Welsh Parliament
Senedd Research

How broadcasting works

Research Briefing

November 2026



Find out more:
research.senedd.wales

The Welsh Parliament is the democratically elected body that represents the interests of Wales and its people.

Commonly known as the Senedd, it makes laws for Wales, agrees Welsh taxes and holds the Welsh Government to account.

An electronic copy of this document can be found on the Senedd's website:
research.senedd.wales

Copies of this document can also be obtained in accessible formats including Braille, large print, audio or hard copy from:

Welsh Parliament
Tŷ Hywel
Cardiff Bay
CF99 1SN

X: **@SeneddResearch**
Senedd Research: **research.senedd.wales**
Subscription: **Newsletter**

© Senedd Commission Copyright 2026
The text of this document may be reproduced free of charge in any format or medium providing that it is reproduced accurately and not used in a misleading or derogatory context. The material must be acknowledged as copyright of the Senedd Commission and the title of the document specified.

Welsh Parliament
Senedd Research

How broadcasting works

Research Briefing

November 2026

Author:
Robin Wilkinson

Plaid Cymru, who formed the Welsh Government in May 2026, made a manifesto commitment in the 2026 Senedd election to “work towards the devolution of powers over broadcasting”, which is reserved to Westminster. This commitment also features in the Programme for Government. This paper explores how broadcasting in Wales currently works.

Find out more:
research.senedd.wales



Contents

1. Exploring the devolution of broadcasting 7
Previous exploration of the devolution of broadcasting 7
Silk Commission (2014) 7
Fifth Senedd's Culture, Welsh Language and Communications Committee (2021) 8
Welsh Labour Government commitment (2021) 8
Independent Commission on the Constitutional Future of Wales (2024) 10
Plaid Cymru manifesto and Programme for Government commitment 10
2. Viewing and listening in Wales 12
Viewing 12
Listening 18
3. Public service broadcasting (PSB) 20
BBC 20
Funding 20
Regulation 21
Activity in Wales 23
Channel 3 24
Background 24
Content for Wales 24
Network content made in Wales 25
S4C 26
Background 26
Funding 27
Performance 28
Radio 29
Commercial radio 29
Community radio 30
Small-scale DAB (Digital Audio Broadcasting) 31
4. Ofcom 32

Ofcom in Wales 33
5. Welsh Government 34
Wales Public Interest Journalism Working Group 34
6. Network news analysis 36
7. Listed sporting events 38

1. Exploring the devolution of broadcasting

Broadcasting is a reserved matter, as outlined in Schedule 7A to the Government of Wales Act 2006. This means that the UK Parliament, rather than the Senedd, has the power to legislate on broadcasting.

However, this does not mean that the Welsh Government and Senedd have no relevant roles. For example, the Welsh Government has Memoranda of Understanding with Ofcom and the BBC. Among other things, these set out the process for Welsh Ministers to appoint a member to the Ofcom Board and commit Ofcom and the BBC to appear before relevant Senedd committees. The Welsh Government also needs to agree with the UK Government on the appointment of the BBC board member for Wales. More information on Welsh Government activity relating to broadcasting is in section 5 of this briefing.

Previous exploration of the devolution of broadcasting

Plaid Cymru, who formed the Welsh Government in May 2026, made a manifesto commitment in the 2026 Senedd election to “work towards the devolution of powers over broadcasting”. This commitment is repeated in the Programme for Government. Where responsibility for broadcasting should lie has been considered a number of times during the Senedd’s existence. Ultimately, a decision to devolve powers over broadcasting to the Senedd would require the agreement of the UK Government and the approval of the UK Parliament.

Silk Commission (2014)

The Commission on Devolution in Wales (often referred to as 'the Silk Commission', after its chair, Paul Silk KBC) was established as a result of a commitment made in the Coalition Agreement between the Conservatives and Liberal Democrats in 2010.

The Commission was launched in October 2011, with the support of the Welsh Government and the three opposition parties in the (then) National Assembly for Wales. It was asked to consider how the scope of devolution might be changed to better serve the people of Wales.

The Commission published two reports, in 2012 and 2014, the first focused on financial powers. The summary of the Second Report, looking at legislative powers to strengthen Wales, said:

> *Regulation of broadcasting should remain the responsibility of the UK Government.*
>
> *On the BBC, we recommend the creation of a devolved governance body within the UK Trust framework. This body should provide oversight and scrutiny of BBC outputs in Wales. The appointment of a Wales representative to the overall BBC governance body should be made through agreement between the Welsh and UK Governments.*
>
> *Whilst the bulk of funding for S4C should continue to be met through the licence fee, we believe that responsibility for the public expenditure element that comes direct from government should be devolved to the National Assembly.*
>
> *We also make recommendations on the representation of Welsh interests on the Ofcom board and suggest ways of more effective monitoring of progress in public service broadcasting in Wales.*

Fifth Senedd's Culture, Welsh Language and Communications Committee (2021)

In 2021, the Fifth Senedd's Culture, Welsh Language and Communications Committee published its report "Exploring the devolution of broadcasting: How can Wales get the media it needs?". The report looked at the supply of content for Wales, the funding of broadcasting in Wales and whether there was a need for any regulatory change.

It called for further powers over broadcasting to be devolved to Wales - including a formal role in setting the licence fee, and responsibility for Welsh language broadcaster S4C – but did not call for full devolution of broadcasting. Further information is available in a Senedd Research article.

Welsh Labour Government commitment (2021)

The previous, Welsh Labour, Government had Programme for Government commitments (following a Cooperation Agreement with Plaid Cymru) to:

- Pursue the case for devolution of broadcasting and communication powers; and

- Explore the creation of a shadow Broadcasting and Communications Authority for Wales and provide additional investment to develop enterprises to improve Welsh based media and journalism.

In August 2023, the Welsh Government published a report, A new future for broadcasting and communications in Wales, by an expert panel. The panel concluded that the sector:

> *…needs an independent body of expertise – a Shadow Broadcasting and Communications Authority – to increase transparency and visibility at a Welsh level.*

The report envisaged the Shadow Broadcasting Authority costing £704,000 to £804,000 a year to run.

In March 2024 the previous Welsh Government responded to the report and said that it would:

> *Establish a Broadcasting and Communications Advisory Body to provide guidance on broadcasting and communications.*

It was unclear to what extent the previous Labour Welsh Government pursued the devolution of broadcasting in conversations with the UK Government. In November 2024, the then Culture Minister Jack Sargeant MS told the Sixth Senedd's Culture Committee:

> *I accept the position of the* (Welsh) *Government, of course, and I don't think I'm saying that I'm against the devolution of broadcasting. I think I'm saying I'd like to do the piece of work around that to form my view and to see where we take this conversation next.*

In a May 2025 Welsh Government update on broadcasting and the media, Jack Sargeant MS said:

> *I have concluded, to maximise resources and avoid duplication, the advisory function of a Broadcasting and Communications Advisory Body should instead be delivered through existing channels between Creative Wales and broadcasting and media stakeholders. We will seek to strengthen these networks and identify specific opportunities to bring stakeholders together on individual issues, building on recent examples such as the joint Creative Wales and Ofcom event to discuss Ofcom's review of Public Service Media. We will capitalise on more*

> *positive relationships with the UK Government to pursue a strengthened framework for broadcasting and a greater voice for Wales.*

In December 2025 the previous Welsh Government announced funding for Aberystwyth University to explore pathways to the devolution of broadcasting. The same statement also explained that £350,000 funding had been allocated by Creative Wales to eight projects through the Public Interest Journalism Fund. Information about the fund is available on the Creative Wales website.

Independent Commission on the Constitutional Future of Wales (2024)

In 2021 the previous, Welsh Labour, Government convened an independent commission, co-chaired by Professor Laura McAllister and former Archbishop of Canterbury, the Rt. Hon. Dr Rowan Williams, to consider the constitutional future of the UK and steps to improve Welsh democracy.

Regarding broadcasting, it said:

> *The Welsh and UK Governments should agree mechanisms for a stronger voice for Wales on broadcasting policy, scrutiny and accountability, and robust work should continue on potential routes to devolution.*

The Commission also published a sub-group report on broadcasting.

Plaid Cymru manifesto and Programme for Government commitment

Plaid Cymru, which became the largest party in the Senedd in May 2026, had manifesto commitments at that election to:

> *… work towards the devolution of powers over broadcasting, including powers to regulate, supervise and ensure accountability for broadcasting and communications in Wales.*
>
> *As an interim step, ahead of the devolution of these powers, we will move forward with plans to establish a Shadow Broadcasting and Communications Authority for Wales, to protect and strengthen local and national public service media platforms in Wales.*

These commitments are reiterated in the Welsh Government's Programme for Government (published September 2026).

In July 2026, the Minister for Culture and Sport, Heledd Fychan MS, outlined her plans to establish a Shadow Broadcasting Authority. She said:

> *I am adopting a phased approach to the establishment of the Shadow Broadcasting and Communications Authority for Wales. As a first step, as recommended by the Expert Panel, I am establishing a Shadow Broadcasting and Communications Authority Working Group.*

Recruitment to the Working Group was scheduled for September, with £45,000 from Creative Wales's budget in 2026-27 allocated to fund activity this financial year.

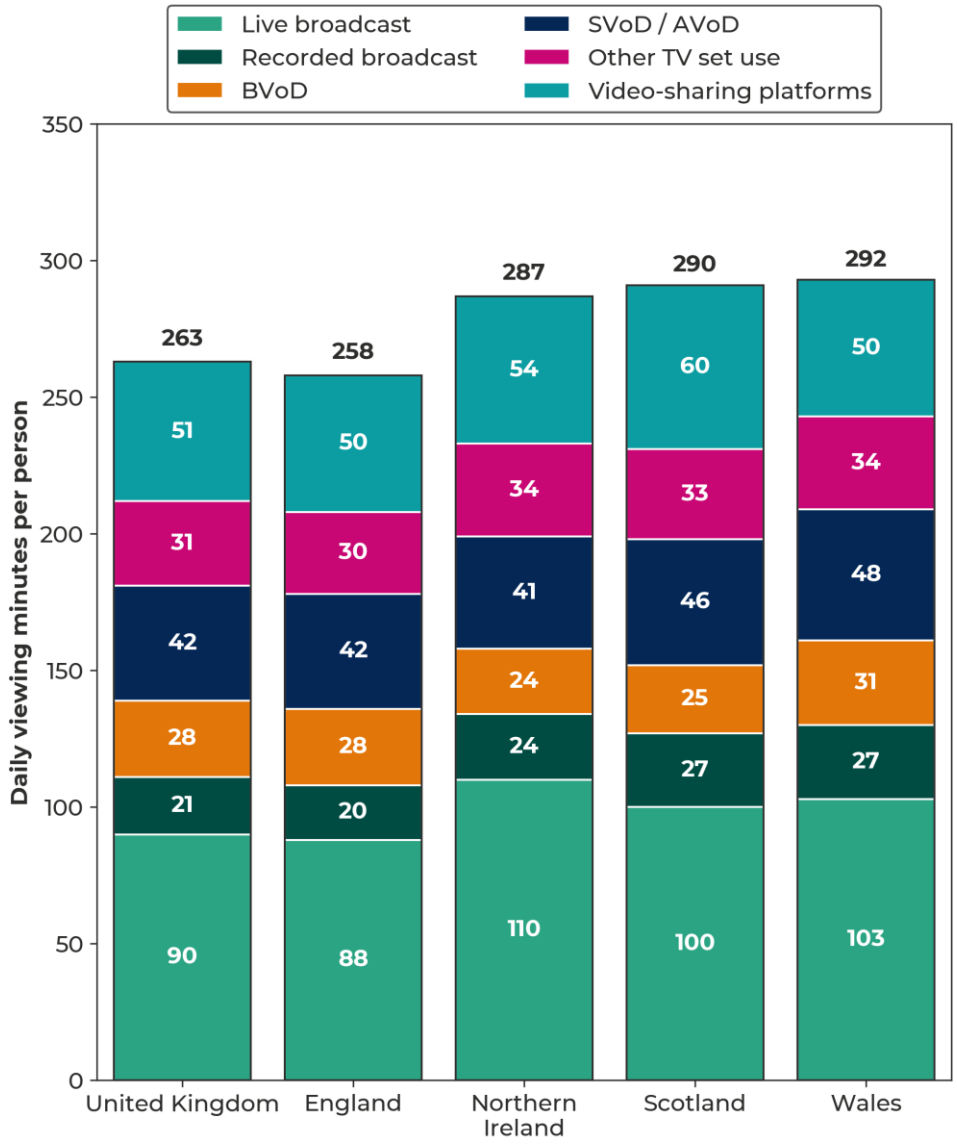
2. Viewing and listening in Wales

The broad trends for audiences in Wales mirror those across the UK: they are moving away from consuming content when it is broadcast to streaming content at times of their choosing, and away from regulated broadcasters to unregulated, online content.

Viewing

Viewers in Wales watch the most video content of the UK nations. The average daily minutes of broadcast TV watched in Wales is in continued decline, as it is across the UK. The BBC remains the most-watched video service in Wales, ahead of YouTube, and then ITV. Consumption of broadcast television skews very much towards older audiences, though all age groups show a year-on-year decline.

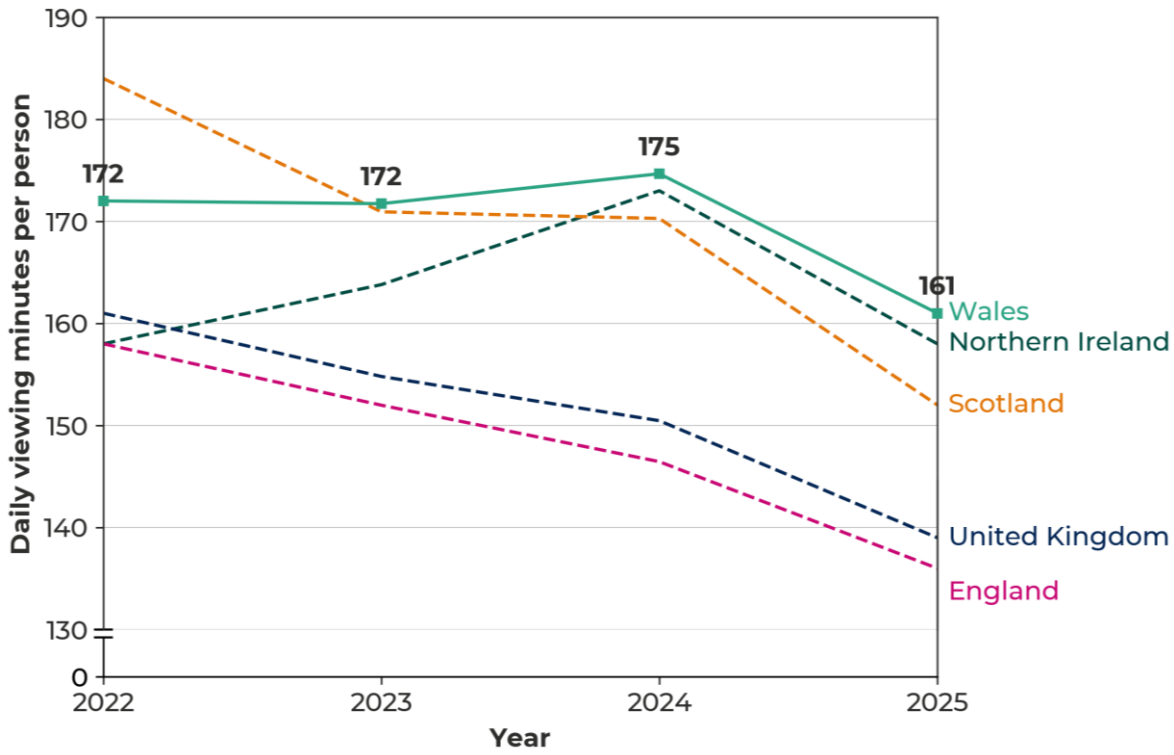
Total in-home daily video viewing minutes per person, by platform and nation: 2025



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

Source: Ofcom, Media Nations Wales 2026

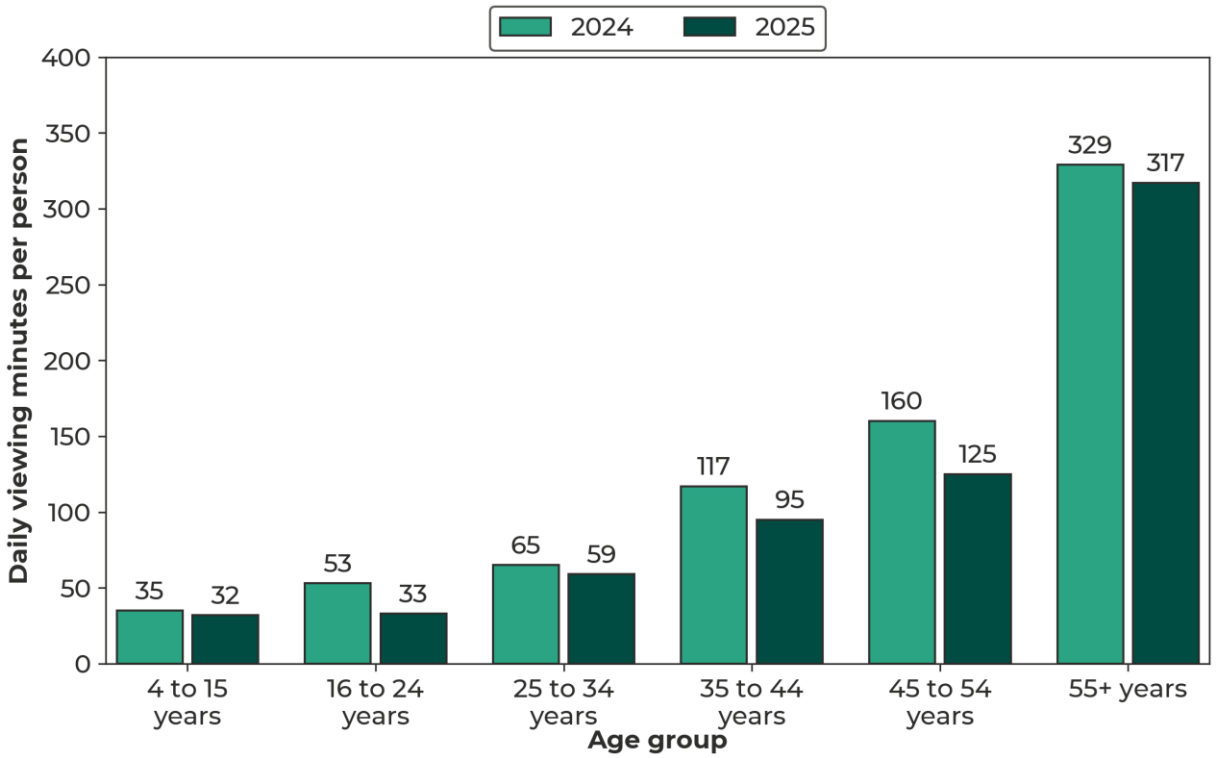
Average daily minutes viewed of broadcast TV per person, by nation: 2022-2025



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

Source: Ofcom, Media Nations Wales 2026

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



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

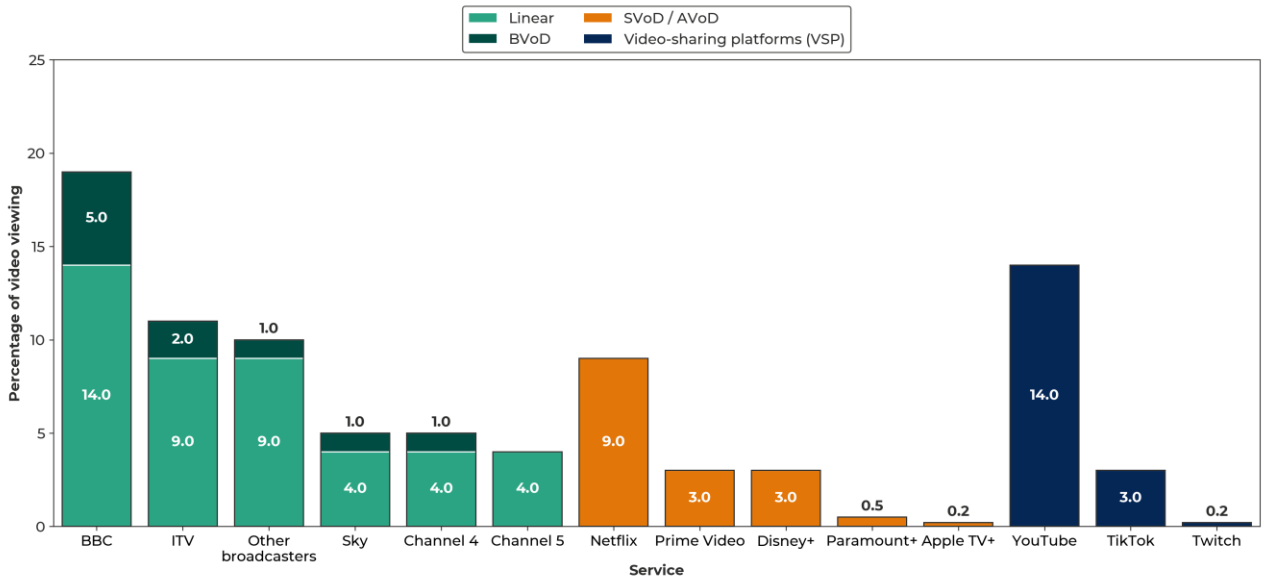
Source: Ofcom, Media Nations Wales 2026

In Q1 2026, the proportion of households in Wales subscribing to at least one SVoD[1] service declined slightly, with 69% of households taking a subscription, compared with 70% in Q1 2025.

The most popular service in Wales (including broadcast and video on-demand) is the BBC, with YouTube in second, followed by ITV.

[1] Subscription video on-demand (e.g. Netflix, Amazon Prime Video or Disney +)

Share of total video viewing for individual services in Wales, all individuals 4+ (2025)

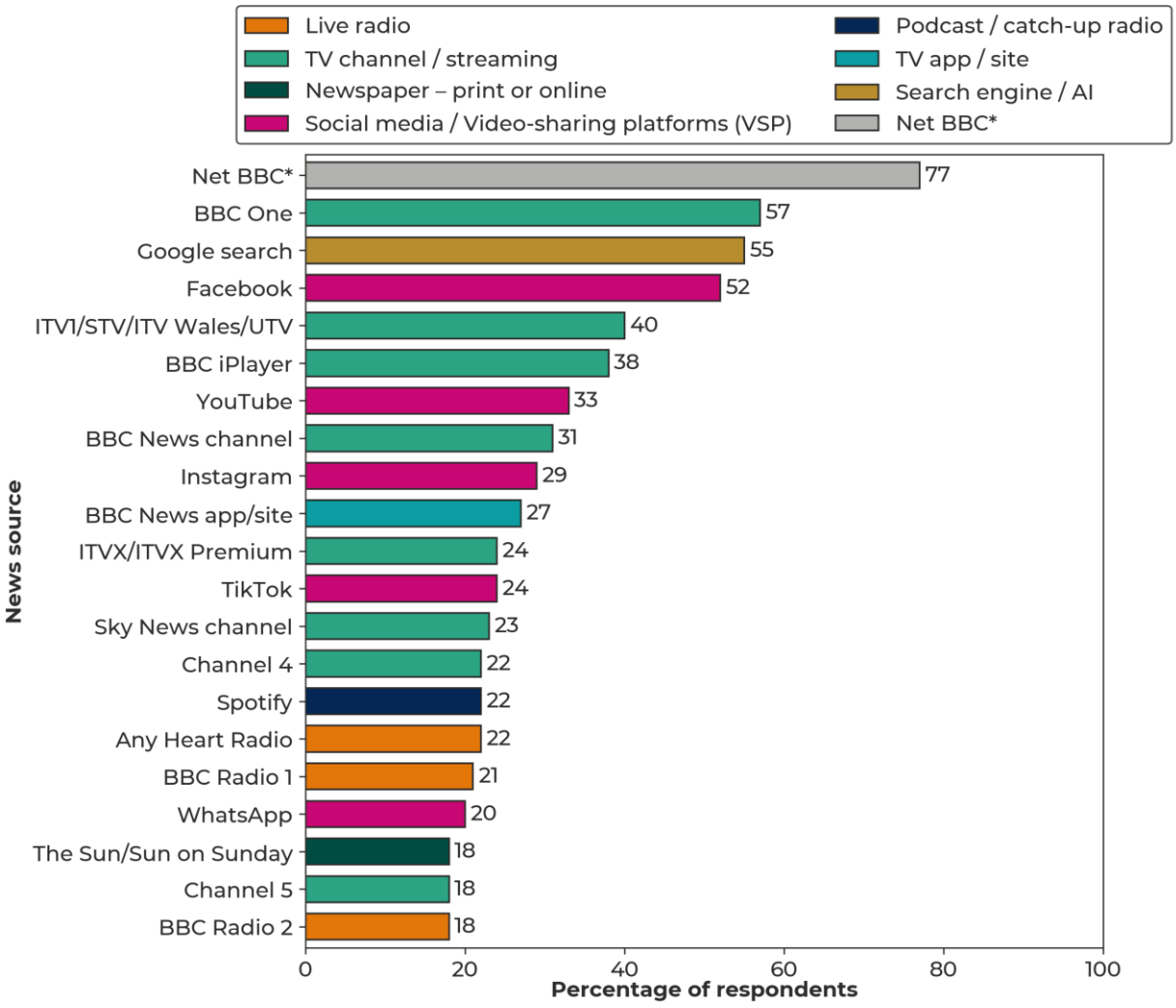


Source: Barb as-viewed on TV sets and other devices using the home's WiFi networks, all individuals 4+. 'Linear' includes broadcast content watched live or via recorded playback. Broadcaster services include all portfolio channels.

Source: Ofcom, Media Nations Wales 2026

Ofcom's News Consumption Survey found that BBC One is the most commonly used way to access news among people in Wales, with 57% of respondents in Wales saying they had used it in the past month for news. This was followed by Google Search (55%), Facebook (52%) and ITV1 (40%). The BBC News website or app was the most-used broadcaster website or app for news by people in Wales, used by 27% of respondents.

Top ways to access news in Wales in the last month: 2026

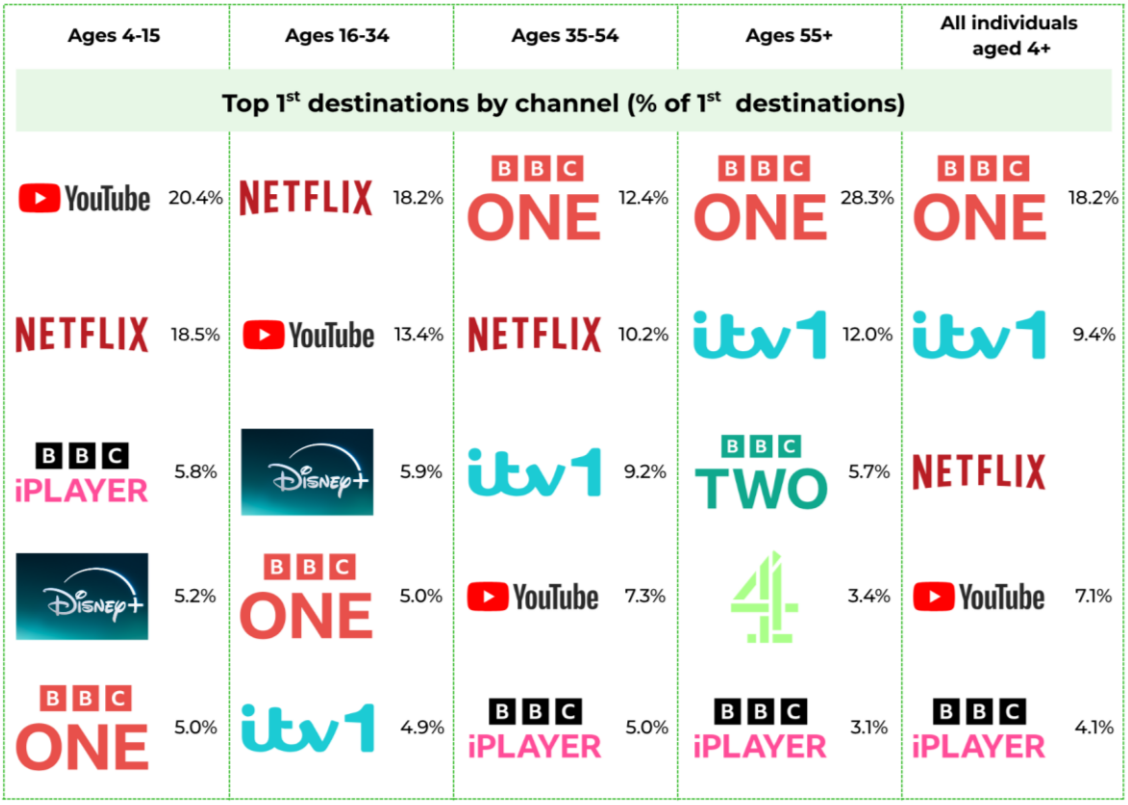


Source: Ofcom News Consumption Survey 2026. Question: D1-D22. Which, if any, of the following [MEDIA TYPE] have you seen or heard news on in the last month? *NET BBC includes BBC TV/ BBC iPlayer, BBC apps/ sites, BBC Radio, BBC Sounds. Base: All adults in Wales (600).

Source: Ofcom, Media Nations Wales 2026

Ofcom's 2025 review of Public Service Media, Transmission Critical, warned that as they spend less time viewing broadcasters' services than any other age group, there is a risk that "young people may not form a connection with the PSBs". Its data shows that YouTube and Netflix are the most popular first destinations for children (4-15) and younger people (16-34) whereas people aged 35+ are more likely to start their viewing journeys (i.e. the first destination viewers go to after switching on the TV) with BBC One.

First destinations for viewing by channel/service, November 2024

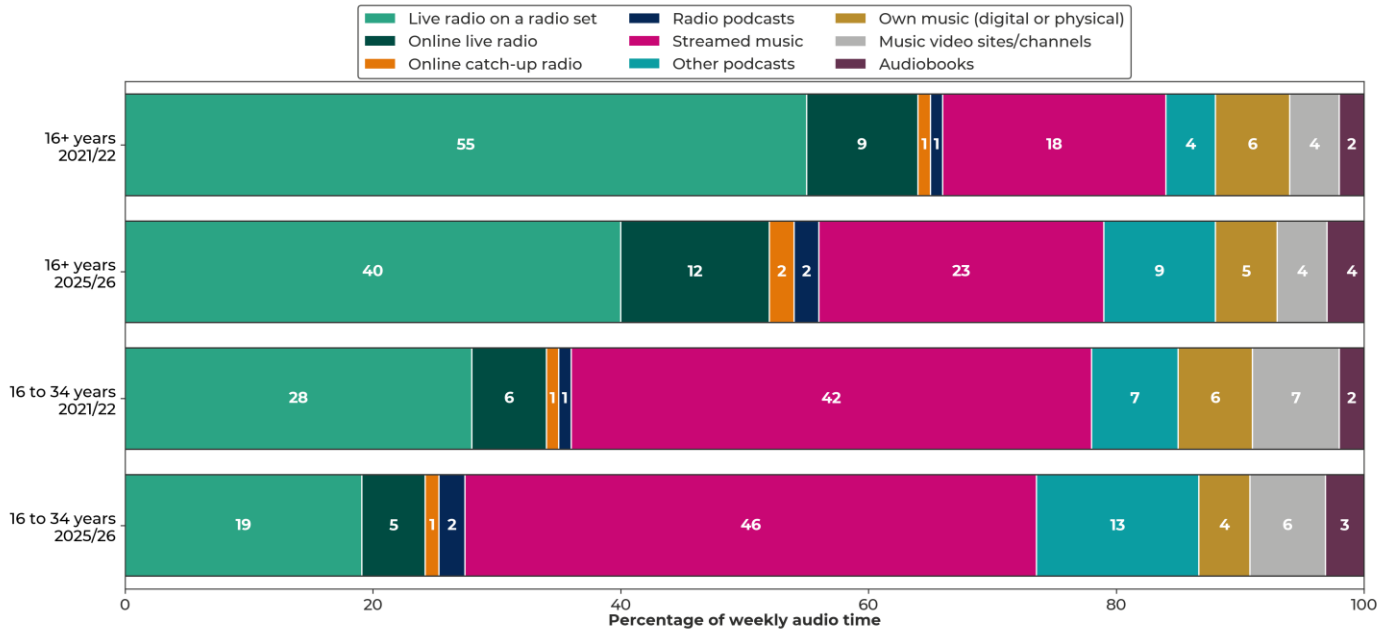


Source: Ofcom, Transmission Critical 2025 NB. The first destination is the first channel a viewer watches for one minute or more.

Listening

Across the UK, live radio listening on a radio set is declining as podcast, online live radio and streamed music listening is increasing.

Share of time spent listening to audio each week (UK-wide)



Source: IPA TouchPoints SuperHub.

Source: Ofcom, Media Nations UK 2026

3. Public service broadcasting (PSB)

Public service broadcasters (that is, the BBC, ITV, S4C, Channel 4 and Channel 5) are regulated by Ofcom to provide specific programming in the public interest. They have varying responsibilities in relation to the public benefits they receive (such as funding in the case of the BBC and S4C, and protected prominence on electronic programme guides for all PSBs) as part of their PSB status.

BBC

Funding

The BBC (alongside S4C) is funded from a licence fee, payable – with exceptions – by anyone who wants to watch programmes on broadcast television, online or on an online TV service. A standard TV licence costs £180 for a year.

The BBC consistently spends more in Wales than is raised by the licence fee. In 2025-26, the BBC estimates that the licence fee raised £196m in Wales. In the same year the BBC spent £216m in Wales (NB. S4C is also funded by the licence fee).

In 2023 the BBC told the Sixth Senedd's Culture, Communications, Welsh Language, Sport and International Relations Committee (Culture and Communications Committee) that an increase in the licence fee was needed for the BBC to serve the whole United Kingdom:

> *The BBC has also lost 30 per cent of its income over that decade, and I think support for the licence fee, support for restoring inflation within our licence fee, is a necessity if we are to serve and to proceed with universality, so that we reach every corner of the United Kingdom, whether it's Blaenau Gwent or the Cynon valley, or anywhere else. We need the money. And at some point, I think the UK Government also has to take a decision that it wants a broadcaster of scale operating throughout the world, and then it has to figure out how to pay for it.*

In February 2026 the BBC announced it would be making "cuts amounting to about 10% of its costs in the face of 'substantial financial pressures', over the next

three years. In April 2026 the BBC clarified that it needed to make "£500m savings over the next two years".

In June 2026 the BBC published details of the first £160 million of savings including £9 million in Wales, and around 50 roles.

The total proposed savings in the nations are:

> *A total of £33m of savings by the end of 27/28, with the expected closure of around 250 posts in this first phase expected to be broken down as follows:*
>
> *- Savings of £9m in Wales and a reduction in headcount of around 50 roles*
>
> *- In Northern Ireland, £4m of savings and up to 50 roles*
>
> *- In Scotland, over £10m of savings and up to 60 roles*
>
> *- In BBC Local, £9m savings and around 90 roles*

In September 2026 it published details of what these savings would look like in Wales.

Regulation

The 2017-27 Royal Charter, the constitutional basis for the BBC, included a new role for Ofcom as the first external regulator of the BBC. This role includes ensuring that audiences in the individual nations of the UK are "well served". Ofcom's regulatory duties include setting conditions designed to "secure the provision of distinctive output and services" by the BBC. As well as policing content, Ofcom is responsible for ensuring that a "suitable proportion" of network programmes are made outside of London, including in each of the UK's nations.

Ofcom rules say that at least 5% of the BBC's expenditure on UK network programmes must be spent in Wales, which must represent at least 5% of UK network hours. Equivalent population share-based figures exist for Scotland and Northern Ireland, and England outside of the M25.

Ofcom has developed a single operating licence for the BBC containing, in its words "clear, measurable and appropriately challenging regulatory conditions in relation to the BBC's services". This specifies what each channel and radio station

should do, including time requirements for various categories, such as “news and current affairs” and “programmes of national and regional interest”.

Charter renewal

The Royal Charter is the constitutional basis for the BBC as a public service media provider. The UK Government is in the process of renewing the current Charter, which expires in December 2027.

The Charter defines the BBC’s Mission and Public Purposes and sets out how it is governed, regulated and funded. The BBC Framework Agreement sits alongside the Charter, and provides additional detail.

The BBC’s current public purposes are:

- Public Purpose 1 – to provide impartial news and information to help people understand and engage with the world around them.
- Public Purpose 2 – to support learning for people of all ages.
- Public Purpose 3 – to show the most creative, highest quality and distinctive output and services.
- Public Purpose 4 – to reflect, represent and serve the diverse communities of all the United Kingdom’s nations and regions and, in doing so, to support the creative economy across the United Kingdom.
- Public Purpose 5 – to reflect the United Kingdom, its culture and values to the world.

The previous Senedd’s Culture and Communications Committee responded to the UK Government’s consultation on the Charter Green Paper in March 2026. It recommended:

- Recommendation 1: During the next Charter period, the BBC and S4C should receive at least current funding amounts increased by CPI (“Consumer Price Index”: a measure of inflation).
- Recommendation 2: S4C needs to be guaranteed adequate funding. This should represent an increase on current levels, following significant long-term cuts to the broadcaster’s funding and the increased costs of serving audiences across multiple digital platforms.

- Recommendation 3: The BBC and S4C should be funded by a universal mechanism (with exceptions for those unable to pay).

The House of Commons Digital, Culture, Media and Sport Select Committee published a report into BBC Royal Charter Review in October 2026. The UK Government has said it expects to publish a White Paper later in 2026.

The UK Government also consulted on a Media Green Paper looking more broadly at media reform.

Activity in Wales

The BBC produces "local content" for audiences in Wales, and "network content" which is broadcast across the UK, and some of which is made in Wales.

Local content

In 2025-26, the BBC's spend on English language TV content for audiences in Wales was £33m (a slight decrease on spend in 2024-25 when it was £34m).

In Scotland (which currently has a separate TV channel, BBC Scotland, though this is set to close) spend on English language TV for Scottish audiences was £65m in 2025-26, or about double the equivalent spend in Wales.

The previous Senedd's Culture and Communications Committee raised this disparity with the BBC several times, recommending in March 2026:

> *The BBC's spend on English-language television content in Wales should grow year-on-year until it approaches parity with the BBC's spend on English language content in Scotland. The BBC should outline to this Committee how it will achieve this.*

Network content

According to the terms of its operating licence with Ofcom, at least 5 per cent of the BBC's expenditure on UK network programmes must be spent in Wales (in 2025 the actual figure was 9.1 per cent) which must constitute at least 5 per cent of the UK network hours (in 2025 the figure was 8.6%). This follows a strategy pursued by successive Director Generals of the BBC to move production out of London.

Channel 3

Background

Across the UK there are 15 regional Channel 3 licences, which describe the terms on which the owner of the licence must operate, and are enforced by Ofcom. Other than the two Scottish licences - which are owned by STV – all of these licences are owned by ITV.

The Channel 3 licence for Wales requires ITV to provide four hours of news and 90 minutes of non-news programming for Wales every week. This licence was renewed in 2024 for ten years, with the commitments for Wales maintained at the same level.

Content for Wales

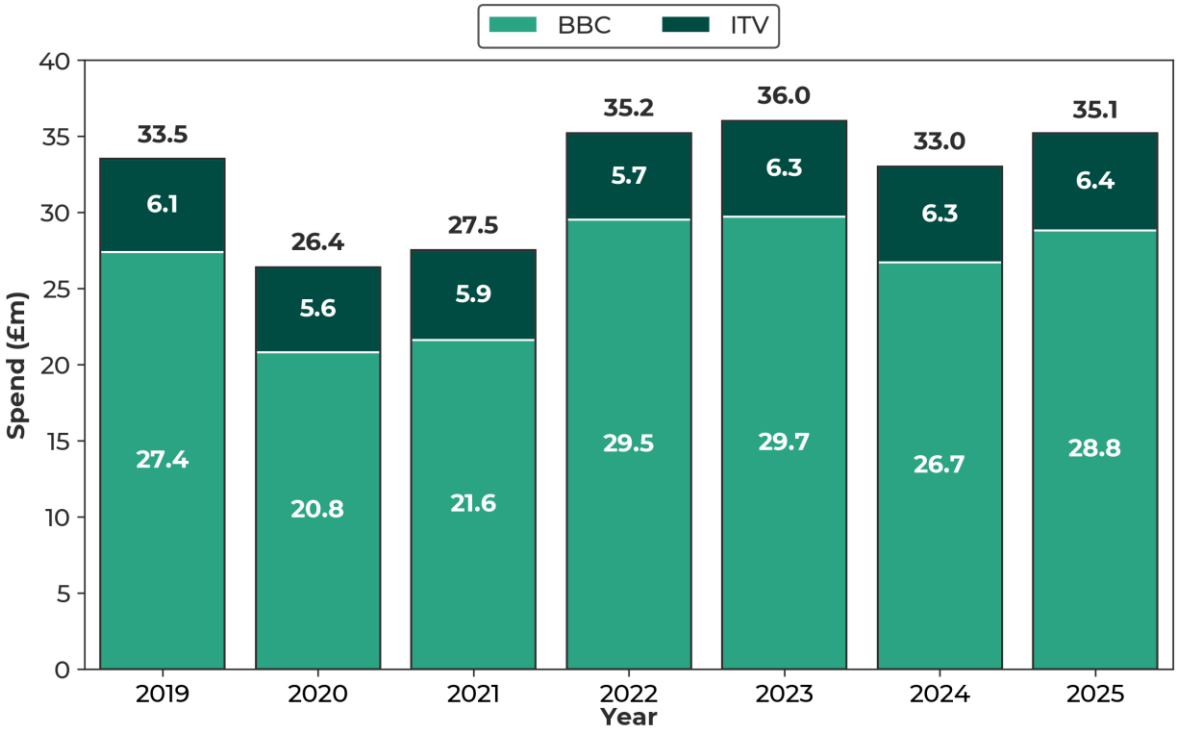
ITV has previously told the Sixth Senedd's Culture and Communications Committee that due to changes in the way people consume their media, the Channel 3 licences are declining in value:

> *We've seen over the last five, 10 years or so, since the last licences were granted, a drift away from consumption of broadcast linear television, and that's had two effects. It's reduced the value of DTT* (Digital Terrestrial Television) *capacity. So, we know that, to buy capacity for a channel on terrestrial television, on Freeview, the price to do that has gone down a lot, and, therefore, the benefit of having that spectrum for free has gone down too. And the value of prominence, arguably, has gone down, because, essentially, fewer people are using a linear grid electronic programme guide that you would expect to find on a traditional television set—so, literally, channel 1, channel 2, channel 3. Fewer people are accessing their content in that way. They're using apps, they're using all sorts of other methods of finding content, and the result of that is that the prominence is therefore less valuable. So, in aggregate, because of changing consumption habits, the licences are less valuable. But the truth is that's the history of ITV since competition was introduced, if you like, because the licence, originally, literally gave you a monopoly, because there was no other commercial competition back in the 1950s and 1960s, and so the trajectory has been about introducing competition to*

> *ITV, which, inevitably, has eroded the value of the licence over time.*

ITV's annual spend on non-network first-run UK-originated content for Wales was £6.1 million in 2019 and £6.4m in 2025 (a real-terms decrease of about 18%).

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



Source: Ofcom, Media Nations Wales 2026

Network content made in Wales

In 2024 the Sixth Senedd's Culture and Communications Committee recommended:

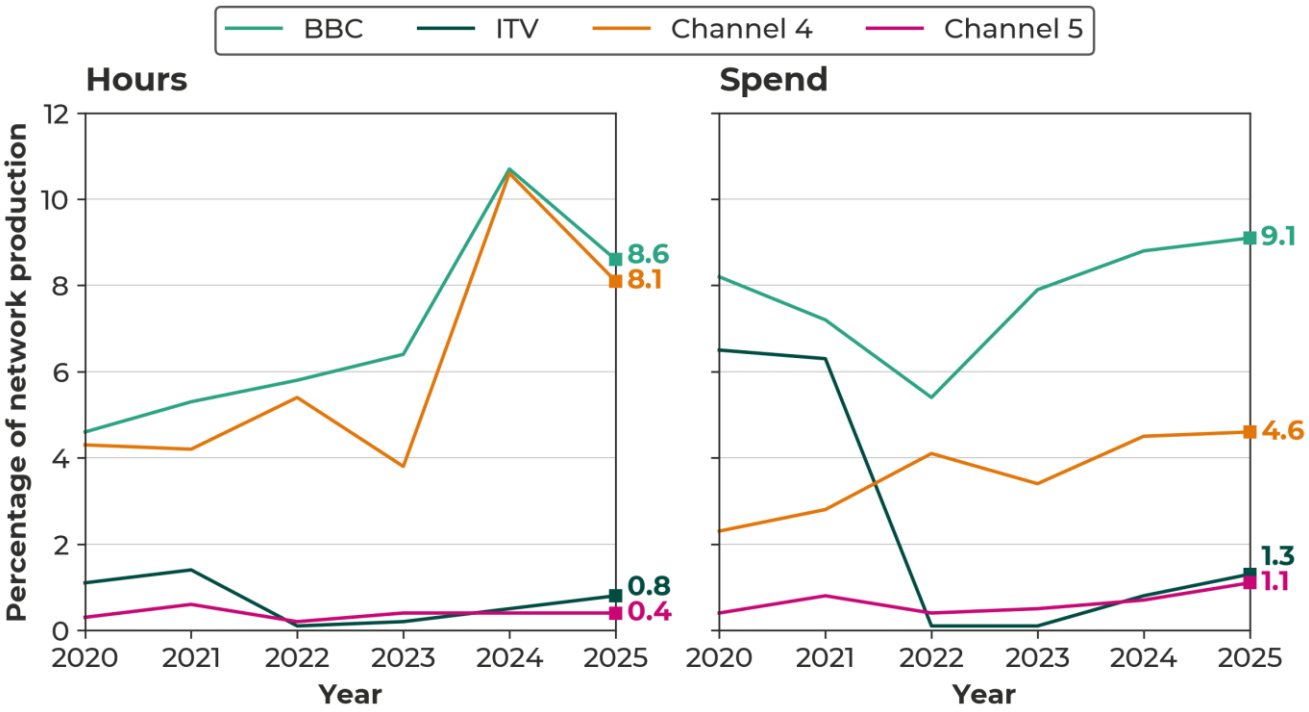
- Ofcom should include a requirement for the Channel 3 licence in Wales to produce a greater proportion of network content in Wales. It should report to back to the Committee outlining how it will do this.

The current channel 3 licence in Wales, which was renewed in 2024 for ten years, does not include this requirement. The Ofcom response to the Committee's report said:

The Channel 3 licence for Wales imposes obligations on the licence holder to produce and broadcast given amounts of specific regional content in and for Wales (see Channel 3 Background section above). *The licence also includes a requirement that at least 35 per cent of originated network content is made outside of the M25 area. However, we do not have a power to specify, as part of that condition, particular geographic locations outside of the M25 area where such production should take place.*

In 2025, ITV Wales's network spend in Wales was 1.3% of its UK spend:

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



Source: Ofcom, Media Nations Wales 2026

S4C

Background

Welsh language broadcaster S4C launched in 1982, following legislation passed by the UK Parliament. It originally carried English-language content from then newly-launched Channel 4, but following digital switchover in 2010, broadcasts solely in Welsh.

Responsibility for S4C, along with the rest of broadcasting, is reserved to Westminster. S4C operates according to a remit set by the UK Government, which has a statutory duty to ensure that S4C receives "sufficient" funding.

Funding

Around 98% of S4C's total income comes from the licence fee, with the remaining 2% coming from commercial activities. Before April 2022, funding was provided directly by the UK Government.

In January 2022, the then Secretary of State determined that S4C would receive approximately £88.85 million in Licence Fee funding from 1 April 2022, with this amount to increase annually in line with CPI inflation from 1 April 2024 until the end of the settlement period (31 March 2028).

In 2025-26 S4C received £97.6 million from the licence fee.

In 2010, S4C received £102 million from the UK Government. This means that since then the channel has faced a real-terms cut of about 40%.

Relevant recommendations in the Sixth Senedd's Culture and Communications Committee's State of Play report included:

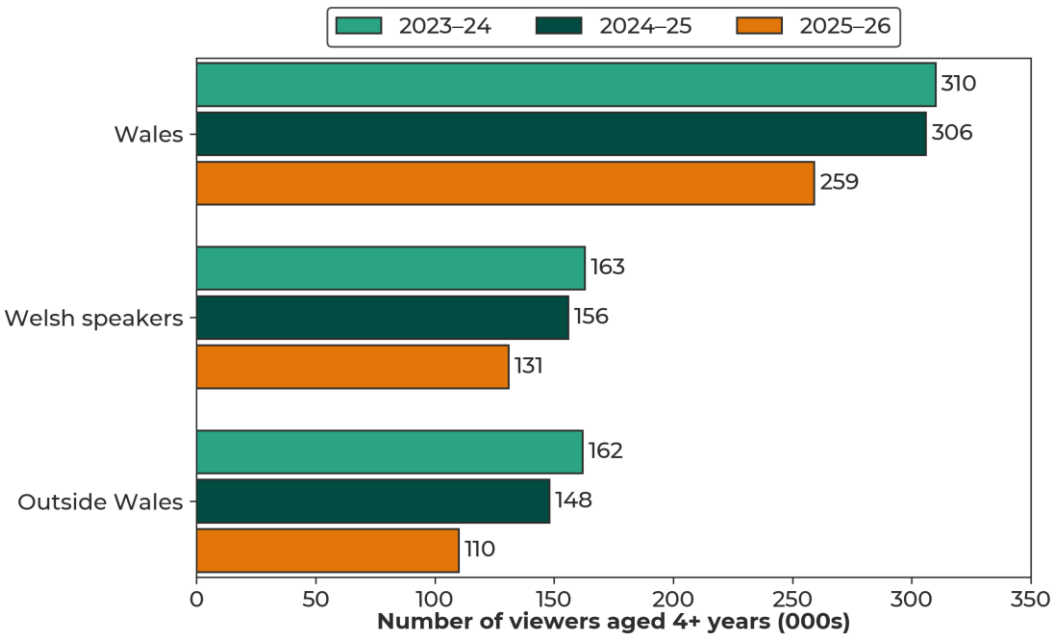
- The UK Government should significantly increase S4C's funding. This should include indicative funding for a number of years to enable S4C to adequately plan for the future.
- The UK Government should consider funding S4C according to a formula, to give S4C greater certainty over future funding. This formula could include linking S4C's funding to measures of inflation such as CPI or RPI, or have reference to overall licence fee revenue. It should include a ratchet mechanism to ensure that funding for S4C does not fall in real-terms.

In its response the UK Government said it had launched a review of the licence fee funding model, which will "explicitly consider the funding arrangements of Welsh language broadcasting". It noted that S4C's funding was now "funded by a formula linked to CPI inflation for the rest of this Charter period, until 2028".

Performance

S4C's weekly reach shows a continued decline:

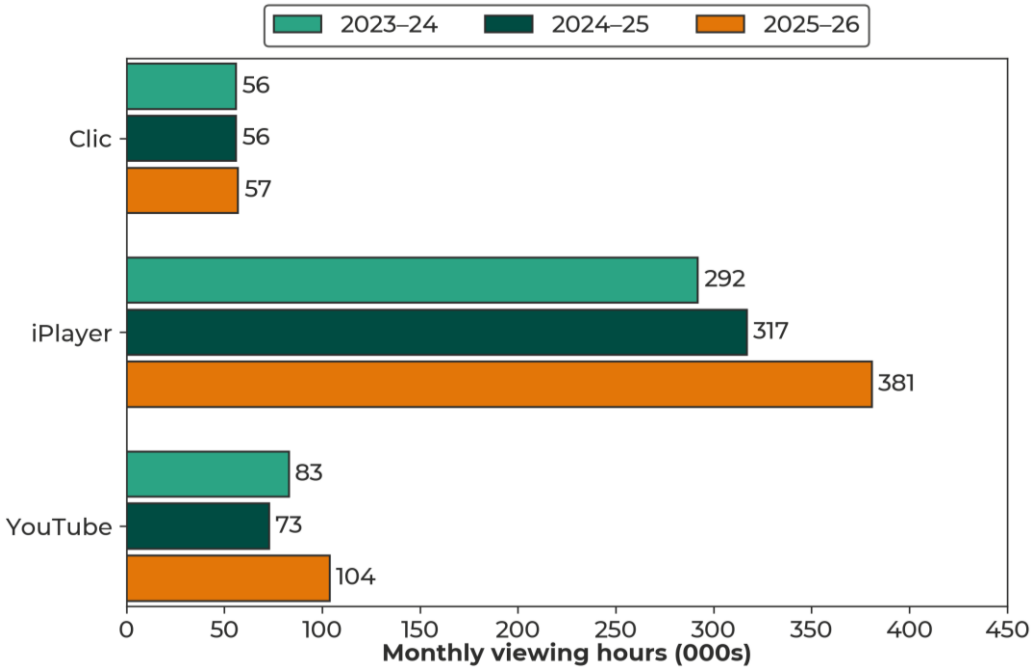
Weekly reach



Source: BARB/ S4C Annual Report 2025-26

At the same time, viewing of S4C content on streaming platforms continues to rise:

Hours of S4C content viewed on S4C Clic, BBC iPlayer and YouTube



Source: BARB/ S4C Annual Report 2025-26

Radio

Ofcom regulates broadcast radio services (i.e. not online-only services).

Commercial radio

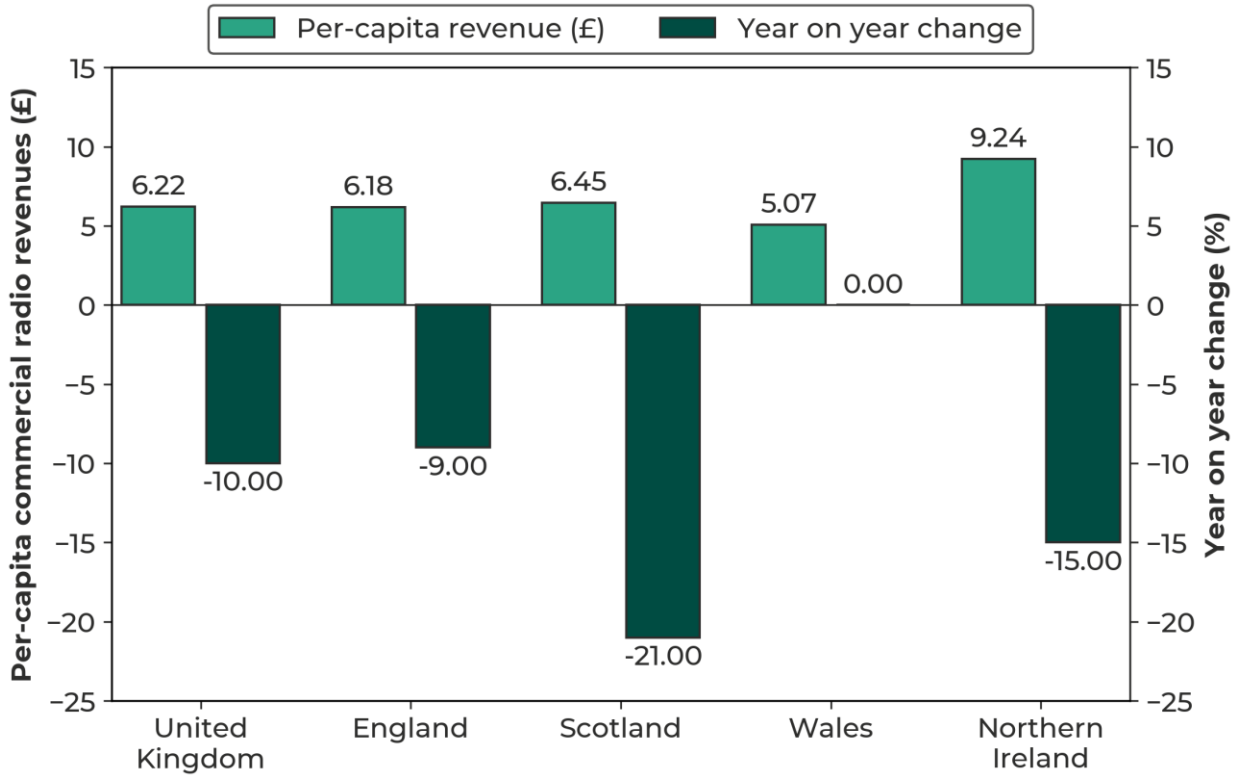
Until the mid-2000s, all local commercial services had specific requirements to meet, set out in a 'format', which prescribed when their services must provide local news, other local content such as weather and travel, and when the presenter must be based in the local area. Following legislation, Ofcom has progressively removed these requirements, as commercial radio broadcasters face increasing competition from unregulated online radio and streaming services.

The Media Act 2024 reduced regulatory requirements on commercial radio stations, by removing requirements about the 'character of service' of each service (including the types of music they play) and requirements that local material, including locally-made programming, must be broadcast.

However, it has also put in place new requirements relating to the provision of local news and information. In January 2025, Global announced that it would cease broadcasting in Welsh and would move to a single base in Cardiff, closing its Capital Cymru facilities in north Wales. Nation Broadcasting handed back its FM licence for Ceredigion in July 2025. This means that listeners to Nation Radio in this area will now need to access the service via DAB (Digital Audio Broadcasting) or online.

Commercial radio revenues are consistently lower in Wales than elsewhere in the UK:

Per-capita commercial radio revenues, by nation: 2024 (£)



Source: Ofcom, broadcaster returns. These figures solely relate to total relevant turnover reported against AL licences (local analogue commercial) and in relation to advertising includes both local and national advertising revenues, i.e., not only the revenues which relate to adverts aimed at the specific nation. As mid-year 2024 population estimates were not available at the time of publication, 2023 mid-year population data has been used for both 2023 and 2024.

Source: Ofcom Media Nations Wales 2025 (NB. Equivalent figures are not in Ofcom's Media Nations Wales 2026)

Community radio

Community radio services have specific requirements around content, such as local news and locally-produced content. They also have specific social gain requirements, such as participation in the service and provision of training. They must be operated on a not-for-profit basis.

There are 11 community radio services broadcasting their services in Wales:

- BGfm (Brynmawr),

- Bro Radio (Vale of Glamorgan),
- GTFM (Pontypridd, Aberdare and surrounding areas),
- Môn FM (Anglesey),
- Newport City Radio (Newport/Chepstow),
- Premier Radio (Wrexham),
- Radio Cardiff (Cardiff),
- Rhondda Radio (Rhondda Valleys),
- Rookwood Sound Radio (Cardiff),
- SA Radio Live/Welsh Coast Radio (Tircoed), and
- Sound Radio (Towyn and Rhyl).

Eight of these stations have Welsh language commitments in their licences.

Small-scale DAB (Digital Audio Broadcasting)

Small-scale DAB offers an opportunity for smaller and specialist stations to broadcast content, including in the Welsh language. It provides a low-cost route for local commercial, community and specialist music services to broadcast on terrestrial digital radio to a relatively small geographical area. There are now six small-scale DAB multiplexes on air in Wales.

4. Ofcom

Ofcom is the UK's communications regulator. It regulates the BBC and S4C, ensures that ITV Cymru Wales complies with the terms of its licence, and licences radio services.

In March 2026 the Sixth Senedd's Culture and Communications Committee recommended:

- Recommendation 1: Ofcom should use both its regulatory levers and substantial influence to improve the provision of media content for Wales.
- Recommendation 2: Ofcom should provide current staffing levels for its offices across the UK, and explain how the seniority of staff in Wales compares with other offices across the UK. It should provide the median pay for its Cardiff office, and how this compares with the UK Ofcom median pay.
- Recommendation 3: Ofcom should increase its number of employees in Wales.
- Recommendation 4: Ofcom should work with ITV to increase its UK network spend in Wales.
- Recommendation 5: Ofcom should revise the draft code of practice on prominence and accessibility on connected television platforms so that UK PSBs receive equivalent prominence as they do at present under the Electronic Programme Guide code.
- Recommendation 6: Ofcom should revise the draft code of practice on Prominence and accessibility on connected television platforms so that S4C receives greater prominence within Wales than it does across the UK as a whole. S4C should also receive prominence across the UK, in recognition of its audiences outside of Wales.
- Recommendation 7: Ofcom should make it clear that it supports PSBs in their negotiations with television platforms. To this end, Ofcom should provide clearer guidance, so that there is less scope for disagreement between PSBs and platforms.

- Recommendation 8: Ofcom should continuously review UK network news coverage of devolved policy issues. It should report to back to this Committee (and a future Senedd committee) outlining how it will do this.

Ofcom's response can be read here.

Ofcom in Wales

The Communications Act 2003 requires Ofcom to establish and maintain offices in England, Wales, Scotland, and Northern Ireland. In Wales, Ofcom has an office located in Cardiff. It is led by a Director of Nations who is supported by a Regulatory Affairs team to represent Welsh interests across Ofcom's remit and a Welsh Language Unit to ensure that Ofcom complies with its responsibilities under the Wales Language Measure 2011.

As of January 2026, Ofcom employed 1,714 people UK-wide, with 28 staff based in Wales, including 26 in the Cardiff office and 2 homeworkers, representing 1.6% of the total headcount.

The Ofcom Advisory Committee advises Ofcom on communications matters in relation to Wales.

5. Welsh Government

Although broadcasting is reserved to Westminster, the Welsh Government has broad powers (conferred upon the Welsh Ministers under section 60 of the Government of Wales Act 2006) to do anything it considers appropriate to promote or improve the economic, social or environmental well-being of Wales.

The Welsh Government funds film and television productions through its creative industries division, Creative Wales.[2] The Welsh Government has Memoranda of Understanding with Ofcom, the BBC and S4C (regarding the Welsh Government's Welsh language strategy)

Creative Wales has Memoranda of Understanding with the BBC and S4C, focusing on work to develop the creative industries.

Wales Public Interest Journalism Working Group

In 2023, the previous Welsh Government published a report (Of and for Wales: towards a sustainable future for public interest journalism) from its Public interest journalism working group. This group of experts and industry representatives had a remit to, among other things, "focus attention and advice on supporting the long-term sustainability of Welsh and English language journalism". Its report said:

> *The Welsh Government should declare public interest journalism as defined in this report as a public service and establish a Wales Media Institute. The Institute should have a broad remit to engage citizens, serve audiences and support and improve public interest journalism in Wales, and be the vehicle for a series of specific strategic funding mechanisms to ensure the long-term sustainability of the sector in Welsh, in English and multilingually.*

It recommended that the Wales Media Institute should have:

> *A budget of at least £1m a year to arms-length support for public interest journalism.*

[2] Details of investments made under the Welsh Government's Welsh Screen Fund are available in written evidence provided to the Sixth Senedd's Culture and Communications for its scrutiny of the Welsh Government's 2026-27 Draft Budget.

The previous Welsh Government did not substantively respond to this report, though it said it would "take forward these recommendations where possible, in the context of ongoing financial challenges".

6. Network news analysis

A perennial complaint in discussions around broadcasting in Wales is the weakness of news and current affairs coverage. In 2021, the Fifth Senedd's Culture, Welsh Language and Communications Committee said (in its report on the devolution of broadcasting):

> *Our inquiry revealed widespread dissatisfaction with the supply of media content for Welsh audiences. News and current affairs content was the biggest shortfall identified.*

Since then, several studies have analysed the provision of network news about Wales.

In 2022, Ofcom published a report by Professor Stephen Cushion of Cardiff University and Dr Richard Thomas of Swansea University looking at how well UK network news providers report devolved policy issues on television and online. It said:

> *UK network news providers have enhanced their coverage of devolved issues compared to previous findings in 2015 and 2016. This was largely as a consequence of Covid-19, which brought devolution to the fore of UK politics.*
>
> *Interviews with senior news editors revealed that newsrooms have become increasingly conscious of reporting devolved policy differences in network news.*
>
> *Overall, while the study found more coverage of the devolved institutions, it also identified missed opportunities to explain different Government decisions across England, Scotland, Wales and Northern Ireland.*

In 2026, the Welsh Government part-funded a report by Professor Stephen Cushion of Cardiff University looking at how network news, including social media posts, covers devolved politics. This found that:

> *When posts had clear devolved relevance, over seven in ten posts (73%) did not state whether the issue applied to England only, such as in stories about health, education and transport.*

> *Over half the items on TV news (57.4%) did not provide any clarity about the story being relevant to a specific nation, such as England, or England and Wales. For example, most broadcasters failed to mention that the "National Grooming Gangs inquiry" only related to England and Wales, as Scotland and Northern Ireland are responsible for policing and criminal justice.*
>
> *Just over a third of all online articles (35.3%) did not provide any clarity about the story being relevant to either England, Scotland, Wales or Northern Ireland. For example, some online stories covered the ongoing junior doctors' strikes without stating they were happening in England only.*

The 2026 report included the following recommendations:

> *Since coverage of the nations and devolved politics in UK-wide news media has been a constant concern over the past two decades, the Welsh Government should fund an independent bi-annual review of network news output and people's understanding of Welsh politics. This will ensure the issue remains on the radar of broadcasters, regulators and the wider public, with debates informed by robust rather than anecdotal evidence.*
>
> *While Ofcom may not have the resources to regularly monitor network news coverage or undertake audience studies about public knowledge of devolution, the regulator could remind broadcasters of the importance of accurately reporting the UK's constitutional arrangements in official guidance issued ahead of elections or in other periodic reviews and assessments of news output.*

7. Listed sporting events

The Broadcasting Act 1996, as amended by the Media Act 2024, gives the Secretary of State for Digital, Culture, Media and Sport the power to draw up a list of sporting events of "national interest". This means the broadcast rights to these events must be offered to public service broadcasters (PSBs) on "fair and reasonable terms".

Listing does not mean that an event must be shown on free-to-air television. It just means that if the rights-holders offer the rights for sale they must give PSBs first-refusal to bid for them on "fair and reasonable terms".

There are two groups of listed events:

- Group A events have full live-coverage protected, and include the football European Championships, the Olympics and Wimbledon.
- Group B events just have "secondary coverage" (edited highlights or delayed coverage) protected, and include Six Nations rugby matches involving home nations.

The Sixth Senedd, the Sixth Senedd's Culture and Communication Committee, the previous Welsh Government and the previous House of Commons Welsh Affairs Committee have all called for extra protection for Six Nations rugby matches so viewers in Wales can watch them on free-to-air television. The UK Government has responsibility for the regulation of broadcasting and all of these calls were rejected by the previous UK Government.

A perfect-storm of market dynamics have led to an increasing number of sporting events that used to be available to TV licence-fee payers going behind a paywall.

PSBs face budget constraints, whether from long-term cuts to the licence fee or a downturn in the advertising market, which are compounded by production cost inflation. The value of rights has increased with the entrance to the market of global streaming services with deep pockets.

In 2021, the BBC and S4C lost the live broadcast rights for the rugby Autumn Internationals, which were available on subscription-service Amazon Prime. World Rugby CEO Alan Gilpin has repeatedly speculated that future men's Rugby World Cup matches could go behind a paywall.

In March 2025 the BBC and ITV agreed a new four-year deal for the Men's Six Nations to remain on free-to-air TV until 2029.

The 2026 Plaid Cymru manifesto said:

> *Events of national importance to Wales, such as the Rugby Six Nations, should remain free-to-air on television.*

This commitment is not in the subsequent Programme for Government.