	87.4%	Not Measured
Scotland	Homes	95.3%	81.7%	69.0%	85.4%	40.1%
	Major roads	69.1%	45.5%	33.6%	45.6%	Not Measured
Wales	Homes	92.2%	67.5%	56.9%	83.1%	31.1% ²⁶
	Major roads	78.1%	53.3%	37.7%	61.9%	Not Measured
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%	39.1%
	Major roads	79.3%	86.9%	55.0%	87.8%	Not Measured

Source: Arqiva, BBC, Ofcom. Note: Coverage of SSDAB is measured on a homes basis only.

Live radio listening in Wales

Where our data comes from

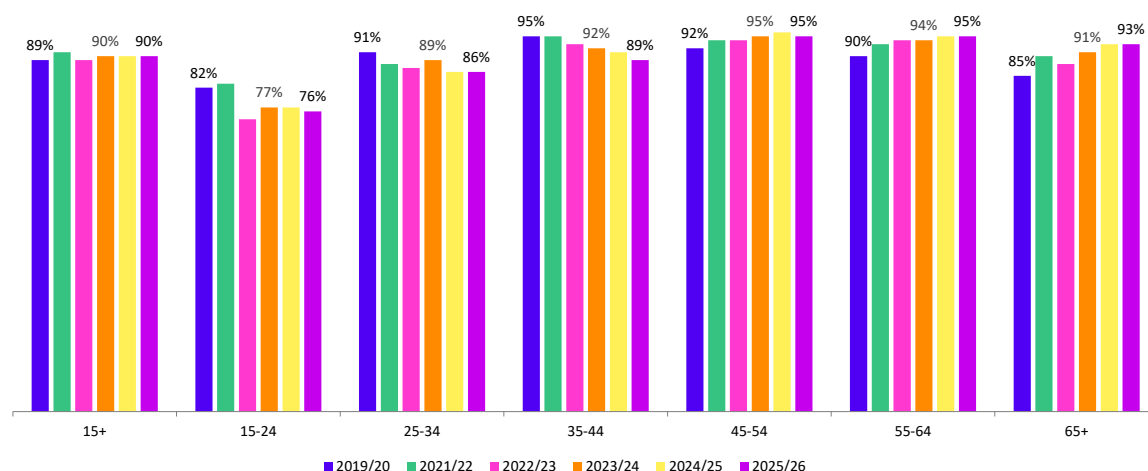
Our figures for reach of audio services come from our Audio Survey, whose participants are aged 16 and above. Figures on share of listening to different audio types come from IPA TouchPoints, and figures on live radio listening come from RAJAR, which use participants aged 16+ and 15+ respectively. We have used the term ‘adults’ here when referring to all three sources. See the [Annex](#) for more detail on data sources and methodology.

Overall radio listening

Weekly reach of radio in Wales for 2025/26 was 90% of adults, a figure which has been relatively consistent for a number of years. The RAJAR survey shows a decrease in the proportion of young people in Wales listening to the radio over the past few years, currently 76% compared to 82% in 2021/22. There are differences in the trend patterns across the other age groups, with 35-44 year olds falling over the past four years (95% to 89%) while there have been increases across the age groups older than 44.

²⁶ The figure for small-scale DAB coverage in Wales was incorrectly reported in the Media Nations 2025 report as 35.1%. The correct figure for March 2025 is 30.7%. Although no further multiplexes launched between 1 April 2025 and 31 March 2026, there has been a slight increase in coverage in Wales from multiplexes situated in England.

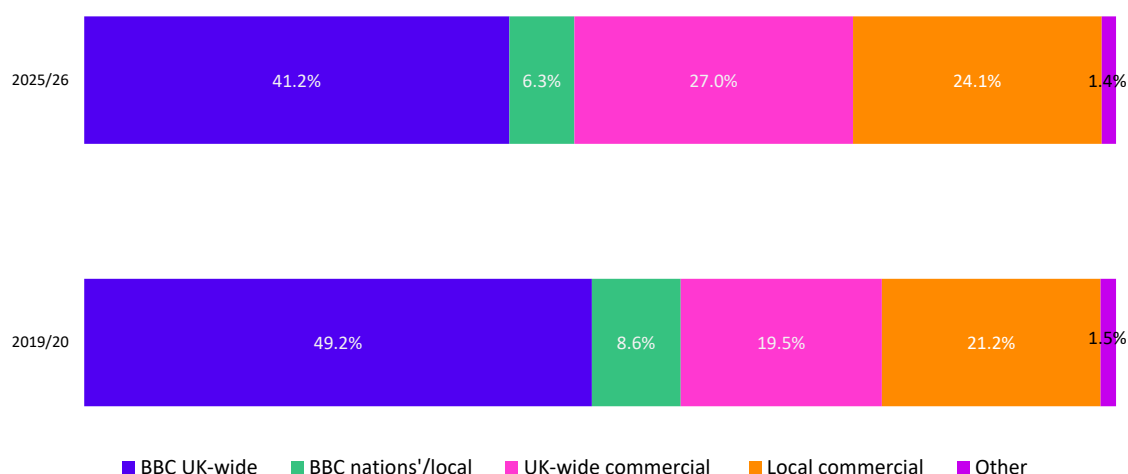
Figure 32: Weekly reach of radio in Wales, by age: 2019/20 – 2025/26



Source: RAJAR; BBC Radio Wales TSA; Q1 with 12-month weighting.

Comparing listening by sector within Wales, BBC UK-wide stations have fallen from 49% market share in 2019/20 to 41% over the past year. In contrast, commercial UK-wide stations have increased their market share to over 27% from less than 20% six years ago. There has been a shift in local listening patterns, with BBC stations falling and commercial stations increasing in this period.

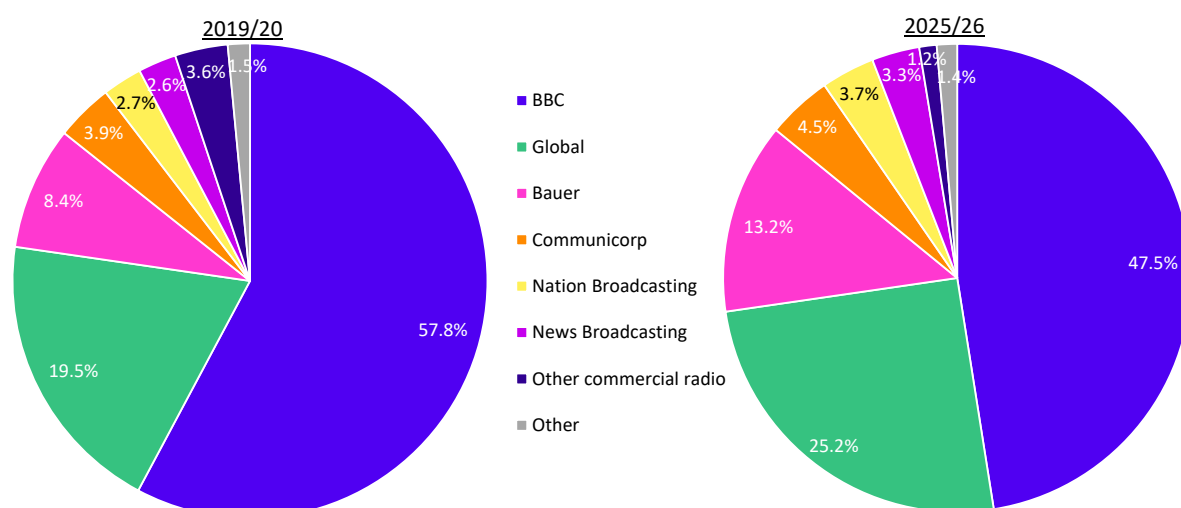
Figure 33: Share of listening by sector, in Wales: 2019/20 vs 2025/26



Source: RAJAR; BBC Radio Wales TSA; Q1 with 12-month weighting.

Looking at how listening in Wales varies across commercial broadcaster groups, there have been increases across the board over the past six years, but in particular for Global (25.2% share of listening in 2025/6 compared to 19.5% in 2019/20) and Bauer (8.4% to 13.2%). The number of radio stations available has expanded listener choice by offering a range of different music genres on digital platforms.

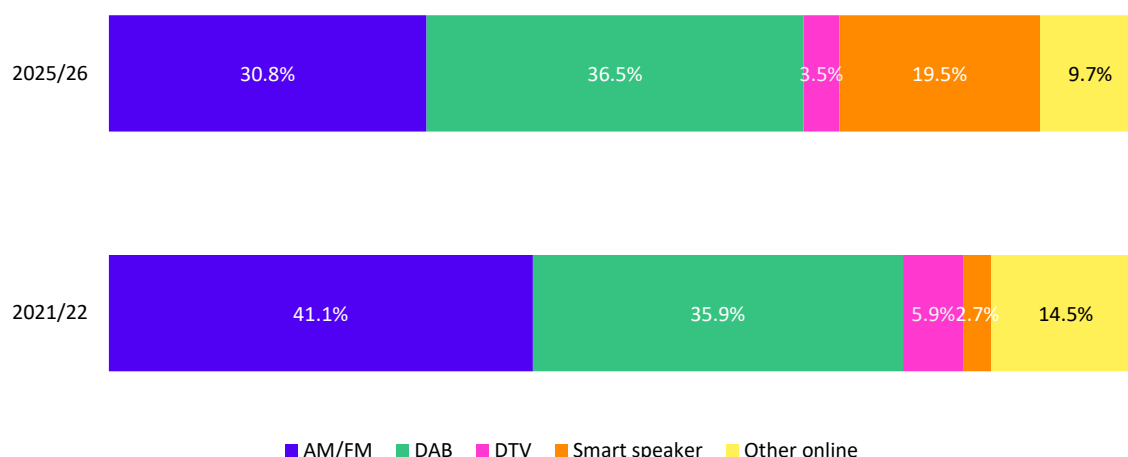
Figure 34: Share of listening by broadcaster group in Wales: 2019/20 vs 2025/26



Source: RAJAR; BBC Radio Wales TSA; Q1 with 12-month weighting.

How people in Wales listen to radio has shifted significantly, even over the past four years since smart speakers were added to the RAJAR survey. In 2021/22, more than two-fifths (41.1%) of listening was through an AM/FM radio set, more than listening through DAB sets (35.9%), and 17.2% was online. In the most recent twelve-month period, DAB accounts for over a third of listening (36.5%), with online and analogue listening now on a par with each other (29.2% and 30.8% respectively).

Figure 35: Share of listening by platform in Wales: 2019/20 vs 2025/26

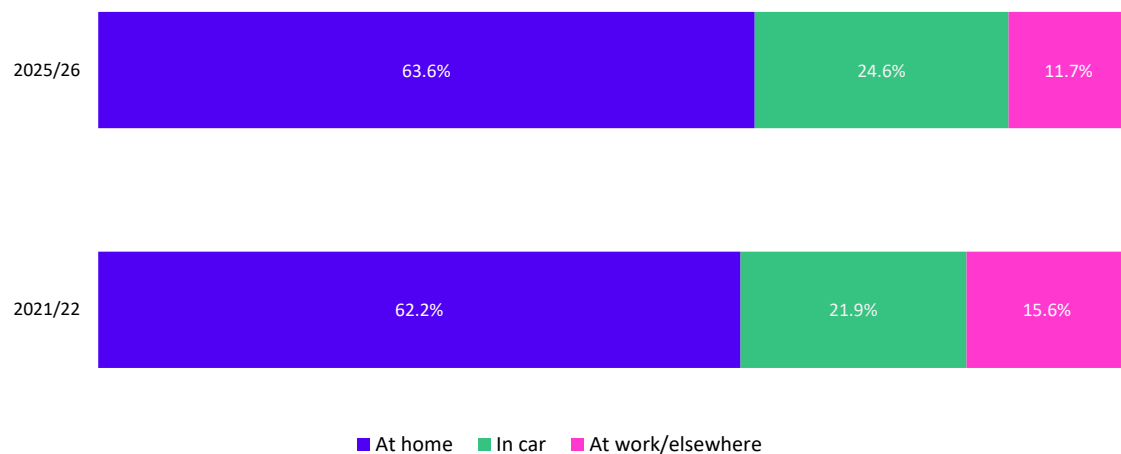


Source: RAJAR; BBC Radio Wales TSA; Q1 with 12-month weighting.

Looking at where people in Wales listen to the radio, the majority of this time is at home, accounting for 64% of all weekly hours. The proportion of time spent listening to the radio at work has decreased, perhaps reflecting the shift for some people to work more from home. Time spent listening to the radio in a car or other vehicle has increased slightly over the past four years, and now accounts for around a quarter of listening hours. Just over two-fifths (22%) of radio listeners in Wales *only* listen to the radio in a vehicle; in 2019/20 this figure was 15%, demonstrating the importance of in-car listening to the radio industry.

However, as people become more used to accessing audio in other ways in their cars, this could shift over time, although this shift seems a little behind in Wales compared to the other Nations. In our latest Audio Survey, we asked people if they had used a voice assistant in the past three months, and 48% of adults in Wales said they had (52% across UK). Among those in Wales who had used voice assistants, 9% said they had used it to listen to radio through their smartphone in the car (vs 12% across the UK and 19% in Scotland).

Figure 36: Share of listening by location in Wales: 2019/20 vs 2025/26



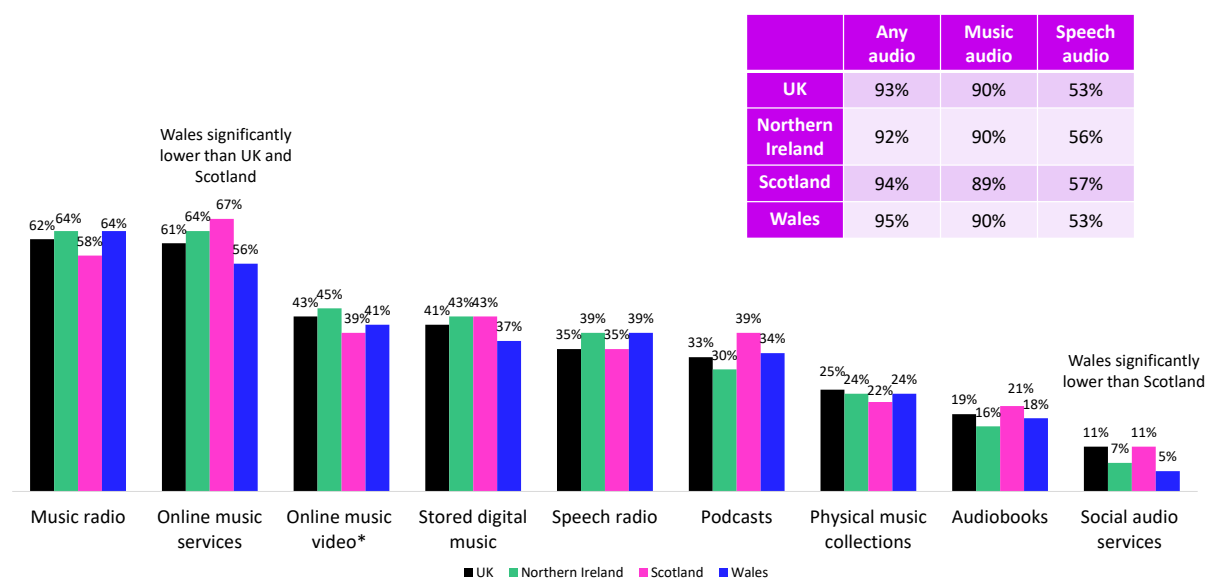
Source: RAJAR; BBC Radio Wales TSA; Q1 with 12-month weighting.

Online audio in Wales

Radio and music streaming services are both used by 60% of adults in Wales on a weekly basis

Audio is an important medium in Wales, with 95% of adults listening weekly to content and using an average of 3.4 different audio types each week, from the list shown in Figure 37. The most-used service for streaming music is Spotify, with 44% of adults in Wales listening each week to music through the premium or free versions of this provider.

Figure 37: Weekly reach of different types of audio, by nation: 2026



Source: Ofcom Audio Survey. Q1 How often, if at all, do you listen to any of the following? Base: All adult respondents NET: Weekly. *For background listening.

Figure 38: Weekly reach of online music streaming services, by nation: 2026

	UK	Northern Ireland	Scotland	Wales
Spotify (net)	49%	49%	52%	44%
YouTube (net)	38%	44%	40%	31%
Amazon Music (net)	19%	19%	18%	20%
BBC Sounds	15%	14%	15%	14%
Apple Music	15%	12%	15%	13%

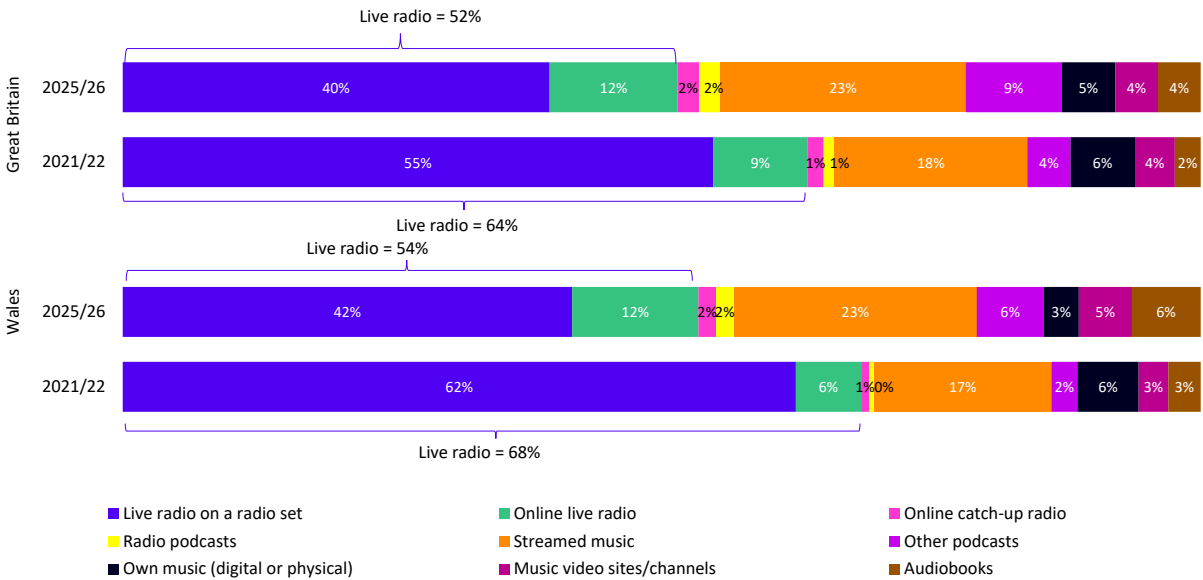
Source: Ofcom Audio Survey 2026. Q1 How often, if at all, do you listen to any of the following? Base: All adult respondents NET: Weekly.

Over half of time spent listening to audio in Wales is to live radio

There has been a gradual shift in the types of audio people spend their time with. Live radio listening in Wales now accounts for 54% of weekly audio time compared to 68% in 2021/22, a similar fall as

seen across Great Britain as a whole over the same period (64% to 52%). Listening to music streaming services in Wales now accounts for just under a quarter of audio time each week.

Figure 39: Share of time spent each week on *any* audio: Wales vs Great Britain²⁷



Source: IPA TouchPoints SuperHub.

²⁷ The IPA TouchPoints survey is across Great Britain only (excluding Northern Ireland) whereas RAJAR is surveyed across the whole of the UK.

Podcasts

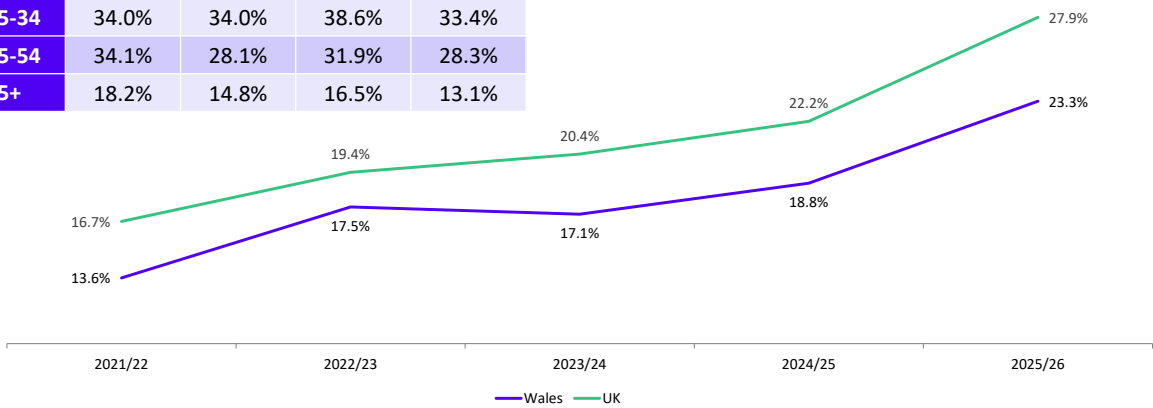
Fewer people in Wales listen to podcasts than in other UK nations

Twenty-three per cent of adults in Wales now listen to podcasts each week, up from 14% four years ago but lower than any other nation in the UK. Looking at age groups, reach is much lower among older age groups, with just 13% of those aged 55 and older listening each week.

Figure 40: Weekly reach of podcasts over time: 2021/22 vs 2025/26

Weekly podcasts listeners by age group: 2025/26

	UK	Northern Ireland	Scotland	Wales
15+	27.9%	24.7%	27.5%	23.3%
15-34	34.0%	34.0%	38.6%	33.4%
35-54	34.1%	28.1%	31.9%	28.3%
55+	18.2%	14.8%	16.5%	13.1%



Source: RAJAR; BBC Radio Wales TSA; Q1 with 12-month weighting.

The most popular podcasts in Wales are similar to those across the UK as a whole

Four of the top five podcasts²⁸ by reach in Wales in Q2 2025-Q1 2026 were also in the top five for the UK as a whole.

²⁸ The Joe Rogan Experience, The Diary of A CEO with Steven Bartlett, The Rest is History, The Rest is Politics.

Figure 41: Top 10 podcasts in Wales: Q2 2025 – Q1 2026

	Title	Producer	Reach	Genre
1	The Joe Rogan Experience	Spotify	10.5%	Comedy
2	The Diary of A CEO with Steven Bartlett	The Diary of A CEO	6.7%	Business
3	Newscast	BBC Radio	5.6%	News
4	The Rest is History	Goalhanger Podcasts	4.9%	History
5	The Rest is Politics	Goalhanger Podcasts	4.5%	News
6	Americast	BBC	3.5%	News
7	That Peter Crouch Podcast	Tall or Nothing	2.9%	Sports
8	RedHanded	Audioboom	2.4%	True Crime
9	The Rest is Entertainment	Goalhanger Podcasts	2.3%	TV & Film
10	The Overlap	Global	2.2%	Sports

Source: Edison Podcast Metrics UK, Q2 2025 – Q1 2026. Base: Weekly podcast listeners aged 15 and older in Wales (333). Genres reflect the broad primary genre category chosen by the podcast creator on Apple. Podcasts, as defined by Apple. Percentage refers to percent of weekly podcast listeners who listen to the podcast.

Podcasts in Welsh

The decentralised nature of podcasting, and differences in how people define them, means that there is no single definitive list of podcasts. However, to understand the scope of the Welsh language podcasting landscape we used the Podcast Index dataset, to get a sense of the number of podcasts in the Welsh language. In total we identified 228 podcasts which met our criteria.²⁹ Given the complexities of identifying and classifying podcasts, this figure should be seen as indicative. Fifty of these of these listed ‘education’ as their first genre,³⁰ including titles from the BBC, S4C and audio production company Stiwdiobox, alongside other organisations and individuals. Many podcasts in this category were related to learning Welsh, but also included topics related to other subjects, or from individual schools. In addition to Welsh language learning, S4C and the BBC publish podcasts across a range of genres, in particular related to their TV and radio programming, including political discussion (*Gwleidydd*) and football (*Pod Sgorio*).

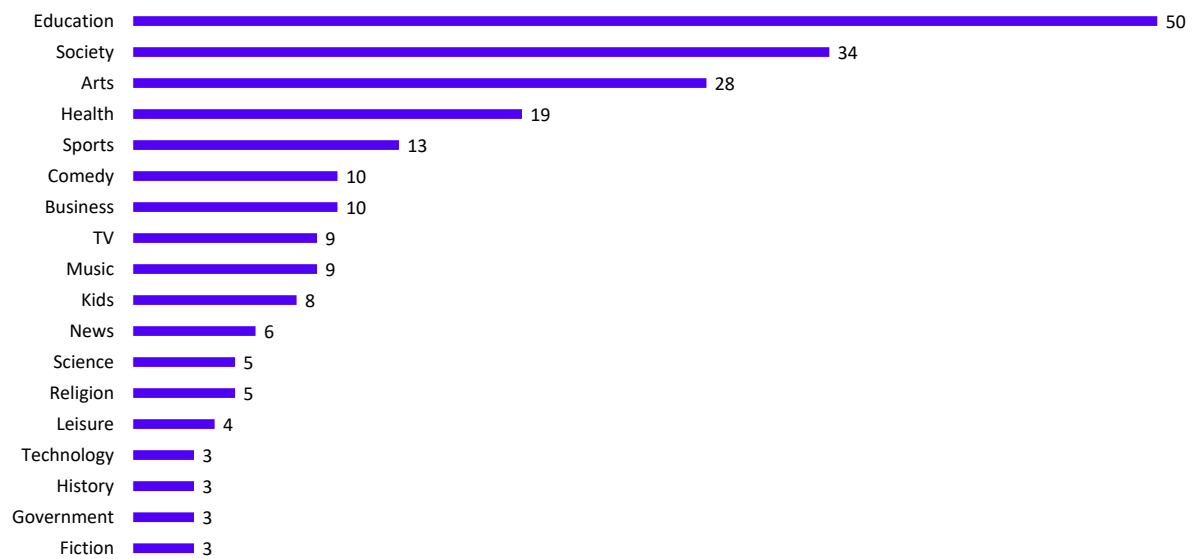
Among the 228 podcasts, the median number of episodes was nine, suggesting a long tail of podcasts with relatively few episodes. Podcasts with the largest number of uploaded episodes listed

²⁹ From our initial list of 348 podcast RSS feeds with the <CY> language tag we removed titles which on review were spam, or where despite using the CY language identifier in the RSS metadata, there was no evidence of the use of the Welsh language. We included podcasts several podcasts which had been erroneously assigned RSS language tags for Irish or Gaelic which our review identified as being in Welsh. We also excluded podcasts with fewer than two uploaded episodes. We note that incorrect or missing language metadata may mean that some Welsh language podcasts were not captured.

³⁰ A podcast can have more than one genre assigned to it. In order to simplify the analysis we have focused on the first listed genre.

include the BBC Radio Cymru *Beti a'i Phobol* interview podcast, with over 649 listed episodes as at April 2026, and cycling podcast *Y Dihangiad*, with 440 episodes.

Figure 42: Number of podcasts identified as being in Welsh, by primary category



Source: Ofcom analysis of [Podcast Index](#) data. Chart includes only those podcasts where a primary category has been assigned (222/228). We have not applied a filter on upload frequency meaning that some of these titles may not upload regularly.