

# Wales

The BBC's expenditure in Wales during 2015/16 was £177.7 million across all services and platforms. Total expenditure represents an increase of £8.5 million on network content and £1.7 million on local content when compared to the previous year. Network TV in 2015/16 included BBC Wales productions *The Game* and the *Sherlock Special* along with *Casualty*, *Doctor Who*, *Crimewatch*, *Coast*, *Bargain Hunt* and a number of Factual productions for Daytime television.

In terms of volume for local content there has been little change, around 700 hours of English language TV content in both years (including repeats) and a small increase of 14 hours on content for S4C relating to repeats of *Pobol y Cwm*. Similarly the BBC Wales radio services are relatively static year on year with Radio Wales transmitting 7,439 hours in 2015/16 and Radio Cymru at 7,000 hours.

The reduction in time spent by BBC audiences consuming our television output in 2015/16 reflects wider trends and changes in audience behaviour.

The following pages provide additional detail on the BBC's performance in Wales, including income, high level expenditure and performance across services provided in Wales.

## Income

These numbers are estimated as figures for each nation and have been calculated by applying the proportion of licenced premises to the total number of licences in force. The exact number of licences in force varies on a daily basis. The number of licenced premises are different to the number of licences in force as, in some cases, a premise may need more than one licence. Figures exclude concessionary licences for those living in residential care.

|                         | 2016<br>£m | 2015<br>£m |
|-------------------------|------------|------------|
| <b>Estimated income</b> |            |            |
| UK                      | 3,742.8    | 3,735.4    |
| Wales                   | 186.5      | 186.0      |

## Expenditure by service

Direct and indirect spend relating to programmes produced in the nation.

|                                | 2016<br>£m   | 2015<br>£m   |
|--------------------------------|--------------|--------------|
| <b>Network content</b>         |              |              |
| TV (inc. Sport and Childrens)* | 69.4         | 60.8         |
| Radio                          | 3.8          | 3.8          |
| Online & Red Button            | 1.5          | 1.6          |
| <b>Total network spend</b>     | <b>74.7</b>  | <b>66.2</b>  |
| <b>Local content</b>           |              |              |
| TV – BBC One                   | 21.7         | 21.4         |
| TV – BBC Two                   | 12.0         | 10.5         |
| Radio Wales                    | 15.1         | 15.5         |
| Radio Cymru                    | 14.2         | 14.1         |
| Online & Red Button            | 6.4          | 6.2          |
| <b>Total local spend</b>       | <b>69.4</b>  | <b>67.7</b>  |
| National Orchestra of Wales    | 4.7          | 4.6          |
| S4C**                          | 28.0         | 27.1         |
| Development                    | 0.9          | 1.2          |
| <b>Total</b>                   | <b>177.7</b> | <b>166.8</b> |

\* Network content is attributed on an Ofcom basis, which excludes foreign productions.

\*\* This represents the television programmes commissioned and produced by BBC Wales and supplied to S4C (i.e. excluding programmes commissioned directly by S4C from other producers).

## TV hours

### Local opt-out hours<sup>^</sup> (including repeats) on BBC One and BBC Two

|  | 2016<br>Hours | 2015<br>Hours |
|--|---------------|---------------|
| Drama, Comedy, Entertainment, Music & Arts | 31            | 27            |
| Daily, Weekly News and Current Affairs     | 400           | 390           |
| Sport & Leisure                            | 168           | 166           |
| Education, Factual & Religion              | 98            | 117           |
| Childrens                                  | –             | –             |
| <b>Total</b>                               | <b>697</b>    | <b>700</b>    |

<sup>^</sup> Television content commissioned specifically for audiences in the nation.

### S4C\*

|  | 2016<br>Hours | 2015<br>Hours |
|--|---------------|---------------|
| Drama, Comedy, Entertainment, Music & Arts** | 246           | 220           |
| Daily, Weekly News and Current Affairs       | 263           | 273           |
| Sport & Leisure                              | 98            | 99            |
| Education, Factual & Religion                | 9             | 8             |
| Childrens                                    | –             | 2             |
| <b>Total</b>                                 | <b>616</b>    | <b>602</b>    |

\* This represents the television programmes commissioned and produced by BBC Wales and supplied to S4C (i.e. excluding programmes commissioned directly by S4C from other producers).

\*\* This includes repeats where BBC Wales has incurred a charge associated with the transmission of the programmes. The 2016 hours include 100 hours of repeats (including 77 hours of *Pobol y Cwm*) and the 2015 hours include 38 hours of repeats (including 35 hours of *Pobol y Cwm*).

## Radio hours

### BBC Radio Wales

|                          | 2016<br>Hours | 2015<br>Hours |
|--------------------------|---------------|---------------|
| News and Current Affairs | 2,168         | 2,206         |
| General                  | 5,271         | 5,217         |
| <b>Total</b>             | <b>7,439</b>  | <b>7,423</b>  |

### BBC Radio Cymru

|                          | 2016<br>Hours | 2015<br>Hours |
|--------------------------|---------------|---------------|
| News and Current Affairs | 1,418         | 1,323         |
| General                  | 5,582         | 5,613         |
| <b>Total</b>             | <b>7,000</b>  | <b>6,936</b>  |

## Headcount



















Average headcount reflects those individuals employed to directly support the services produced in Wales.

|  | 2016<br>Number | 2015<br>Number |
|--|----------------|----------------|
| Average number of persons employed in the year | 1,158          | 1,145          |

Average headcount of individuals based in Wales across all services including support functions.

|  | 2016<br>Number | 2015<br>Number |
|--|----------------|----------------|
| Average number of persons employed in the year | 1,394          | 1,444          |

## Wales' performance by service

|   |  | Content (£m)<br>We spent a total of £103.1 million on these services last year in Wales | Reach (%)<br>Wales population who use the service each week  | Time spent watching a channel each week (h:m)<br>Length of time the average Wales viewer spent each week with the channel |
|---|--|---|--|---|
| <b>Television</b>   |  |   |  |   |
|    | BBC One is our flagship service and the UK's most popular television channel. It unites and inspires the nation with high-quality programmes across a range of genres which includes news and current affairs, drama, comedy, entertainment and factual. | <b>£77.1m</b><br>2014/15: £68.0m  | <br><b>75.9%</b><br>2014/15: 77.5%              | <br><b>08:39</b><br>2014/15: 08:53     |
|    | BBC Two is a mixed-genre channel with programmes of depth and substance. It includes the greatest amount and range of knowledge-building programming on the BBC, complemented by distinctive comedy, drama and arts programming.                         | <b>£22.2m</b><br>2014/15: £15.2m  | <br><b>49.9%</b><br>2014/15: 51.4%              | <br><b>03:17</b><br>2014/15: 03:19     |
|   | BBC Three is constantly innovating to provoke thought and to entertain audiences from 16-year-olds to 30-somethings with original comedy, drama and factual programming that celebrates new British talent.  | <b>£0.4m*</b><br>2014/15: £1.4m   | <br><b>19.5%<sup>^</sup></b><br>2014/15: 20.8% | <br><b>01:50</b><br>2014/15: 01:54    |
|  | BBC Four aims to be British television's most intellectually and culturally enriching channel, offering an ambitious range of UK and international arts, music, culture and factual programmes.  | <b>£3.4m</b><br>2014/15: £3.3m  | <br><b>13.0%</b><br>2014/15: 13.2%            | <br><b>01:41</b><br>2014/15: 01:44   |
|  | The CBBC channel offers a distinctive mixed schedule for 6- to 12-year-olds, with mainly UK programmes served in a stimulating, creative and enjoyable environment.  | —<br>2014/15: £3.7m   | <br><b>4.4%</b><br>2014/15: 4.7%              | <br><b>02:35</b><br>2014/15: 02:21   |
|  | CBeebies provides a mix of high-quality, mostly UK-produced, programmes designed to encourage learning through play in a consistently safe environment for children under six.   | —<br>2014/15: £1.1m   | <br><b>6.6%</b><br>2014/15: 9.4%              | <br><b>04:19</b><br>2014/15: 04:22   |

















Reach definition: 15+ minutes consecutive for all channels and services and audiences aged 4+ (TV).

Source: BARB (TV reach and time spent – all channels include their simulcast HD channel where applicable).















<sup>^</sup>BBC Three: among its target group of 16-34 year-olds reach was 25.2%. Owing to the channel moving online, BBC Three BARB data to 14/02/2016.

\*BBC Three as a linear service closed in March 2016, being replaced with an online service from February 2016. Spend on BBC Three Online formed part of the BBC Online & Red Button service from that point onwards.

## Wales' performance by service

|                                      |  | Content (£m)<br>We spent a total of £3.8 million on these services last year in Wales | Reach (%)<br>Wales population who use the service each week  | Time spent listening to a service each week (h:m)<br>Length of time the average Wales listener spent each week with the service |
|--------------------------------------|--|---|--|---|
| <b>Radio</b>                         |  |   |  |   |
| <b>BBC RADIO 1</b>                   | BBC Radio 1 broadcasts a distinctive mix of new music and entertainment for 15- to 29-year-olds as well as providing tailored news, documentaries and advice campaigns for young adults.   | —<br>2014/15: —   | <br><b>24.9%+</b><br>2014/15: 26.4%   | <br><b>07:49</b><br>2014/15: 07:12           |
| <b>BBC RADIO 1Xtra</b>               | BBC 1Xtra plays the best in contemporary black music, with a strong emphasis on delivering high-quality live music and supporting new artists.   | —<br>2014/15: —   | <br><b>2.0%^</b><br>2014/15: 1.8%     | <br><b>02:20§</b><br>2014/15: 02:55          |
| <b>BBC RADIO 2</b>                   | BBC Radio 2 broadcasts a unique mix of music and speech programmes covering a diverse mix of live pop and rock, comedy, documentaries and religious output, as well as running social action campaigns to over 14 million listeners.       | —<br>2014/15: —   | <br><b>36.6%**</b><br>2014/15: 38.2% | <br><b>13:30</b><br>2014/15: 12:26          |
| <b>BBC RADIO 3</b>                   | BBC Radio 3 centres on classical music, around which it provides a broad spectrum of jazz, world music, arts programmes, religion and drama. There is a strong emphasis on musical performance across the UK.                              | <b>£2.6m</b><br>2014/15: £2.6m  | <br><b>3.4%</b><br>2014/15: 3.1%    | <br><b>05:42</b><br>2014/15: 06:43         |
| <b>BBC RADIO 4</b>                   | BBC Radio 4 is a mixed-speech radio station, offering in-depth news and current affairs and a wide range of other speech programmes including drama, readings, comedy, factual and magazine programmes.                                    | <b>£1.2m</b><br>2014/15: £1.2m  | <br><b>16.6%</b><br>2014/15: 18.0%  | <br><b>11:51</b><br>2014/15: 11:43         |
| <b>BBC RADIO 4extra</b>              | Originally launched in 2002 as BBC 7, the station was relaunched in April 2011 as BBC Radio 4 extra. The digital-only network is the principal outlet for the BBC's archive of speech entertainment, including comedy, drama and readings. | —<br>2014/15: —   | <br><b>3.0%</b><br>2014/15: 3.0%    | <br><b>07:06</b><br>2014/15: 05:14         |
| <b>BBC RADIO 5 live</b>              | BBC Radio 5 live broadcasts continuous news and live sports coverage, bringing major news stories and sports events to its listeners as they happen, and providing context through wide-ranging analysis and discussion.                   | —<br>2014/15: —   | <br><b>9.1%</b><br>2014/15: 8.3%    | <br><b>06:33</b><br>2014/15: 06:02         |
| <b>BBC RADIO 5 live sports extra</b> | BBC Radio 5 live sports extra brings a greater choice of live action to sports fans by extending live coverage of various sporting events.   | —<br>2014/15: —   | <br><b>2.8%</b><br>2014/15: 1.7%    | <br><b>03:44</b><br>2014/15: 04:03         |

## Wales' performance by service

|  | Content (£m)<br>We spent a total of £3.8 million on these services last year in Wales | Reach (%)<br>Wales population who use the service each week   | Time spent listening to a service each week (h:m)<br>Length of time the average Wales listener spent each week with the service |
|--|---|---|---|
| <b>Radio</b>   |   |   |   |
|  <p>BBC 6 Music is a digital radio station that entertains lovers of popular music with a service that celebrates the alternative spirit of popular music from the 60s to the present day, complemented by music news and documentaries.</p>  | —<br>2014/15: —   |  <p><b>3.1%</b><br/>2014/15: 3.8%</p>      |  <p><b>08:11</b><br/>2014/15: 09:41</p>      |
|  <p>BBC Asian Network offers speech and music appealing to British Asians, with a focus on news and current affairs. It broadcasts mainly in English, but does offer some programmes in other languages.</p>  | —<br>2014/15: —   |  <p><b>0.1%</b><br/>2014/15: 0.6%</p>      |  <p>*<br/>2014/15: *</p>                     |
| <p>Reach definition: 15+ minutes for all stations and audiences aged 15+.<br/>                     Source: RAJAR (Radio reach and time spent).<br/>                     Excludes programme 'Coming up on 5 live sports extra'.<br/>                     + BBC Radio 1: among its target group of 15-29 year-olds reach was 50.6% and time spent was 07:17.<br/>                     ^ BBC Radio 1Xtra: among 15-24 year-olds reach was 7.5%.<br/>                     **Radio 2: among its target group of 35+ year-olds reach was 42.4% and time spent was 14:47.<br/>                     * Sample size for time per user is too low to report.<br/>                     § Lower sample size may be responsible for greater variability in the data.</p> |   |   |   |
| <b>News</b>  |   |   |   |
|  <p>The BBC News Channel is a 24-hour impartial and independent news service offering breaking news, analysis and insight. It provides fast and comprehensive coverage of local, UK and international events as they unfold.</p>  | —<br>2014/15: —   |  <p><b>12.5%*</b><br/>2014/15: 12.4%</p> |  <p><b>03:13</b><br/>2014/15: 03:10</p>    |
|  <p>BBC Parliament is the UK's only channel dedicated to politics. It shows debates and committees from Westminster, Holyrood, Stormont, Cardiff Bay and Strasbourg as well as political programmes from across the UK.</p>   | —<br>2014/15: —   |  <p><b>0.7%*</b><br/>2014/15: 0.5%</p>   |  <p><b>01:53</b><br/>2014/15: 01:48</p>    |
| <p>Reach definition: 15+ minutes for all channels and services and on audiences aged 4+.<br/>                     Source: reach and time spent BARB (TV).<br/>                     *Three-minute reach for BBC News Channel and BBC Parliament – in line with industry standards – would be 16.5% and 1.4% respectively (18.6% and 1.6% among 16+ population).</p>   |   |   |   |
| <b>Digital</b>   |   |   |   |
|  <p>BBC Online comprises the BBC's portfolio of online products on desktop, connected TV, mobile and tablet, including news, sport and weather; our children's services CBBC and CBeebies; and Knowledge &amp; Learning – as well as IP-delivered TV and radio services, with both live and on-demand programmes available on BBC iPlayer.</p>  | <p><b>£7.9m</b><br/>2014/15: £7.8m</p>  |  <p><b>62.8%</b><br/>2014/15: 67.3%</p>  | <p><b>n/a</b><br/>2014/15: n/a</p>  |
| <p>Reach definition: 3+ mins for both services, and on adults aged 16+.<br/>                     Source: Cross-Media Insight Survey by GfK, 16+, UK data financial years, Wales data calendar years.</p>   |   |   |   |