

Dawn Bowden AS/MS
Dirprwy Weinidog y Celfyddydau, Chwaraeon a Thwristiaeth
Deputy Minister for Arts, Sport and Tourism



Llywodraeth Cymru
Welsh Government

Ein cyf/Our ref DB/00552/23
Rhuanedd Richards
Director
BBC Wales

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16 October 2023

Dear Rhuanedd,

Thank you for your letter of 30 August in response to the publication of the Expert Panel's report on a Shadow Broadcasting and Communications Authority for Wales. I apologise for the delay in my response.

As you know, the Expert Panel was established as a result of the commitment in the Welsh Government's Co-operation Agreement with Plaid Cymru. It was tasked with providing recommendations and options to help strengthen Wales' media and support the development of plans for an effective and fit for purpose broadcasting regulatory framework for Wales. The Panel met regularly during the course of a year, engaged with a range of stakeholders, commissioned targeted research and sought evidence to inform its recommendations, which were set out in the report published in August.

As an independent report to the Welsh Government, any statements made in the Report reflect the views and position of Panel members. As such, it would not be appropriate for us to try to interpret the Panel's reasoning and respond directly to your request for further information on the basis of these statements. As the publication of the report marks the completion of the Panel's work we are also unable to seek the Panel's response to these. We do, however, thank you for bringing these points to our attention and we understand the role that BBC Wales is seeking to discharge as a player in that current framework. In particular, we welcome the further information you have provided to contextualise the figures quoted in the report related to programming hours for news and current affairs, education, factual and religion. This information will be extremely useful as we take forward our work, through the Co-operation Agreement, to consider the findings and recommendations set out in the report and agree next steps. No decision has yet been made. We are now considering a way forward following receipt of the Expert Panel's report and recommendations.

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

In terms of the request for information on the methodology and sample size of the Broadcasting Trends research report commissioned by the Panel, our understanding is that the main source of data for the analysis undertaken by Enders Analysis came from Broadcast Audience Research Board (Barb), where viewing data is derived from a UK representative panel of 5,300 households and around 12,000 individuals. The Barb data for Wales was based on a sample of 743 people, who represented an overall TV owning population of 2,911,073 people, meaning that every person in Barb's Welsh panel represented around 3,918 people.

The methodology for projections for video viewing in Wales until 2027 was estimated using Enders Analysis own model that was based on various industry sources. This primarily included Barb data on TV viewing and Comscore data on the usage of online video platforms, which track the trends in each category of viewing over a period of 12 years. Additionally, forecasts for Wales used a number of underlying assumptions, most of which are shared by the UK-wide viewing forecasts.

The modelling for the viewing data also used expanded demographic groupings (4+, 4-24, 25-44, 45-64, 65+) to account for the Barb panel's smaller sample sizes in Wales. The samples for ten-year age groups in Wales (Children, 16-24s, 25-34s, 35-44s and 45s-54s) were all smaller than 100 people, while all the demographic groupings used had samples of more than 200 people, except 4-24s, which had 138 people. The ONS' Welsh census and population projections were used in conjunction with Barb Establishment Survey data, to estimate Wales' population growth and demographic makeup to 2027.

Figures relating to radio listening used data from RAJAR via a household survey. National stations report on a quarterly sample of c. 25,000 diaries. When exploring demographic breakdowns, or data from smaller stations, sample sizes can become too small for meaningful analysis and there is much greater fluctuation between each survey than when looking at a UK level.

The definition of 'Welsh network programming' refers to all viewing of "opt out" programming on the Welsh regional network.

I understand that you recently met with the First Minister and discussed the report and your comments with him. As noted during that meeting, we are keen to continue to engage with stakeholders, including BBC Cymru, as we reflect on the contents of the report and respond to its recommendations. In the meantime, should you have any additional comments or if you would like to discuss this response further, my officials in Creative Wales would be happy to arrange a meeting with you.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Dawn Bowden'. The signature is fluid and cursive, with a large initial 'D' and 'B'.

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