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Chair, Culture, Communications, Welsh
Language, Sport and International Relations
Committee

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Annwyl Delyth

Future of public service broadcasting in Wales

Thank you for the opportunity to submit further written evidence as part of the Committee's on-going work on the future of public service broadcasting in Wales.

Our media landscape is undergoing rapid transformation. Traditional broadcasters in Wales are in a fierce battle for audience attention, while global tech giants flood the market with an ever-growing range of content. Services like YouTube and Netflix offer hyper-personalised experiences that are hugely popular with viewers and advertisers. In this environment, the Public Service Broadcasters are finding it much harder to fund the production and distribution of high-quality content, such as trusted news, to all audiences in all parts of the UK.

It is within this context that I'd like to draw the Committee's attention to developments that might be of interest to them and to update on the specific recommendations relating to Ofcom's work made in its State of Play report.

Future of broadcast television

Ofcom has a duty to review, at least every five years, whether the Public Service Broadcasters (PSBs) have collectively fulfilled their purposes and consider how public service television can be maintained and strengthened in the future.

In July 2025 we published our Review into Public Service Media (PSM) [*Transmission Critical: The future of Public Service Media*](#). In it we set out six outcomes that the broadcasting sector, the UK Government and Ofcom should urgently work towards to maintain and strengthen PSM. The recommendations were:

- Prominence and discoverability for PSM content on YouTube and potentially other third-party platforms;
- Stable and adequate funding to sustain a broad range of PSM content;
- Urgent clarity on the future of TV distribution;
- Ambitious partnerships amongst the PSBs;
- Investment in media literacy to support audiences; and
- Streamlined regulation that strips away any outdated unnecessary restrictions, protects audiences from harm wherever they are and to encourage growth and innovation.

We are continuing to monitor the progress of the six recommendations. For example, Ofcom is currently consulting on recommendations for how online platforms, broadcasters and other services can promote media literacy, which is a key part of the education curriculum in Wales.

In terms of the first recommendation, we have continued to meet with a wide range of stakeholders, including PSBs and platforms, to identify the opportunities and challenges for connecting audiences with PSB content on these services – in particular news and, where relevant, children’s content. As part of our work to understand how UK audiences can more easily see and find this content on the platforms they increasingly turn to, we are conducting research to better understand audience habits: how they engage with social video platforms and specifically with PSB content on them.

With regards to recommendation six, we know that much of the current legislative and regulatory framework is out of date given the rapid transformation in the sector. It was designed for a linear world, where audience choice was limited to switching channels or radio services. Although the Media Act will provide vital reforms to the regulatory system, more needs to be done so that audiences are protected wherever they are watching and listening to content, innovation and growth in the sector is supported and regulation is flexible for inevitable future market changes.

We published a call for input asking stakeholders for their views on how broadcast regulation needs to evolve in the short and longer term, focussing on licensing, advertising and a new video on demand code.

- **Licensing:** whether licence modifications are needed to support the future provision of PSM. In the longer term the licensing framework is likely to need fundamental reform so that it reflects a wholly digital environment, which would require legislative change.
- **Advertising:** the pace of change in the sector has fundamentally disrupted advertising funded models for the commercial PSBs and other broadcasters. We will look at the regulation relating to advertising to see where the current rules need updating or stripping out given the differences between linear and online services in the amount of advertising allowed and how it must be scheduled.
- **Content standards:** we are currently implementing the new Video on Demand code as required by the Media Act. Once we have put this in place, we will consider whether further changes to our rules are needed so that they apply fairly to content wherever it is watched or listened to and work alongside the Online Safety regime to keep audiences safe now and in the future.

Implementation of the Media Act

Since we last gave evidence to the Committee, the Media Act (the Act) became law in May 2024. The Act updates the regulatory framework which applies to Public Service Media (PSM) so that it can continue to support creativity and foster innovation in the interests of audiences. It brings into effect many of the recommendations made in our 2021 review of PSM, *SmallScreen: Big Debate*.

Our implementation work can be divided into two distinct themes:

- Updating existing regulation of the PSBs and commercial radio sectors to bring them in line with audience expectations and tech developments.
- Preparing for duties in new regulated environments such as voice assistants, new standards for VoD providers, and the prominence of PSB content on connected TV platforms.

Implementation of the Media Act in full is a significant exercise which we expect to complete in 2026. All our publications to date and updates on implementation progress can be found on our [website](#). Below we have set out some of the areas of work that might be of interest to the Committee:

Public Service Obligations

For the first time (from 1 Jan 2026), PSBs can now deliver their public service quotas using on-demand services as well as their main linear TV channels, and their broader public service remit obligations on a range of different services. This will include their delivery of regional production quotas. It also lifts the geographical restrictions on S4C allowing for it to be broadcast across the whole of the UK.

Listed Events

The listed events regime aims to ensure that coverage of certain major sporting or other events of national interest is widely available to audiences in the UK for free. The events on the list are designated by the Secretary of State and in some cases, Ofcom's consent is needed to show live coverage of a listed event.

The Media Act has brought about some changes to the listed events regime. Instead of being restricted to traditional broadcast channels, the updated regime will include any services which can be used to show live coverage of listed events to UK audiences – including Public Service Broadcasters' (PSBs) on-demand players, global media platforms and other internet-based streaming services. Last year, we consulted on updating the regime and we plan to issue our statement and final Code in early 2026, which we expect to take effect from mid-2026.

Prominence

The Act introduces new rules to ensure that public service content is available and easy to discover and watch on popular connected TV platforms. For the first time, certain connected TV platforms – those designated by the Secretary of State - must make sure that BBC iPlayer and any other PSB players designated by Ofcom, including S4C, along with their public service content, are available and prominent. We are due to consult on our Code of Practice and Guidance early in 2026.

Welsh language radio content

Under the Broadcasting Act 1990, Ofcom had a duty to regulate the formats of commercial radio services. A format set out the specific type of broadcast output a commercial radio station was required to deliver as a condition of its licence. Formats used to contain a description of its character of service, and more detailed requirements that included things like the genre of the music that must be played, how often a station was required to broadcast local news, how much locally-made programming a station needed to produce, and for some stations, other specific deliverables such as the language of the content.

Part Five of the Media Act removed the obligation for commercial radio stations to provide content required by the Format (other than local news), meaning that stations could choose to continue providing such content, including Welsh language content, if they so wished but did not need to. Some services have since ceased broadcasting in the Welsh language.

Part Five of the Media Act safeguarded the provision of local news and information by introducing new requirements on commercial radio services. Under the new statutory framework, we will include appropriate conditions in the stations' licences that will stipulate how and when the local news and information should be broadcast. There is also a new requirement that the news consists of, or includes, 'locally-gathered' news and this will require the journalist to be operating in the general area of the broadcast. Our consultation on how Ofcom should implement the new framework closed in October and we are planning to issue our Statement in February 2026.

Small-scale DAB offers a cost-effective opportunity for smaller and more specialist community and commercial stations to broadcast content in various areas across the UK. Our programme of work has resulted in six small-scale DAB multiplexes launching in Wales to date with another due to launch in Swansea next year.

There are also 11 analogue community radio services broadcasting in Wales, with eight of them broadcasting content in the Welsh language, and two of these services simulcasting their content on the relevant small-scale DAB multiplex.

The BBC provides Welsh language content through BBC Radio Cymru and is available across Wales on FM, DAB, digital TV and BBC Sounds. In January 2024 Ofcom approved the BBC's proposal to significantly extend BBC Radio Cymru 2's original Welsh-language hours, allowing it to become a full UK Public Service station, meaning much more music and content for Welsh speakers, from around 25 hours to 61.5 hours per week.

Update to the Committee since the publication of the State of Play report

Ofcom formally responded to the Committee's State of Play report in May 2024, but we'd like to update the Committee in relation to the report's recommendations. These include:

Recommendation 8

Ofcom should be ambitious in using its regulatory approach to drive improvements in the BBC's representation and portrayal of people in Wales. The BBC and Ofcom should report back to this Committee before the end of the Sixth Senedd.

Ofcom reviews the BBC's performance against the requirements of its Operating Licence on an annual basis in our Annual Report, which was published in November 2025, and also includes our second Periodic Review of the BBC's performance over the Charter period to date.

This year's Report contains additional information on the BBC's performance in Wales. The report draws on audience research, industry data and information from stakeholders which could provide useful information for the UK Government as it undertakes its Review of the BBC's Charter. All eight of our Annual Reports on the BBC are publicly available on Ofcom's website. Alongside the Annual Report, we have also published the findings of the second part of our [Review of Local Media in the UK](#), focusing on the BBC's impact on competition in the local news sector.

As we set out in our Public Service Media Review [Transmission Critical](#), the BBC sits at the heart of the PSM system. We set out how it should play to its strengths, while continuing to address areas where it needs to further improve, including by:

- deepening its engagement with less satisfied audiences – including those on lower incomes;
- innovating and taking risks to excite and engage, making content available where people want to watch it, such as on third party platforms; and
- building on the successes of its 'Across the UK' strategy to deliver a range of content made in and made for the diverse communities of the UK's nations and regions, while supporting their creative economies; and

- investing in media literacy to help audiences to critically engage with news and online services.

Recommendation 10

Ofcom should include a requirement in the Channel 3 licence for Wales to produce a higher proportion of network content in Wales and report back to the Committee on how it will achieve this.

We renewed the Channel 3 licence for Wales on the 1 January 2025, and it is valid for a ten-year term. The licence imposes obligations on the licence holder to produce and broadcast given amounts of specific regional content in and for Wales, which are 4 hours of news programmes and 1.5 hours of non-news programmes including 47 minutes of current affairs each week. As such it is the only other PSB, apart from the BBC, that has a requirement to produce news specifically for audiences in Wales, providing a plurality of choice for the viewer.

Under the Communications Act, Ofcom must set programming quotas for the PSBs requiring them to produce a minimum percentage of network shows outside London (M25 area.) In our latest Media Nations report, data for 2024 shows that for all the PSBs combined (outside of S4C), Wales accounted for six percent of qualifying network hours and five percent of spend outside of London.

Recommendation 12

Ofcom should continuously review UK network news coverage of devolved policy issues and report back to the Committee on how it will do this.

Ofcom regularly monitors audience consumption and attitudes to local, national, UK and international news in our Reviews of Local Media and as part of our Public Service Media.

Our 2024 a Review of Local Media in the UK looked at trends in online news on both the BBC and commercial providers and took into account the views of these and other stakeholders. We also engage regularly with the PSBs to discuss how they connect with audiences, including our research on devolved news reporting and audience satisfaction. Our News Consumption tracker includes specific questions about news consumption in the nations.

Recommendation 13

Ofcom should use its existing regulatory powers to improve coverage of devolved policy issues in network news and report back to the Committee on how it will do this.

Ofcom has a duty to review the extent to which the public service broadcasters collectively provide a comprehensive and authoritative coverage of news and current affairs both from around the world and in the different parts of the UK. There are also specific license requirements setting out the amount and scheduling of news that public service broadcasters have to provide, in addition to their duty to comply with the broadcasting code. We are a post-broadcast regulator and therefore we do not have any powers or duties in relation to the editorial choices that news programmes make. However, we do have a large research programme that allows us to monitor and evaluate the availability and consumption of a wide range of media including news. This includes research we [commissioned](#) by Professor Stephen Cushion, Cardiff University, to understand how UK network news providers reported devolved policy issues during the Covid-19 pandemic.

Recommendation 14

Ofcom should improve its analysis of media provision in Wales, including by increasing staffing levels in Wales.

Ofcom regularly analyses the markets it regulates, including tracking trends and developments into media provision. In July last year we published our flagship [Media Nations](#) report which sets out key trends in the media sector and shows how audiences are served by broadcast TV and radio as well as digital delivery including online video and audio streaming. This is an annual publication, much valued by our stakeholders, and this year again we published a specific report for Wales, alongside reports for the UK, Scotland and Northern Ireland.

Other annual research Ofcom conducts around media provision include: the BBC Performance Tracker and the BBC Children's Tracker which look at attitudes towards the BBC in the context of wider media provision; the PSM Tracker which looks at audience perceptions of the PSB providers; the News Consumption Survey which tracks audiences' attitudes and cross-platform use of news providers; the Online Nation which is an annual report that looks at what people are doing online, how they are served by online content providers and platforms, and their attitudes to and experiences of using the internet; and Audio and Video on Demand (VOD) surveys which provide greater insight on online media providers. We also measure media use, attitudes and understanding among adults and children in our Adults and Children's Media Literacy trackers.

Ofcom Wales plays a vital role in Ofcom's mission to make communications work for everyone across the UK. The Ofcom Wales team represents the unique communications interests of people in Wales within Ofcom's policymaking and also ensures that Ofcom's work is understood in Wales. We do this by holding events and by keeping in touch with the views and opinions of citizens and consumers, the regulated industries, and stakeholders more generally across Wales. We also ensure the views and expertise of Ofcom's Advisory Committee for Wales – together with the views and expertise of the Main Board, Content and Communications Consumer Panel members for Wales - also feed into our work.

Where relevant, we proudly promote and facilitate the use of the Welsh language in our work.

Within the Wales team, Ofcom has now established a distinct Welsh Language Unit whilst the Regulatory Affairs team in Wales has been strengthened with three members to represent Welsh interests across all the sectors Ofcom regulates. Some 25 colleagues now consider Cardiff as their main office, working across Ofcom's functions from broadcasting and spectrum to research and online safety. Ofcom's ambition is for 30% of its workforce to be based outside of London and it is on track to reach that target. There is further capacity within the office space to continue to grow the Welsh workforce to aid this target.

I hope that this response is helpful and look forward to giving evidence in person to the Committee in due course.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Philip Henfrey', written over a horizontal line.

Philip Henfrey