

MEDIA NATIONS: Wales 2018



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About this document

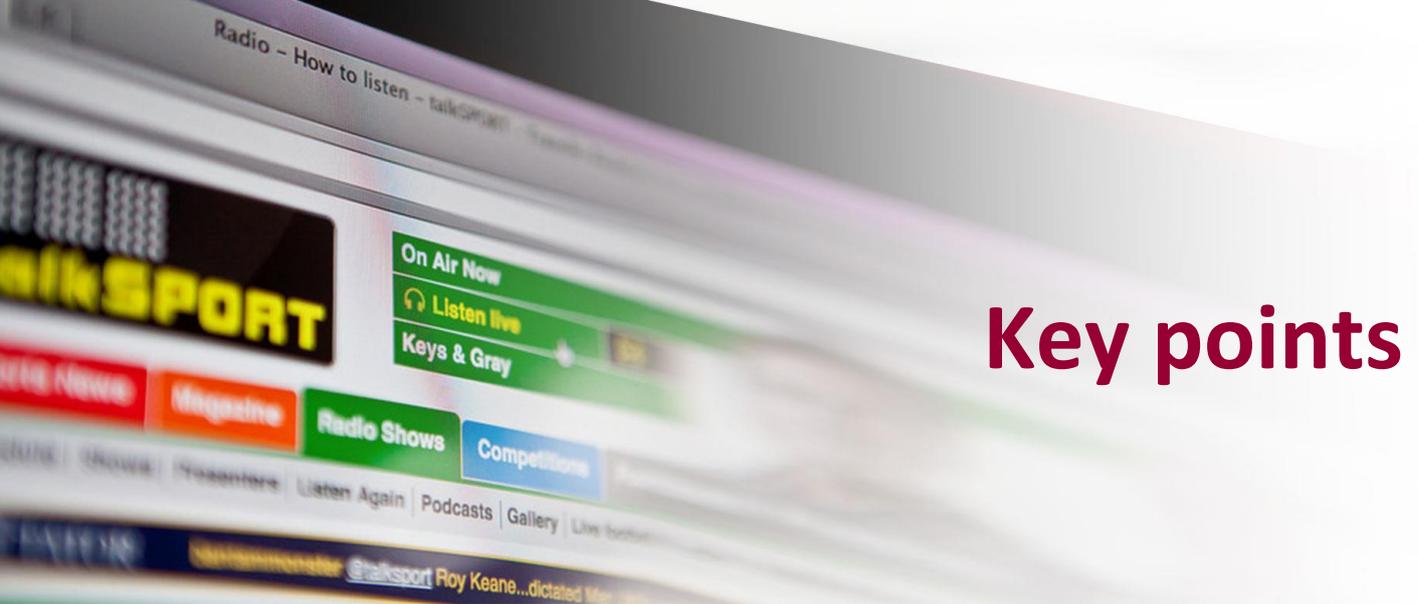
This is Ofcom’s first annual Media Nations: Wales report. The report reviews key trends in the television and audio-visual sector as well as the radio and audio industry in Wales. It provides context to Ofcom’s work in furthering the interests of consumers and citizens in the markets we regulate.

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

The report provides updates on several datasets, including bespoke data collected directly from licensed television and radio broadcasters (for output, spend and revenue), Ofcom’s proprietary consumer research (for audience opinions), and BARB and RAJAR (for audience consumption). It should be noted that our regulatory powers do not permit us to collect data directly from online video-on-demand and video-sharing services (such as ITV Player, Netflix, Amazon Prime Video and YouTube) for research purposes, and therefore we rely predominately on third-party sources for information relating to these services.

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Key points

In 2017 people in Wales spent an average of 3 hours 43 minutes per day watching broadcast television, down 17 minutes since 2016

- This 7.1% decline in television viewing in Wales was greater than the UK average of 4.2%.
- The decline in Wales is partly due to an increase in the amount of time spent using the television set for purposes other than broadcast TV (such as streaming services like Netflix and Amazon, or gaming). Use of the television set for these purposes increased by an average of 11 minutes, to 44 minutes per person, per day.
- Wales v Ireland in the Six Nations on BBC One was the most-viewed TV programme in 2017 with an average audience of 806,000 viewers.
- In a typical week in 2017, 364,000 viewers in Wales watched S4C on television for at least three consecutive minutes. This was the highest level of reach since 2014 and there was a notable increase in reach, when all viewers across the UK are considered, to 562,000 in 2017, a 3.1% increase since 2016.

There was an 8% real-terms increase in spend on programming for viewers in Wales by the BBC and ITV in 2017

- Together, the BBC and ITV spent £29.1m on first-run, UK-originated content for viewers in Wales, an 8.1% increase in real terms on 2016. This increase was driven by the BBC, which increased its spend by 12% year on year, while ITV spend has remained broadly stable since 2013.

More than half of homes in Wales (50.4%) have a satellite TV service

- At 50.4%, far more homes in Wales had a satellite TV service in Q1 2018 than the UK average (37.1%). Sky's pay satellite service was the most popular pay-TV service in Wales in Q1 2018, with 41.8% of homes having such a service.
- One in ten homes (10.1%) had a cable TV service in Wales by the start of 2018 – lower than the 14.9% UK average, and comparable with the 8.7% take-up among homes in Northern

Ireland. A third of homes in Wales (33.3%) had digital terrestrial television (DTT) as their only TV platform in Q1 2018.

- BBC iPlayer was the most popular on-demand service in 2018, with 37% of adults in Wales using the service, followed by Netflix (25%) and ITV Hub (24%).

Seven in ten PSB viewers were satisfied with PSB content in 2017

- At 72%, this compares with 75% for the UK average, 75% in England, 71% in Scotland and 69% in Northern Ireland.
- Looking at news provision by the public service broadcasters (PSBs), audiences in Wales rated delivery of 'Its news programmes are trustworthy' highly at 65%. This compares with the UK average of 69%, England (68%) and Northern Ireland (74%). It is significantly¹ lower than in Scotland (79%).
- Less than half of regular/occasional PSB audiences in Wales (47%) rated the delivery of '*It portrays my region/nation fairly to the rest of the UK*' highly. While this score is comparable to Northern Ireland (48%), it is significantly lower than Scotland (62%) and England (56%).
- '*It shows different parts of the UK, including England, Northern Ireland, Scotland and Wales*' was rated highly by 56% of regular/occasional PSB audiences in Wales. This compares to 63% in Northern Ireland and is significantly lower than Scotland (70%) and England (66%).

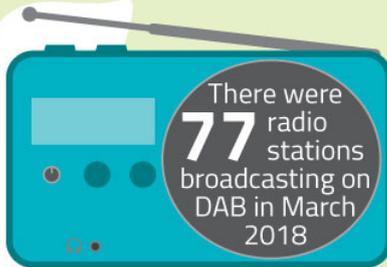
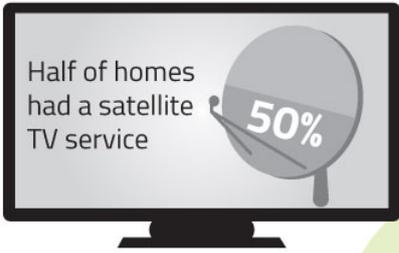
Digital radio listening continues to grow in Wales

- The amount of radio listening via a digital platform has been increasing, from 28% at the start of 2013 to 47% in 2018.
- Ownership of DAB radio sets within Wales dropped slightly to 56% in 2018, despite continuing to increase across the rest of the UK. Compared to Wales, take-up was higher across the UK as a whole (64%) and in Scotland (66%) at the start of 2018 but remained lower in Northern Ireland at 50%.
- Looking at all radio, around nine in ten adults listened to the radio each week in Wales in Q1 2018, and at 22 hours, they listened for longer each week than any of the other nations in the UK.
- BBC Radio 2 was the station with the most weekly listeners in Wales in the first quarter of 2018.

¹ Throughout the *Satisfaction and Perceptions of TV* chapter, 'significantly' has only been used to highlight any increase or decrease in scores that show statistically significant differences at the 95% confidence level for results compared within the current year, and at the 99% confidence level for results compared between years. For further details, please refer to the PSB Tracker technical report on Ofcom's website:

<https://www.ofcom.org.uk/research-and-data/data/statistics/stats18>

Key findings: Wales

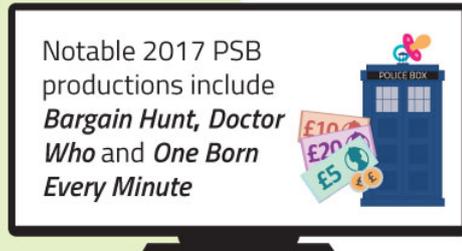


On average people spent **3 hours 43 minutes** per day watching TV in 2017



90% of adults listen to the radio every week

Wales v Ireland in the **Six Nations** was the most-viewed TV programme in 2017



of regular or occasional PSB viewers claimed to be satisfied with PSB broadcasting in 2017



Ownership of DAB radio sets dropped slightly to **56%** despite continuing to increase across the rest of the UK

All data relates to 2018 in Wales unless stated otherwise



TV services and devices

Chapter overview

TV services are available in a variety of ways in Wales. Freeview is available through digital terrestrial television (DTT) and delivered through a television aerial while Sky and Freesat offer satellite services and Virgin Media offers a cable TV service. Set-top boxes from providers including TalkTalk and BT offer a Freeview service alongside pay-TV channels delivered through an internet connection, sometimes referred to as internet protocol television (IPTV).

There are also many on-demand and streaming services available to consumers over the internet. These range from public service broadcaster (PSB) services like BBC iPlayer, ITV Hub, S4C's Clic, All4 and My5 to the subscription services offered by Netflix and Amazon.

97.7% of premises in Wales had DTT coverage in 2018²

DTT services are provided in Wales through a combination of public service broadcasting (PSB) and commercial (COM) multiplexes.³ Examples of services on the PSB multiplex include BBC One, ITV, Channel 4 and S4C, while the COM multiplexes provide access to services such as Dave, Sky News and E4.

As of January 2018, 2.3% of premises in Wales had no DTT coverage at all, while over a quarter (26.6%) had PSB coverage but were unable to receive the COM channels through their aerial.⁴ As such, these households would need to receive television via satellite, cable or over the internet, in order to watch the channels provided by the commercial multiplex.

² Ofcom analysis of operator data, January 2018

³ Multiplexes are the transmission infrastructure used to distribute television services.

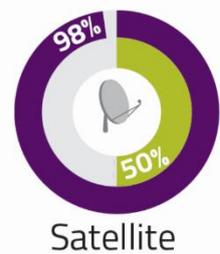
⁴ As above

At 97%, a higher proportion of homes in Wales had a television in the first quarter of 2018 than across the UK as a whole (95.6%) and Scotland (94.5%), and on a par with Northern Ireland. A third of homes in Wales (33.3%) had DTT only as their TV platform in Q1 2018.⁵

Half of homes in Wales had a satellite TV service in 2018

Satellite TV services are provided by Sky and Freesat and serve about 98% of UK premises,⁶ with broadly the same level of availability across Wales. Sky's paid satellite service was the most popular pay-TV service in Wales at the beginning of 2018, serving 41.8% of homes. A further 8.6% had a free satellite service, most likely from Freesat, meaning that at 50.4%, far more homes in Wales than the UK average (37.1%) had a satellite TV service.⁷

- Availability
- Take-up



- Availability
- Take-up

Cable TV take-up in Wales continues to be lower than in the UK as a whole

Virgin Media's cable service was available to more than 300,000 premises in Wales (21.2%) in January 2018, a slight increase on the 20.9% of premises where it was available in June 2016.⁸

One in ten homes (10.1%) had a cable TV service in Wales at the beginning of 2018 – lower than the 14.9% seen across the UK as a whole, and comparable with the 8.7% take-up among homes in Northern Ireland.⁹



⁵ Source: BARB Establishment Survey Q1 2018

⁶ Based on the availability of a line-of-sight path to the satellite. Does not include the impact of factors such as access in multi-dwelling units where it is not feasible to install a dedicated household satellite dish and where there is no internal wired distribution system for satellite, and the need for planning permission in some locations

⁷ Source: BARB Establishment Survey Q1 2018

⁸ Ofcom analysis of operator data, January 2018

⁹ Source: BARB Establishment Survey Q1 2018

Broadband in Wales

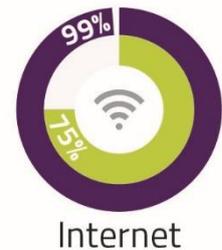
A download speed of 2Mbit/s is the minimum speed required to deliver standard definition (SD) video, and 98.5% of premises in Wales had access to such a service in 2018 – an increase from 97.1% in 2016. The vast majority (98.2%) of premises with PSB DTT coverage that were unable to receive transmissions from the commercial multiplex through their aerial did have access to such a broadband service in January 2018.¹⁰

Ofcom research shows that three quarters (75%) of households in Wales had fixed internet access in 2018, lower than the UK (80%) as a whole.¹¹ Superfast broadband offers download speeds equal to or greater than 30Mbit/s, and 36% of superfast lines in Wales delivered such speeds in 2017. This was lower than the 43% across the UK.¹²

IPTV services are less popular in Wales than in the rest of the UK

The proportion of homes that have internet protocol television (IPTV) only (any one of BT TV, TalkTalk TV, Plusnet TV, or a standalone YouView box, and do not also have satellite, cable or other service), was only 5.5% in Wales in Q1 2018, the lowest across the UK nations.¹³

- Availability
- Take-up



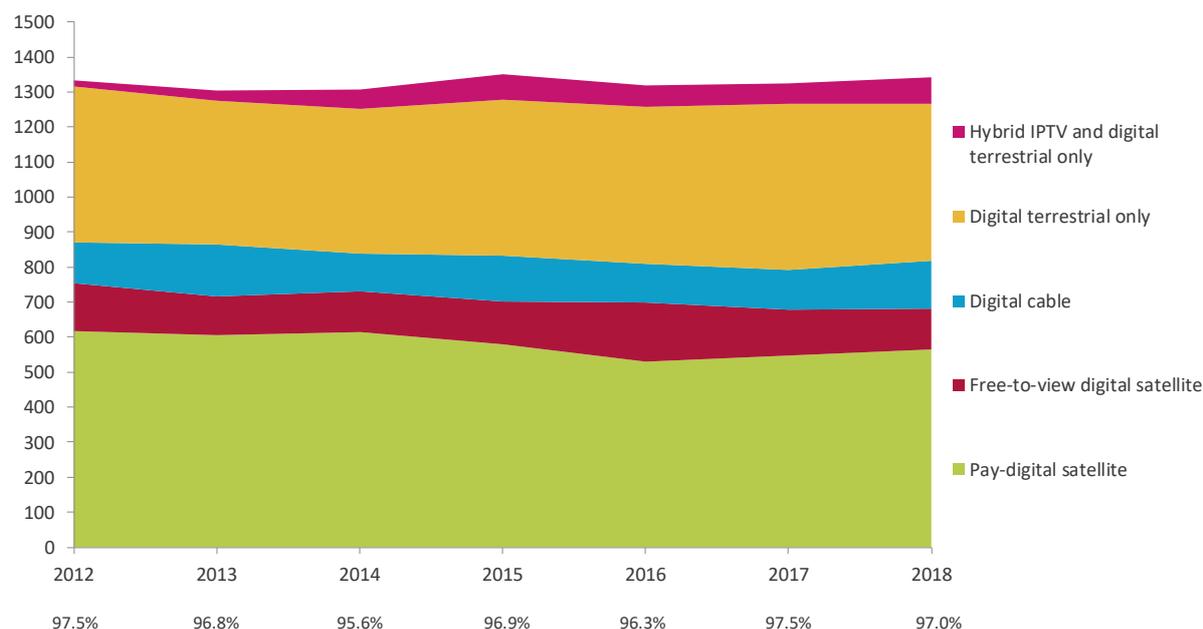
¹⁰ Ofcom analysis of operator data, January 2018

¹¹ Ofcom Technology Tracker H1 2018

¹² *Connected Nations 2017: Wales* available at https://www.ofcom.org.uk/__data/assets/pdf_file/0023/108842/wales-connected-nations-2017.pdf.

¹³ Source: BARB Establishment Survey Q1 2018

Figure 1: Platform take-up in Wales, households (000s): 2012-2017



Source: BARB Establishment Survey. BBC areas. Household-level data, all TV sets in home, therefore there are platform overlaps. Notes: Data points are based on Q4 of each year until 2018 when it is Q1. From Q4 2015 the claimed usage element was removed, which led to an increase in the 'TV set homes' population. 'Digital terrestrial only TV' = receives digital TV through an aerial and not through DSAT/DCAB or other platforms. 'Hybrid IPTV digital terrestrial only' = receives digital terrestrial TV through any of BT TV/TalkTalk TV/YouView/Plusnet TV and not DSAT/DCAB/other platforms.

On-demand and streaming services offer additional content and options for consumers

A third (33%) of adults in Wales used subscription streaming and on-demand services, such as Netflix and Amazon, in 2018. This is broadly the same proportion as in England (34%), Scotland (33%) and Northern Ireland (34%).

However, BBC iPlayer was the most popular on-demand service in 2018, with 37% of adults using it, followed by Netflix (25%) and ITV Hub (24%).¹⁴



¹⁴ Ofcom Technology Tracker H1 2018

Over half of TV households in Wales have a television connected to the internet

Over two in five (42%) households with a TV in Wales had a smart TV in H1 2018 and most of these were connected to the home broadband service (79%). However, when we look at all forms of internet connectivity, including broadband-connected smart TVs, more than half (52%) of TV households in Wales have their TVs connected to the internet in 2018. Other ways people in Wales connected their TV to the internet include: through games consoles (26%); laptops/desktops (15%), and internet-connected dongles or set-top boxes (such as NOW TV set-top box, Roku, Google Chromecast, Amazon Fire TV stick, Amazon Fire TV, Apple TV) (13%).¹⁵

Watching TV on the go has been enabled by the growth in smartphone take-up in recent years, although in Wales just 78% of mobile phone users have a smartphone, a lower proportion than in England (83%) and Northern Ireland (85%). Among smartphone users in Wales, 83% have a 4G service, in line with Scotland and Northern Ireland.¹⁶

¹⁵ Ofcom Technology Tracker H1 2018

¹⁶ Ofcom Technology Tracker H1 2018



TV and AV consumption

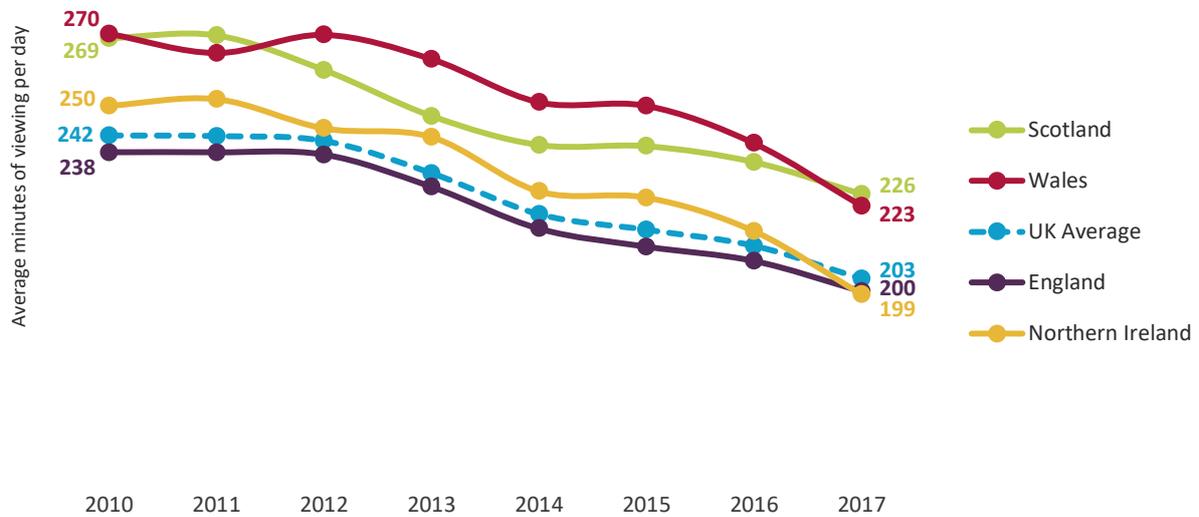
This section uses data provided by the Broadcasters' Audience Research Board (BARB), a panel of 5,100 homes across the UK providing the official broadcast TV measurement for the industry. This includes all viewing of broadcast TV through a television set, and via any device attached to the set such as a computer, laptop or tablet. Unless otherwise stated, figures quoted are for seven-day consolidated viewing. Consolidated viewing includes viewing of programmes at the time they were broadcast on TV (live viewing) as well as from recordings on digital video recorders (DVRs) and through catch-up player services (e.g. apps on smart TVs) up to seven days after the first broadcast (time-shifted). [See the methodology annex for more information.](#)

In 2017 people in Wales spent an average of 3 hours 43 minutes per day watching broadcast television

Wales had the second-highest average viewing per day of the four nations (overtaken by Scotland for the first time since 2011). Between 2016 and 2017, viewing fell by 17 minutes (7.1%) in Wales – a steeper decline than the 4.2% average across the UK. Only Northern Ireland, down by 7.9% since 2016, had a steeper decline.¹⁷

¹⁷ Source: BARB. Source: BARB. All individuals (4+), network. Note: the number of hours calculations are made from minutes data to six decimal places, so may not always fit with the rounding to whole minutes in the charts.

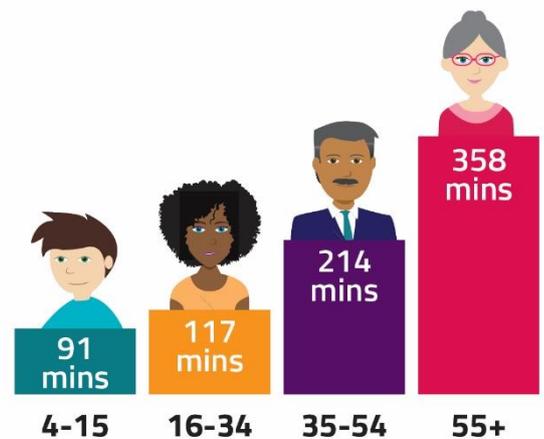
Figure 2: Average total TV daily viewing by nation (in minutes): 2010-2017



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

Younger viewers are driving the decline in broadcast TV viewing

As in the rest of the UK, the decline in viewing by children and young adults is driving the overall decline in TV consumption in Wales. TV viewing among the over-55s remained fairly stable in Wales; on average, this group watches 5 hours 58 minutes of TV every day – the highest figure for this age group in any UK nation. Meanwhile, under-16s in Wales watch only 1 hour 31 minutes of TV a day on average. Again, this figure is higher than in any other nation of the UK; five minutes more than the UK



average for this age group. Viewing among under-34s in Wales has declined by 45% since 2010 – a steeper decline than the UK average of 39.1% for this age group.

Figure 3: Average daily minutes spent viewing total TV, by age group in Wales: 2010 - 2017



Source: BARB. BBC areas.

Non-broadcast viewing on TV sets continues to increase

As in the rest of the UK, although people in Wales are watching less broadcast television, they are spending more time watching other things on their TV sets. Viewing of non-broadcast services on the TV set (such as streaming services like Netflix and Amazon, and gaming) increased by 11 minutes a day in 2017, to 44 minutes per person, per day. However, this increase did not totally offset the overall decline in use of the television set, which decreased from 277 minutes per day in 2016 to 272 minutes in 2017.

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



Source: BARB. BBC areas, all individuals (4+). * Note: Unmatched viewing refers to when the TV is in use, but content cannot be audio-matched or otherwise identified. It includes gaming, viewing DVDs/box sets/archives, SVoD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded

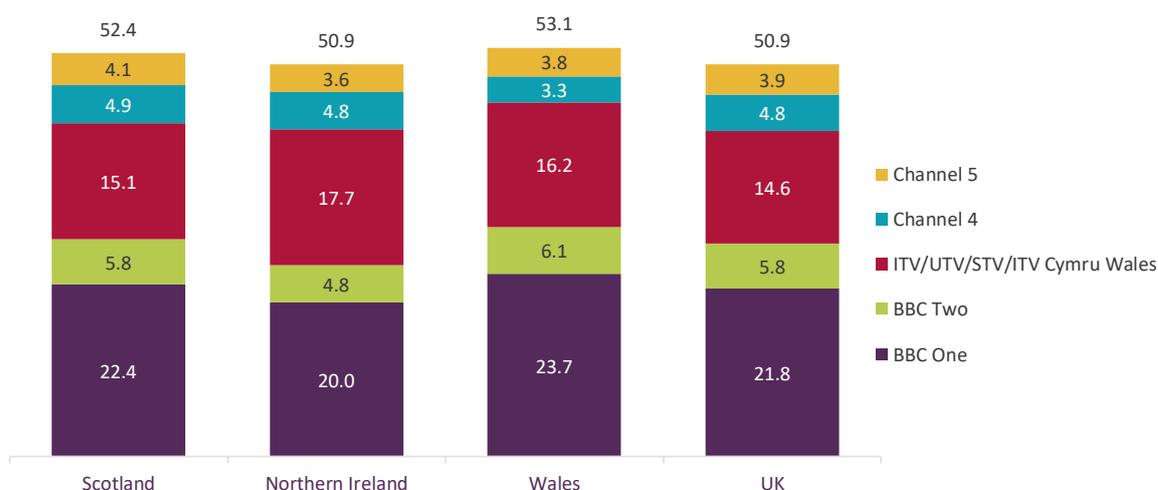
The PSB channels

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

The main five PSB channels perform better in Wales than in the other UK nations

The main five PSB channels accounted for a combined 53.1% share of the total broadcast TV audience in Wales in 2017. This audience share is higher than in Scotland and Northern Ireland, and higher than the UK average of 50.9%. But although the main five PSBs, put together, had a relatively high audience share in Wales in 2017, compared to the rest of the UK, this was not true of every individual PSB. Channel 4 had a lower audience share in Wales than in all the other UK nations and regions, with a 3.3% audience share (compared to the UK average of 4.8%). This may be because Channel 4 in Wales has a lower position on the electronic programme guide (EPG); S4C occupies slot 4/104, so Channel 4 appears lower down on most TV platforms in Wales.

Figure 5: Percentage share of total TV viewing in the devolved nations of the UK, five main PSB channels: 2017



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

Wales v Ireland in the Six Nations was the most-viewed TV programme in 2017

The most-viewed programme in Wales in 2017 was the Wales v Ireland Six Nations rugby match in March. All in all, rugby accounted for five of the top ten programmes in Wales in 2017, and its popularity helped to fuel a strong performance for BBC One in Wales: 15 of the top 20 programmes were on BBC One Wales or BBC Two Wales. The premiere of the 2017 series of *I'm a Celebrity - Get Me out of Here!* was the most-viewed ITV Cymru Wales show in 2017, and the third most-viewed of all programmes in Wales.

Figure 6: The top 20 most-watched programmes in Wales, 2017

Rank	Programme Title	Channel	Date	Average 000s	% TVR	% Share
1	Six Nations Rugby: Wales v Ireland	BBC One Wales	10/03/2017	806	27.9	54.7
2	Mrs Brown's Boys Christmas Special	BBC One Wales	01/01/2017	779	27.0	52.5
3	I'm a Celebrity - Get Me Out of Here!	ITV Cymru Wales	19/11/2017	759	26.2	52.6
4	Strictly Come Dancing	BBC One Wales	16/12/2017	746	25.7	58.1
5	Six Nations Rugby: Wales v England	BBC One Wales	11/02/2017	741	25.7	62.4
6	Blue Planet II	BBC One Wales	12/11/2017	700	24.2	47.8
7	Call the Midwife	BBC One Wales	19/02/2017	695	24.1	48.2
8	Six Nations Rugby: Scotland v Wales	BBC One Wales	25/02/2017	666	23.1	65.2
9	Britain's Got Talent (Series 11)	ITV Cymru Wales	27/05/2017	648	22.4	44.8
10	Six Nations Rugby: France v Wales	BBC One Wales	18/03/2017	647	22.4	67.8
11	New Year's Eve Fireworks	BBC One Wales	31/12/2017	644	22.2	54.8
12	Strictly Come Dancing: The Results	BBC One Wales	03/12/2017	617	21.3	45.0
13	Sherlock	BBC One Wales	01/01/2017	611	21.2	39.2
14	Rugby Union: Wales v New Zealand	BBC Two Wales	25/11/2017	590	20.4	48.9
15	Broadchurch	ITV Cymru Wales	17/04/2017	589	20.4	38.2
16	Strictly Come Dancing Launch Show	BBC One Wales	09/09/2017	587	20.3	48.0
17	Ant & Dec's Saturday Night Takeaway	ITV Cymru Wales	18/03/2017	585	20.3	42.8
18	Death in Paradise	BBC One Wales	05/01/2017	584	20.3	37.1
19	EastEnders	BBC One Wales	25/12/2017	583	20.1	37.5
20	One Love Manchester	BBC One Wales	04/06/2017	582	20.1	49.0

Source: BARB. BBC areas, all individuals (4+). Includes HD variants where applicable, excludes +1 variants. The TVR (television rating) is the measure of the popularity of a programme, daypart, commercial break or advertisement by comparing its audience to the population as a whole. One TVR is numerically equivalent to one per cent of a target audience.

***Keeping Faith* breaks iPlayer records.**

BBC Cymru Wales' *Keeping Faith* was requested more than 9.5 million times on BBC iPlayer across the UK, the highest ever number for a non-network show.¹⁸ The series was filmed simultaneously in English and Welsh (*Un Bore Mercher*). The initial S4C broadcasts carried entirely English subtitles, while repeat airings carried encoded English subtitles for scenes spoken in Welsh, before the show was aired in English on BBC One Wales. BBC Wales has confirmed that *Keeping Faith* is the broadcaster's most-watched Welsh series on BBC One Wales in over twenty years and has confirmed that a second series is in development.

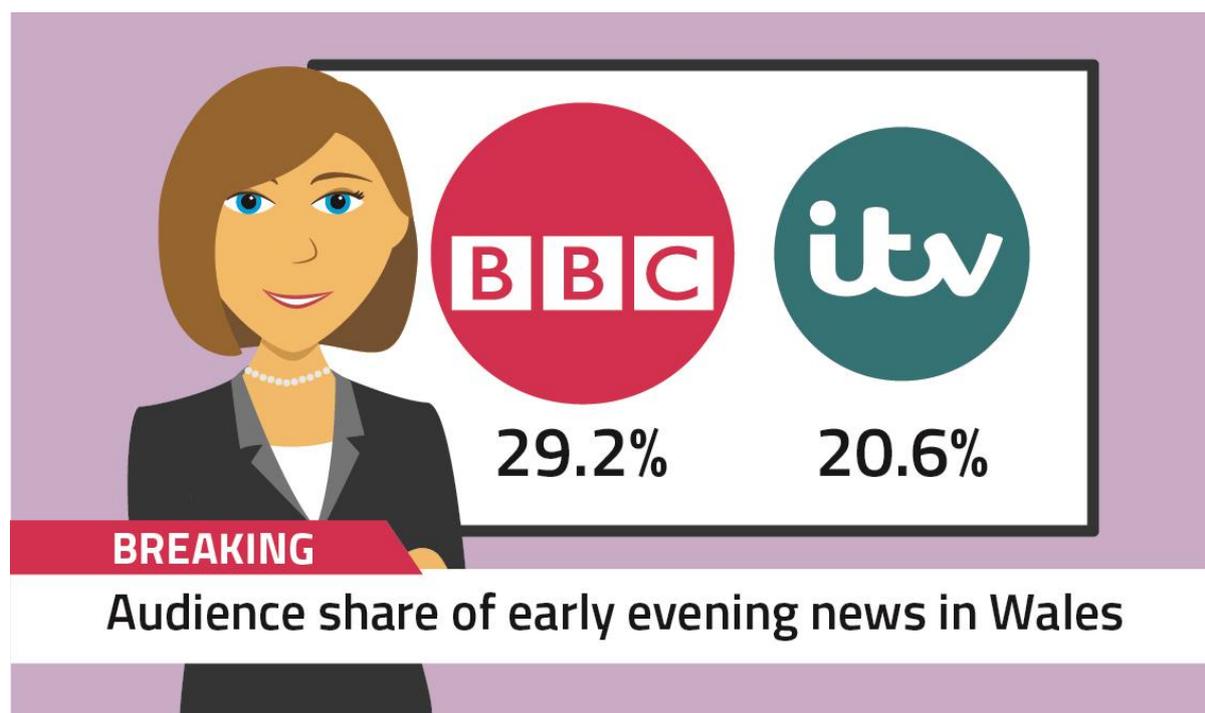
BBC One Wales' and ITV Cymru Wales' early evening news bulletins attracted a lower share in Wales than their equivalents in the other devolved nations

Wales Today, BBC One Wales' early evening news bulletin, attracted a 29.2% share of the slot's viewing in Wales, fairly stable since 2016 (28.8%) but lower than the equivalent early evening news programmes in Scotland and Northern Ireland. ITV Cymru Wales' counterpart *Wales at Six* attracted a lower 20.6% share, slightly down on 2016 (22.2%) and on a par with the Channel 3 UK average share (20.5%) of the slot.¹⁹

¹⁸ <http://www.bbc.co.uk/mediacentre/latestnews/2018/keeping-faith>

¹⁹ Source: BARB. Individuals (4+). UK averages based on share to respective early evening news bulletin time slots (using the London news schedule). BBC One's news is based on BBC Wales area, ITV news is based on ITV Wales area. Channels include HD variants but not +1s.

Figure 7: Audience share % of BBC One Wales and ITV Cymru Wales early evening news: 2017



Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures based on 'regional news' genre programmes, start time 17:55-18:35, 10mins+ duration, weekdays. UK averages based on share to respective early evening news bulletin time slots (using the London news schedule). BBC One's early evening news bulletin is transmitted between 18:30-19:00 and based on BBC areas. ITV Cymru Wales is transmitted between 18:00-18:30 and is based on ITV areas.

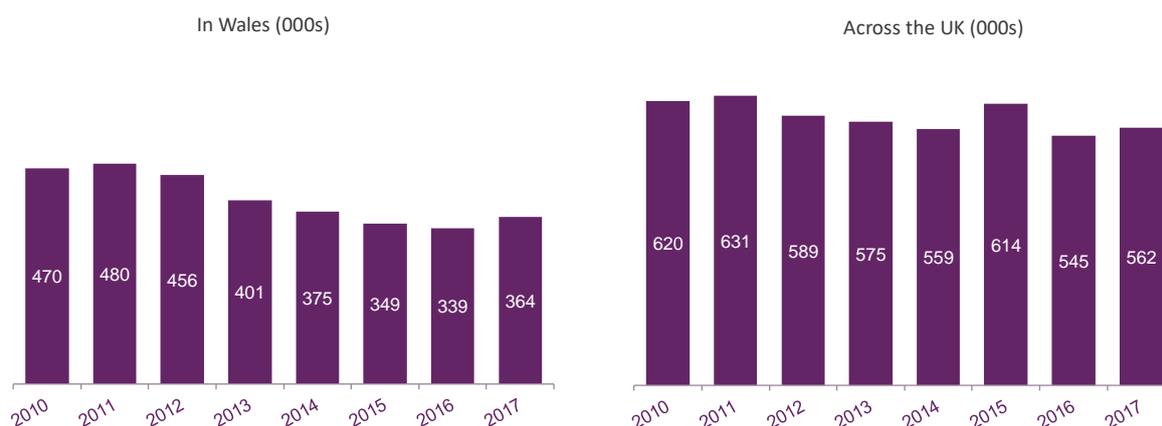
S4C viewing and reach increased in 2017

In a typical week in 2017, 364,000²⁰ viewers in Wales watched S4C on television for at least three consecutive minutes. This was the highest level of reach since 2014, and when all viewers across the UK are taken into account, it increases to 562,000, up by 3.1% on 2016. When we include figures for viewing on the TV set between eight and 28 days after transmission, S4C's 2017 reach increased by 2% to 373,000 in Wales and by 25% across the UK to 700,000.²¹

²⁰ These reach figures are rounded to the nearest 1000.

²¹ Source: BARB. All individuals (4+), S4C total area and S4C network. Reach criteria: 3+ consecutive minutes, full weeks used.

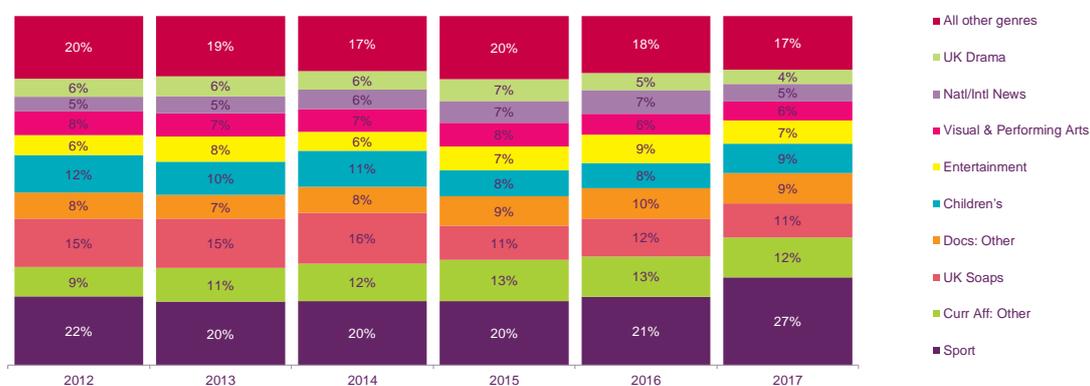
Figure 8: Average weekly reach (000s) of S4C, individuals: 2010-2017



Source: BARB. Individuals (4+). S4C total area and S4C network. Reach criteria: 3+ consecutive minutes, full weeks used. Consolidated up to 7 days.

Time spent watching S4C increased in Wales in 2017 to 13 hours 18 minutes per person, per year, following four years of decline. The spread of viewing by genre on S4C has remained broadly consistent year on year, although sport was driven up by the World Cup qualifiers. Sport accounted for the largest proportion of viewing, at 27%, while news dropped to 2013 levels. The proportion of children’s viewing increased to its highest level since 2014.²²

Figure 9: Proportion of viewing to S4C in Wales, by genre, individuals



Source: BARB. All individuals (4+), S4C total area. News and weather on S4C is for Wales only and has been placed in the national news/weather category. All other genres = Music: contemporary, news: other, visual & performing arts, religion, music: other, weather, music: classical, education, party political broadcast, current affairs: other, docs: science & natural history, current affairs: political/ economic/ social, UK films and BARB ‘other’ /unspecified

²² Source: BARB. All individuals (4+). S4C total area.



TV programming for viewers in Wales

Chapter overview

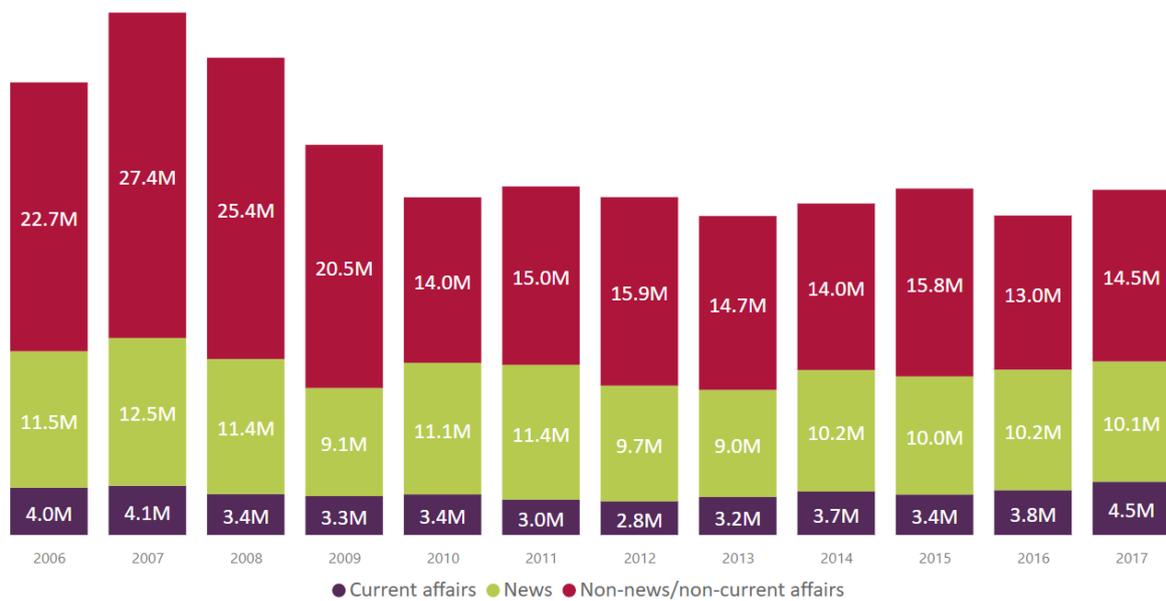
The BBC and ITV provide content specifically for viewers in Wales, over and above what they show across the UK. This is across a range of genres but has a particular focus on news and current affairs. S4C is a channel dedicated to Welsh-language programming across a wide range of genres.

The analysis below 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 such 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.

There was an 8% real-terms increase in spend on programming for viewers in Wales by the BBC and ITV in 2017

In 2017, the BBC and ITV combined spent £29.1m on first-run UK-originated content for viewers in Wales, an 8.1% increase in real terms on 2016. Half of this total spend was on news and current affairs content (£14.6m) with the rest (£14.5m) on other genres.

Figure 10: First-run UK originated content for Wales, by genre

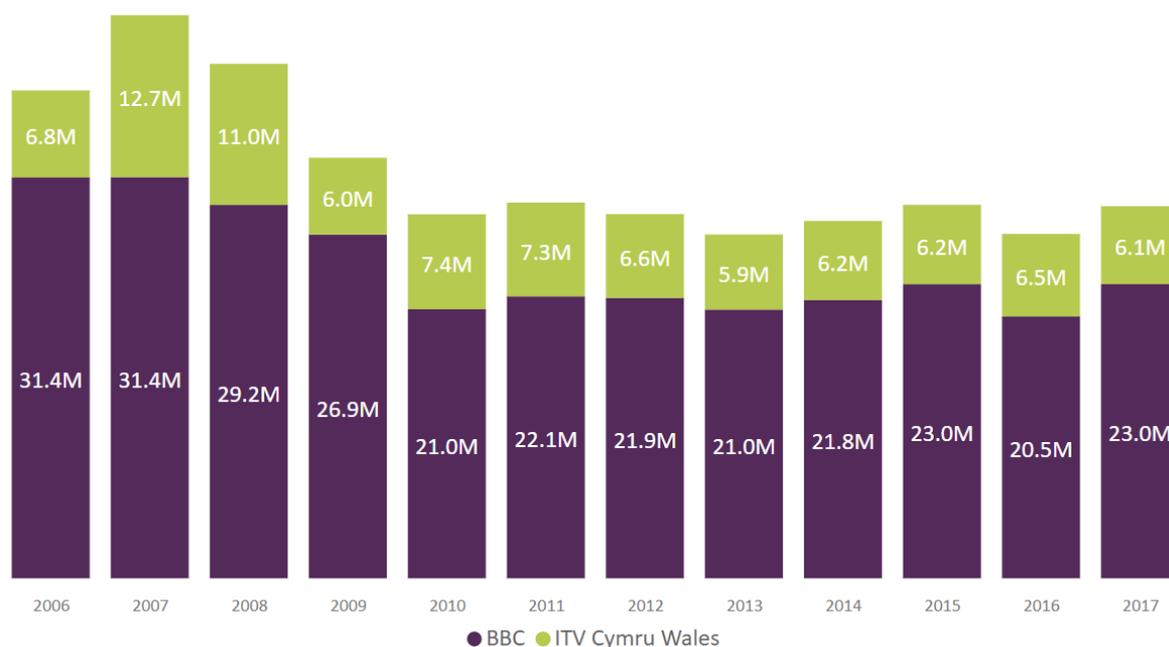


Source: Ofcom/broadcasters. Note: Figures are expressed in 2017 prices. Excludes spend on S4C output.

In 2017, BBC spend for viewers in Wales increased by 12% in real terms

The BBC contributed £23m of total first-run spend in 2017, a 12% increase in real terms on 2016, bringing spend back up to 2015 levels. ITV Cymru Wales spent £6.1m on new UK content in 2017 and has maintained this level of investment in real terms since 2013.

Figure 11: BBC/ITV spend on non-network first-run UK originations, Wales (£m)



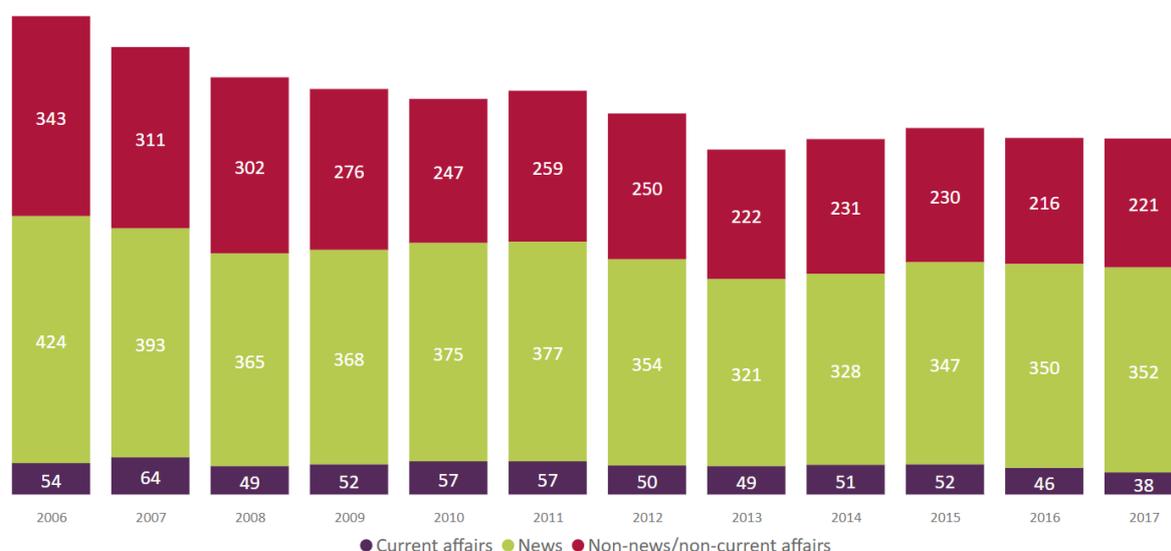
Source: Ofcom/broadcasters. Note: Figures are expressed in 2017 prices. Excludes spend on S4C output.

The BBC broadcast 611 hours of first-run UK-originated content for Wales in 2017

BBC hours of first-run UK-originated content for viewers in Wales have remained fairly stable since 2012, totalling 611 hours in 2017. However, 2017 was the second consecutive year in which there was a decline in current affairs output from the BBC; at 38 hours, this was an eight-hour decline on 2016.

The steady level of hours, despite a 12% real term increase in spend, reflects the genre composition of BBC programming for Wales. On average, drama has a higher cost per hour than other genres, and spend increased considerably in 2017, partly due to the third series of *Hinterland*, while hours remained constant.

Figure 12: BBC hours of first-run UK-originated content for Wales, by genre



Source: Ofcom/broadcasters.

New BBC Cymru Wales headquarters

BBC Cymru Wales took possession of its new headquarters in Cardiff's Central Square in April 2018. The redevelopment of the site will take around 18 months, with staff starting to move in by the end of 2019. S4C transmission staff will also be based in the new office, which will serve as a hub where the independent production sector can work with both broadcasters.²³

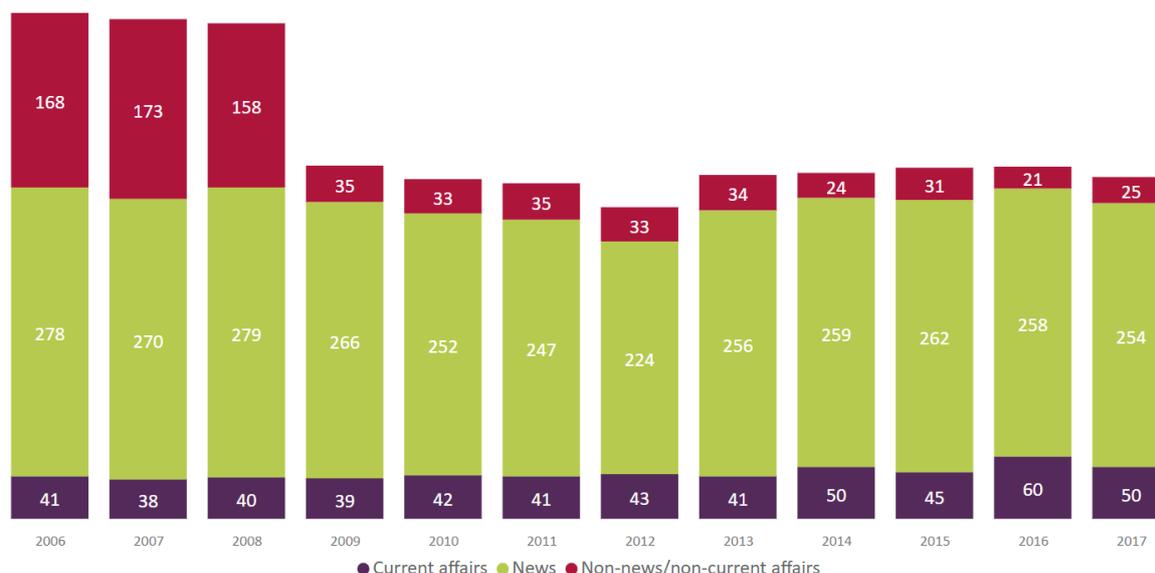
Original hours from ITV Cymru Wales have remained stable since 2009

ITV Cymru Wales broadcast 75 hours of first-run UK-originated 'non-news' programming in 2017. This was delivered across 16 different programme titles, with the majority being shown in peak time for Welsh audiences. Regular strands included the weekly current affairs programme *Wales this Week*, countryside programme *Coast & Country*, and political programme *Sharp End*.

ITV Cymru Wales has programming commitments attached to its licence, relating to the hours of regional programming broadcast per week (5 hours 30 minutes), original productions throughout the day (65%) and at peak (85%), and the quota of independent productions (25%) that it broadcasts. The performance in relation to these quotas is published in an [annex to this report](#).

²³ For more information see <https://www.bbc.co.uk/news/uk-wales-south-east-wales-43782811>

Figure 13: ITV hours of first-run UK-originated content for Wales, by genre



Source: Ofcom/broadcasters.

Local TV in Wales

There were three local TV stations broadcasting in Wales in 2018. Cardiff's service was the first to launch in 2014, followed by the service for Swansea in 2016 and the service for Mold in 2017.

Each channel has programming commitments attached to its licence, typically to do with the required hours of local programming, including local news and current affairs. These commitments can be found on [Ofcom's website](#). Ofcom granted a variation to the programming commitments of the Swansea service earlier in 2018²⁴.

Across the PSB channels, 2.4% of qualifying network programmes broadcast in 2017 were Wales productions.

The public service broadcasters produce programming across the UK, based on Ofcom's [regional production guidance](#).²⁵ Of all qualifying hours in 2017, 2.4% were Wales productions, accounting for 3.4% of all qualifying spend, up from 3.2% in 2016.

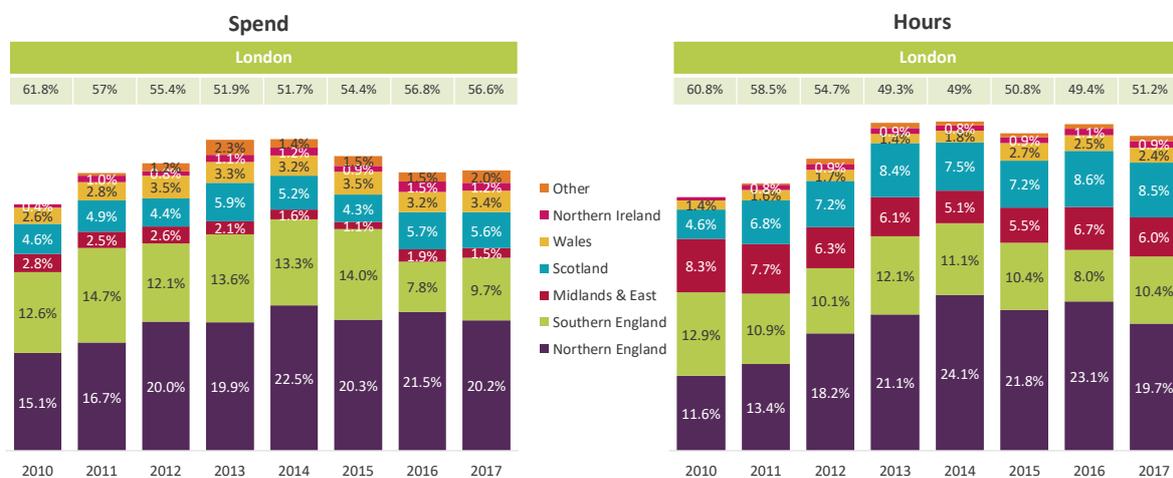
²⁴ https://www.ofcom.org.uk/data/assets/pdf_file/0028/112987/swansea-change-request.pdf

²⁵ The main purpose of the PSBs' regional production requirements, measured against their out-of-London quotas, is to support and strengthen the TV production sector and creative economies in the nations and regions of the UK. Ofcom is currently reviewing the guidance and published a call for evidence in March 2018: <https://www.ofcom.org.uk/consultations-and-statements/category-2/regional-production-programming-guidance-review>.

The bulk of these hours were BBC productions, with productions from Wales making up 4.4% of the BBC’s qualifying hours and 6.7% of its qualifying spend in 2017. This covered a broad range of programming, including high-volume productions such as *Bargain Hunt* and *Casualty* as well as drama productions with typically higher production budgets such as *Sherlock* and *Doctor Who*.

More than 2% of Channel 4’s qualifying hours (2.7%) and spend (2.2%) were assigned to Wales productions in 2017; *One Born Every Minute* was the most high-profile production. The vast majority of ITV’s (99.7%) and Channel 5’s (98.8%) qualifying network productions continued to be produced in England in 2017.

Figure 14: Expenditure on and hours of originated network productions out of London: 2010-2017



Source: Ofcom/broadcasters. Note: Figures do not include network news production. The category ‘other’ refers to programmes made by producers based within the M25, which qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See www.ofcom.org.uk/data/assets/pdf_file/0019/87040/Regional-production-and-regional-programme-definitions.pdf on Ofcom website for further details.

Cardiff shortlisted for Channel 4’s national HQ and Creative Hubs

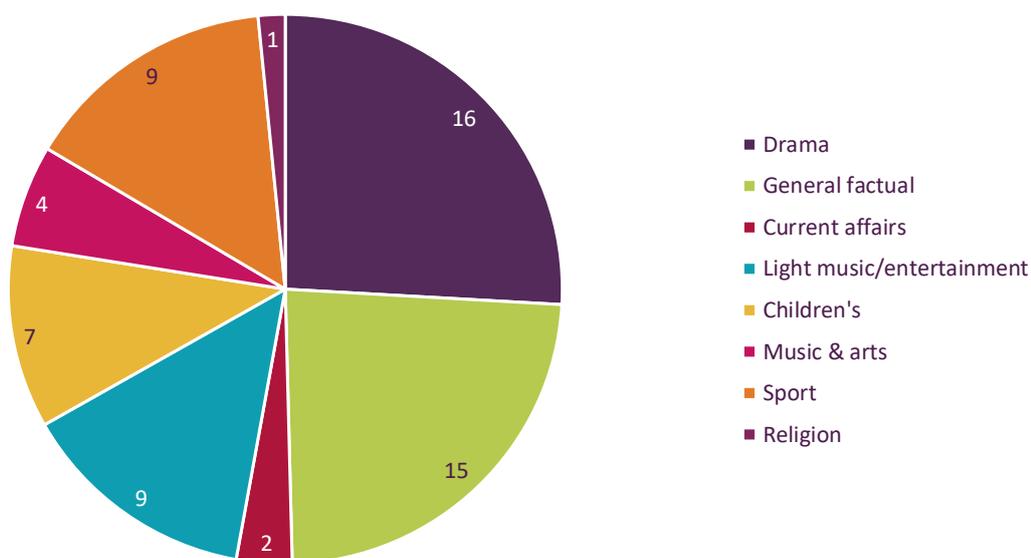
Cardiff is shortlisted in the second stage of the competitive process for the new national HQ, and two Creative Hubs, that Channel 4 will open from 2019. The decision will be made in October 2018, with Cardiff facing competition from six cities for the national HQ and from 12 cities for the two Creative Hubs.²⁶

²⁶ <http://www.channel4.com/info/press/news/channel-4-reveals-shortlist-for-new-national-hq-and-creative-hubs>

S4C spent £62.9m on first-run commissions broadcast in 2017-18

S4C spent £62.9m on original commissions broadcast in 2017/18 across eight genres of programming. Drama and general factual programming combined accounted for nearly half of this spend (£31.2m) with the rest distributed across the genres, as shown below. In addition, the BBC provided 508 statutory programming hours for S4C, down from 538 the previous year.

Figure 15: S4C spend on first-run commissions: 2017-18 (£m)



Source: S4C. Note: current affairs programming includes weather.

The UK Government's independent review of S4C was published in March 2018

The UK Government appointed Eyrn Ogwen Williams to lead an independent review of S4C. The review examined three issues:

- 1) S4C's public service remit and its ability to deliver high-quality content;
- 2) S4C's funding methods; and
- 3) S4C's governance structure.

The report was published on 29 March²⁷ and made seven recommendations.

Recommendation
Chapter 1: Delivering High Quality Content and Serving Welsh Speaking Audiences
Recommendation 1: The government should update S4C's public service remit to include digital and online services and remove the current geographical broadcasting restrictions. This will allow S4C to broaden its reach and offer its content on a range of new platforms in the UK and beyond.
Recommendation 2: S4C should establish an in-house digital hub to develop and improve S4C's digital footprint and form the basis of a Welsh language digital cluster.
Recommendation 3: S4C should establish a language partnership with the Welsh Government and others to help deliver the Welsh Government's commitment to reach 1 million Welsh language speakers by 2050.
Chapter 2: Guaranteeing an S4C for the future
Recommendation 4: S4C's public funding should be provided entirely through the licence fee from 2022/23 onwards, with all future funding decisions made as part of the BBC licence fee funding settlement. <ul style="list-style-type: none">• The UK Government currently provides about 8% of the channel's £84m budget - £6.7m - with 90% coming from the licence fee and 2% from S4C's own commercial income. The UK contribution is guaranteed until 2020.
Recommendation 5: The government should consider amending current approval requirements to give S4C greater freedom to invest and generate commercial revenue.
Chapter 3: Securing an independent and effective S4C
Recommendation 6: The S4C Authority should be replaced with a new unitary board comprising executive and non-executive directors.
Recommendation 7: The government should consider whether S4C's current financial audit arrangements are suitable, including whether it would be appropriate to appoint the Comptroller and Auditor General as S4C's external auditor.

The UK Government accepted all the review's recommendations and now expects S4C to take these forward. S4C is due to provide a detailed implementation plan by July 2018 on how it will deliver the necessary reforms.

²⁷ Available at <https://www.gov.uk/government/publications/building-an-s4c-for-the-future-an-independent-review-by-euryn-ogwen-williams>

S4C's digital strategy

S4C has announced that it will spend £3m over the next three years to develop the channel's digital strategy.²⁸ In line with the recommendations of the DCMS review, S4C has already approved changes in the way the channel connects with viewers. This entails improving and expanding the online viewing platform, S4C Clic, and varying the the content on offer: long-form, short-form and mid-form. S4C will work to get to know its viewers better and will enable users to create personal homepages on S4C Clic.

²⁸ <https://rts.org.uk/article/future-s4c-wales>



Satisfaction with and perceptions of TV

Chapter overview

This chapter examines TV audiences' overall satisfaction with PSB channels in Wales, and their opinions on the importance and delivery of a range of purposes and characteristics²⁹, with data drawn from Ofcom's 2017 PSB tracker survey.³⁰ It then considers audience satisfaction with broadcasting standards, using data from Ofcom's 2017 cross-platform media tracker survey.

Seven in ten PSB viewers were satisfied with PSB content in 2017

Seventy-two per cent of regular or occasional viewers in Wales of any PSB channel (BBC One, BBC Two, ITV Wales, Channel 4 and Channel 5) claimed to be either very, or quite satisfied with PSB broadcasting. This compares to 75% for the UK average, 75% in England, 71% in Scotland and 69% in Northern Ireland.³¹

Looking at news provision by the PSBs, audiences in Wales rated delivery of "*Its news programmes are trustworthy*" highly at 65%. This compares with the UK average of 69%, England (68%) and Northern Ireland (74%). It is significantly³² lower than in Scotland (79%).

²⁹ The statutory purposes and objectives of public service broadcasting are set out in Section 264 of the Communications Act 2003. In Ofcom's first PSB Review, we built on these, following extensive research and consultation, creating a framework of PSB purposes and characteristics.

³⁰ For details on the methodology and questionnaire, please refer to the PSB tracker technical report on Ofcom's website at <https://www.ofcom.org.uk/research-and-data/data/statistics/stats18>

³¹ Ofcom PSB tracker 2017. For details on the methodology and questionnaire, please refer to the PSB tracker technical report on Ofcom's website at <https://www.ofcom.org.uk/research-and-data/data/statistics/stats18>

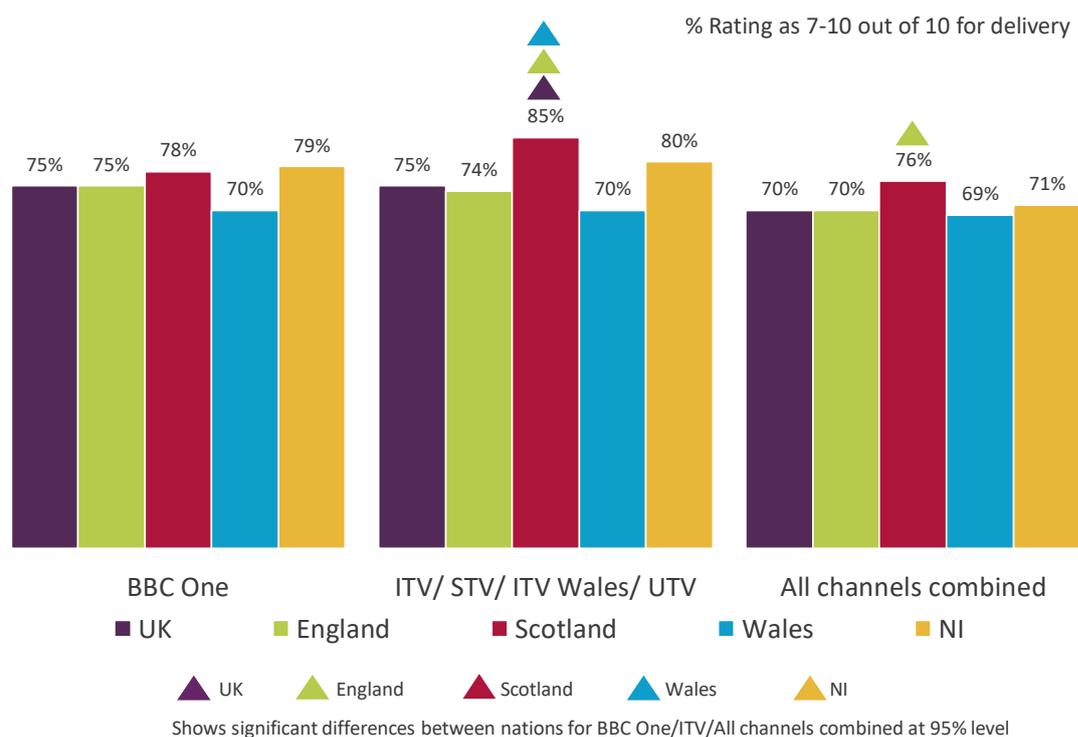
³² Throughout the *Satisfaction with and perceptions of TV* chapter 'significantly' has only been used to highlight any increase or decrease in scores that show statistically significant differences at the 95% confidence level for results compared within the current year, and at the 99% confidence level for results compared between years. For further details, please refer to the PSB tracker technical report on Ofcom's website at <https://www.ofcom.org.uk/research-and-data/data/statistics/stats18>

PSB viewers in Wales rated the range of news output less highly than the rest of the UK

Figure 16 shows the ratings for the delivery of “regional news programmes providing a wide range of good quality news about my area” for BBC One, ITV and all channels combined, by nation. Seventy per cent of regular viewers in Wales rated BBC One highly for its wide range of quality news. This was lower than the UK average (75%) and the other nations: Northern Ireland (79%), Scotland (78%) and England (75%), although the differences are not significant.

ITV in Wales received the same score as BBC One (70%). This score is significantly lower than the score in Scotland (85%). In comparison, the UK average score is 75%, Northern Ireland is 80% and England is 74%.

Figure 16: Delivery of regional news programmes providing a wide range of good quality, by nation: 2017



Source: Ofcom PSB tracker 2017.Q15 How would you rate each channel individually on this statement, on a scale of 1 to 10, where 10 is the highest score and 1 is the lowest? Q16 How would you rate BBC One and ITV combined on this statement? Base for individual channels: Self-reported regular viewers of each in each nation (BBC One = 2207, 1384, 351, 292, 180; ITV1 = 1884, 1183, 286, 246, 169). Base for ‘All channels combined’: All respondents who ever watch any PSB channels in each nation (3098, 1957, 502, 400, 239).

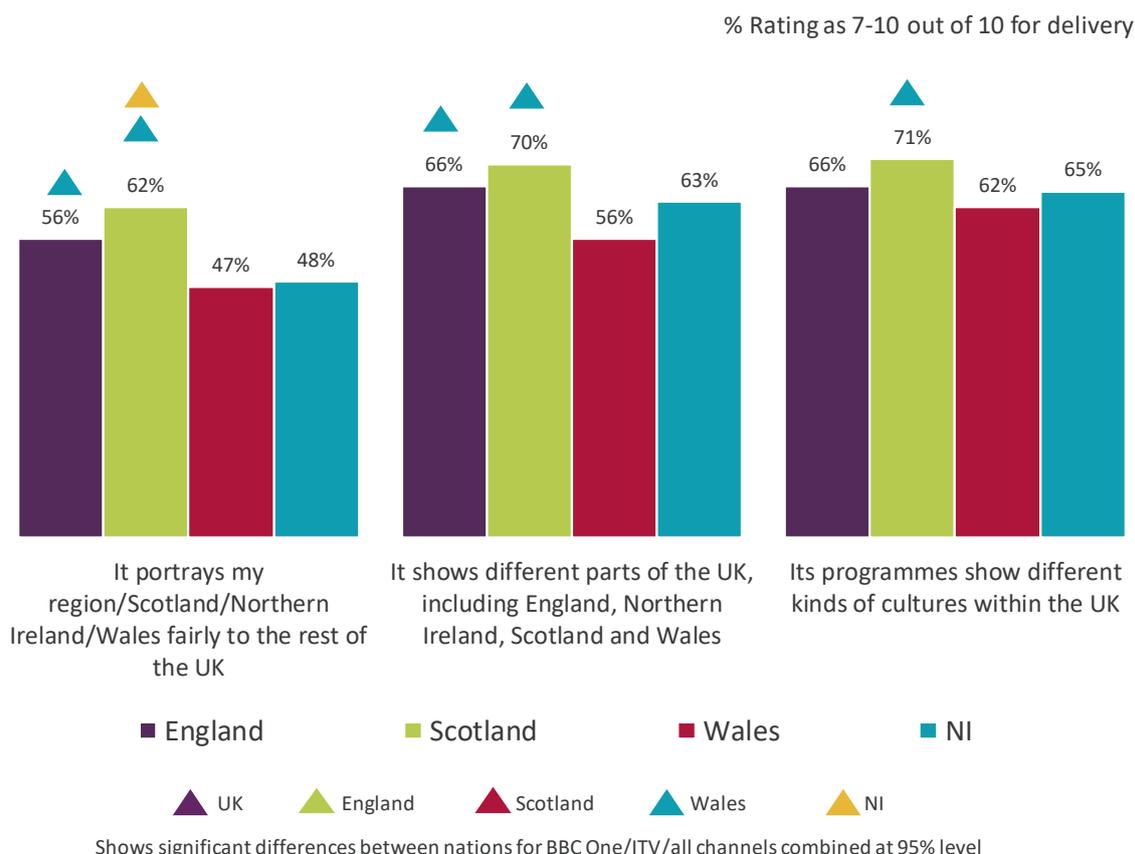
PSB viewers in Wales rated the representation and diversity of the PSBs less highly than viewers in the other UK nations

Almost half of regular/occasional PSB audiences in Wales (47%) rated the performance delivery of “It portrays my region/nation fairly to the rest of the UK” highly. While this score is comparable to Northern Ireland (48%), it is significantly lower than Scotland (62%) and England (56%).

“It shows different parts of the UK, including England, Northern Ireland, Scotland and Wales” was rated highly for delivery by 56% of regular/occasional PSB audiences in Wales. This compares to 63% in Northern Ireland and is significantly lower than Scotland (70%) and England (66%).

Sixty-two per cent of regular/occasional PSB audiences in Wales rated “Its programmes show different kinds of cultures within the UK” highly for delivery. This is comparable to Northern Ireland (65%) and England (66%) but is significantly lower than Scotland (71%).

Figure 17: Reflecting identity/ representing diversity in the nations, by nation: 2017

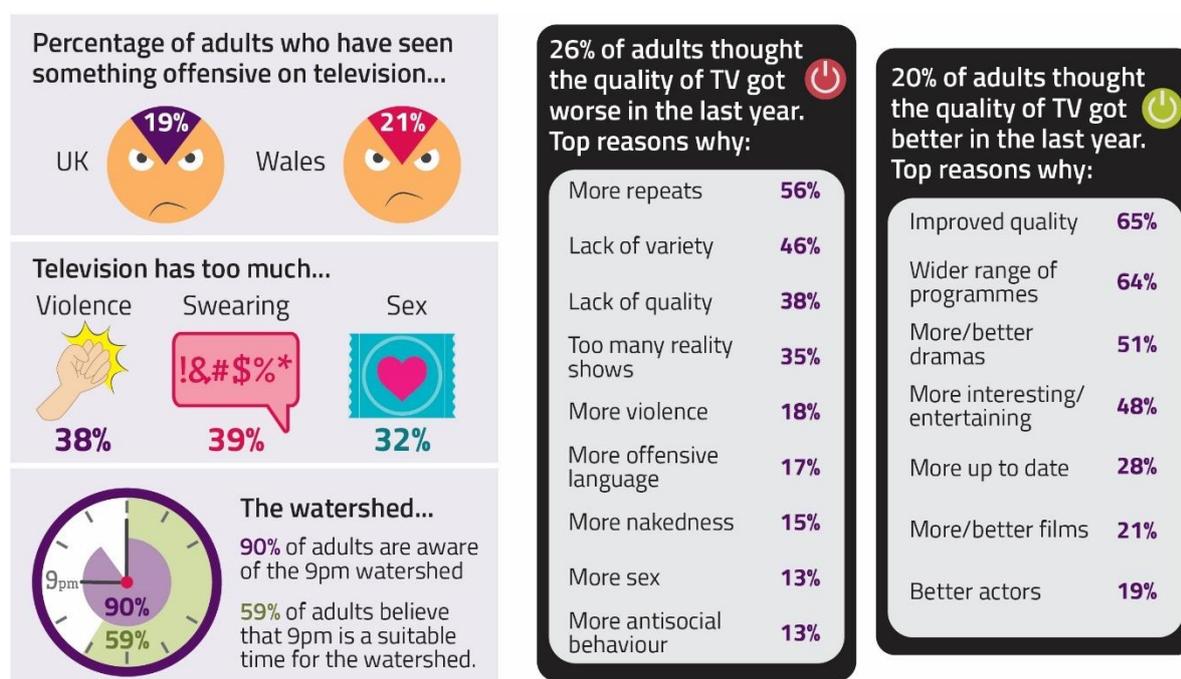


Source: Ofcom PSB tracker 2017. Q15 How would you rate each channel individually on this statement, on a scale of 1 to 10, where 10 is the highest score and 1 is the lowest? Base: All respondents who watch any PSB channels regularly or occasionally in each nation: 2017 (1957, 502, 400, 239).

Attitudes to TV in Wales

One of Ofcom’s duties under the Communications Act 2003 is to ensure that people who watch television and listen to the radio are provided with appropriate protection from harmful or offensive material. The Ofcom cross-platform media tracker looks at attitudes to offensive language, sex and violence on an annual basis.

Television audiences in Wales are significantly more likely than audiences in the UK to say that there is too much sex on TV (32% vs. 25%). They also feel that there is too much violence (38% vs. 34% for the UK), too much swearing (39% vs. 33%) and that TV has got worse in the past year (26% vs. 22%). However, these differences are not significant.



Source: Ofcom cross-platform media tracker 2017. Base: All with any TV sets in 2017; UK (2,313); Wales (237)



The radio listener

Chapter overview

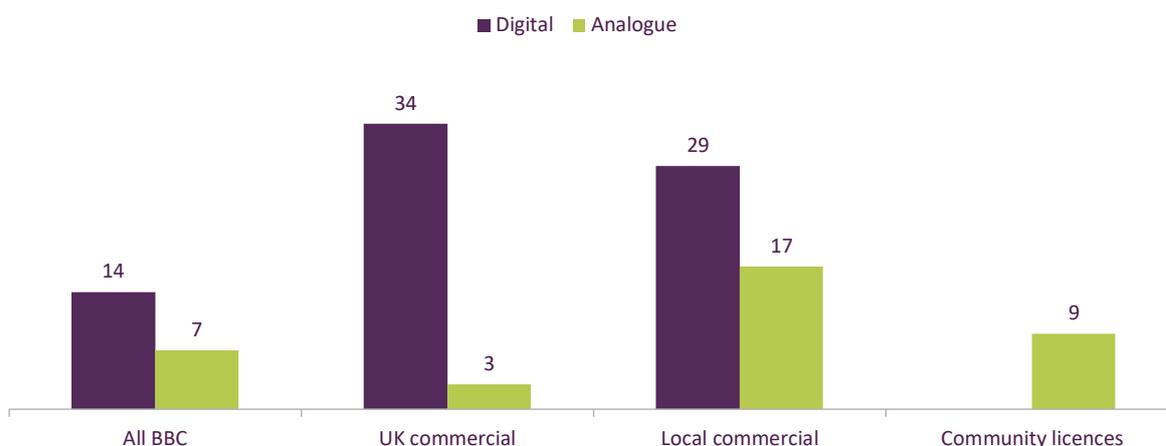
This chapter provides an overview of the key developments in the radio and audio market in Wales, including who is listening, how they are listening and what they are listening to. It also looks at the availability of DAB (digital audio broadcasting) services in Wales.

There were 77 services broadcasting on DAB multiplexes across Wales in March 2018³³

Most of the DAB services available in Wales (34) were commercial stations that broadcast across the UK. However, nearly as many local commercial services were also broadcasting (29) in various parts of Wales. There were 36 analogue stations broadcasting across Wales in 2018, including nine community stations. Local commercial radio stations available include Heart and Capital stations (owned by Global or Communicorp), serving communities in north and south Wales, Nation Broadcasting's portfolio of stations (including Radio Ceredigion and Nation Radio) and Wireless Group's The Wave and Swansea Sound.

³³ There may be some duplication in the services counted here, where services broadcast on more than one Welsh local multiplex.

Figure 18: Radio station availability in Wales



Source: BBC / Ofcom, March 2018.

Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of them. 'All BBC Digital' figure includes Radio Cymru 2. The local commercial digital figure refers to the number of services carried by local DAB multiplexes in Wales. Not all services will contain local content, and some services may be broadcast on a number of different multiplexes (but are still counted for these purposes as individual services).

Community radio in Wales

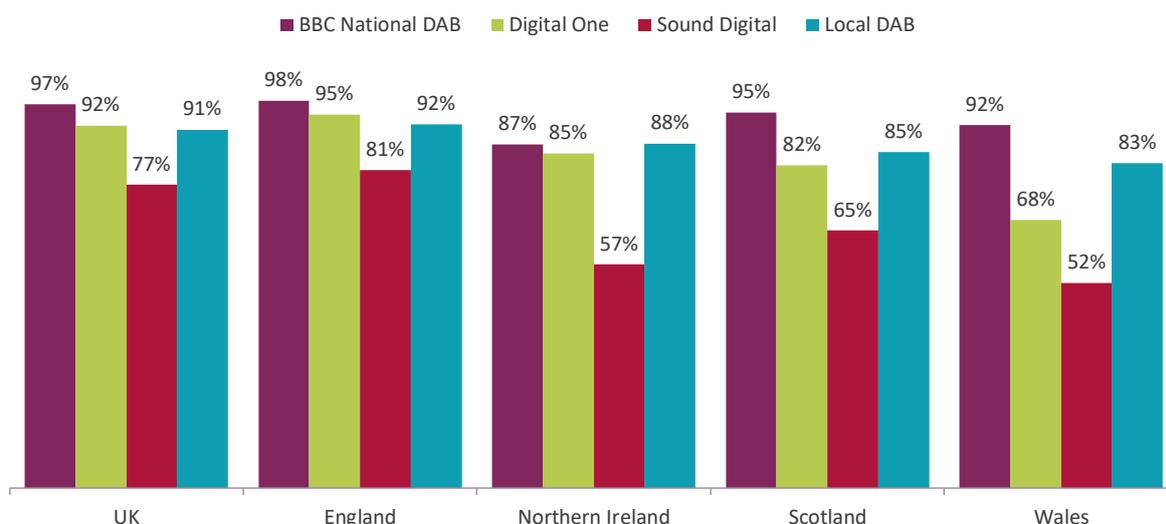
Ofcom has awarded two community radio licences since October 2017, Radio Aber (Aberystwyth) and Rhondda Radio. In total there are now 11 licensed community radio stations in Wales (including two which are currently making preparations to go on air). These stations broadcast to small areas usually within 5 kilometres of their transmitter. They focus on a specific community (such as an ethnic minority group) or on a range of listeners within the broadcast area. Community radio's role is to benefit communities rather than make a profit.

DAB services from the BBC are available to 92% of households in Wales

There was little change in levels of DAB coverage across Wales households in 2017; the BBC (92%), Digital One (68%) and Sound Digital (52%) multiplexes all had the same level of coverage as in 2017. Local DAB coverage in Wales was 83% of households in March 2018.³⁴

³⁴ This figure is lower than the coverage estimates published in 2017, as network build-out did not include some sites listed in the original local DAB expansion plan.

Figure 19: Household coverage of DAB (%)



Source: BBC, Arqiva, Ofcom, March 2018.

Radio Cymru 2

BBC Radio Cymru’s second Welsh language station, Radio Cymru 2, launched at the end of January 2018, having been trialled in 2016 to celebrate Radio Cymru’s 40th anniversary. Radio Cymru 2 received funding from the BBC to develop and sustain the station during its first year. It is available on weekdays between 7am and 10am on DAB, BBC Radio iPlayer and digital TV (subject to agreeing contractual arrangements with the relevant DAB operators).

Digital radio ownership dipped slightly in Wales in 2018

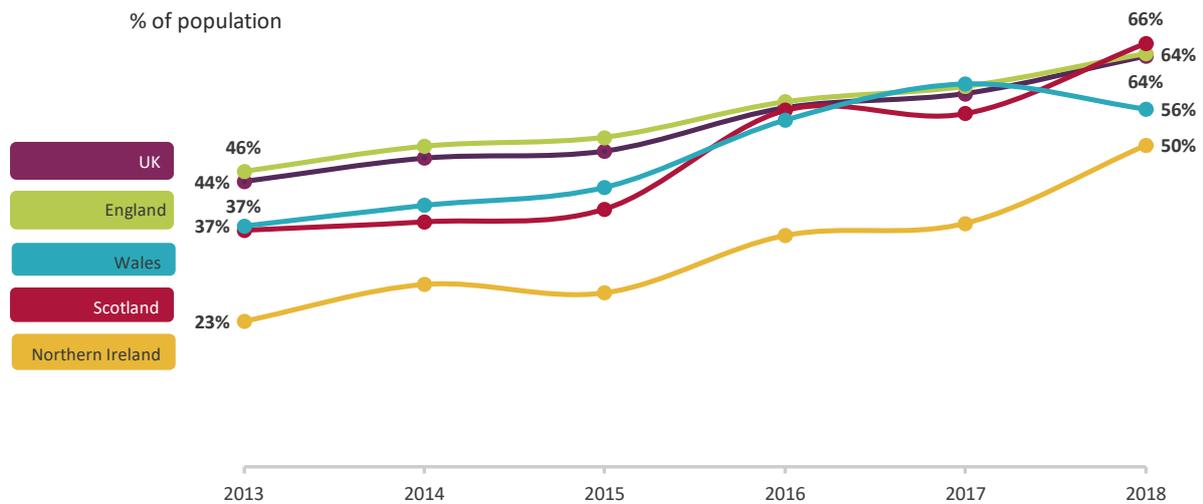
Ownership of DAB radio sets in Wales dropped slightly to 56% in 2018, despite continuing to increase across the rest of the UK. Take-up was higher across the UK as a whole (64%) and in Scotland (66%) at the start of 2018, but remained lower in Northern Ireland, at 50%.

Among radio listeners in Wales, 36% had a DAB radio in the home in 2018,³⁵ broadly in line with Scotland (40%) and higher than Northern Ireland (28%).³⁶

³⁵ These are ‘active’ digital radio sets in the home, i.e. a radio that is used by someone in the household most weeks.

³⁶ Ofcom Technology Tracker, H1 2018

Figure 20: DAB ownership



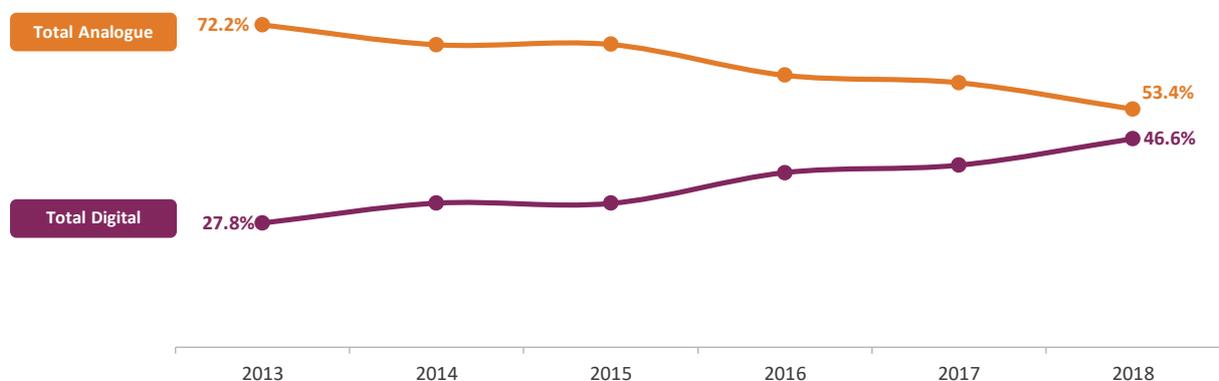
Source: RAJAR, all adults (15+), Q1 for each year
 BBC nations'/local radio TSA in each nation

Digital listening continued to grow in 2018

The amount of listening that is through a digital platform has increased; from 28% at the start of 2013 to 47% five years later. This is lower than in the UK as a whole (51%), the same as in Scotland (47%) and far greater than in Northern Ireland, where only around a third of total listening was digital in Q1 2018 (35%).

Although listening online has seen the greatest increase in Wales in recent years, listening through DAB radio now accounts for a third of all listening (33%).

Figure 21: Share of listening hours via digital and analogue platforms in Wales: 2013-2018



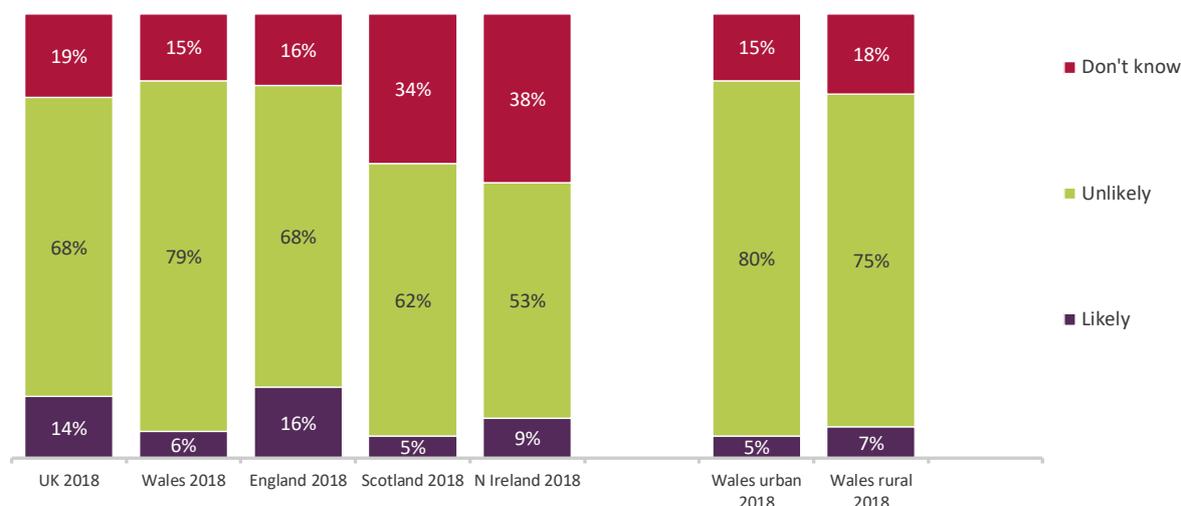
Source: RAJAR, all adults, Q1 of each year, BBC Radio Wales TSA

Nearly eight in ten radio listeners in Wales without a DAB set say they're unlikely to buy one in the next year

Only 6% of radio listeners without a DAB radio in Wales say they are likely to get one in the next 12 months; the vast majority are unlikely to do so (79%).

Among those unlikely to get a DAB radio in the next 12 months, more than half (51%) said they were happy using an existing service, while 46% said they had no need of a DAB radio.³⁷

Figure 22: Likelihood of purchasing a DAB radio within the next year



Source: Ofcom Technology Tracker, Half 1 2018. Base: Adults aged 16+ who listen to radio, have any active radio sets at home and do not have a DAB set** (n = 675 UK, 98* Wales, 361 England, 110 Scotland, 106 Northern Ireland, 48* Wales urban, 50* Wales rural). *Caution: Low base, treat as indicative only. Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2018 and between Wales urban and rural in 2018. QP12: How likely is it that your household will get a DAB radio in the next 12 months?

Live radio is the most popular listening activity in Wales

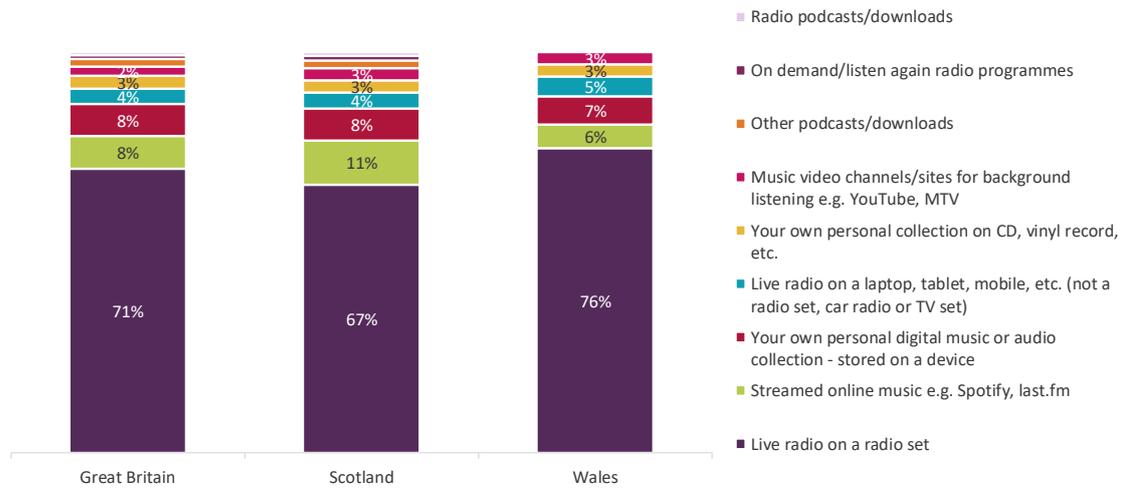
On average, adults in Wales spend 14 hours 45 minutes each week listening to any type of audio; 81% of this is to live radio. This is greater than the proportion of time spent on live radio across the UK (75%). Adults in Wales are less likely than adults across Great Britain (8%) or Scotland (7% vs. 11%)³⁸ to spend time listening to streamed music (e.g. Spotify and Apple Music). This is reflected in the fact that adults in Wales are less likely to subscribe to a music streaming service (25%) than adults in Great Britain (30%) or Scotland (33%).³⁹

³⁷ Ofcom Technology Tracker, Half 1 2018

³⁸ The TouchPoints sample covers Great Britain and so excludes Northern Ireland

³⁹ TouchPoints 2017

Figure 23: Proportion of time spent listening to different types of audio

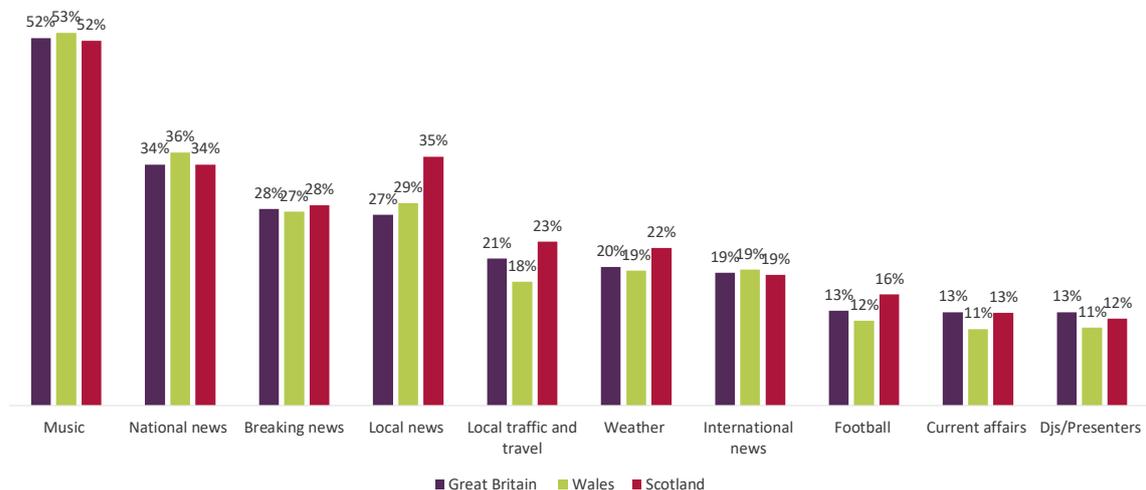


Source: TouchPoints 2017

Base: GB adults 15+; Government Office Regions: Wales; Scotland

Music is the most valued type of audio content for listeners across Great Britain as a whole, and in Wales, followed by national news. For listeners in Wales, local news coverage is the third most valued type of content, ahead of breaking news.

Figure 24: Top ten most-valued types of content on the radio



Source: TouchPoints 2017

Base: GB adults 15+; Government Office regions: Wales; Scotland

Ninety per cent of adults listened to the radio each week in Wales in Q1 2018

Nine in ten adults listened to the radio each week in Wales in Q1 2018, and at an average of 22 hours per week, they listen for longer than adults in any of the other UK nations. Seventy-one per cent listen to BBC radio services each week, down from 76% five years ago. Commercial radio listening has remained stable over the period; 60% of adults tune in each week (61% in 2013).

Culture, Welsh Language and Communications committee

The National Assembly for Wales' Culture, Welsh Language and Communications Committee is holding an [inquiry into radio in Wales](#). The terms of reference to the consultation were to assess:

- the extent to which BBC Cymru Wales radio services, commercial radio services and community radio services meet the needs of audiences in Wales;
- the possible impact of the deregulation of commercial radio on audiences in Wales;
- ownership structures of commercial radio and their impact on local content;
- the impact of new technology on local content;
- the financial sustainability of community radio services in Wales; and
- the suitability of Wales's radio broadcasting infrastructure.

Ofcom's former Wales Director, Rhodri Williams, and Head of Radio Licensing and Planning, Neil Stock, gave evidence to the committee on the deregulation of commercial radio in February 2018.⁴⁰ The Committee due to publish its report shortly.

Figure 25: Average weekly reach and listening hours

	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening	20:48	21:06	22:00	19:18	20:48
Reach	89.9%	88.3%	90.1%	93.4%	90.2%

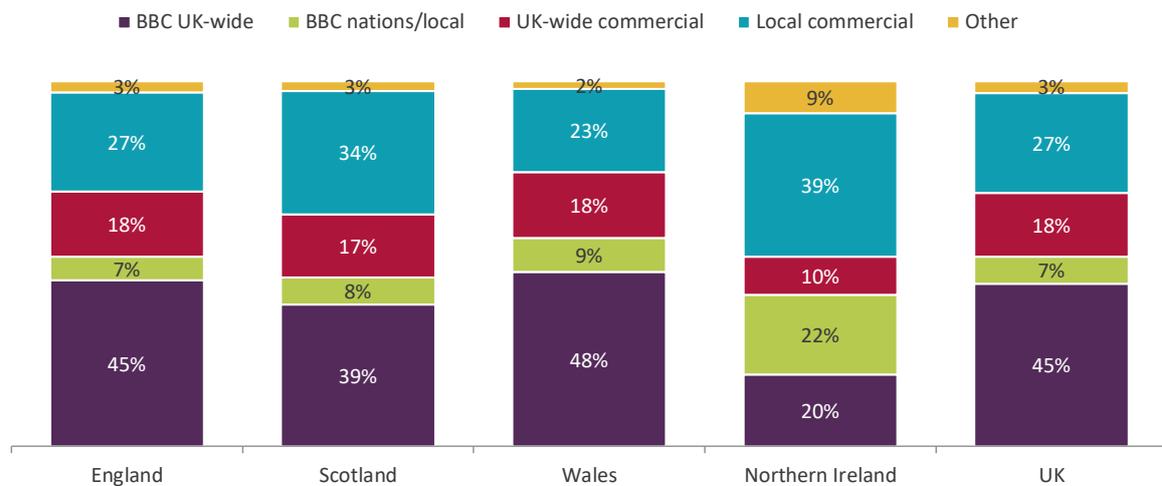
Source: RAJAR, all adults (15+), Q1 2018
BBC nations'/local radio TSA in each nation

⁴⁰ A transcript of the session can be found at <http://record.assembly.wales/Committee/4561>

The BBC's network radio stations are particularly popular in Wales

As a proportion of all radio listening, more time is spent listening to BBC UK-wide services in Wales than in any other UK nation. BBC Radio 2 takes almost a quarter of the share of listening in Wales (23.3%). In contrast, local commercial services have a lower proportion of listening hours in Wales than in other nations. Commercial stations also have lower reach in Wales (43%) than in the other UK nations (51% in Scotland, 60% in Northern Ireland).

Figure 26: Share of listening hours, by nation



Source: RAJAR, all adults (15+), Q1 2018
 BBC nations'/local radio TSA in each nation

BBC Wales national radio stations

In June 2017, BBC Cymru Wales announced plans for expansion in BBC Radio Wales coverage, extending the station's availability on the FM band to an estimated 330,000 people and increasing its nationwide FM coverage in Wales from 79% to 91%.

The increase in BBC Radio Wales' coverage on FM will benefit listeners in north-east Wales and mid Wales. Using a small amount of the existing network FM frequency band, currently allocated to BBC Radio 3, the development brings Radio Wales's FM coverage into line with other national and network radio stations. Radio 3 continues to be available to 92% of households in Wales on FM, and the station's availability on DAB, television and online will be unaffected by the changes.

Reach of national commercial radio in Wales grew in 2018

The sector that has increased its audience most is the UK-wide commercial stations; listener figures have risen from 33% of adults in Wales in 2013 to 38% in 2018. This is probably due to the increased availability of these stations since March 2016 when the second UK-wide commercial DAB multiplex, Sound Digital, was launched. BBC radio has seen the biggest drop in audience numbers: from 76% of adults in Wales in 2013 to 71% in 2018.

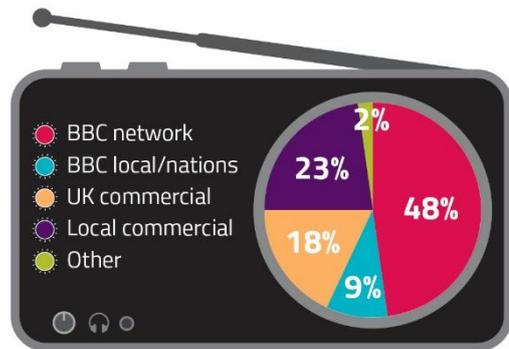
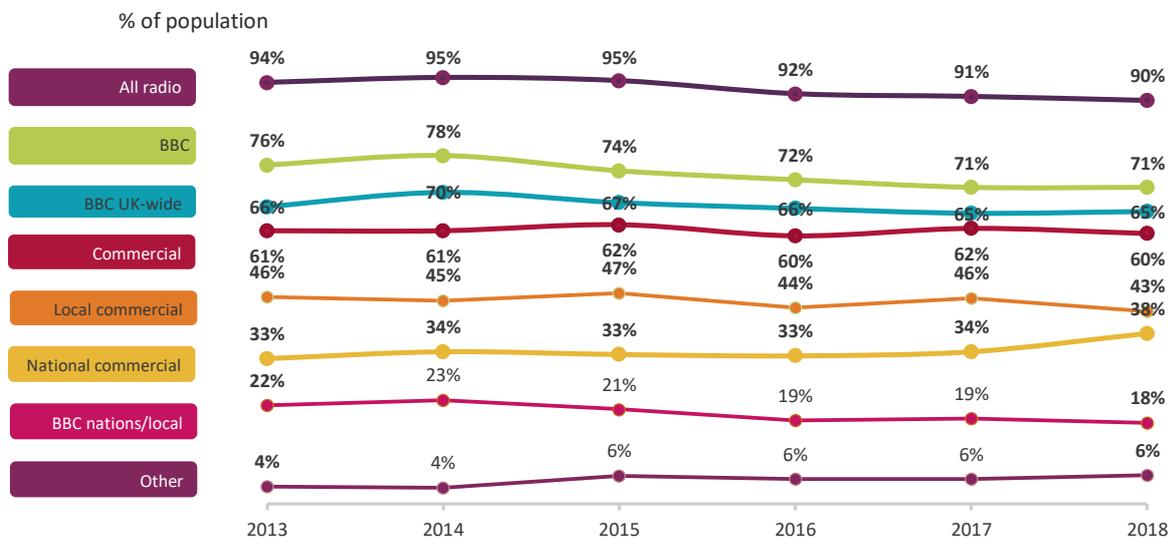


Figure 28: Weekly reach by radio sector over time: 2013-2018



Source: RAJAR, all adults (15+), Q1 of each year, BBC Radio Wales TSA

BBC Radio 2 was the most popular radio station in Wales in Q1 2018

BBC Radio 2 was the most listened-to radio station across Wales in Q1 2018⁴¹ with a weekly reach of 38%, followed by BBC Radio 1 at 24% and BBC Radio 4 with 17%.

In Cardiff⁴², Global's Heart South Wales was the third most popular radio station, with a reach of 21%; behind BBC Radio 2 and BBC Radio 1. Across North Wales⁴³, the three most popular stations were the same as those across Wales as a whole, with BBC Radio 2 having an even greater reach (41%).

Table 29: Top three stations listened to across the UK, Wales and Welsh regions

	UK		Wales*		Cardiff**		North Wales***	
Rank	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)
1	BBC Radio 2	28.3%	BBC Radio 2	37.9%	BBC Radio 2	37.9%	BBC Radio 2	40.6%
2	BBC Radio 4	20.0%	BBC Radio 1	23.6%	BBC Radio 1	21.8%	BBC Radio 1	24.1%
3	BBC Radio 1	17.4%	BBC Radio 4	17.1%	Heart South Wales	21.2%	BBC Radio 4	20.9%

Source: RAJAR Q1 2018

* BBC Radio Wales TSA

**Capital South Wales TSA

***Heart North Wales TSA

Typically, across the UK, peak listening is between 8am and 9am. But in Wales the peak in Q1 2018 was between 10am and 10:30am, when around 15-16% of the population listened to *The Ken Bruce Show* – featuring BBC Radio Wales presenter Lynn Bowles until March 2018 – on BBC Radio 2. Across the duration of the show⁴⁴ it reached 20% of the population in the Cardiff area, higher than the average across the UK (16%).

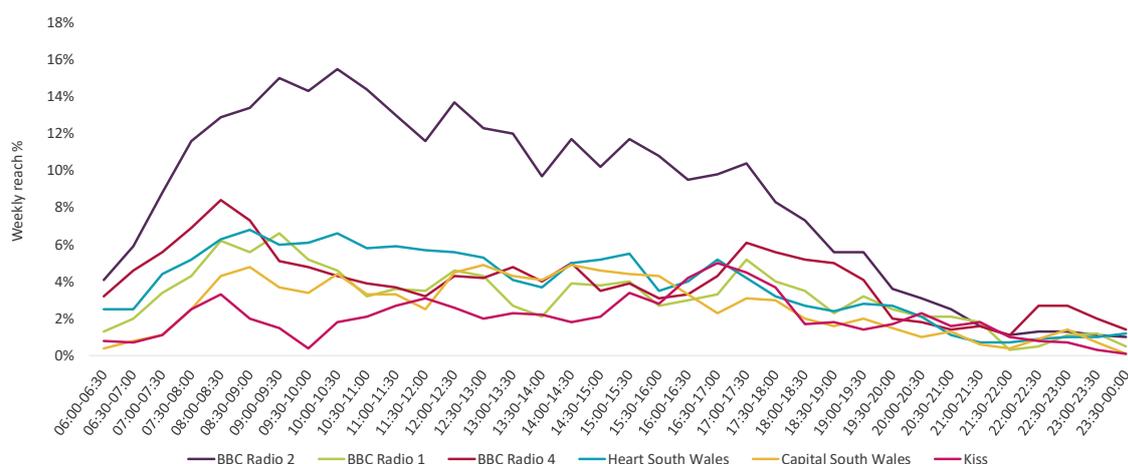
⁴¹ RAJAR's BBC Radio Wales TSA

⁴² RAJAR's Capital South Wales TSA which accounts for around 40% of the Wales adult population.

⁴³ RAJAR's Heart North Wales TSA, which covers around 727,000 adults.

⁴⁴ 09:30-12pm Monday-Friday

Figure 30: Average reach across the day in the Cardiff area: Monday-Friday

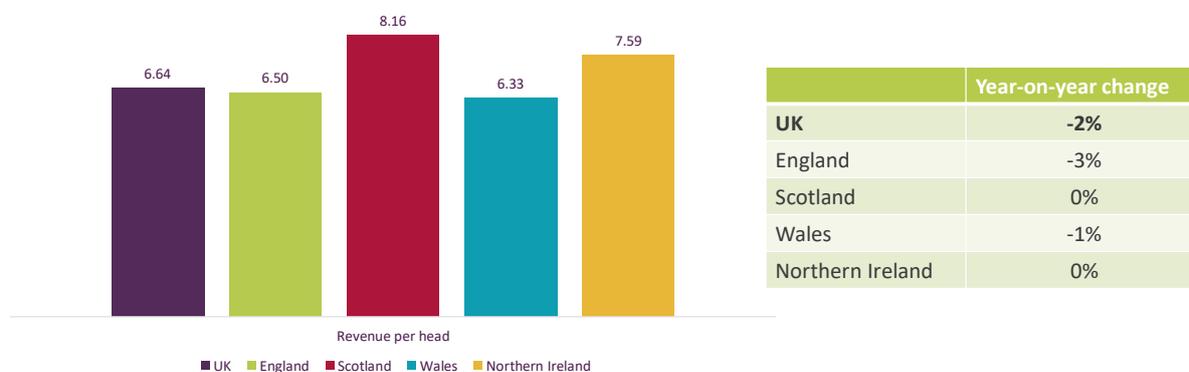


Source: RAJAR Q1 2018, all adults 15+
Capital South Wales TSA

Local commercial radio in Wales generated £6.33 per head in 2017

Local analogue commercial radio stations in Wales such as *Radio Ceredigion* and *Capital South Wales* generated £6.33 per head of population in 2017.⁴⁵ This was the lowest figure across the UK nations and a 1% decrease in real terms on 2016.

Figure 31: Local commercial radio revenue per head: 2017 (£)



Source: Ofcom/broadcasters, Ofcom estimates. Note: These figures relate to relevant turnover of AL licences (local analogue commercial) and include local and national revenues and sponsorship.

⁴⁵ These figures relate to revenues generated against analogue licences only. Revenue generated through digital platforms are not included.