



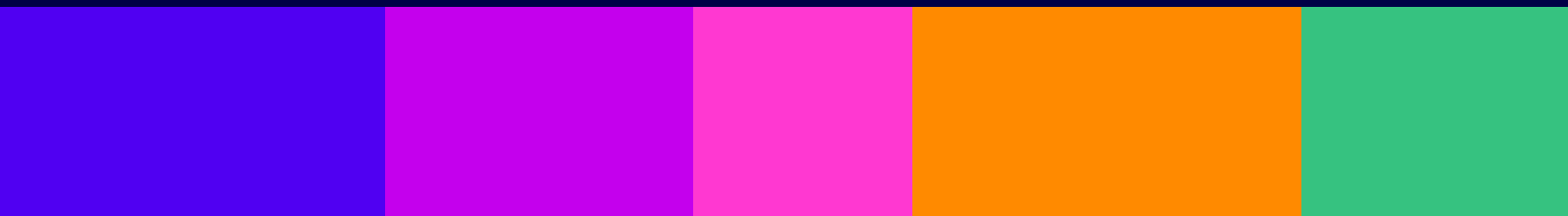
Media Nations

Wales 2023



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Contents

Section

1. Overview	3
Introduction	3
Key findings.....	3
2. TV and video	4
Market developments	4
TV services and devices	8
Viewing trends	10
Video-on-demand viewing trends	19
News sources	21
TV programming for and from Wales	24
3. Radio and audio	31
Market developments	31
Availability and coverage of radio services.....	32
Commercial radio revenues.....	33
Live radio listening in Wales	33
Online listening in Wales	37

1. Overview

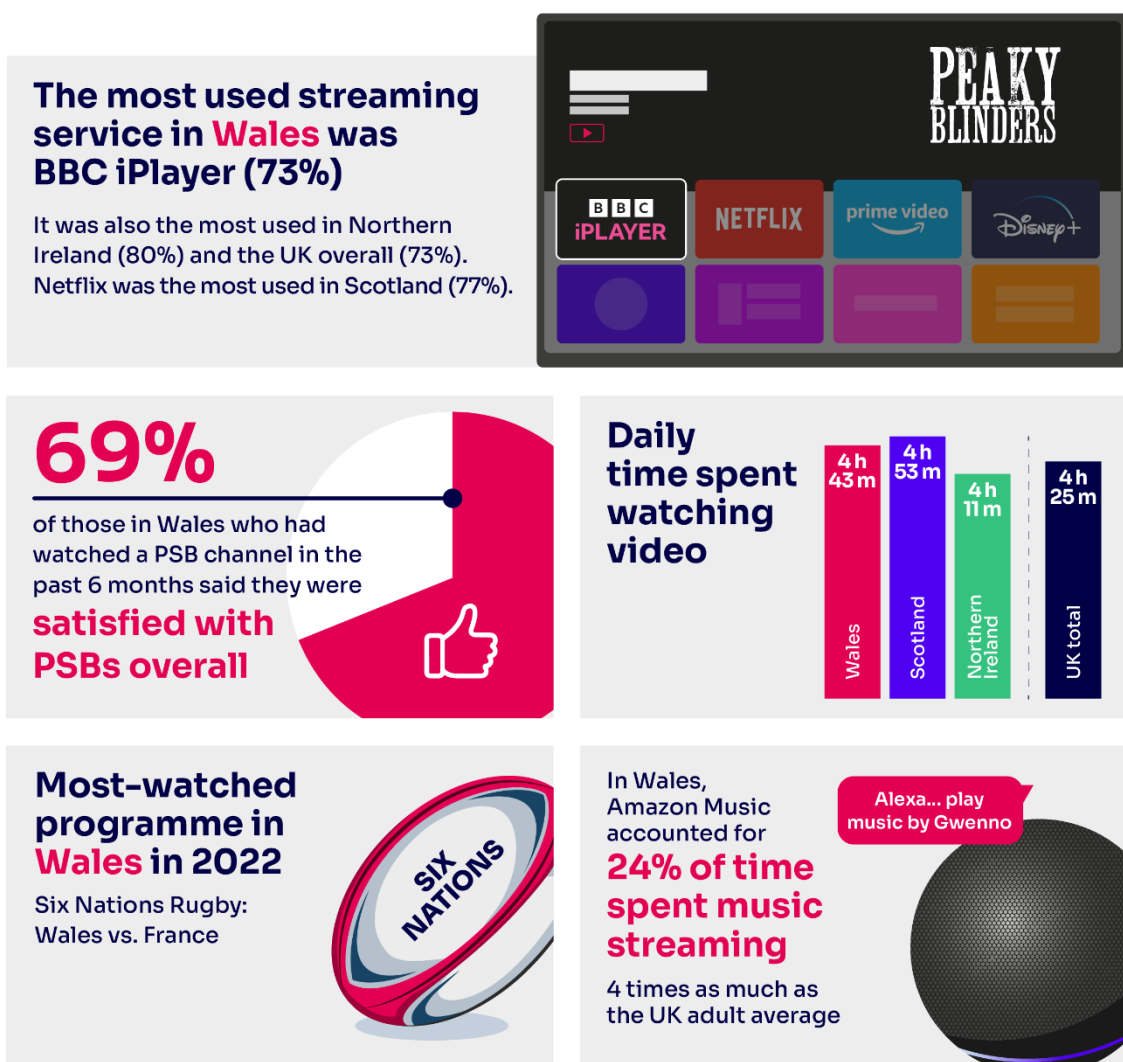
Introduction

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, including 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](#), [Scotland](#), and [Northern Ireland](#). A version of this report is also available in [Welsh](#).

Key findings



Sources used: Ofcom's VoD Survey 2023 (Online adults/teens aged 13+). Ofcom's Public Service Media Tracker 2022, Barb.

2. TV and video

Market developments

Draft Media Bill published

The UK Government's proposals for modernising broadcasting legislation were published in March 2023. The [draft Media Bill](#) has been welcomed by PSBs in Wales which regard it as being essential to give them the ability to compete with global streaming services. The draft Bill's key proposal is the creation of a new prominence regime, to ensure that PSBs' on-demand services such as BBC iPlayer, ITVX and S4C Clic are prominent, available and easily accessible on connected-TV platforms including smart TVs, set-top boxes and streaming sticks. New must-carry obligations will also guarantee that S4C's services are available to audiences across the UK. The Bill will update S4C's public service remit to include online services, and remove the geographical broadcasting restrictions, simplifying its approval processes for commercial activity and reforming S4C's governance structure in line with the independent review of S4C published in 2018.

Welsh Affairs Select Committee

The Welsh Affairs Select Committee has been taking evidence for its inquiry¹ into broadcasting in Wales. It is looking at how to ensure a successful and dynamic broadcasting sector in Wales, the future of public service broadcasting and the place of free-to-air sports broadcasting in Wales. The Committee has visited Llandudno and Swansea to gather the views of stakeholders on matters relating to broadcasting, specifically gathering the views of young people about their viewing habits on streaming services. Ofcom gave evidence during April and the committee has also heard from representatives from BBC Cymru Wales, ITV Cymru Wales, S4C, Tik Tok, Meta and YouTube, as well as the Welsh Rugby Union and the Football Association of Wales.

ITV Cymru Wales

ITV Cymru Wales is increasing its slate of productions outside its licence commitments for the ITV network and BBC Wales. Two major crime documentaries for the ITV Network were commissioned and produced by the network programmes team in 2022 – *Cold Case Detectives* and *Cold Case Forensics*. In June 2022, ITV Cymru Wales launched Wales's newest (and only) programme showcasing the arts scene in Wales - *Backstage* moved into peak time in early 2023, highlighting the company's commitment to a wide variety of programmes in the prime-time slot.

ITV Cymru Wales' political series *Sharp End* moved to a new hour-long format in early 2023, making it the principal off-peak brand. The longer format gives more room for analysis and discussion of politics in Wales and how it impacts viewers' everyday lives.

During the FIFA World Cup tournament in 2022, ITV showed the first of the Wales games against the USA and secured a peak UK audience of 11.5 million and a 56% share of viewing. In Wales, the peak share was even higher, with 69% of the available TV audience watching the game on ITV. ITV has a

¹ <https://committees.parliament.uk/work/6851/broadcasting-in-wales/>

history of covering live national sport for audiences in Wales and will be showing every fixture in the upcoming Rugby World Cup tournament in France later this year.

BBC Cymru Wales

BBC Cymru Wales celebrated its centenary in 2023 and drama will play a key part in BBC Cymru Wales' output. Dramas currently either in production, or due to broadcast, include *Steeltown Murders*, which centres on the hunt to catch the killer of three young women in the Port Talbot area and the story of how – in the first case of its kind – the mystery was solved almost 30 years later using DNA evidence. Other dramas include *Wolf*, *Men Up*, *Tree on a Hill* and *Lost Boys and Fairies*.

BBC Cymru Wales had extensive coverage of Wales in the FIFA World Cup and alongside coverage of the matches, broadcast documentary programmes and concerts, as well as providing educational resources for teachers introducing primary-school children to some of the other countries competing for the World Cup.

The women's national team wasn't successful in its qualification attempt this time, but audiences to the matches on BBC Wales grew significantly during the qualifying stages, raising the profile and visibility of the women's game in Wales.

Coverage of news and current affairs continued to be as important as ever as audiences tuned in for comprehensive coverage across news, radio and online services. The *BBC Wales Investigates* team investigated claims of sexism, bullying and sexual harassment at the Welsh Rugby Union, prompting further scrutiny.

S4C

S4C serves its audience with content that entertains, informs and reflects Wales in all its diversity. There are currently three priority genres – drama, sport and children.

Drama

S4C celebrated its 40th anniversary in November 2022. *Y Sŵn*, a film about the campaign to establish S4C, brought one of the most colourful periods in Wales's recent history to new audiences. Other drama productions have included *Y Golau*, S4C's first drama co-production with Channel 4, and *Dal y Mellt*, the first S4C production to be sold to a global streamer (Netflix) for distribution in Welsh with English subtitles.

Itopia and *Y Goleudy* are two drama series targeted at viewers in the 11-13 age group and are partly funded by the Young Adults Involvement Fund (YACF).

S4C's partnership with Cymru Creadigol and Ffilm Cymru, Sinema Cymru was launched during 2022. Through this scheme, a Welsh language film will be created each year, with the National Film and TV School Cymru providing training to nurture the film-writing talent of the future.

Sport

Sport remains one of the cornerstones of S4C's services. S4C was the only broadcaster to show every stage of the Welsh men's football team's journey to the World Cup in Qatar. S4C was also a part of Team Wales' campaign to take the Welsh language to over 1,070 schools and more than 230,000 children through its Stwnsh service in the run-up to the World Cup.

Securing the rights to broadcast Wales' national sports events, free of charge and in Welsh, remains a priority for S4C, and is an important part of its contribution to the Welsh Government's aim of creating a million Welsh speakers by 2050. It was announced in June 2023 that S4C had partnered with Viaplay to broadcast the 2024-2028 Welsh international football matches in Welsh, showing at

least 40 matches live over the period. S4C also continued to broadcast a range of other sports including the Giro d'Italia and the Tour de France and will broadcast highlights of Wales women's football matches.

Children

S4C's services for children remain a priority, and *Cywion Bach*, a series to support the transmission and learning of the language for families with young children, was launched in 2022. On Stwnsh, it was possible to watch the *Lego® DREAMZzz* series in Welsh for the first time. An Education Content Executive has been appointed to increase the use of S4C content to support education and learning.

Other

In June, a partnership was announced with Ryan Reynolds and Fubo to provide six hours of S4C Welsh content a week on their Maximum Effort channel in the USA under the brand 'Welsh Wednesdays'. This will take the Welsh language and S4C content to international audiences and will hopefully attract commercial income for the creative sector in Wales.

Creative Wales

Creative Wales is a Welsh Government agency established to support the ongoing sustainability and growth of the creative industries in Wales. Its mission is to position Wales as the best place for creativity to thrive, through developing skills, supporting home-grown talent and attracting international creative projects to build on existing successes.

Creative Wales' focus for the screen industry is to position Wales as a top location for film and television production. Major productions recently attracted to Wales include Netflix's *Havoc* and Lucasfilm's production of *Willow*. These global players, alongside Wales' own production companies, are helping to expand the Welsh economy, develop its skills base and raise the profile of Wales across the world. To meet demand for studio space from productions looking to film in Wales, Creative Wales is investing in studio infrastructure, including the new Aria Studios in Anglesey. Creative Wales is also supporting the pipeline of productions by investing in new ideas and IP through its development funding mechanism, with another round of funding launching in July 2023. Recognising the importance of the industry's workforce's mental health to the future success of the industry, Creative Wales has worked with CULT Cymru and 6ft From the Spotlight CIC on a pilot scheme to introduce well-being facilitators (WBF) into the screen production sector in Wales. The pilot was successful, and a second round of the project is currently being delivered.

To address challenges related to a lack of skills, Creative Wales launched its Creative Skills Action Plan and Creative Skills Fund in September 2022. The Plan sets out ten priority areas of focus which are being used to target the Fund's investments. Seventeen projects have been awarded more than £1.5m in grants through this Fund, across the Welsh screen, music, digital and gaming sectors. Projects range from entry-level skills to management training and include initiatives which specifically aim to improve diversity and inclusion, as well as cross-sector projects which focus on transferable skills between all creative sectors and the upskilling and wellbeing of the freelance workforce.

In March 2023, Creative Wales supported eight projects with a combined grant of £352,545 from its Young Content Fund. The scheme, which is providing production companies with development funding for new bilingual content (animation or live action) for children and young people, will open for a second round of funding later this year. The scheme directly addresses the withdrawal of UK Government support for this segment via the (now closed) YAC fund.

Creative Wales continues to work in partnership with public service broadcasters in Wales through its Memoranda of Understanding with BBC Cymru and S4C.

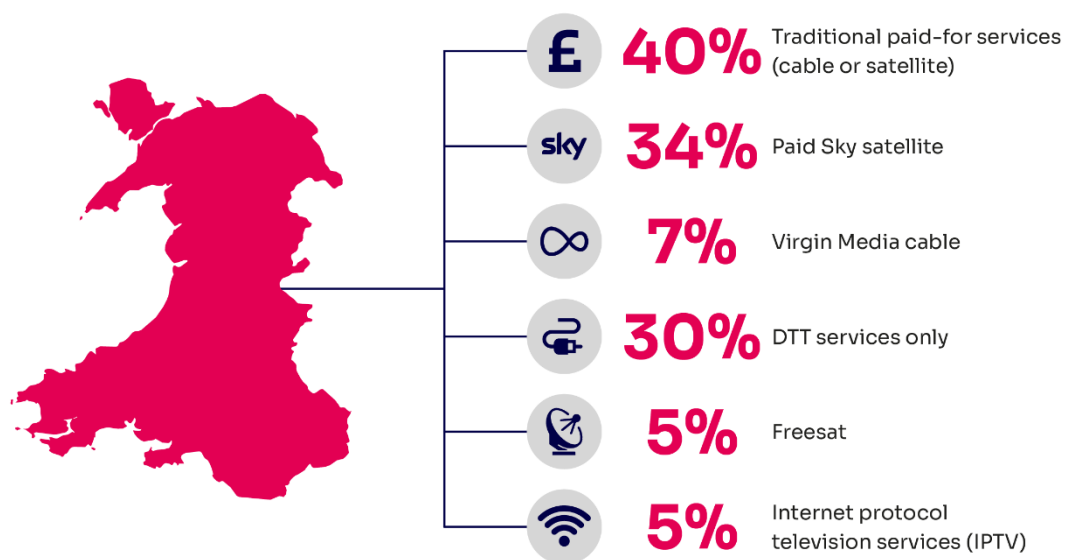
Expert panel on the devolution of broadcasting

The [Cooperation Agreement](#) between the Welsh Government and Plaid Cymru, published in November 2021, says that it will explore the creation of a shadow Broadcasting and Communications Authority for Wales, to “*address concerns about the current fragility in the media and attacks on its independence. This body would support the use of the Welsh language, particularly in digital, and encourage media plurality. We believe broadcasting and communication powers should be devolved to Wales*”. The expert panel established to look at this has been taking evidence from witnesses and published its [report](#) on 2 August 2023.

TV services and devices

The majority (96%) of households in Wales had a TV set in Q1 2023. Traditional paid-for television services such as satellite (primarily Sky) and cable services (Virgin Media) were present in 40% of homes in Q1 2023. Paid-for satellite services account for most of these, with Virgin Media's cable service present in just 7% of Welsh households in Q1 2023. Homes receiving digital terrestrial (DTT) services only (delivered through an aerial) account for most subscription-free TV viewing (30%) in Wales, with free satellite present in just 5% of homes in Wales, through Freesat or Freesat from Sky. Only 5% of homes in Wales had an internet protocol television service (IPTV). These are delivered through set-top boxes from providers including TalkTalk and BT, and offer a Freeview service alongside pay-TV channels, delivered through an internet connection.²

Figure 1: Take-up of TV platforms in Wales: Q1 2023



Source: Barb Establishment Survey Q1 2023. 'DTT services only' includes households with an aerial only and not cable, satellite or IPTV. IPTV includes BT Vision, TalkTalk, Youview or Plusnet. In the 2022 report 'traditional paid-for services' also included IPTV and are therefore not comparable with the figure above which includes paid cable and satellite only.

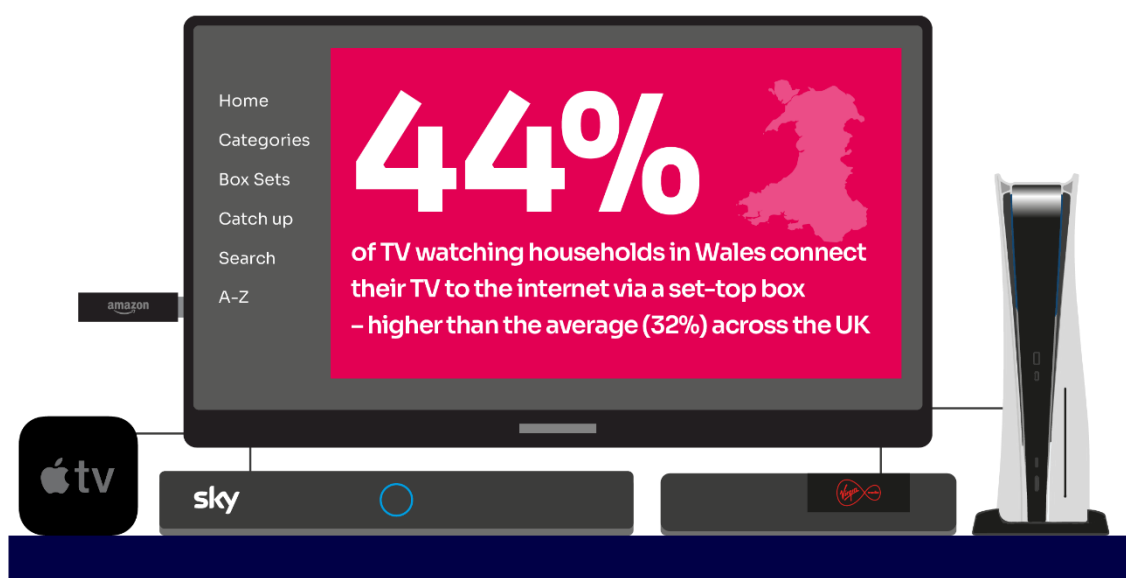
² Barb Establishment Survey Q1 2023

Seven in ten TV users in Wales had a connected TV in 2023

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.

In the first half 2023, seven in ten (70%) TV users in Wales had a connected TV, broadly in line with the UK average (65%). TV users in Wales were more likely to connect their TV to the internet via a set-top box (44%), such as Sky+ or Virgin Media Tivo, than in the UK overall (32%).

Figure 2: Connected TVs in Wales: 2023



Source: Ofcom Technology Tracker 2023.

Broadband in Wales

More than nine in ten (92%) homes in Wales had an internet connection in the first half of 2023; 88% had fixed broadband.³ As of September 2022, superfast broadband services (offering download speeds of at least 30 Mbit/s) were available to 95% of all homes in Wales. Of these, seven in ten homes (71%) were using a superfast service, up from 66% in 2021. Full-fibre services were available in 40% of households in Wales. Take-up in those homes was 28%.⁴

³ Ofcom Technology Tracker 2023

⁴ Ofcom analysis of provider data. Please refer to [Connected Nations 2022 UK report](#) and [Connected Nations 2022 Wales report for more information](#).

Viewing trends

Total in-home audio-visual viewing

Wales watched the most SVoD/AVoD of all the nations in 2022

On average, people in Wales watched 4 hours 43 minutes of video content per day in 2022, the second highest among the UK nations. Content from broadcasters – which includes live TV, recorded TV and broadcaster video-on-demand (BVoD) – accounted for 61% of this time (2 hours 51 minutes), on a par with the UK average. In addition, people in Wales spent 15% of their total video time on subscription video-on-demand (SVoD) and advertising video-on-demand (AVoD) services, and 15% on video-sharing platforms.

Figure 3: Total in-home daily video viewing minutes per person, split by platform, by nation: 2022



Source: Barb, as viewed. Broadcaster content includes live TV, recorded playback and BVoD. The UK total minutes here is not the same as in the UK report; the UK report includes estimates for out-of-home viewing which are not included here. Due to rounding, the total minutes in the chart might be slightly different to summing the individual sections of each bar. 'Other TV set usage' includes viewing to some SVoD/AVoD/VSP that cannot be definitively measured. This category also includes some unmeasured broadcast channels, non-catch-up DVD/DVR viewing, some EPG/menu browsing, viewing when the audio is muted, piracy, unmeasured boxsets/pay-per-view content, and non-video internet activity through a PC or other device connected to the TV. SVoD 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 out).

Broadcast TV viewing in Wales

Where our data comes from

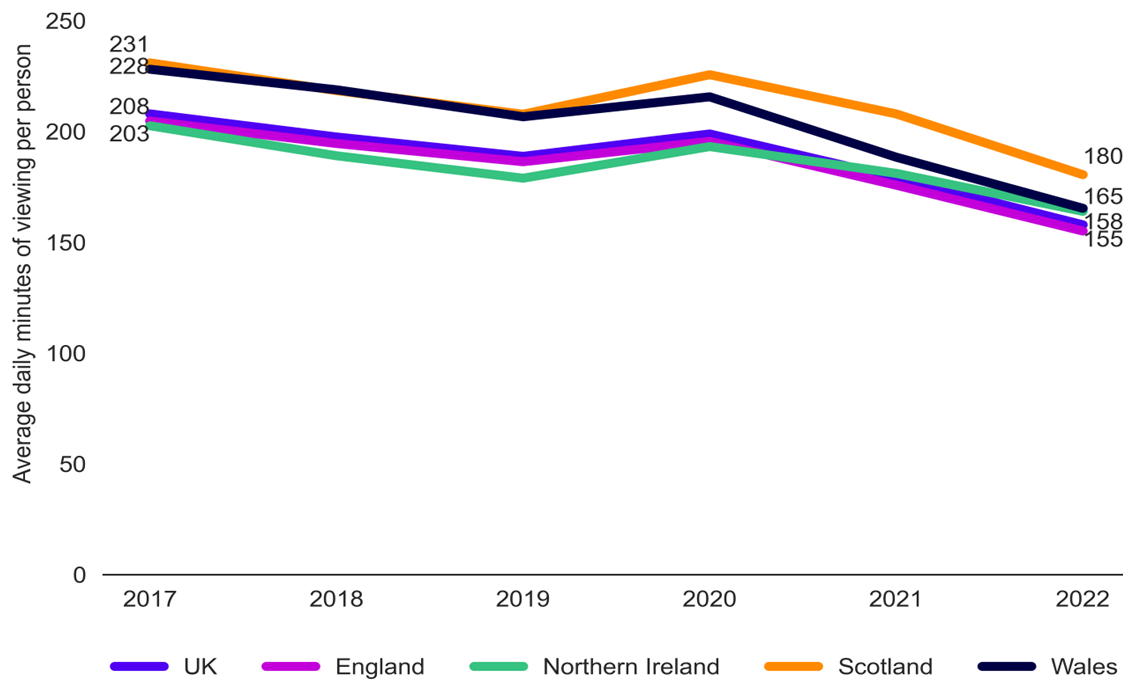
Most of the viewing data comes from Barb Audiences Ltd (Barb), the industry's standard for measuring what people watch. This includes viewing of broadcast TV through TV sets and via devices attached to TV sets, such as computers, streaming devices and set-top boxes. It also includes some viewing for 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).

Viewers in Wales on average watched the second most broadcast TV of any UK nation in 2022

On average, people in Wales spent 2 hours 45 minutes per day watching broadcast TV on the TV set in 2022, the second most of any nation in the UK. This was a decline of 23 minutes from 2021. Proportionally, this represented a decline of about 12% between 2021 and 2022, on a par with the UK average decrease.

Figure 4: Average daily minutes viewed of broadcast TV per person, by nation: 2017-2022

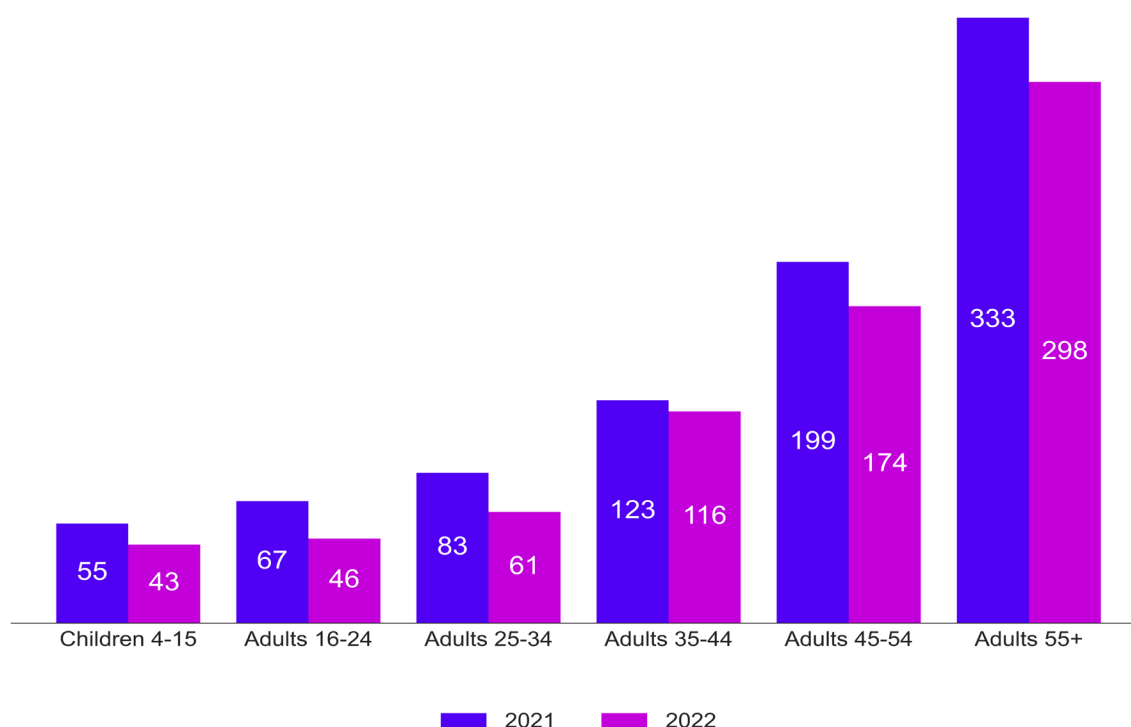


Source: Barb. BBC areas, all individuals (4+).

Broadcast viewing decreased among all age groups

In line with the general trend across the UK, older people in Wales watch more broadcast TV on a television set compared to younger viewers. The over-54s watched more than any other age group, at an average of 4 hours 58 minutes per day, down by 10.6% since 2021. Children aged 4-15 watched the least, at an average of 43 minutes per day, down by 21.2% since 2021.

Figure 5: Average daily minutes of broadcast TV viewed in Wales, by age group: 2021-2022



Source: Barb consolidated 28 days, tv set only. BBC areas.

Sport and special events dominated the most-viewed TV programmes in Wales in 2022

Wales's love of rugby is reflected in the top-10 programme list; Wales is the only nation to have any rugby games appear in its top 10. As in 2021, the *Wales v France Six Nations Rugby*, broadcast on BBC One, was the most-viewed programme in Wales for the year, with an average audience of 652,000. The match ended with a win for France over Wales (13-9). Wales's defeat to England (19-23) in another Six Nations game two weeks later was also in the top programmes list in 2022, with an average audience of 540,000.

The only drama programme to get into the top ten programmes was *Strike* (with an average audience of 560,000). The entertainment show, *I'm a Celebrity... Get Me Out of Here!* (535,000) was the only other non-sports or special events programme to get into the list.

Figure 6: Top 10 most-watched programmes in Wales: 2022

Rank	Programme title	Channel	Date	Average audience (000s)	Programme share (%)
1	Six Nations Rugby; Wales vs France	BBC One	11/03/2022	652	48.8
2	The State Funeral of HM Queen Elizabeth II (part 2)	BBC One	19/09/2022	624	62.7
3	FIFA World Cup 2022	BBC One	29/11/2022	612	56.2
4	World Cup	ITV1 Wales	21/11/2022	573	51.6

Rank	Programme title	Channel	Date	Average audience (000s)	Programme share (%)
5	Happy New Year Live!	BBC One	31/12/2022	561	50.1
6	Strike	BBC One	11/12/2022	560	45.6
7	The Queen's Platinum Jubilee	BBC One	04/06/2022	551	59.0
8	Six Nations Rugby; England vs Wales	ITV1 Wales	26/02/2022	540	59.7
9	The State Funeral of HM Queen Elizabeth II (part 1)	BBC One	19/09/2022	539	61.9
10	I'm a Celebrity... Get Me Out of Here!	ITV1 Wales	09/11/2022	535	42.2

Source: Barb 28-day consolidated across TV and other devices in the home. Highest occurring episode by channel, ranked by average audience. Channels include any +1 equivalents.

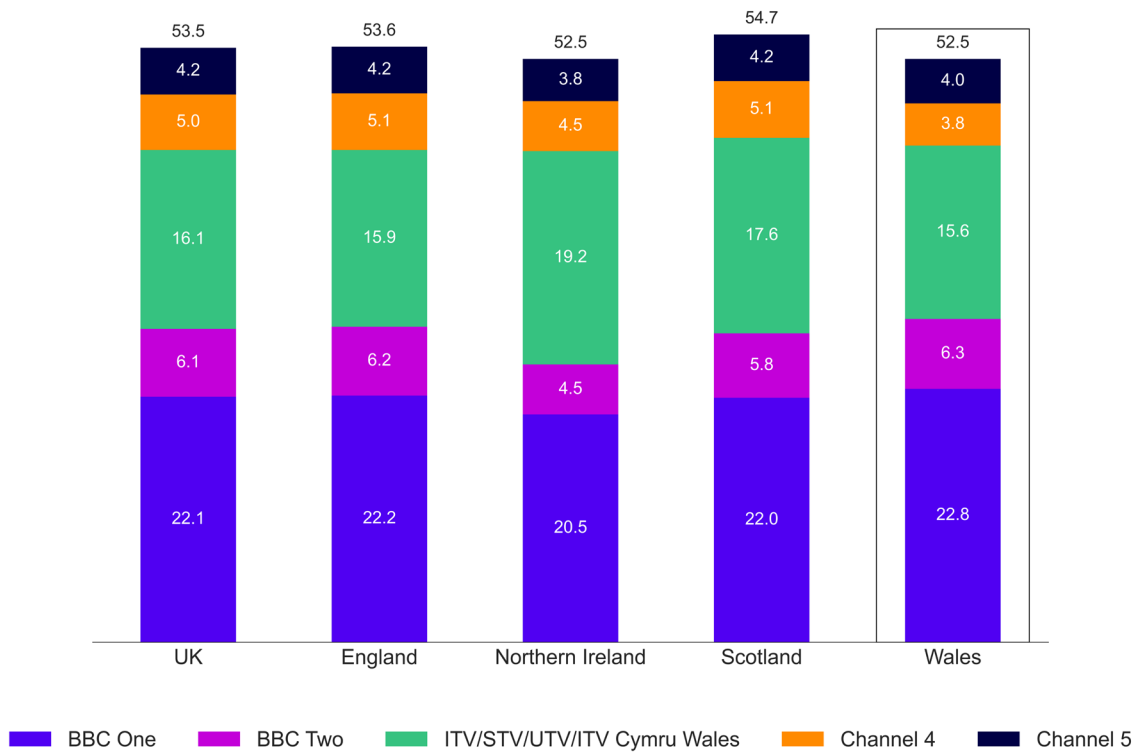
The main five PSB channels accounted for more than half of total broadcast viewing

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 2022, the main five PSB channels accounted for a combined 52.5% share of the total broadcast TV audience in Wales. This was a slight decrease from 53.4% in 2021. BBC One had the highest audience share of any individual PSB channel, at 22.8%, while Channel 4 had the lowest at 3.8%. The audience shares of BBC One and BBC Two in Wales are the highest among the UK nations.

Figure 7: Share of total TV viewing for the five main PSB channels, by nation: 2022 (%)

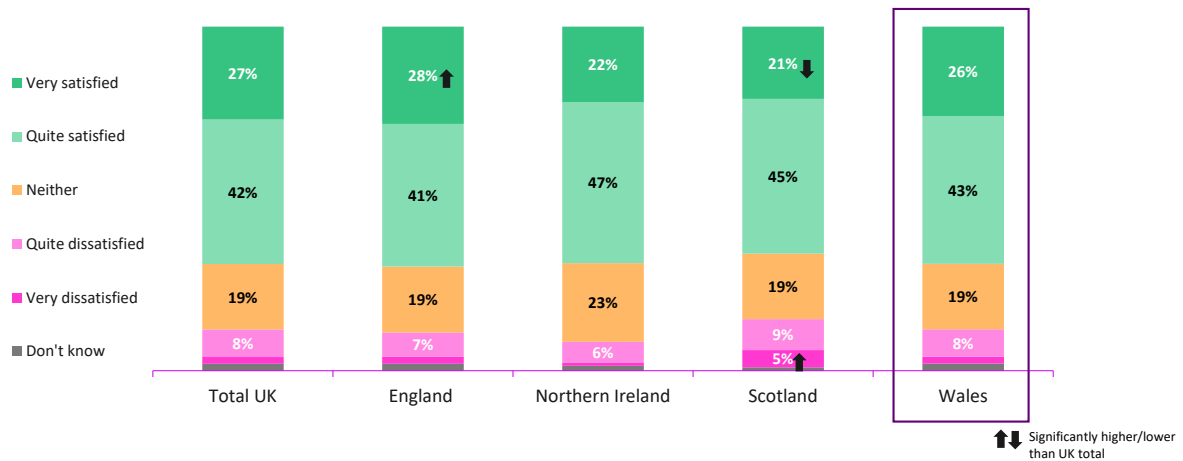


Source: Barb. BBC areas, all individuals (4+). Excludes any +1 channels.

Overall, seven in ten audiences in Wales are satisfied with PSB channels

Ofcom’s Public Service Media Tracker (PSM)⁵ found that in Wales, seven in ten (69%) of those who had watched a PSB channel in the past six months said they were satisfied with PSBs overall; only one in ten (10%) said they were dissatisfied. This is consistent with the UK total and findings from 2021.

Figure 8: Satisfaction with PSBs overall – UK total and by nation: 2022



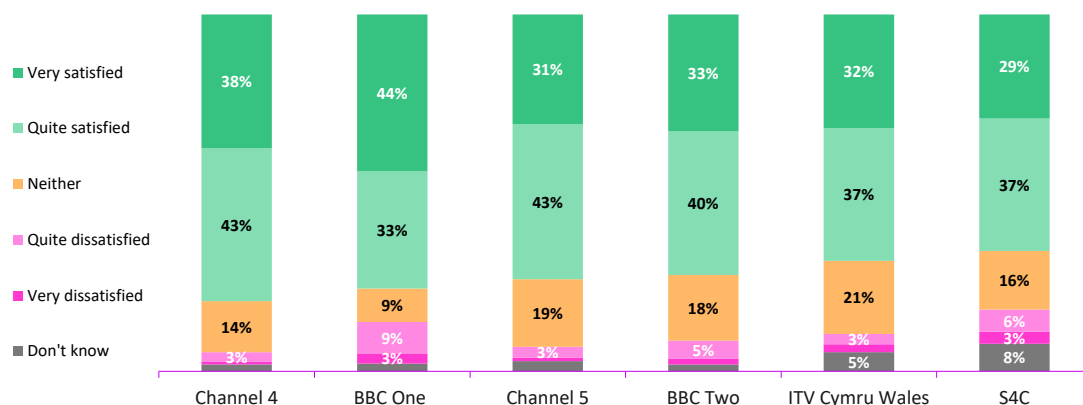
Source: Ofcom’s Public Service Media Tracker 2022. Question 28. And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined they provide the different elements asked about in the previous question? Base: All who have watched PSB channel/service in last 6 months, Total UK (2,826), England (1,850), Northern Ireland (366), Scotland (303), Wales (307). Note, not showing percentages under 5%.

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

When asked to consider PSB channels individually, over three-quarters of viewers said they were satisfied with Channel 4 (80%), and BBC One (77%), with a slightly lower proportion saying the same of BBC Two (73%) and Channel 5 (74%). About seven in ten said they were satisfied with ITV Cymru Wales (69%).

⁵ Ofcom’s Public Service Media Tracker 2022.

Figure 9: Satisfaction with individual channels: 2022



Source: Ofcom’s Public Service Media Tracker 2022. 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 (276), Channel 4 (259), BBC Two (240), ITV Cymru Wales (224), Channel 5 (247), S4C (101). Note, not showing percentages under 3%.

Viewers in Wales think that the PSBs deliver well on a wide range of programmes

Three-quarters (75%) of PSB viewers⁶ in Wales said that PSBs overall performed well on providing ‘a wide range of different types of programmes, such as drama, comedy, entertainment or sport’, a figure higher than in any other nation. About seven in ten said that they delivered well on ‘programmes made for UK audiences’ (72%) and ‘programmes that help me understand what is going on in the world today’ (68%).

About half said that PSBs delivered well on ‘programmes that feature Wales’ (49%) and nearly three in five (58%) said the same for ‘regional programmes that keep me informed about my area’, a six-percentage-point increase on 2021. However, there was variation in attitudes towards individual PSB channels; for example, viewers in Wales were significantly more likely than the UK total to say that BBC TV channels delivered well on ‘regional programmes that keep me informed about my area’ (62% vs 56%), and more likely to say that they delivered well on ‘programmes made for UK audiences’ (75% vs 67%). 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’ (65% vs 49%). The same is true for ‘regional programmes that keep me informed about my area’ (65% vs 52%).

S4C

Two-thirds (66%) of S4C viewers in Wales said they were satisfied with S4C. Four in five (79%) said that S4C delivered well on ‘programmes that feature Wales’, the highest-rated statement for any channel asked about. Three in five (61%) said it delivered well for ‘programmes made for UK audiences’ (61%) and ‘regional programmes that keep me informed about my area’ (63%).

⁶ Ofcom’s Public Service Media Tracker 2022 defines PSB viewers as all who have watched a PSB channel/service in the last six months.

Seven in ten (71%) UK viewers said the same for S4C Clic. S4C Clic had similar delivery scores across most statements, but was seen as delivering particularly well on statements such as *'programmes made for UK audiences'*, (67%) *'easy to find something I want to watch'* (67%) and *'programmes that feature people like me'* (67%).⁷

⁷ Ofcom's Public Service Media Tracker 2022.

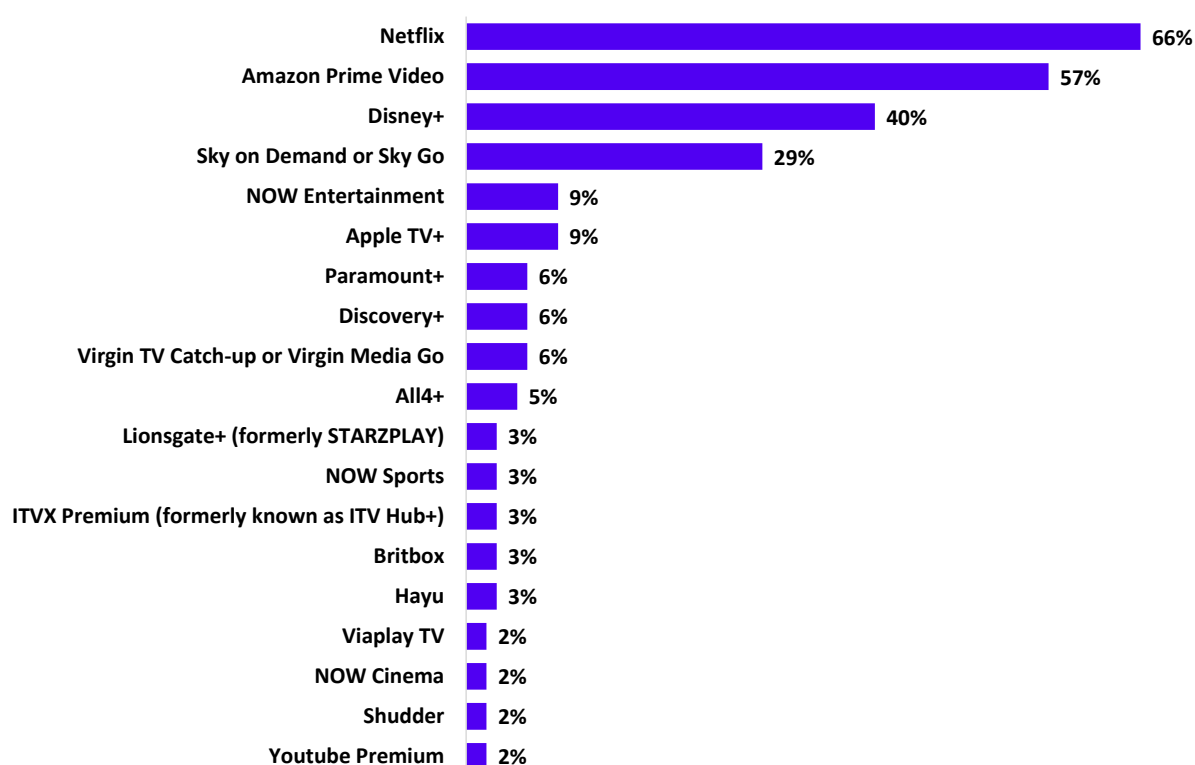
Video-on-demand viewing trends

Viewers have a wide choice of subscription services

In Wales, the number of households using SVoD services fell in Q1 2023, with 63% of households subscribing to at least one service, down from 71% in Q1 2022.⁸

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 which collectively have significant reach. These include services such as NOW and Apple TV+, and genre specialist services such as Shudder (horror) and Hayu (reality TV).

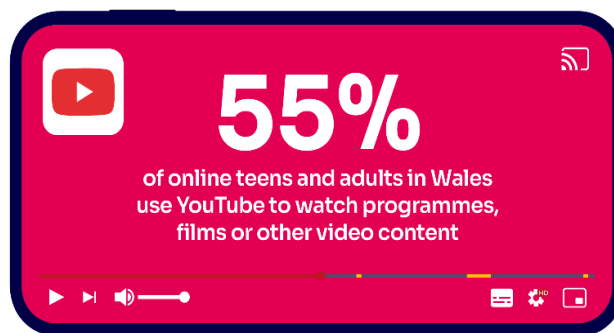
Figure 10: SVoD services used in Wales to watch programmes, films or other video: 2023



Source: Ofcom VoD Survey 2023. Online adults/teens aged 13+, Wales. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 158. Fieldwork conducted 22nd – 27th February 2023. *Payment of licence fee required to use BBC iPlayer.

⁸ Barb Establishment Survey Q1 2023.

YouTube was the most popular video-sharing platform, with 55% of online teens and adults in Wales saying that they had used it to watch programmes, films or other video content in the three months before the fieldwork, slightly below England and Scotland, but slightly higher than Northern Ireland.



Short videos (15 minutes or less) and long videos (longer than 15 minutes) were equally popular among users of YouTube in Wales (both 50%). ‘YouTube Shorts’ were less popular, with 35% watching them, while 23% reported watching full-length programmes or films.⁹

Ofcom’s PSM Tracker shows that levels of satisfaction with SVoD services remain high; over four in five viewers in Wales say they are satisfied with Disney+ (87%), Netflix (86%) and Amazon Prime (83%).¹⁰

Nearly three quarters of adults and teens in Wales watch BBC iPlayer

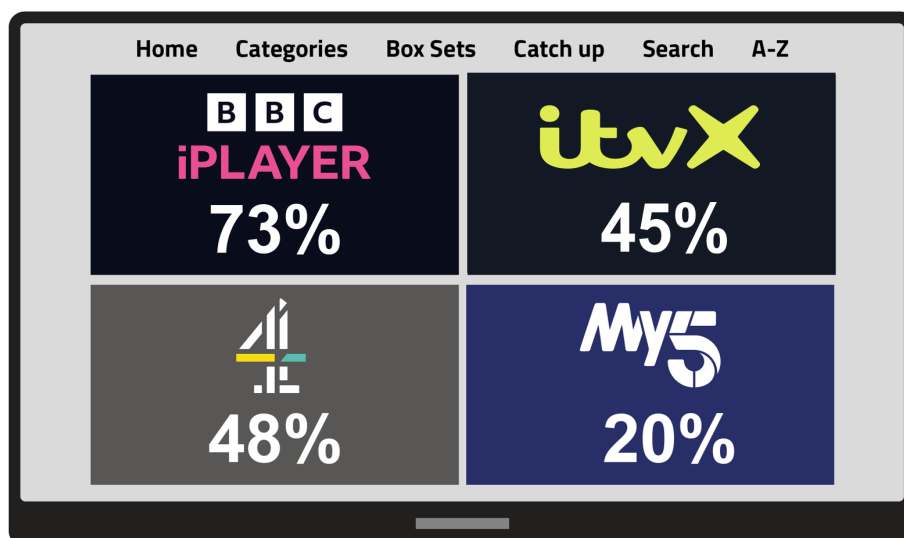
Ofcom’s VoD survey found that 93% of online adults and teens in Wales used a free-to-view video on demand service (any streaming service not behind a paywall, including YouTube). This is in line with figures for England, slightly above Scotland and slightly below Northern Ireland.

Nearly three in four people in Wales (73%) used the BBC iPlayer in 2023, with just under half using Channel 4 (48%) and one in five using My5 (20%) over the same period. Following its launch at the end of 2022, just under half of people in Wales said they used ITVX in early 2023 (45%).

⁹ Ofcom VoD Survey 2023. Note: the ‘short videos’ category does not include YouTube Shorts, similarly long videos do not include full length programmes and films.

¹⁰ Ofcom’s Public Service Media Tracker 2022.

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



Source: Ofcom VoD Survey 2023. Online adults/teens aged 13+, Wales. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films, or other video content in the past 3 months? Base: 158. Fieldwork conducted 22nd – 27th February 2023. *Payment of licence fee required to use BBC iPlayer.

Overall, audiences in Wales are satisfied with BVoD services

When asked to consider their satisfaction with the different BVoD services, over four in five (86%) viewers in Wales said they were satisfied with BBC iPlayer, and about three-quarters said the same for ITV Hub¹¹ (78%), All 4 (75%) and My5 (77%).

In Wales, BVoD viewers¹² said they used BVoD services ‘to catch up on programmes that I have missed on TV’ (64%), so they could ‘watch what they want, when they want’ (51%), to watch specific programmes or box-sets (39%) or to access older or archive programming (39%). In contrast, some of their 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

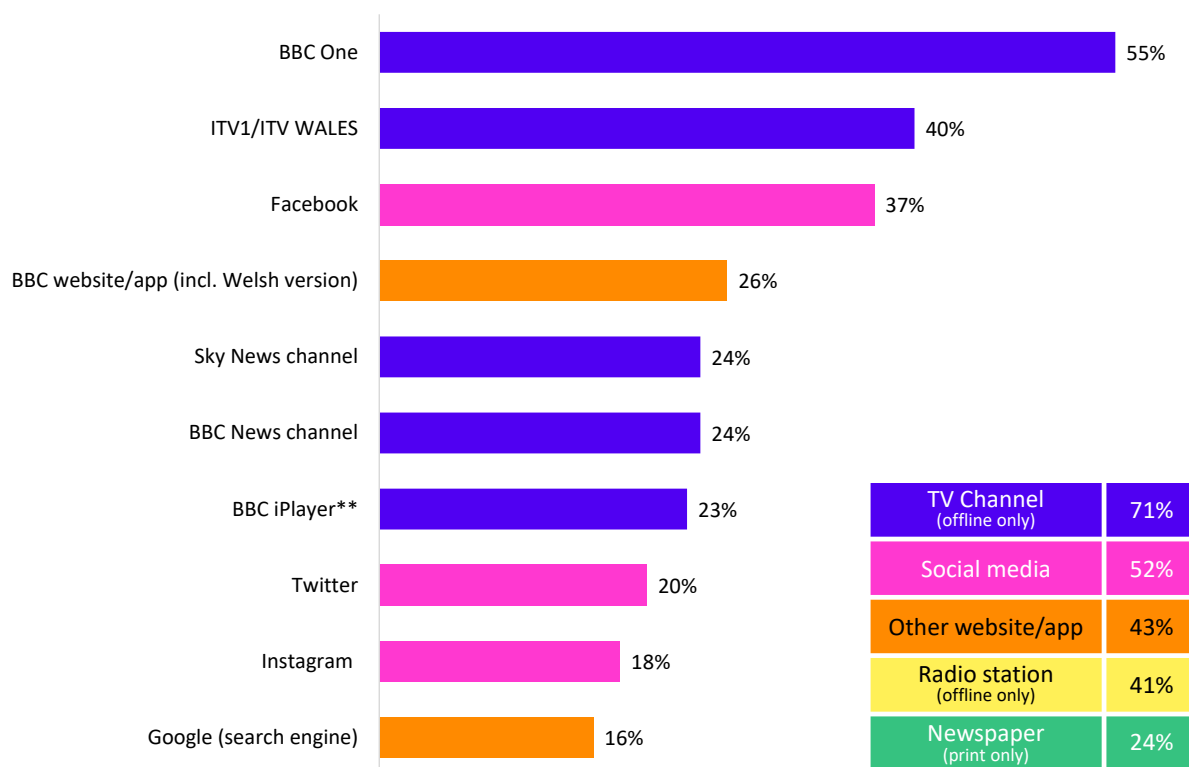
Over half of adults in Wales (55%) used BBC One for news in general, making it the most-used news source, followed by ITV Wales (40%). Other TV channels in the top ten included Sky News Channel and the BBC News Channel. Social media ranked highly too, with Facebook the third most popular source of news (37%), while Twitter (20%) and Instagram (18%) ranked eighth and ninth respectively. BBC Radio 2 was the top radio station cited (14%). No newspapers made the top ten. This year Ofcom’s News Consumption Survey also collected figures relating to use of video-on-demand services. The most popular of these was BBC iPlayer; just under a quarter of adults (23%) in

¹¹ 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+.

¹² BVoD viewers are defined as those who have watched at least one BVoD service in the past six months.

Wales use this service for news. ITVX also appeared in the top 20 news sources, used by 13% of adults.¹³

Figure 12: Top ten sources of news in general in Wales: 2022

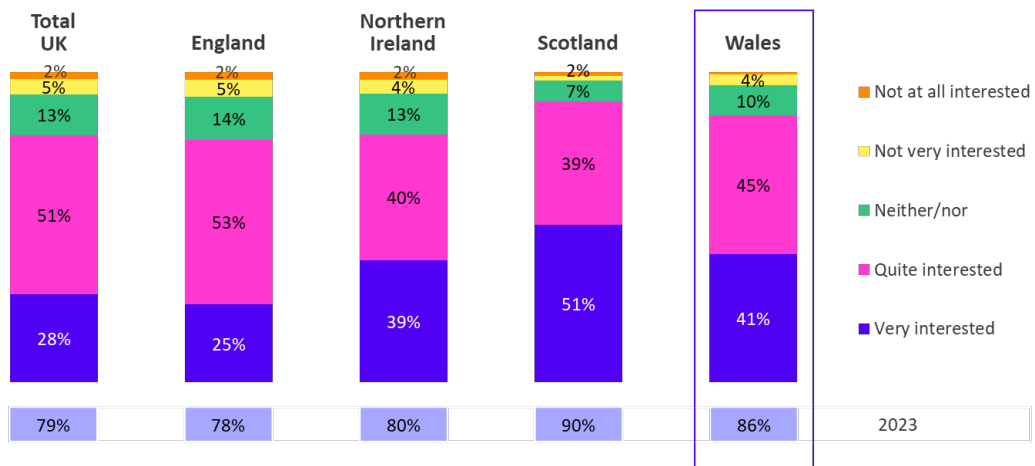


Source: Ofcom News Consumption Survey 2022 – COMBINED F2F & ONLINE sample. Question: D2a-D8a. Thinking specifically about <platform>, which of the following do you use for news nowadays? Base: All adults 16+ in Wales - 2023 = 657 **BBC iPlayer added in 2023.

There is a significant amount of interest in news about Wales among people who live there. Just over two-fifths of those who follow news claim to be ‘very interested’ in news about Wales (41%), rising to 86% who are ‘very’ or ‘quite’ interested. As shown below, adults in Wales and Scotland are the most likely to say they are ‘very interested’ in news about their nation.

¹³ Ofcom News Consumption Survey 2023

Figure 13: Level of interest in news about own nation, by nation: 2023



Source: Ofcom News Consumption Survey 2023 – Combined F2F and ONLINE sample. Question: F3. How interested are you in news about your NATION/REGION? Base: All adults 16+ who follow news 2023 - Total=4371, England=2516, Scotland=665, Wales=627, Northern Ireland=563.

BBC One (38%) and ITV Wales (28%) were the first and second most-used sources for news about the nation, followed by Facebook (25%) and the BBC website/app (13%).¹⁴

¹⁴ Ofcom News Consumption Survey 2023

TV programming for and from Wales

The BBC and ITV Cymru Wales provide programming specifically for viewers in Wales across a range of genres, but most notably news output. There was a 28% increase in spending on first-run content for viewers in Wales in 2022, with spend on non-news/non-current affairs increasing the most, up by 53%. Non-news/non-current affairs accounts for the largest share of first-run spend (58%) in Wales.

BBC hours of first-run content in Wales grew by 5% in 2022 to 603 hours. Overall, news content makes up the largest amount of the BBC's output for Wales, comprising 51% of first-run hours.

Wales is also an important source of production for PSB content shown across the UK. Some 3.4% of qualifying network spend on the PSB channels was on Wales-based productions in 2022.

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

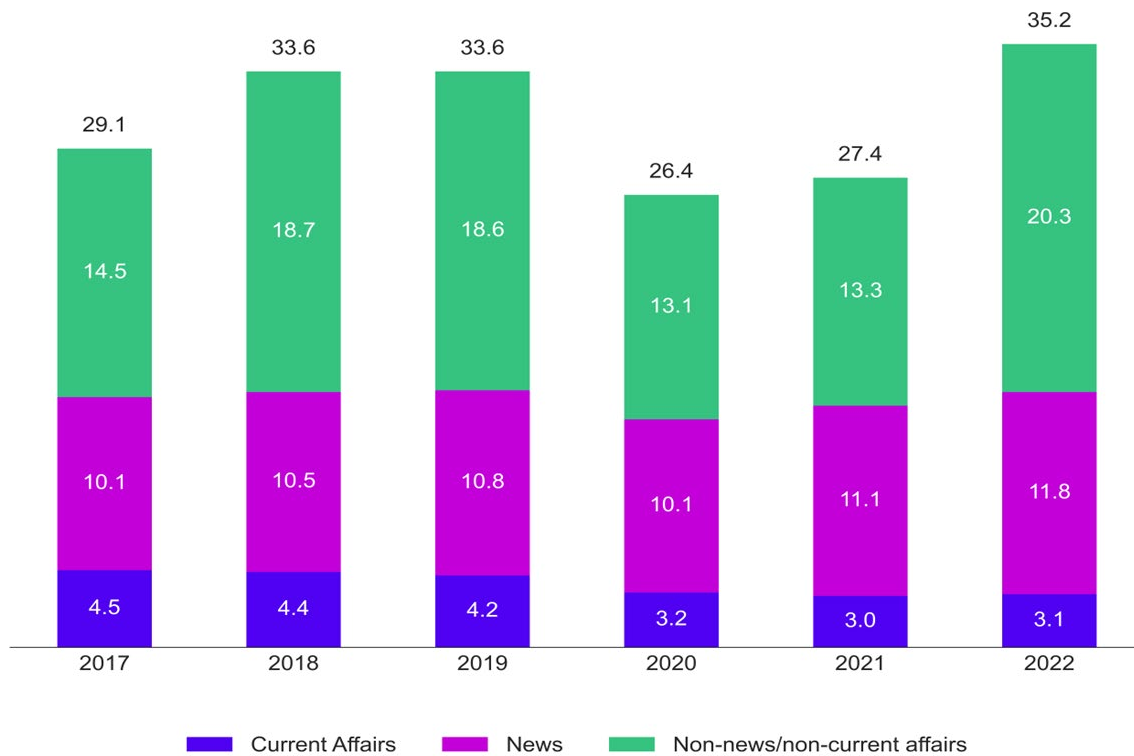
Financial data quoted in this report is presented in nominal terms, meaning that historical data has not been adjusted to account for inflation. In our interactive report, users can view financial data in either nominal or 'real' (CPI-adjusted) terms, with users easily able to switch between the two.

PSB spend on first-run content for Wales increased by 28% in 2022

Of the total £35.2m spend, the majority went towards non-news/non-current affairs, at £20.3m; a year-on-year rise of £7m.

Non-news/non-current affairs had the largest relative growth in first-run spend, increasing by 53% year on year to £20.3m. PSB spend on news programming for Wales has increased by 6%.

Figure 14: PSB spend on first-run UK-originated content for Wales, by genre: 2017-2022 (£m)

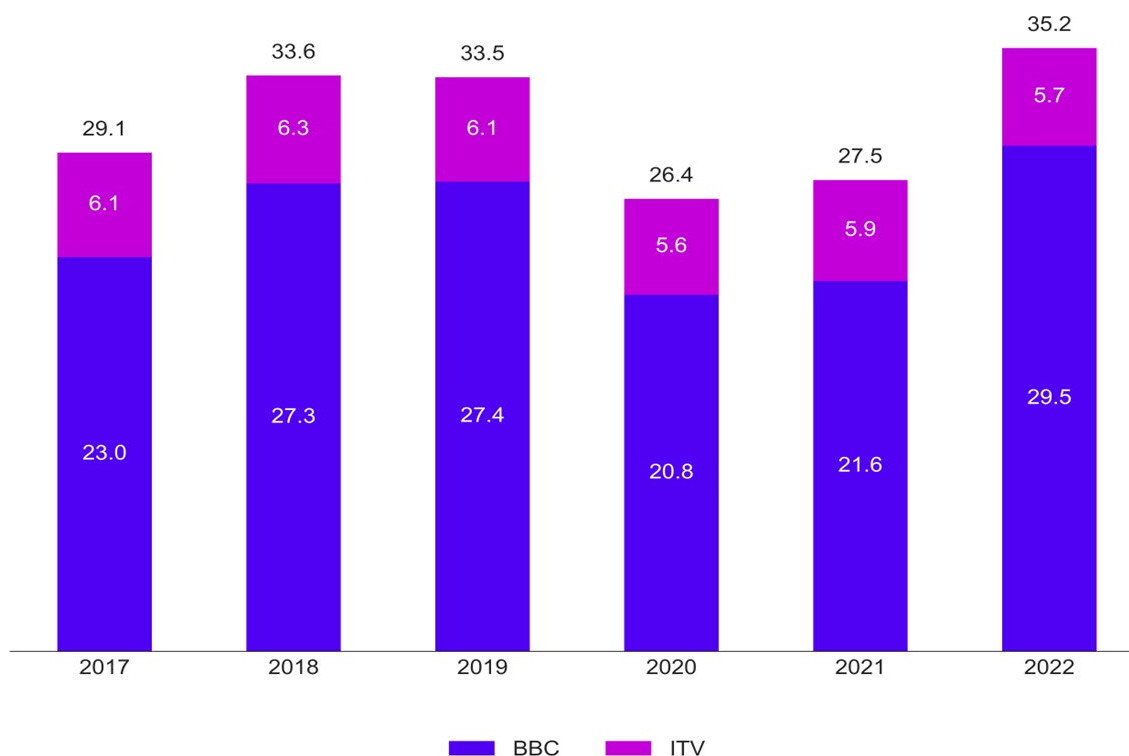


Source: Ofcom/broadcasters.

PSB spend on first-run content for Wales rose in 2022

The increase in spend on first-run content is driven by the BBC, from which spend for Wales increased from £21.6m in 2021 to £29.5m in 2022 (up 37%). As shown by the combined PSB totals above, this primarily came from non-news and non-current affairs programming.¹⁵ Spend by ITV on first-run content for Wales decreased in 2022, by 3%.

Figure 15: BBC and ITV Cymru Wales spend on non-network first-run UK-originated content for Wales: 2017-2022 (£m)



Source: Ofcom/broadcasters.

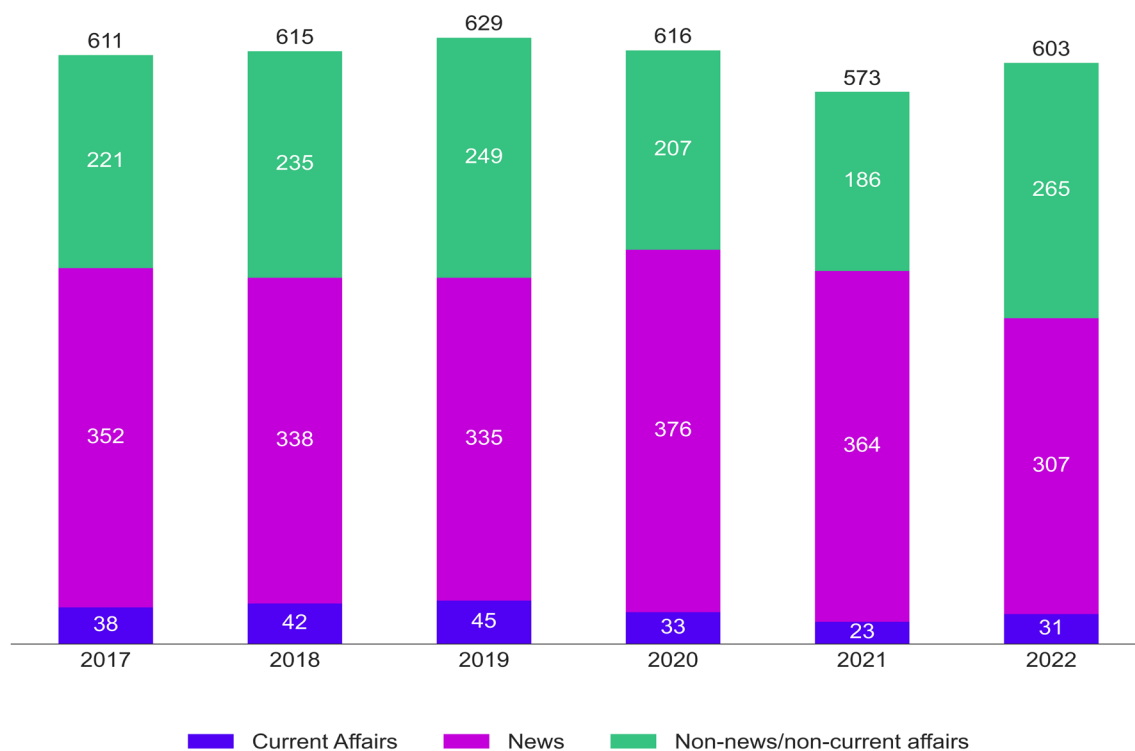
¹⁵ This may include some co-commissions between BBC network and non-network services. In 2022, if such programmes were broadcast on regional opts first, the spend is captured as part of the BBC's regional programming spend.

BBC hours of first-run content in Wales grew by 5% in 2022 to 603 hours

This growth in hours has been driven by current affairs and non-news/non-current affairs. The largest proportional increase was for non-news/non-current affairs, up by 79 hours to 265 hours (42%).

Overall, news content makes up the largest amount of the BBC's output for Wales, comprising 51% of first-run hours. This is a decrease since 2021, which was mainly due to the end of the *Wales Today Coronavirus Update*.

Figure 16: BBC hours of first-run UK-originated content for Wales, by genre: 2017-2022



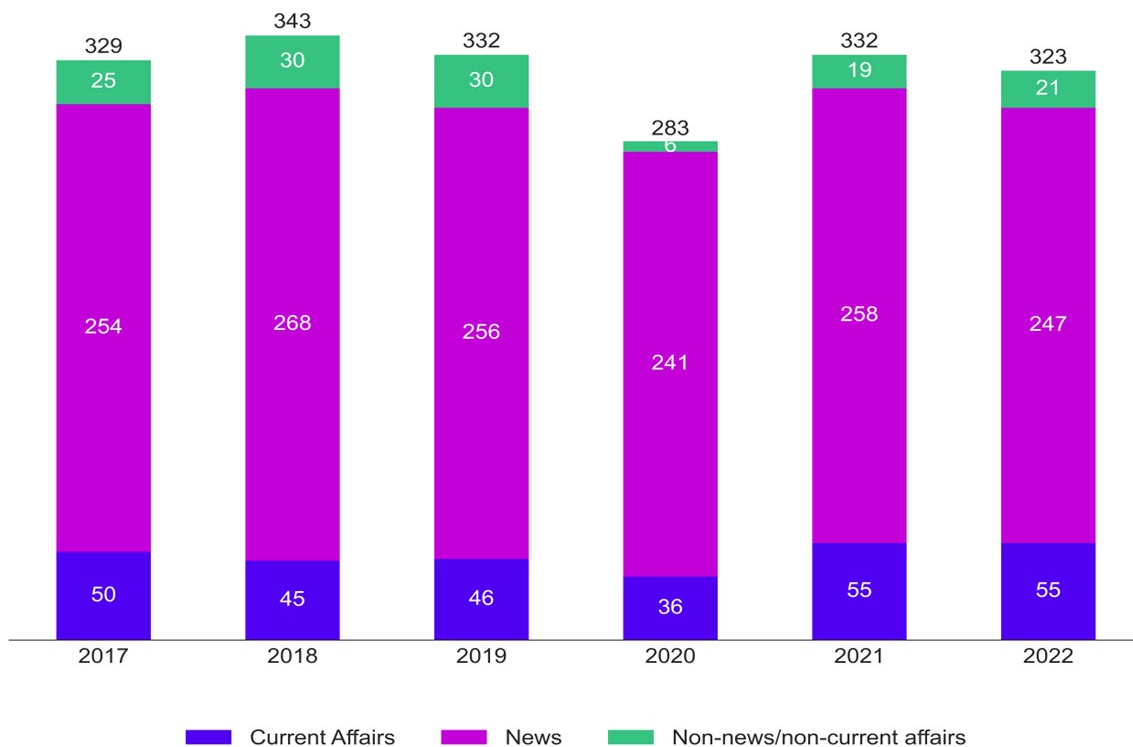
Source: Ofcom/broadcasters.

ITV Cymru Wales’ hours of first-run content for Wales dropped year on year, with 323 hours of programme output in 2022

The vast majority of ITV Cymru Wales output is news content, comprising 76% (247 hours) of first-run programming on the channel.

The decrease in hours has been entirely due to news, down by 11 hours (4%). The largest rise has been for non-news/non-current affairs, growing by 2 hours to 21 hours (up 11%).

Figure 17: ITV Cymru Wales’ hours of first-run UK-originated content for Wales, by genre: 2017-2022



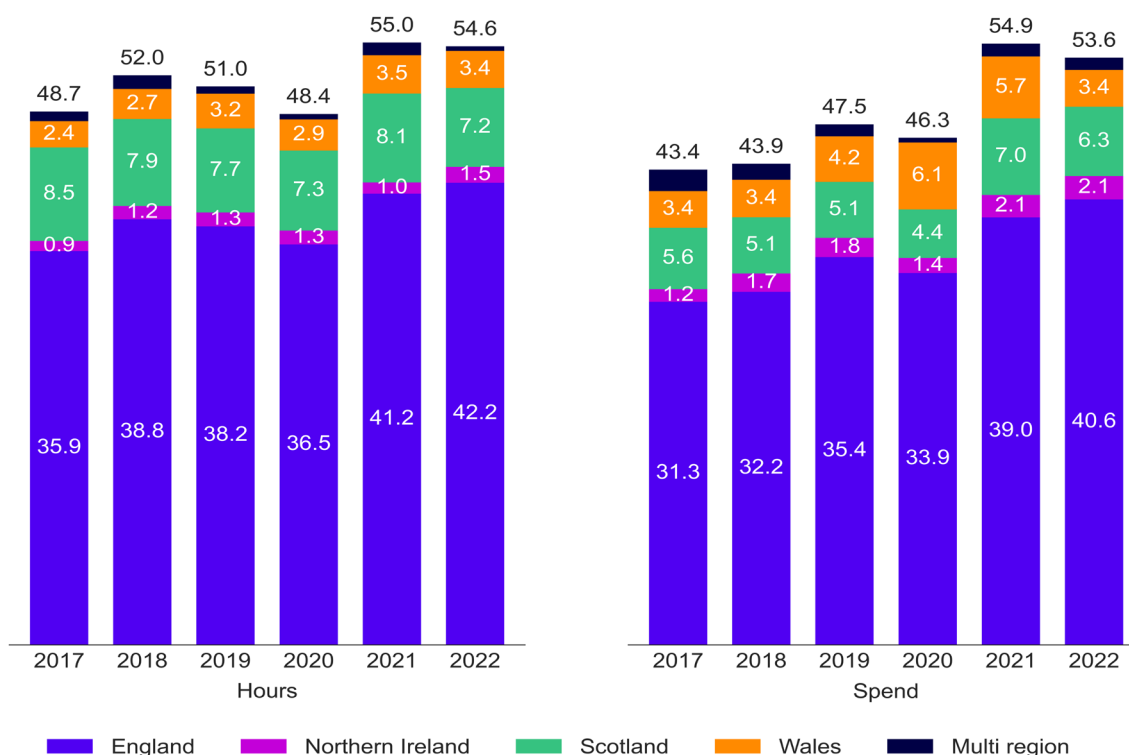
Source: Ofcom/broadcasters.

Network content produced in Wales

Public service broadcasters have quotas in relation to spend and hours of content produced in the UK that are broadcast for the first time on their network TV channel. 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, 3.4% of qualifying first-run network spend was allocated to programmes qualifying as Wales productions, as well as 3.4% of hours.

Figure 18: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2017-2022 (%)



Source: Ofcom/broadcasters.

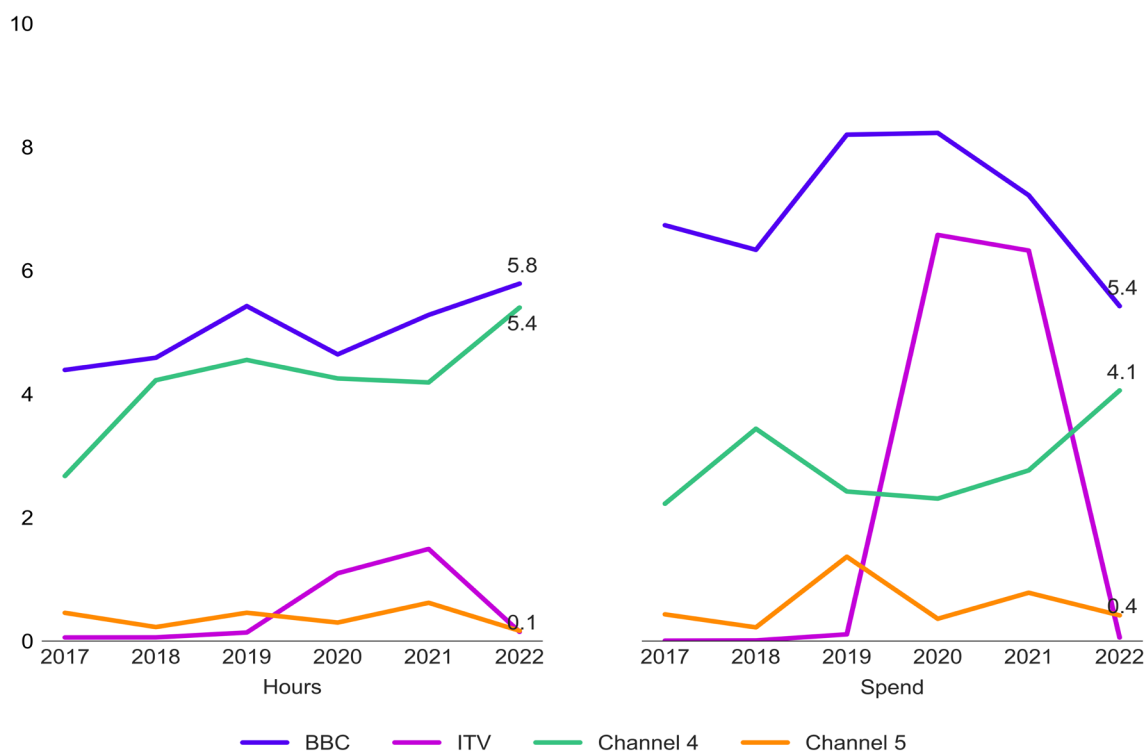
The overall output of network content made in Wales increased in 2022, although qualifying spend levels dipped

The BBC, which is responsible for the majority of qualifying network content made in Wales, reduced the proportion of its network spend in Wales to 5.4% in 2022, although the proportion of hours increased, to 5.8%. Some of the increase in hours came from coverage of the mixed martial arts competition *Bellator* on the relaunched BBC Three, managed from Whisper Films Limited’s Cardiff base, with spend and crew allocations in Wales. In addition, the BBC manages several arts and music productions from Cardiff, as well as long-running drama series such as *Casualty* and *Doctor Who*.

The proportion of qualifying hours and spend allocated to Wales by ITV reduced in 2022. This was largely a result of the temporary relocation in 2021 of *I’m a Celebrity... Get Me Out of Here!*, which, following the easing of travel restrictions after the Covid-19 pandemic, returned to filming in Australia.

In contrast, network production produced in Wales for Channel Four increased in 2022. The main titles allocated to Wales include factual entertainment and leisure titles *Handmade: Britain’s Best Woodworker* and *Find It, Fix It, Flog It*, and the new property competition format *Flipping Fast*.

Figure 19: Proportion of qualifying network production in Wales, by PSB: 2017-2022 (%)



Source: Ofcom/broadcasters.

3. Radio and audio

Market developments

BBC Cymru Wales

In February, Owain Wyn Evans presented BBC Radio 2's first daytime programme strand outside London. His early morning show, produced by Welsh independent production company Bengo Media, hit the airwaves as part of the BBC's creative commitment to serving the whole of the UK. From September, BBC Radio 1, 2, 3 and 4 will be broadcasting from BBC Cymru Wales' headquarters at Central Square every week. The latest show to announce Cardiff as its home is the *Weekend Breakfast Show* on BBC Radio 1 with Sam and Danni.

BBC Radio Wales has refreshed its weekday schedule, including a new-look *Radio Wales Breakfast*. News and current affairs are at the heart of the programme, reflecting news in Wales, across the UK and the world.

Siarad Anabledd | Talk Disability was launched in January, the start of BBC Wales's new commitment to disability, on and off screen, over the next twelve months. It includes programmes, initiatives and content designed to inspire conversations about disability. Central to the commitment was the announcement of new BBC Wales traineeships specifically for people with disabilities, created in partnership with Disability Wales and consisting of eight-week placements in either radio, news, or business and operations departments.

Small-scale DAB (SSDAB)

Ofcom has continued to license small-scale DAB during the past year and recently awarded three multiplex licence awards in the fourth round of licensing (Newport & Chepstow, North Pembrokeshire and South Pembrokeshire), bringing the number of small-scale multiplex licences awarded in Wales to eight, with Cardiff DAB now on air (small-scale radio multiplexes are required to launch no more than 18 months after the date of the licence).

Community radio

There are currently nine community radio stations in Wales – Calon FM, GTFM, Bro Radio, Rhondda Radio, Mon FM, BGfm, Tircoed, Radio Cardiff and Sound. Bro Radio, in the Vale of Glamorgan, recently launched on DAB+, extending its coverage across Cardiff and the eastern part of the Vale of Glamorgan.

To date Ofcom has awarded three [Community Digital Sound Programme Service](#) (C-DSP) licences to services in Wales; these are designed to provide a low-cost route for community, local or specialist music services to broadcast on digital radio to a small geographic area.

The Community Radio Fund continues to support the core costs of running Ofcom-licensed community radio stations and now welcomes applications from C-DSPs services which are broadcasting on a small-scale multiplex at the date of their application. During 2022-23, [Bro Radio and Calon FM received awards](#) from the fund.

Availability and coverage of radio services

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 terrestrial analogue and DAB radio. The BBC also operates two Wales-wide services, BBC Radio Wales and BBC Radio Cymru, which are broadcast on FM. These services are also available via DAB across Wales.

As of March 2023, there were two commercial stations, 15 local commercial stations and nine community radio stations broadcasting on AM/FM in Wales. Forty-six commercial stations were broadcasting on DAB, unchanged since last year, while the number of local commercial stations broadcasting on DAB increased from 26 to 32.

Figure 20: Number of commercial and community radio services in Wales, by broadcast technology

	AM/FM	DAB
UK-wide Commercial	2	46
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. Community-DSP (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 from 2022, 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.

Figure 21: DAB coverage as of March 2023

		BBC		Commercial		Small-scale
			Digital One	Sound Digital	Local DAB	
UK	Homes	97.4%	91.7%	82.6%	92.0%	13.8%
	Major roads	87.4%	80.2%	72.6%	76.8%	NM
England	Homes	98.4%	94.8%	86.7%	93.4%	12.8%
	Major roads	94.5%	93.9%	89.8%	87.4%	NM
Scotland	Homes	95.3%	81.7%	69.0%	85.4%	24.9%
	Major roads	69.1%	45.5%	33.6%	45.6%	NM
Wales	Homes	92.2%	67.5%	56.9%	82.6%	15.5%

	Major roads	78.1%	53.3%	37.7%	60.9%	NM
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%	5.6%
	Major roads	79.3%	86.9%	55.0%	87.8%	NM

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

Commercial radio revenues

Per-capita commercial radio revenues grew in Wales between 2021 and 2022

Per-capita commercial local radio revenues grew by 7% year on year in Wales, although at £4.99 per person, this was still below the UK average of £7.18.

Figure 22: Per-capita commercial radio revenues, by nation: 2022 (£)



Source: Ofcom, broadcaster returns. These figures relate solely to relevant turnover reported against AL licences (local analogue commercial) and include local and national revenues and sponsorship i.e., not only those revenues which relate to adverts aimed at the specific nation). As mid-year 2022 population estimates for were not available at the time of publication, 2021 mid-year population data has been used for both 2021 and 2022.

Live radio listening in Wales

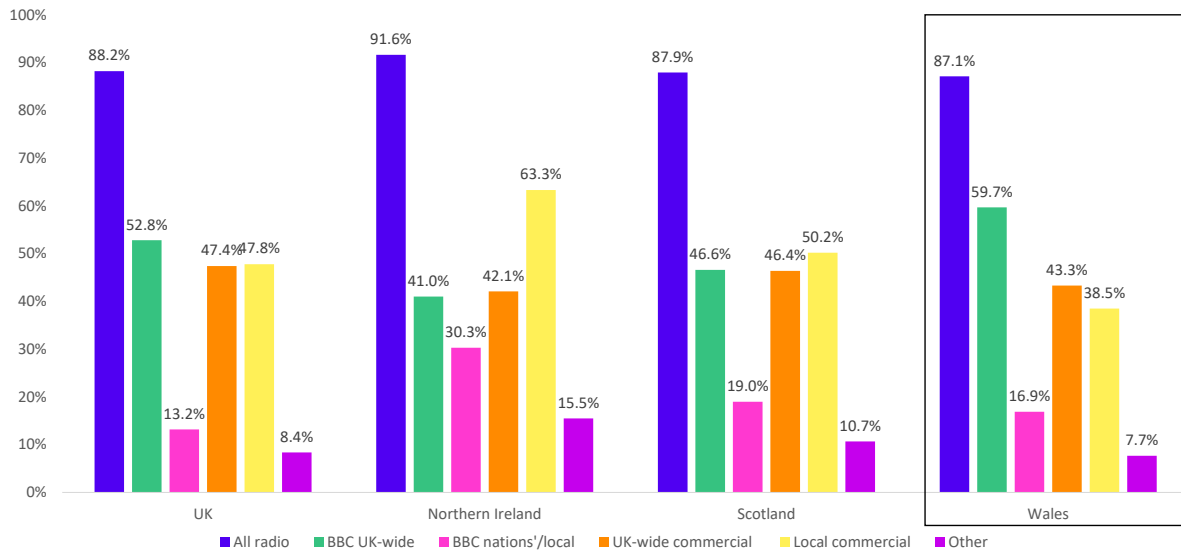
Radio listening is more concentrated in Wales, with fewer people listening for longer, compared to Northern Ireland, Scotland and the UK overall

Radio continues to be strong in Wales, with just under nine in ten adults (87% / 2.3 million) tuning in each week. Although weekly reach is fractionally lower (1pp) than across the UK as a whole, people in Wales tend to listen for longer, averaging 21 hours 48 mins each week compared to the UK average of 20 hours 24 mins.

Figure 23 shows the reach of the different broadcast sectors and how they vary by nation. Just under six in ten adults in Wales (59.7%) listen to UK-wide BBC stations at least once a week, higher than in Scotland, Northern Ireland and the UK overall. The reach of BBC nations'/local stations (16.9%) was

broadly aligned with Scotland (19%) and the UK as whole (13.2%), while Northern Ireland continued to be an outlier with a much higher proportion of people tuning in to BBC’s local services.

Figure 23: Weekly reach of radio, by sector and nation: Q1 2023

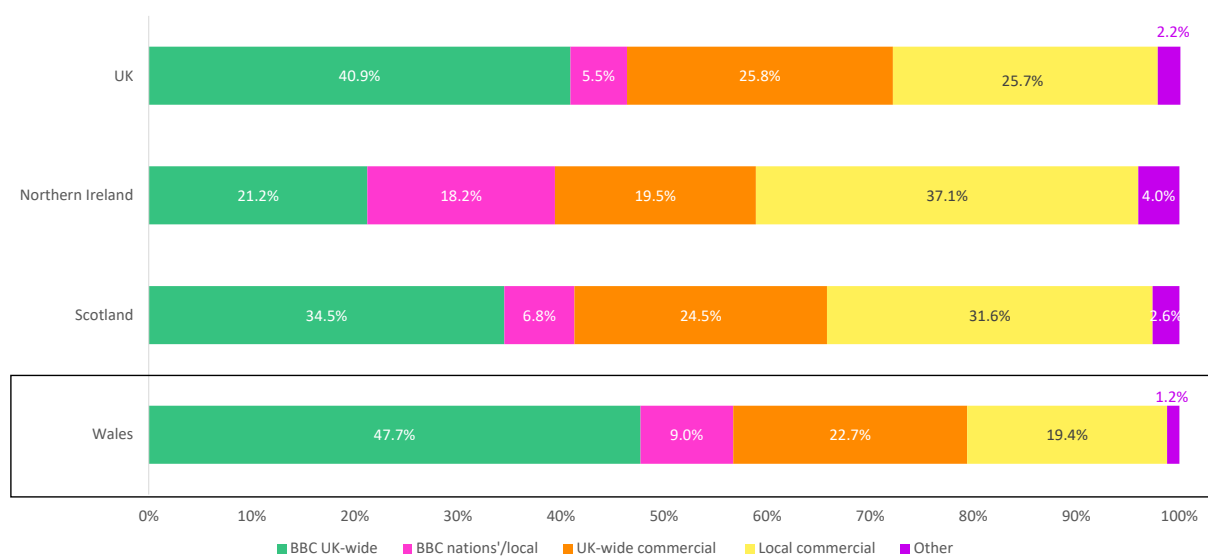


Source: RAJAR Q1 2023; All radio TSA, BBC Radio Ulster TSA, BBC Radio Scotland TSA, BBC Radio Wales TSA.

BBC radio accounts for the majority of radio listening in Wales

BBC radio is particularly strong in Wales, accounting for the majority (56.7%) of total radio listening compared to 46.4% across the UK overall. Most of this listening is to UK-wide BBC stations. A lower proportion of listening is to local commercial stations than in the other parts of the UK (as illustrated in Figure 24).

Figure 24: Share of radio listening, by sector and nation: Q1 2023

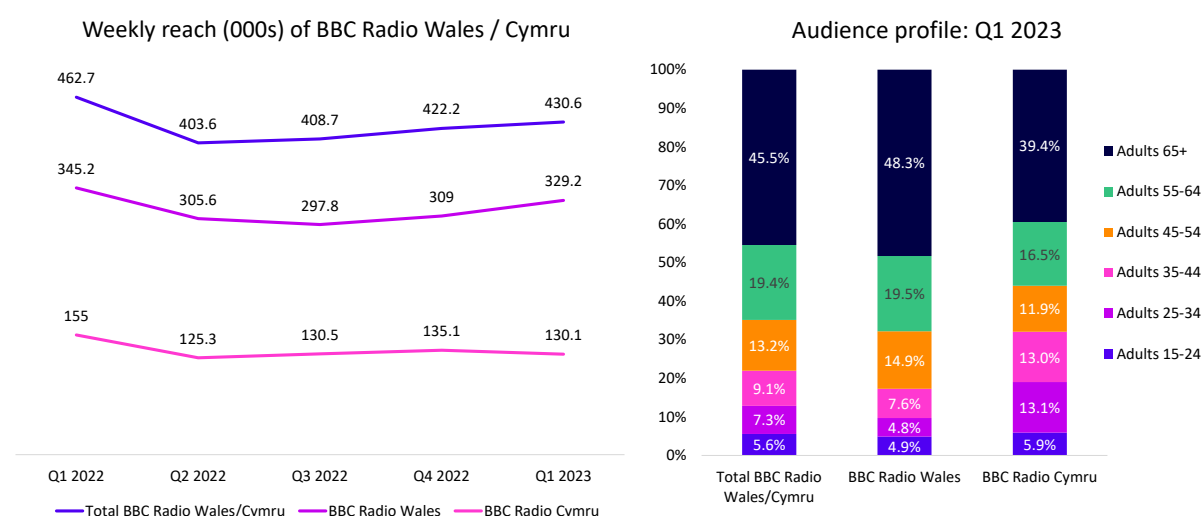


Source: RAJAR Q1 2023; All Radio; BBC Radio Ulster TSA, BBC Radio Scotland TSA; BBC Radio Wales TSA; six-month weighting.

About one in six adults in Wales listen to BBC Radio Wales or BBC Radio Cymru each week

After a dip in Q2 2022, BBC Radio Wales’ audience figures have begun to recover. BBC Radio Cymru has a younger age profile than BBC Radio Wales: 32% (vs 17%) of its listeners are aged under 45. Cymru’s audience are also more likely to be in higher socio-economic groups: 66% ABC1 vs 46% for BBC Radio Wales. Only 9% of BBC Radio Cymru’s audience also listen to BBC Radio Wales.

Figure 25: Weekly reach and audience profile for BBC Radio Wales / BBC Radio Cymru, by age



Source: RAJAR; BBC Radio Wales TSA. Note: BBC Radio Cymru2 is not included on RAJAR.

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 2023, with no Bauer stations making the top spots due to its limited presence in Wales. BBC Radio Cymru was the fourth most popular station in North Wales, while in South Wales this position was taken by BBC Radio Wales.

Figure 26: Top five stations by area and by market share: Q1 2023

	Across Wales		North Wales		South Wales	
Rank	Station	Market share %	Station	Market share %	Station	Market share %
1	BBC Radio 2	20.2	BBC Radio 2	22.3	BBC Radio 2	19.3
2	BBC Radio 4	11.1	BBC Radio 4	13.2	BBC Radio 4	10.2
3	Heart Network (UK)	8.0	BBC Radio 1	8.0	Heart Network (UK)	9.1
4	BBC Radio 1	7.0	BBC Radio Cymru	6.6	BBC Radio Wales	6.8
5	BBC Radio Wales	5.6	Heart Network (UK)	5.1	BBC Radio 1	6.6

Key BBC UK-wide BBC nations / local UK-wide commercial Local commercial

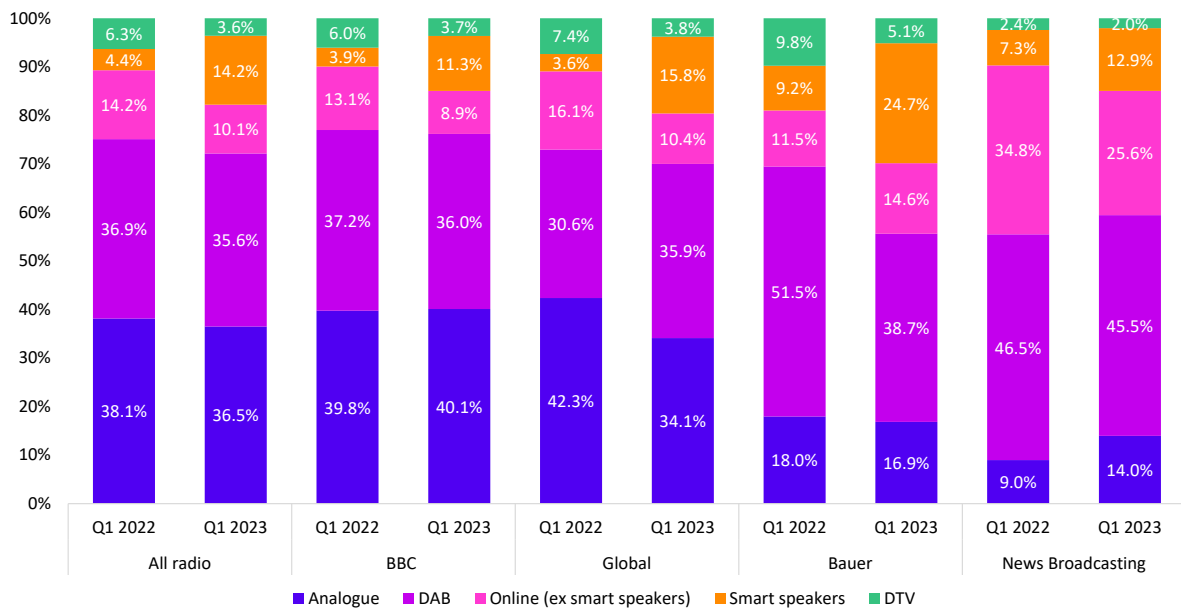
Source: RAJAR Q1 2023; BBC Radio Wales TSA; Heart North Wales TSA; Heart South Wales TSA; six-month weighting.

Smart speakers account for 14% of radio listening in Wales, three times higher than a year ago

The gradual shift to online listening continues, with smart speakers, smartphones and other internet-enabled devices now accounting for 14.2% of all radio listening in Wales. Over half of all online listening to radio is via smart speakers, which have nearly tripled their overall share in the last year from 4.4% to 12%. This figure is higher for the commercial broadcasters Global (15.8%), Bauer (24.7%) and News Broadcasting (12.9%), and lower for the BBC, at 9%.

Amidst this growth in online listening, DAB and analogue radio remain resilient in Wales. DAB accounted for more than a third of listening (35.6%), just 1pp lower than AM/FM at 36.5%.

Figure 27: Share of radio listening by platform and broadcast group, Wales: 2022-2023



Source: RAJAR, BBC Radio Wales TSA.

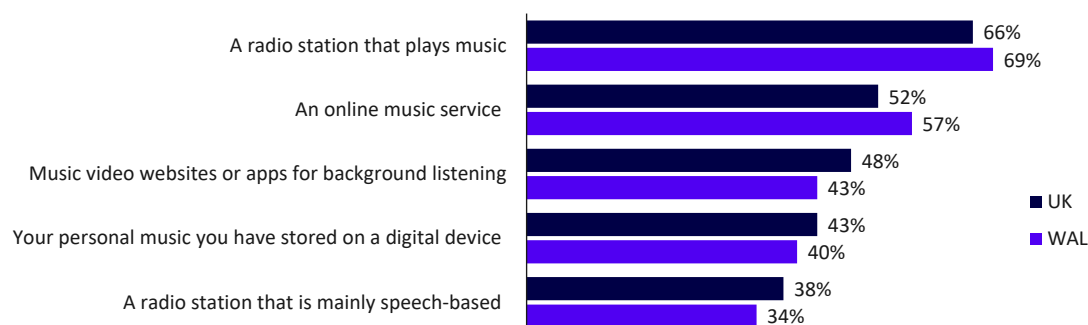
Listening to the radio is not the only way in which people use their smart speakers. In the next section we take a closer look at take-up and use of these devices, as well as wider trends in online audio listening.

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 (69%) and nearly six in ten (57%) listen to an online music service at least once a week. Although there are some slight variations, there are no statistically significant differences in weekly audio listening in Wales compared to the UK as a whole.

Figure 28: Weekly reach of audio activities: adults aged 15+ in the UK and Wales: 2023

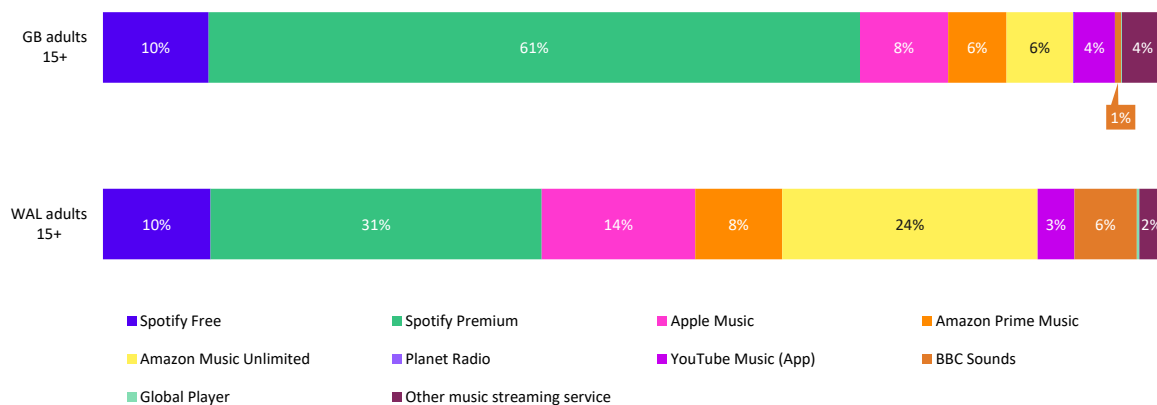


Source: Ofcom Audio Survey 2023. Q1 How often, if at all, do you listen to any of the following? Base: All Adult respondents 2259 (UK) 107 (Wales) NET: Weekly.

Spotify Premium is half as popular in Wales than in Great Britain as a whole, accounting for just under a third of time spent streaming music

Focusing on music streaming, Amazon music accounted for just under a quarter (24%) of time spent music streaming; four times as much in the average for adults in Great Britain. Spotify Premium was also popular in Wales but accounted for less than a third of time spent music streaming (31%) compared to the GB average of 61%.

Figure 29: Share of time spent music streaming by platform: Adults 15+ in Wales vs GB: 2023

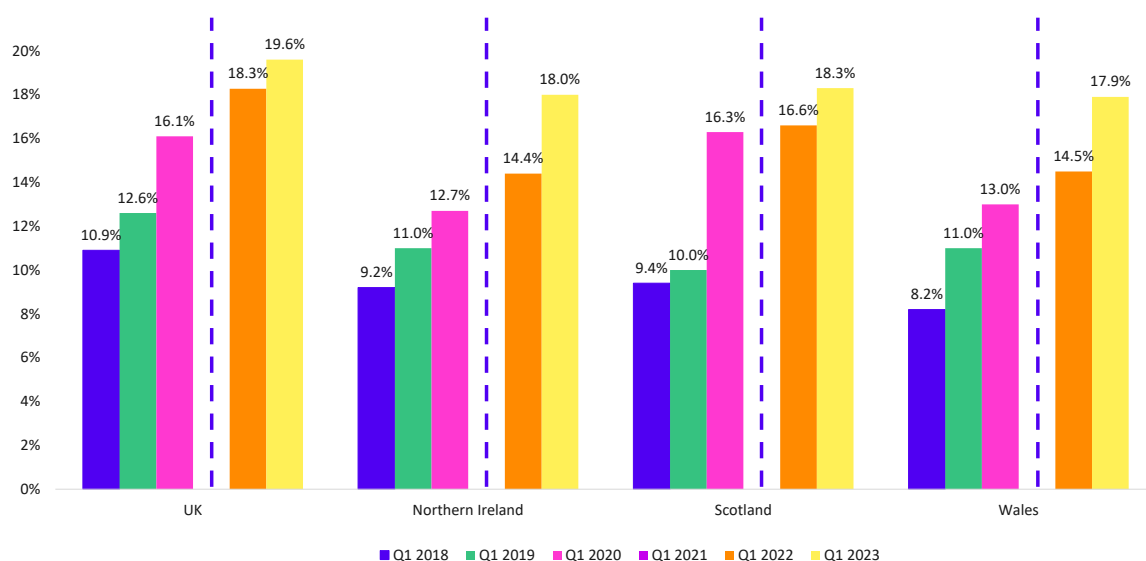


Source: IPA TouchPoints wave 1 2023 (Jan-April).

More people are listening to podcasts, but less than one in five adults listen every week

Podcasts are slowly but surely becoming a fixture of the average audio diet, but less than one in five (17.9%) adults in Wales listened to them once a week in Q1 2023. This is slightly less than the UK reach figure of 19.6%, but still more than double the 2018 figure (8.2%) and 3.4 percentage points higher than a year ago.

Figure 30: Weekly reach of podcast listeners, by nation: 2018-2023



Source: RAJAR; dotted lines indicate suspension of fieldwork and change in methodology. Comparison with previous quarters should be made with caution.

Four in ten households in Wales have a smart speaker, while three in ten have a DAB radio set in the home

Just over four in ten households (44%) in Wales have a smart speaker, in line with the UK as a whole (42%).¹⁶ The Amazon Echo is by far the most popular brand, with just over four in five homes (84%) with smart speakers having one, followed by the Google Home / Google Nest at 11%.¹⁷ The most popular place to have a smart speaker is the living room, with over half of all smart speaker owners having one here (59%), followed by the kitchen (45%) and bedroom (39%).¹⁸

In comparison, just over three in ten (31%) of households in Wales have a DAB radio at home and 46% have one in the car, with total household penetration of DAB radios at 61%.¹⁹ Ofcom will soon be publishing findings from quantitative research commissioned to assess the penetration and use of DAB+ radio in home and in cars. DAB+ is the latest technology for digital audio broadcasting and is more efficient than standard DAB.

¹⁶ Ofcom Technology Tracker 2023; Base: All Respondents (UK weighted base: 3997, Wales weighted base: 200)

¹⁷ Ofcom Technology Tracker 2023; Base: Where have a smart speaker or smart display (UK weighted base: 1679, Wales weighted base: 88)

¹⁸ Ofcom Technology Tracker 2023; Base: Where have a smart speaker or smart display (UK weighted base: 1679, Wales weighted base: 88)

¹⁹ Ofcom Technology Tracker 2023; Base: All Respondents (UK weighted base: 3997, Wales weighted base: 200)