

Agenda – Culture, Welsh Language and Communications Committee

Meeting Venue:

Committee Room 2 – Senedd

Meeting date: 10 October 2019

Meeting time: 10.00

For further information contact:

Martha Da Gama Howells

Committee Clerk

0300 200 6565

SeneddCWLC@assembly.wales

1 Introductions, apologies, substitutions and declarations of interest

(10.00)

2 Annual Scrutiny of ITV Cymru Wales

(10.00 – 11.00)

(Pages 1 – 27)

Phil Henfrey, Head of News and Programmes, ITV Cymru Wales

Jonathan Hill, Editor, Network Programmes, ITV Cymru Wales

Zoe Thomas, Editor, English Language Programmes, ITV Cymru Wales

Branwen Thomas, Acting Editor, Welsh Language Programmes, ITV Cymru Wales

3 Annual Scrutiny of BBC Cymru Wales

(11.00–11.50)

(Pages 28 – 62)

Rhodri Talfan Davies, Director, BBC Cymru Wales

Elan Closs Stephens, BBC Board member for Wales

4 Papers to note

4.1 Correspondence on Fusion programme

(Pages 63 – 70)

5 Motion under Standing Order 17.42 to resolve to exclude the public from the remainder of this meeting



6 Private Debrief

(11.50-12.00)

Document is Restricted



**National Assembly for Wales
Culture, Welsh Language and Communications Committee**

Briefing note

10 October 2019

ITV is a cornerstone of popular culture in homes across Wales. It is a significant employer with some four hundred staff operating from ten locations right across Wales, making around eight hundred hours of television a year. It retains substantial viewership for television content made in Wales for Wales while also growing audiences of scale for public service news and current affairs content online and across social media. It brings the nation together around important events - as we are currently seeing with the Rugby World Cup - broadcast free-to-air across ITV. As a UK-based commercial business ITV pays tax on its profits here and its employees spend their wages here. It grows brands in Wales, offering trusted and cost effective advertising platforms to government, public bodies and commercial enterprises. It works in partnership with the National Assembly, the Welsh Government and a wide range of commercial and third sector organisations to celebrate the best of Welsh life while providing plurality of coverage in both English and Welsh across news, current affairs, factual and children's programming. It is a strong supporter of apprenticeship programmes and many other initiatives which are designed to support and encourage diversity and inclusivity.

KEY HIGHLIGHTS

- ITV broadcast three of the top five most popular tv programmes in Wales in 2018 (*I'm a Celebrity*, *World Cup: Croatia v England*, *Six Nations England v Wales*). A fourth of the top five (*Bodyguard*) was made by an ITV company for the BBC.
- ITV remains Wales' most popular peak time broadcaster during 2019. The lead over BBC 1 Wales has widened to 2.45 points to the end of August 2019 (1.79 point to end of Aug 2018)
- We have grown audiences for our nightly news programme in 9 of the last 10 years. In 2019, *Wales at Six* share of viewing stood at 22.6% across the first 35 weeks of the year - up 0.6% over the same period of 2018.
- More than 40 million social media video views of ITV Wales content to the end of August 2019 (16m to end of Sept 2018)
- Programmes made by ITV companies attracted more than twenty nominations in the Bafta Cymru Awards in October 2019.
- We have a growing list of network commissions. Two hour long films, *Code Blue: Murder* aired on the ITV network in April with work underway on five new network series.

OVERVIEW

1.1 ITV Cymru Wales makes around 300 hours of television a year as part of its public service broadcasting obligations [all free and universally available to viewers in Wales]. These cover news, current affairs, factual and other strands. The majority of programmes are broadcast in peak - frequently between episodes of highly popular continuing dramas such as *Coronation Street* and *Emmerdale*. Here, they reach audiences who would often not see Welsh content from any other broadcaster.

1.2 But ITV is More than TV. ITV Cymru Wales is one of the top two most used sources of news for people in Wales coming behind only the BBC. We have a successful and growing plan to ensure that audiences can also enjoy that trusted and reliable PSB content on new platforms online and across social media. This online provision is achieved at no direct cost to the public and is not part of our licence requirements. In a highly contested media landscape, with multiple sources of information and deepening fears about 'fake news' it offers a way of maintaining the quality and visibility of public service content that serves the people of Wales as their media consumption moves online and across social media.

1.3 We are developing new platforms to allow advertisers including Welsh Government, Public Health Wales, Dwr Cymru, Visit Wales, Welsh Universities and many other organisations to share important information directly with consumers via the ITV Hub. This is done in a targeted way, a way that helps to maximise the cost effectiveness of marketing campaigns to public sector, third sector and commercial businesses.

1.4 Together with the public service programmes we make to meet our licence obligations, ITV also produces commercially successfully programming in Wales for the ITV Network, for S4C and for other UK broadcasters.

1.5 ITV Cymru Wales is growing the range and quality of programmes that we make in addition to our licence requirements. This has resulted in considerable success in gaining commissions to make shows about Wales for the ITV network. These commissions are secured on merit alone and in the face of strong commercial competition. This success is also being seen by ITV Studios companies, Boom Cymru and Boomerang who continue to win commissions from a wide variety of broadcasters across the UK

1.6 We are also growing and deepening our partnerships with other organisations across Welsh public life. These range from our media sponsorship of the Womenspire Awards run by the gender equality organisation Chwarae Teg to Pride Cymru - Wales' largest celebration of diversity and inclusivity.

1.7 In this briefing paper we will outline the positive impact of our work over the last year and also look at some of the challenges ahead. Our vision in Wales and across ITV plc is to be 'More than TV' building upon our unique and winning combination of creativity and commercial strength, driven by investment in data and technology. This can be seen in our innovative arrangement with the BBC, Channel 5 and Comedy Central to launch the Britbox catch up service and revamp the operation of the ITV Hub. We are also building substantial audiences online - bringing public service content to new generations of audiences. Our most recent innovation has, last month, seen us launch *The Rundown*, a new youth focussed news service for 14-17 years old on Instagram on other social media platforms.

1.8 But the PSB system is facing greater challenges than ever before. Major changes in the UK's advertising and audiovisual markets are transforming the industry. National and local markets have become global, dominated by players like Google and Amazon. These changes have increased choice for viewers and offer ITV opportunities as a content producer. We are investing in that future: growing our international production business, our Video on Demand [VOD] offers, innovating in advertising and launching Britbox, our new Subscription Video on Demand [SVOD] offer. But ITV cannot meet this challenge on its own. To put it starkly, it is ITV's continued commercial success, and in particular the value we receive from PSB licences, that enables us to make the contribution we do in Wales. We need to see bold and ambitious reform from Government and Ofcom, to secure prominence for PSB, to guarantee inclusion on major

platforms on fair commercial terms, and a secure long-term future for DTT (Freeview). While broadcasting is not devolved, we know that your committee maintains a keen interest in the subject and we look forward to supporting you in your consideration of this matter.

STRENGTHENING BRANDS, GROWING AUDIENCES

2.1 We are proud to be part of Wales' most popular peak time television service. Programmes made in Wales for Wales are routinely broadcast alongside some of the highest rating network shows - ensuring substantial and diverse audiences for our PSB content. Across the network, we spend around a billion £s on a wide range of UK originated content from soaps to dramas to impactful factual and big hitting current affairs. This scheduling maximises the audiences available for our Welsh content.

2.2 *Wales at Six* has once more enjoyed a growth in audiences. Its full year share of viewing rose from 21.1% in 2017 to 22.2% in 2018. This growth has continued during 2019. It stands at 22.6% to the end of August 2019 (up 0.6% over the same period 2018).

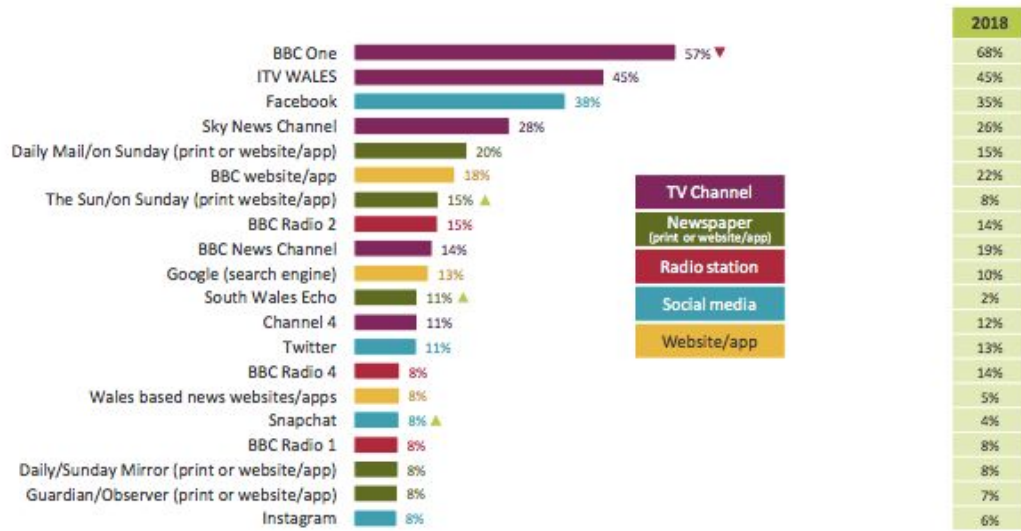
2.3 Key drivers for this audience are high quality journalism - often broadcast live - on stories that matter to viewers in communities right across Wales. We have invested in an all-Wales network of LiveU broadcasting systems. Each unit, the size of a paperback book, uses multiple mobile phone sim cards to send broadcast quality signals to our studios by 3G, wifi or direct broadband link.

2.4 We have also invested considerably in original and specialist journalism. This includes Adrian Masters and Owain Phillips on politics, Carole Green on Brexit, James Crichton-Smith on health, Rob Osborne, our national correspondent concentrating on big issues which affect our population and our latest signing, sports reporter Beth Fisher who earned 44 caps for Wales in hockey and is bringing a truly unique and distinctive approach to our sports coverage.

2.5 We work hard to ensure that viewers understand the differences that devolution makes to their lives - in the knowledge that we are often the only source they use for trusted, impartial news about Wales. We have increased the range and diversity of story choices to ensure that our content on-screen reflects the lives of our viewers. We broadcast *Wales at Six* before the UK network news in early evening - allowing us to offer a Wales-specific context and clarity to UK-wide issues. Highlights in 2019 have included special reports on young people and knife crime, systemic failings in maternity care at the Cwm Taf Morgannwg University Health Board, shining a light on living as a transgender parent and extensive coverage of Wales' hugely successful Grand Slam and Six Nations campaign.

2.6 Research by Ofcom in their *Media Nations: Wales 2019* report has identified the critical importance of ITV Wales as a leading source of news for the people of Wales. It also identifies that this position has been maintained over two years.

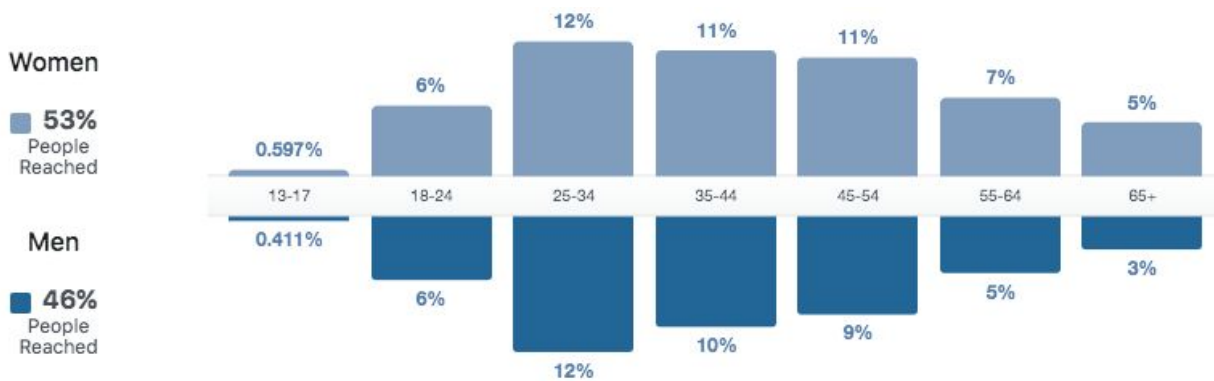
Figure 8: Top 20 sources of news in general in Wales: 2019



¹⁶ Source: Ofcom News Consumption 2019

2.7 The Ofcom report also notes that ITV Cymru’s spend on local programming had increased to £6.3 million in 2018. It previously reported that “ITV Cymru Wales spent £6.1m on new UK content in 2017 and has maintained this level of investment in real terms since 2013.” The number of hours broadcast has remained stable since 2009 - marking a full decade of stability on air while we have also built substantial audiences online and across social media.

2.8 Various studies have noted the average age of viewers watching traditional linear television as being around 60 years old. But our social media platforms - such as Facebook have a much younger average audience (see below). This means our PSB content is reaching substantial groups who might not otherwise see it.



2.9 Brexit has, of course, been a constant element of our news coverage throughout the year. We have sought to offer clear and engaging reporting for news audiences on the likely impacts on communities across Wales while also offering more in depth discussion on our weekly political programme, *Sharp End*.

2.10 Our drive for high quality story-telling and journalistic excellence is echoed in both English Language Programmes that we make as part of our franchise commitments and Welsh language programmes that we make, on a commercial basis, for S4C. Two of the three nominations for Bafta Cymru's 2019 News and Current Affairs award were made by ITV Cymru Wales for S4C: *Ein Byd* and *Y Byd yn ei Le*. *Velindre: Hospital of Hope*, made for us by Green Bay Media was nominated for Best Factual series. Adeola Dewis was nominated in the Best Presenter category for her work on *Dock of the Bay*. This follows success at the Wales Media Awards with *Ein Byd* being named TV News and Current Affairs Programme of the Year with Owain Phillips being named Political Journalist of the Year.

2.11 We have launched a wide range of other popular and engaging factual series, broadcast in peak time and often winning substantial audiences. They have included *Fire Station 20*, a three-part series made in co-operation with the South Wales Fire and Rescue Service on the work of Barry Fire Station; *Missing*, a five part series working with Dyfed-Powys Police as they seek to locate missing people. We filmed this 'back to back' for both ITV Cymru Wales and, in Welsh for S4C (*Ar Goll*). *The Village* was a six part series about the characters who live and work in Portmeirion. *Return to the Mountain* celebrates the splendour of Snowdonia and we also have a wide range of special, live and often hour-long Wales highlights programmes following our team at the Rugby World Cup in Japan.

2.12 Our youth current affairs series *Ein Byd* got international attention with their investigation into cosmetic surgery and their exclusive access filming a 'Brazilian butt lift' procedure in a clinic in Turkey. The series also followed a heroin addict who'd been a victim of a county lines drug dealer from Liverpool. *Y Byd ar Bedwar's* harrowing programme on male suicide rates and mental health provision in North Wales was another highlight as was our investigation into historical child abuse on Caldy Island and, following an undercover investigation into a care home for the elderly, the team highlighted concerns raised by Assembly Members regarding the work of Care Inspectorate Wales. Meanwhile, our series, *Y Byd yn ei Le* featured an exclusive interview on Brexit with former Irish prime minister Bertie Ahern, a live special debate programme for S4C from the Senedd to mark 20 years of devolution and a European Election special looking at the rise of the Brexit Party and Change UK.

INNOVATION: MAKING IT EVEN BETTER

3.1 ITV Cymru Wales puts excellence and innovation at the heart of everything we do. These are just some of our recent successes.

- Network of seven LiveU mobile phone-based broadcast units. These allow us to make news programmes that are live from multiple locations across Wales and beyond on a nightly basis.
- Rugby World Cup: using the same LiveU technology to allow a three-strong team of journalists to follow the Welsh team on its campaign across Japan - and send the most up to date reports back to Wales.
- Live on-location Welsh language current affairs. *Y Byd yn ei Le* has broadcast live from Cardigan to Cardiff Bay to Westminster - allowing us to offer up to the minute coverage of the ever changing Brexit debate.
- Building a substantial audience of scale on social media for public service content. We had 36.7 million video views of Welsh content on Facebook in the eight months to the end of August 2019 and more than four million views on Twitter.
- Developing a vibrant range of short form current affairs content in the Welsh language with S4C as part of the Hansh brand.
- Launch of a range of innovative and engaging new series. *The Village* was an entertaining and informative six part series on the characters who live and work in Portmeirion. *Welsh Lives* celebrates the achievements of a diverse range of people across Wales. *Fire Station 20* used the latest in mini camera technology to tell the story of Barry Fire station.
- We made and broadcast a special hour-long programme on the annual St David Awards which celebrates the best of Welsh life.
- New podcasts launched around series including *Welsh Lives* and *Sharp End*.
- Deployment of the latest Sony F5 video cameras, offering producers 'cinema style' photography to further enhance the visual engagement of programmes
- Development of *Point of View* social media videos featuring first hand accounts of a diverse range of lives. Our series celebrating Pride Cymru had 200,000 views on social media alone.

- Growth of our apprenticeship programme. We have offered jobs to two of the four apprentices we took on during 2018. We have recruited a further three apprentices in September 2019. We have been nominated in the 2019 Apprenticeship Awards Cymru.
- Recognition for our work in championing diversity. ITV Cymru Wales has been shortlisted as Broadcaster of the Year in the Creative Diversity Network's UK Broadcasting Diversity Awards.
- Focussed training and skill development across the year from leadership and management to advanced filming and editing techniques, drone operations and the latest digital and social media techniques

ITV CYMRU WALES AND THE ITV NETWORK

4.1 ITV Cymru Wales is developing the talent and skills to bring stories from Wales to audiences right across the UK. Our growing slate of network commissions have celebrated communities from the Menai Strait to St Davids - and also shown the dedication and skills of some of our leading detectives. All were commissioned on merit alone.

4.2 *Code Blue: Murder*, the result of a three year long partnership between ITV Cymru Wales and South Wales Police was broadcast across the UK in April 2019. The two one hour films on the work of the Major Crime Team won widespread praise from senior officers and many viewers. The hashtag #codeblue was one of the top three trending topics in the UK during the broadcast. We are currently discussing the possibility of further films.

4.3 *The Mountain*, made by Welsh boutique indie Slam Media, will celebrate the beauty of Snowdonia across the ITV network this autumn while *The Village* - about Portmeirion (also Slam Media) gets a network outing early next summer as does *St Davids, Britain's Smallest City* (Boom Cymru). Three other new network series have also been commissioned about the Wales coastal path and two other well-known Welsh tourist destinations.

4.4 Meanwhile the ITV network has commissioned a six part high end thriller television series, called *Tenacity* from Cardiff-based Bad Wolf in partnership with Entertainment One. Filming is due to begin in 2020. Further details have yet to be announced.

COMMERCIAL PRODUCTION: SUPPORTING WALES' CREATIVE ECONOMY

5.1 ITV has a range of Welsh-based businesses and production labels, in addition to ITV Cymru Wales. Programmes such as *Code Blue: Murder* were made by Shiver Cymru (now re-branded as MultiStory Media Cymru). ITV also has two substantial independent production companies based in Wales. They are Boomerang and Boom Cymru which also takes in

important subsidiaries including Gorilla, Cloth Cat and Bait Studios. Between them, they occupy most of the Welsh Government commissioned Gloworks creative industries building in Cardiff Bay.

5.2 Boom is one of Wales' largest production groups. Established in 1994, they are a trusted, multi-genre company that produces over 400 hours of content annually for S4C, BBC, ITV and C5. Through their television and digital production divisions, Boom Cymru, Boom, Boom Social and Boom Kids, the group has an impressive track-record of producing award-winning factual, factual-entertainment, entertainment, drama and children's content.

5.3 Boom Cymru is dedicated to producing the finest quality for Welsh broadcasters, S4C, BBC Wales and ITV Wales, while the Boom division focuses on creating compelling content for the UK's network broadcasters and international markets. Through Boom Social, they are also proud producers of innovative and entertaining multi-platform social content.

5.4 As one of the largest producers of children's content in the UK, Boom Kids' expertise spans the production of content for children from pre-school upwards. The division produces pre-school and older children's programming for both S4C and Network and employs over 50 full time staff. The department, in the Gloworks houses fully operational HD studios, a live gallery and extensive post production facilities.

5.5 The group employs approximately 230 staff in Wales and in addition to its production divisions it includes leading Welsh post-production facility, Gorilla, Visual Effects and Motion Graphics company, BAIT Studio and international animation brand, Cloth Cat.

5.6 Boom Cymru's *Prosiect Z* won a Bafta Children's Award in November 2018 and an RTS Award for Best Children's Programme in March 2019. The innovative show, aimed at 10-13 year olds is part-structured reality, part game-show set in an imaginary apocalyptic world where Zombies roam the earth. An eight-part English language version was commissioned by CITV in January 2019.

5.7 *Mabinogi-ogj* a comedy sketch show based in the magical world of the Mabinogion won the Children's programme category at the Celtic Film Festival, 2019. The festival, which was hosted in Aviemore this year, promotes the language and cultures of Celtic countries in the media.

5.8 Welsh language music travelogue feature film *Anorac* leads the Bafta Cymru 2019 Awards with six nominations (out of 18 in total for Boom) including Huw Stephens for presenter with other nominations for Feature/Television Film; Editing; Director: Factual; Photography: Factual and Sound.

5.9 Boom Cymru have also sparked international broadcasting interest with *Y Siambr* - the world's first underground game-show set in the popular Zip World tourist attraction at Llechwedd slate caverns in Blaenau Ffestiniog. Competitors face a series of epic challenges as they work

their way through the caverns. The series aired on S4C in the spring and Boom are now working with ITV Global Entertainment to sell the format around the world.

5.10 *Priodas Pum Mil* (The £5k Wedding Challenge) which follows Welsh couples as they seek to tie the knot for less than £5,000 is another example of Welsh language programmes, developed in Wales which are now available to international markets via Boom's relationship with ITV Global Entertainment. The four series so far made have proved highly popular with Welsh language viewers and also resulted in a spin-off series *Prosiect Pum Mil* (The £5k Project) - featuring a series of DIY projects helping communities across Wales.

5.11 The BBC's *One Show* also benefits from Boom's talent for factual production. They have increased the number of films they commission from Boom to 28 films a year ensuring another UK wide peak time market for Welsh creative talent.

5.12 Boom also makes drama - most notably the crime series *35 Diwrnod (35 Days)* which has sold to broadcasters in the USA, Canada, New Zealand and Poland. An English language version of the series, commissioned by Channel 5 broadcast successfully in May 2019. It used virtually all the original Welsh language crew on the production.

5.13 2019 proved to be another successful year for Boomerang with the label already having 46 hours of commissioned programming delivering in 2019 with new commissions already confirmed for 2020.

5.14 The second series of *What Would Your Kid Do?* launched successfully in March after a Christmas Special in 2018 and the original format won two awards at the C21 awards in April in the "Best Studio Based Gameshow Format" and "Best Factual Entertainment Format" categories. Its international success continued with format sales being confirmed in a number of territories and versions of the series made locally in Hungary, Finland, Belgium and Turkey.

5.15 *Extreme Cake Makers* continued the company's international success with distribution sales to over 60 territories as well as winning last year's Best Daytime programme at the Broadcast Awards. 2019 also involved an expansion of the "Extreme" brand with a ten-part series of *Extreme Chocolate Makers* premiering on the Easter weekend on Channel 4.

5.16 *Who Should Stay in the UK?* brought a thoughtful and perceptive three part series to BBC 2 in the summer. Boomerang followed the stories of immigrants desperate to stay in the UK and the lawyers tasked with helping them. Some bring investment and jobs, others come for asylum and sanctuary.

5.17 The onset of autumn sees a new slate of Boomerang productions being broadcast, with *Britain's Naughtiest Nursery* being the first to air on 5STAR. This 2 x 60 series involved creating a specialist nursery to help parents cope with their pre-school children, all of whom have behavioural issues.

5.18 *Drag Kids* follows soon after on 5STAR in October. The two hour long documentaries sensitively follow three families as they navigate the world of drag and its associated hurdles. A final two-part series follows towards the end of the year with *Big Birthers* looking at specialist maternity care for those patients with very high BMI and the ensuing problems that can be caused in pregnancy and birth.

5.19 The company also has a range of single documentaries in production including *Council House Millionaires* and *Filthy Family Swap* for Channel 5 as well as *Last Minute Holiday Secrets*, *The Truth About Your Gut* and the first film in the continuing *Historic House Rescue* series, commissioned for four episodes across three years, for Channel 4.

ADVERTISING: GROWING WELSH BRANDS

6.1 ITV offers one of Wales' most prominent, cost effective and trusted advertising platforms. It is regularly used by Welsh Government, Public Health Wales, Welsh universities, Dŵr Cymru Welsh Water and a wide variety of other public bodies - and commercial entities - to inform the public. It has proved especially important in explaining policies such as organ donation laws, anti smoking campaigns, parenting skills and domestic abuse.

6.2 ITV also supports smaller businesses who are seeking to grow their commercial success. Our *Business For All* campaign offers to fund half the cost of an advertising campaign for businesses that are new to television.

6.3 We have used our advertising platforms to support campaigns for healthy lifestyles. ITV developed the *Eat Them to Defeat Them* campaign with partners Veg Power to encourage children to eat vegetables, donating £2 million of commercial airtime to the campaign. This saw a bespoke sixty second advert playing in episodes of some of Wales' most watched programmes including *Coronation Street*, *The Voice*, *Dancing on Ice* and *Britain's Got Talent*, alongside hours of editorial coverage. A YouGov survey showed the equivalent of 650,000 children across the UK said they had eaten more vegetables as a result of seeing the campaign. Econometric analysis showed the campaign led to 18 million more units of veg being sold - the same as an extra portion of vegetables for every household with children in the country.

6.4 We have also supported *The Daily Mile* a simple and effective campaign to get school children to exercise for fifteen minutes a day. There are now more than six and a half thousand schools and 1.5 million children signed up to this campaign across the UK. The numbers trebled after ITV began promoting the campaign.

6.5 During the autumn, ITV will launch a new multi-year initiative, the *ITV Campaign for Mental Wellness*, as part of our drive to encourage ten million people to take action to support their mental or physical health by 2023. We are focusing on the importance of all of us actively

looking after mental health. The first campaign, *Britain Get Talking*, focuses on building resilience in children. One of ITV's biggest campaigns of the year, it is backed by the support of mental health charities Mind and Young Minds.

6.6 We are also driving technological change. Our ITV Hub platform allows us to fine tune advertising to small areas such as an individual postcode, town or county. It can also focus on distinct demographics such as younger people, ensuring relevance and greater cost effectiveness.

SKILLS AND TRAINING: MAKING US FIT FOR THE FUTURE

7.1 We were awarded Employer of the Year in the Quality Skills Alliance Awards 2018. The judges said: "The focus is clearly on the personal development of their apprentices as individuals and each one is given guidance and mentoring from staff with decades' worth of experience. ITV's ongoing commitment to apprenticeships makes it a worthy winner of this award."

7.2 We have also been awarded a Gold Award in the Careers Wales Valued Partner Awards in recognition of our work to inform, inspire and motivate young people in Wales about their career opportunities. This has involved a three year partnership with Eastern High School in Cardiff. In that time we have been involved in numerous projects, including helping staff and pupils with oracy projects, studio visits, talks and presentations, and cv and interview skills workshops.

7.3 We have been named as a finalist in the Apprenticeship Awards Cymru 2019. The Awards organisers have noted: 'Over the four years ITV Cymru Wales' programme has been running, 100% of apprentices have gone on to full-time employment within the creative industries and close to 90% of those enrolled have been from disabled, Black, Asian and Minority Ethnic or socially disadvantaged groups.' Jointly organised by the Welsh Government and the National Training Federation for Wales, the awards are due to take place on October 24th.

7.4 In addition, we have worked with S4C to recruit two young journalists to make current affairs reports specifically for S4C's digital service, *Hansh: Dan Sylw*. It ensures that we help train the next generation of Welsh language journalists to create content for current and future platforms. We take part in the *Breaking into News* initiative with the Media Trust. Previous finalists have gone on to gain jobs in our newsroom.

PARTNERSHIPS, DIVERSITY AND INCLUSIVITY

8.1 In keeping with our vision of being *More Than TV*, we have partnered with or supported a wide variety of public and charitable organisations across Wales over many decades. We are also building new partnerships and alliances as part of our work as a key contributor to Welsh cultural life.

8.2 In January we helped the Welsh gender equality group Chwarae Teg to lunch their Womenspire 2019 Awards. In February we supported the Institute of Welsh Affairs in the organisation of the Wales Media Summit. In March we filmed the St David Awards, working in association with the Welsh Government to produce an hour-long highlights programme celebrating the best of Welsh life. April saw the return of *People's Projects*, an ITV wide initiative with the National Lottery Community Fund to help community groups improve people's lives. Our audiences helped to decide where up to £150,000 of lottery funding is spent in Wales. ITV companies in Wales also sponsored the opening night reception of the Creative Cities Convention in Cardiff. May saw us support an S4C initiative in sharing best practice in online and social media skills with the independent production sector while also sponsoring and hosting the IoD Wales' Director of the Year Awards. In June, we hosted a media training day for dozens of finalists in the Womenspire 2019 Awards - before broadcasting a special series of reports on their work.

8.3 July brought our extensive coverage of the Royal Welsh Show where we also hosted a 'healthy eating' event with a wide range of food organisations, held a reception for communities that have benefited from being featured in our programmes and offered a venue for a meeting of the National Assembly's Climate Change, Environment and Rural Affairs committee. August brought bespoke programmes around the National Eisteddfod where we also hosted a debate about the future of Welsh language journalism in partnership with S4C and Cardiff University. We also supported the *Llais y Maes* scheme offering aspiring Welsh language journalists the chance to report from the Maes. August also saw us entering into a media partnership with Pride Cymru. Bespoke social media videos on *Why Pride is important to me* had some 200,000 views. In September we hosted a visit by members of the Welsh Youth Parliament and also featured their work on *Sharp End*. We also ran a day supporting pupils from Cardiff's Eastern High School in improving their speaking skills. This was one of a wide range of events that we support at the school during the year as part of a long term partnership.

8.4 We are especially proud - and appreciative - of our ITV Wales Diversity Panels which meet across the year in both Cardiff and North Wales. They offer our programme makers and our leadership team important insights from the many diverse communities that make up modern Wales. They are both a source of stories in ensuring that our content engages as wide an audience as possible, and a valued touchstone when we are seeking advice on the most appropriate way of reporting sometimes complicated or contested issues.

8.5 Throughout the year we also work closely with a wide range of Welsh public, third sector and broadcasting bodies, including Bafta Cymru, The Royal Television Society, The Institute of Welsh Affairs, Institute of Directors Wales, Cardiff University, Sgil Cymru and Clwstwr Creadigol. We contribute to a number of careers initiatives that seek to widen the diversity of the broadcasting sector including the Creative Pathways Open Day which showcases ITV and a media career to hundreds of Welsh school children.

WALES, WESTMINSTER AND A GLOBALISED WORLD

9.1 ITV is rightly proud of the role it plays in Wales – and in the broader PSB system. At the same time, it is important to recognise the significant challenges facing PSB – and to bring forward reforms to ensure that PSB continues to thrive in the future.

9.2 The UK is at the forefront of major changes in advertising and audiovisual content markets. National markets have become global markets, increasingly dominated by global players such as Google (market capitalisation \$860bn) and Amazon (market capitalisation \$917bn) across the value chain – in distribution, content creation, and advertising – operating at a scale and with a depth of access to capital that is unprecedented in the history of TV or of other advertising platforms.

9.3 A small set of global players are emerging with the ambition of controlling and directing the choices made in living rooms across the world, dominating content production, and retaining the bulk of associated revenues (for instance, Google and Facebook (market capitalisation \$510bn) are expected to increase their share of all digital advertising in the UK this year to 63.3%. By 2021 this is predicted to be 65%, around £14.7bn).

9.4 The implications of these unprecedented developments are mixed: they are creating more choice for viewers and for advertisers, which is welcome, and significant opportunities for many TV producers, including ITV Studios, who have become major suppliers to Netflix and Amazon amongst others. But at the same time they are putting at risk the plurality of TV services in the UK market, particularly PSB services which speak to UK citizens in particular, supporting our culture, democracy and economy.

9.5 Clearly the starting point for any business facing changing technology, consumer behaviour and intensifying competition is to innovate and invest. That is exactly ITV's strategy:

- Growing our global content production business: since 2010 we have invested significantly in building a content production business of scale in the UK and overseas, now making original content for local customers in 12 territories. In 2018, 56% of ITV Studios revenue was generated outside the UK.
- Growing our Video on Demand [VOD] offer: we have built ITV Hub into a major online content platform with 28 million subscribers and over 79% of all 16-34 year olds in the

UK registered on the service with a 32% increase in viewing in the past year (over 446 million hours of online viewing last year).

- Innovating in advertising: the combination of mass reach and targeted advertising in a brand safe environment gives us a powerful competitive proposition to advertisers. Our recent licensing agreement with Amobee, a global digital advertising technology company, will accelerate the development of our VOD advertising capabilities including an industry standard for VOD (matching the established linear system).
- Entering the Subscription Video on Demand [SVOD] market: we are soon to launch Britbox in partnership with the BBC – an exciting new UK focused SVOD offering combining the best of ITV and BBC content together with new original UK commissions.

9.6 The purpose of these initiatives to modernize our business is to continue to deliver an attractive return to our investors but in the process also sustain a business model that revolves around the investment in original UK television content.

9.7 But ITV cannot meet this challenge on its own. To put it starkly, it is ITV's continued commercial success, and in particular the value we receive from PSB licences, which enables us to make the contribution we do in Wales, a contribution global players such as Amazon and Google are most unlikely to ever make. The case for immediate and fundamental reform was made powerfully by Mark Thompson recently. As the ex-Director General of the BBC and current Chief Executive of the New York Times he has perhaps unparalleled insight into both public service broadcasting and the commercial world on both sides of the Atlantic. He observed that:

“No doubt the relevant government departments and regulators do plenty of good work too across this difficult and rapidly evolving terrain. I want to say to them: policing the beach for litter is a virtuous activity, but it's time to glance out to sea. That grey band on the horizon is a tsunami.”

9.8 We agree and have been encouraged by the Secretary of State's recent call for Ofcom to “think big” in its forthcoming PSB Review. There are a number of areas where we believe sensible reforms can be made that will maintain and strengthen the PSB system, helping PSB status remain viable and attractive. Reform to the system will need to be radical and far reaching but below we set out just a few examples.

9.9 Firstly, following Ofcom's conclusion that “New legislation is needed to keep PSB prominent and support the sustainability of the public service broadcasters,” we are calling on Government to honour its commitment to reform the prominence rules and bring forward legislation as soon as possible to ensure that PSB prominence is extended to new global online platforms and to on demand delivery of PSB content.

9.10 But prominence alone will not be sufficient to support PSB if the terms on which content is provided to platforms prevents commercial PSBs from fairly monetising viewing or from building

a direct relationship with their viewers. Secondly, we therefore believe a new inclusion regime is needed to guarantee PSB universality whilst also enabling PSBs to negotiate fair commercial terms with platforms for inclusion, for retention of our ad revenues, for access to data, and for functionality such as cloud-based PVRs and ad-skipping, securing the funding necessary to ensure PSB content investment for the long term.

9.11 In addition, we are asking for the UK Government and Ofcom to safeguard the future of Digital Terrestrial Television [DTT]. Freeview is universally available in the UK to 98.5% of households, and used in 18m UK homes and on 10m primary TV sets. It offers access to a critical mass of PSB and non-PSB channels for free wherever you live in the UK, enabling everyone, regardless of means, to participate in the life of the UK – through access to the best TV content without charge. It is vitally important that the DTT platform has long term access to significant spectrum to enable it to continue to flourish with a broad channel offering, above all without being penalised or disrupted by policy interventions which would weaken or undermine it.

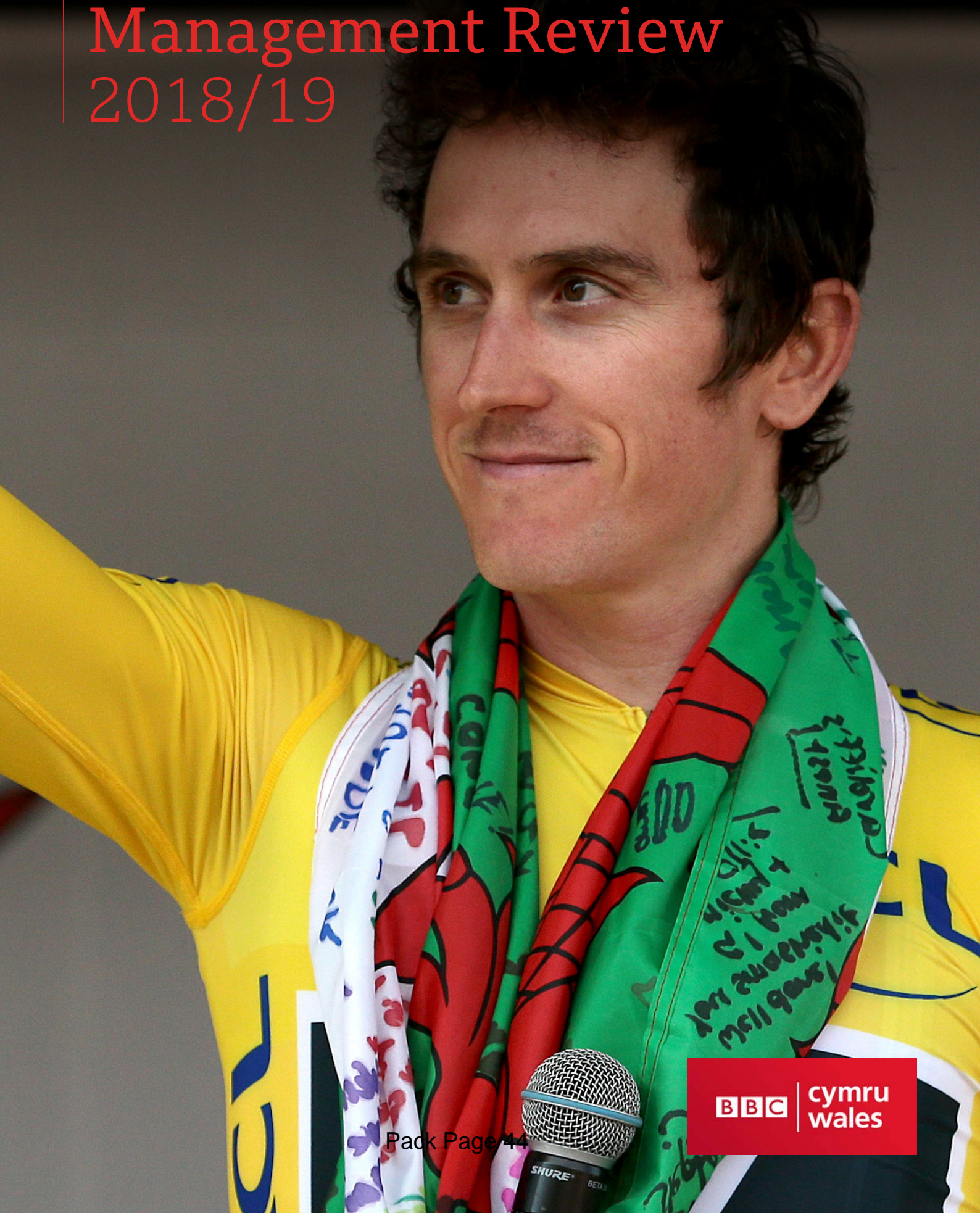
9.12 Comprehensive reform, including the measures set out above, are vital if ITV is to continue to play a key role in the cultural and economic life of Wales and across the rest of the UK's nations and regions. It would be easy for distinct Welsh voices to be lost in the discussion about these seismic changes. We look forward to engaging with the committee, other members of the National Assembly and the wider public in how that can be avoided - and how trusted public service content can be supported for many years to come.

Agenda Item 3

By virtue of paragraph(s) vi of Standing Order 17.42

Document is Restricted

BBC Wales Management Review 2018/19



“The record levels of online and mobile usage achieved over the last year show how quickly BBC Wales is adapting to the new media landscape.”



If you wish to find out more about the BBC's year – including full financial statements and performance against other public commitments – then please visit www.bbc.co.uk/annualreport



Director's Introduction

The record levels of online and mobile usage achieved over the last year show how quickly BBC Wales is adapting to the new media landscape.

The number of requests to view BBC Wales' content on BBC iPlayer increased three-fold to 44 million in 2018 while the number of weekly browsers to BBC Wales' news online service increased 18% year-on-year. Downloads of Radio Wales and Radio Cymru programmes also saw an increase of 50% for the same period.

Alongside this digital growth, we're arguably seeing more of Wales on UK screens than ever before – thanks in part to £8.5m of new content investment announced two years ago.

Keeping Faith and *Hidden*, for example, are the two most successful locally-commissioned dramas ever produced by BBC Wales and both were ranked in the BBC iPlayer top 10 dramas last year. In fact, *Back in Time for the Factory*, *Land of the Wild*, *Hayley*,

Hidden Wales and *The 1900 Island* were also major network successes.

Looking ahead, I believe our move to Central Square in Cardiff city centre later this year will help accelerate our transformation from a traditional broadcaster to a multi-media publisher delivering services across mobile, online and social media – alongside our radio and TV services.

The new technology and facilities will not only help us get much closer to our audiences, they'll also radically change the way we think about creativity and programming. It's a once in a generation opportunity – and we're determined to grab it. ■

A handwritten signature in black ink, which appears to read 'Rhodri'.

Rhodri Talfan Davies
Director, BBC Wales

Two minute summary

Facts and figures about the performance and output of BBC Wales' English language television programmes

Top Ten Broadcast Series

English language series	
Rugby Union Autumn Internationals	492,000
Wales Today at 6.30pm	210,000
Pitching In	204,000
Six Nations Sin Bin	180,000
Hidden	167,000
The Crash Detectives	165,000
X-Ray (Oct-Dec)	148,000
Children's Ward	145,000
Scrum V Six Nations Special	138,000
Secret Life of Farm Animals	135,000

Top Ten Series on BBC iPlayer

English language series	
Keeping Faith	12,160,344
Hidden	11,731,271
Rhod Gilbert's Work Experience	1,323,908
The Crash Detectives	1,081,870
Rugby Union Autumn Internationals	1,023,128
BBC Wales Today	916,992
Back in Time For the Factory	771,363
Scrum V	698,476
High Hopes	630,274
BBC Wales Investigates	608,318

Number of requests on BBC iPlayer

Top Five Individual Broadcast Programmes

English language programmes	
Sam Warburton: Full Contact	272,000
The Brecon Beacons with Iolo Williams (rpt)	232,000
Scrum V – How Wales Won the Grand Slam	211,000
Eddie Butler's Six Nations	205,000
Weatherman Walking: Dylan's Walks (rpt)	190,000

Average audience across all episodes
Source: BARB
Figures include any repeats in the same week

Top Ten Programmes on BBC iPlayer

English language programmes	
Dark Son: The Hunt for a Serial Killer	566,118
Critical: Inside Intensive Care	289,812
Sam Warburton: Full Contact	210,132
Mad About Elvis	130,367
Women's World Cup Qualifier: Wales v England	127,964
The Toddlers Who Took on Dementia	113,668
The NHS: To Provide All People	113,204
The Tuckers	86,247
Puppy Love	85,976
Our Lives: Snowdonia Shepherdess	76,708

Number of requests on BBC iPlayer

Two minute summary

Facts and figures about the performance and output of BBC Wales content on S4C

Top Ten Broadcast Series

Series on S4C	
Pobol y Cwm	41,000
Clwb Rygbi (Pro 14 Matches)	30,000
Clwb Rygbi Rhyngwladol: Chwe Gwlad	25,000
Clwb Rygbi Rhyngwladol: Gemau'r Hydref	25,000
Clwb Rygbi (Principality Matches)	20,000
Yr Eisteddfod Genedlaethol: Mwy o'r Maes	19,000
Yr Eisteddfod Genedlaethol: Noson o Gystadlu	18,000
Newyddion 9	15,000
Yr Eisteddfod Genedlaethol: Seremonïau	15,000
Pawb a'i Farn	14,000

Top Five Individual Broadcast Programmes

Programmes on S4C	
Goreuon Campau Cymru 2018	17,000
Bryn Fon a PTSD	15,000
Newyddion y Flwyddyn 2018	15,000
Stand Yp Cymru	13,000
Camp Lawn Cymru 2019	13,000

Average audience across all episodes
Source: BARB
Figures include any repeats in the same week

Top Ten Series on BBC iPlayer and Clic

Series on S4C	
Pobol y Cwm	1,170,000
Clwb Rygbi	147,500
Eisteddfod Genedlaethol 2019	72,000
Clwb Rygbi Rhyngwladol: Chwe Gwlad	67,000
Newyddion 9	51,000
Newyddion S4C (bulletins)	16,000
Newyddion a Chwaraeon	11,000
Ffeil	11,500
Clwb Rygbi Rhyngwladol: Gemau'r Hydref	12,000
Pawb a'i Farn	6,000

Number of requests on BBC iPlayer and Clic



BBC One Wales and BBC Two Wales

Additional Charter investment has allowed BBC Wales to invest in drama, as well as broadening the portfolio with new comedy and standout factual content.

It was another year of strong drama. It began with *Hidden*. Set in Snowdonia and the surrounding areas, this Cymru-noir drama was enjoyed by audiences across the UK, with viewing figures of around 10 million on BBC iPlayer. *The NHS: To Provide All People* a film poem written by Owen Sheers became the centrepiece of the BBC's celebration of the NHS at 70, with a stellar cast of stars such as Eve Myles, Michael Sheen, Jonathan Pryce and Dame Siân Phillips. BBC Wales also welcomed some of the biggest names in television to its screens in *Pitching In* which featured a raft of well-known stars.



Hidden

This year saw the arrival of new comedy for BBC Wales – the first for many years. Sally Phillips starred in mockumentary *Tourist Trap*, kicking off a season of comedy that spanned the genre from stand-up to sitcom. Two pilot shows, *In My Skin* (a co-commission with BBC Three) and *The Tuckers* were superb examples of the resurgence of broadcast comedy.

Working closely with the newly established BBC Writersroom Wales the 'Find Me Funny' initiative saw almost 350 new writers from across Wales pitch their ideas for their first comedy pilot mini-series.

This year, our coverage of the Six Nations took us beyond the pitch. As well as our comprehensive match day coverage, Eddie Butler gave us a look ahead as well as expert analysis on *Scrum V*, whilst the powerful and poignant biopic *Sam Warburton: Full Contact* was an unique insight into the physical and mental strain of life in the rugby limelight.

Epic: Wales v England '99 gave us a trip down memory lane and a *Tourist Trap: Six Nations Special* saw the hapless staff of Wow! Wales make a hash of another marketing campaign. We also brought *Sin Bin* back for a second series after it established itself as a popular show.

It's been an extraordinary year in politics and our programmes have been at the heart of the action. *BBC Wales Live* continues to deliver expert analysis both here in Wales and in Westminster. We gained privileged access to the Cardiff Bay corridors of power in *Being First Minister*, which followed Carwyn Jones' final days in office. *BBC Wales Investigates* is now an established brand with a track record of uncovering some of the most powerful stories on television.

We re-invigorated our factual slate of programmes with a renewed focus on great documentaries. *Critical: Inside Intensive Care* and *Dark Son: The Hunt For a Serial Killer* are standout examples where unparalleled access and candid interviews presented an unique perspective.

Back in Time for the Factory was a landmark piece of television made with stunning ambition and scale, re-telling the story of the "factory girls" of the south Wales valleys. *Hidden Wales*, and *Secret Life of Farm Animals* proved popular with audiences especially on BBC iPlayer.

This year saw a focus on younger audiences in drama and comedy as well as in factual with content such as *Dirty Vegan*, *Hayley*, and *Help! We're Having a Baby*.



Dirty Vegan with Matt Pritchard

New programmes have contributed to record-breaking growth in BBC Wales' online audiences. The popularity of new programmes, such as *Keeping Faith* and *Hidden* led to an almost threefold increase in the number of requests to view, rising from around 14 million in 2017 to 44 million in 2018. Meanwhile, more of BBC Wales' content than ever before is being broadcast on network, including programmes such as *Keeping Faith*, *Hidden*, and *Sam and Shauna's Big Cook-Out*. ■

BBC network spend in Wales

Wales continues to provide some of the BBC's best-loved programmes, from drama to factual on TV and radio.

Factual content

Wales was featured prominently on network channels over the last year as the nation continues to play a central role in the BBC's narrative.

This includes a number of varied factual commissions such as *Hidden Wales with Will Millard*, *The Secret Life of Farm Animals* and *Andrew Davies: Re-writing the Classics* and co-commissions including *Back in Time for the Factory* and *The 1900 Island*. Produced with the support of the talented independent sector in Wales, these titles generated significant audiences and brought new and interesting stories about Wales to television screens UK-wide.

Elsewhere, some of the BBC's most prestigious musical output is centred in Wales. This year it included *BBC Young Musician* – a competition which has developed a reputation for finding the superstars of the future – whilst Colwyn Bay played host to the BBC Proms in the Park Wales, a cultural highlight of the year.



Back in Time for the Factory

BBC network drama production

The BBC's drama base at Roath Lock continues to be a powerhouse of creativity, providing iconic drama for the BBC's network audience.

All eyes were on *Doctor Who* in October for its much-anticipated relaunch. Jodie Whittaker stepped into the TARDIS as the thirteenth Doctor, and first female Doctor, to critical acclaim, and there has been a changing of the guard behind the scenes too with Chris Chibnall taking over as the new show runner.

Meanwhile *Casualty* also had another great year, taking the BAFTA for the Best Soap and Continuing Drama. A special crossover with *Holby City* saw characters from both series interact and storylines intertwine over two, action-packed episodes. A challenge for scriptwriters and crew alike, this was a dramatic highlight of the year.

Elsewhere, the BBC's first eight-part adaptation of Philip Pullman's *His Dark Materials* trilogy continues. Produced by Bad Wolf, this much-anticipated series is being filmed in Wolf Studios Wales in Cardiff.

Meanwhile, many of BBC Wales' programmes have been seen on network for viewers across the UK to enjoy, including popular drama series such as *Keeping Faith*, *Pitching In* and *Hidden*.

Network radio in Wales

BBC Wales supplied high quality programmes for network radio throughout the year.

Radio drama was dominated by a number of new and returning series which saw the team make further inroads into the digital space. *Tracks: Chimera* was one of Radio 4's drama events of the year and helped to launch BBC Sounds.

Curious Under the Stars became a mainstay on Radio 4 with four series being produced during the year. The *Mabinogi* series was launched on Radio 3, and was also available as a podcast.

At the Audio Drama Awards Eve Myles took Best Actress for her role in the radio drama *19 Weeks*. Meanwhile two members of the Welsh Voices group, which is run by Writersroom Wales, gained their first Radio 4 commissions.

The network radio factual team produced a number of notable programmes for Radio 4 and Radio 3 and also won commissions from BBC World Service. Highlights included programmes about devolution; Trampoline front man Jack Jones; women in Welsh culture, and Welsh writers at Hay.



BBC Wales on S4C

Brexit dominated the news agenda throughout the year as news programming continued to be an integral part of BBC Wales' provision for S4C.

Working with S4C executives in reviewing the editorial brief of the main evening programme, *Newyddion 9*, there is continued focus on original Welsh stories. Coverage of special events this year included live coverage of the celebrations in Cardiff following Geraint Thomas' historic win in the Tour de France 2018 and *Cymru'n Cofio 2018*, the National Service of Remembrance from Llandaf Cathedral marking 100 years since the end of the First World War.

Early in 2019, the audience debate programme *Pawb a'i Farn* gave voice to issues affecting communities across Wales with questions about Brexit coming to the fore in every episode. Live coverage was provided from the conferences of the main political parties in Wales. With input from the National Centre for Learning Welsh *Yr Wythnos*, was introduced, a series looking back at some of the news stories of the week with English subtitles and on-screen vocabulary broadcast as part of S4C's Sunday morning slot for learners.

Coverage of weekly Pro 14 rugby fixtures and Wales International games from the Autumn Test series and the Six Nations Championships form the core of our Sport provision for S4C, delivered within the *Clwb Rygbi* strand. This year, we added live coverage of three Women's Six Nations games and three Wales Under 20's matches, as well as highlights of the Wales tour to Argentina and a number of Welsh Premiership rugby games.

The review programmes *Goreuon Campau Cymru* and *Camp Lawn 2019* celebrated Welsh sporting success during the year.

Almost 90 hours of live coverage are provided annually from the National Eisteddfod.

The open Maes format of the festival held in Cardiff Bay in August 2018 enabled some changes to the scheduling and presentation of programmes and an increase in the breadth of the coverage. The 10 day festival was launched on S4C with *Croeso i'r Eisteddfod* in which actress and presenter Ffion Dafis looked at some of the fringe events and introduced some of the key individuals involved in the festival. Daily programmes included live coverage from the competition stages as well as highlights from the huge variety of cultural activities organised across the week.

During the week of the National Eisteddfod *Pobol y Cwm* fans were given the opportunity to visit the Cwmderi set at Roath Lock.

The BBC's longest running television soap continues to be one of the main cornerstones of the S4C schedule and there is a close working relationship between BBC Wales, BBC Studios producers and S4C executives in shaping the editorial direction of the series. When appropriate, additional supporting programmes are also commissioned. This year, in *Bryn Fôn a PTSD*, the actor and musician researched the condition suffered by his character in the soap, Dr Elgan. *Priodasau Cwmderi* delved into the rich archive of the series and took a lighthearted look at the eventful weddings featured in the series.

Another distinctive one-off commission this year was the documentary *Zimbabwe Taid a Fi*, in which BBC World Service journalist Seren Jones returned to Zimbabwe, where her mother was born and where her grandfather Sekuru is buried, and secured an exclusive interview with the new President of Zimbabwe Emmerson Mnangagwa. ■



Zimbabwe Taid a Fi



BBC Wales News and Current Affairs

At a time when the news agenda is changing more rapidly than ever, BBC Wales' newsroom has strengthened its output, reaching a wider audience than ever before.

Changing audience patterns are now clear. While overall TV news reach fell, social media and online services continued to grow strongly.

English language output has focussed on further strengthening the quality and range of our stories as well as our video storytelling. These changes led to an increase of 18% in the weekly reach of the service in 2018 as well as an increase in reach and engagement on social media. In Welsh, the Cymru Fyw team has focussed on its digital video and social offer.

Changes introduced in March to the main news homepage (bbc.co.uk/news) now delivers a tailor-made service for signed-in users in Wales that blends the biggest global, UK and Welsh stories in one integrated menu giving users a news homepage that reflects the particular needs of users in Wales.

This year saw the News team launch its first major podcast series. *Shreds* is an innovative collaboration between the investigations team and BBC Audio Drama department and tells the full story of the Lynette White murder and the subsequent miscarriage of justice in a way it hasn't been told before.



Reinvestment has also led to the strengthening of our specialist journalism team, with new correspondents across the Social Affairs, Home Affairs and Sport briefs. Dedicated Brexit roles allowed our daily news services to offer comprehensive coverage of ongoing negotiations in Europe and Westminster and the potential implications on the ground in Wales.

Our news programmes decamped to College Green to present programmes on a number of critical days, to provide the audience with a Wales perspective on events in Westminster.

Beyond Brexit, major political stories in Wales included the election of Mark Drakeford as First Minister during a year that saw all major political parties in Wales change leaders. Coverage of the inquest into Carl Sargeant's death was led by BBC Wales' new political editor Felicity Evans. Other major stories included flooding, the suspension of the Wylfa Newydd nuclear project and the rejection of the Swansea Tidal Lagoon project.

There was considerable interest in the coverage of the tragic death of Emiliano Sala in an aeroplane crash in January. Our teams reported on unfolding events in the days and weeks following the disappearance of the plane.

The news services also reflected sporting success in Wales, delivering comprehensive coverage of Wales' grand slam win as well as Geraint Thomas' historic victory in the Tour de France. Delivering extended coverage of the homecoming event across all platforms, thousands of people lined the streets of Cardiff to celebrate the win.

A new presenting team for *BBC Wales Today* saw Nick Servini and Jennifer Jones join Lucy Owen to front the lunchtime, evening and late bulletins on BBC One Wales.

The *BBC Wales Investigates* strand continued to make its mark, delivering a number of ambitious and impactful stories. Undercover investigations exposed a network of badger baiters operating in Wales as part of a six month investigation into the illegal practice. The team also went undercover to shine a light on the extent of labour exploitation and modern day slavery in Wales. Other programmes investigated spycops; the rise of the far right in Wales, the impact of county lines drug operations and an investigation into a Cardiff man at the centre of a network which sent funds to Isis.



BBC Wales Live delivered a number of impactful original stories during the year. Stories on forced marriage, conjoined twins and the suicide of a university lecturer engaged audiences across the UK, including a high proportion of younger adults.

Across all platforms, the focus continues to be on achieving high-impact journalism, delivering engaging stories to audiences across Wales, about the issues that matter to them. ■



Sport at BBC Wales

Undoubtedly Geraint Thomas winning the 2018 Tour De France before being crowned BBC Sports Personality of the Year were highlights this year.

BBC Wales Sport captured the key moments from the twenty three day race with BBC Wales' commentator, Gareth Rhys Owen bringing all the action to listeners of Radio Wales, Radio Cymru and Radio Five Live, as well as compelling podcasts. Thousands of people lined the streets of Cardiff for Geraint's triumphant homecoming.

Elsewhere, it was a dramatic year for Welsh football. BBC Wales was on hand to offer all the highlights, including Newport County's fairy-tale FA cup run, Cardiff City's fight to stay in the Premiership and Swansea City's play-off bid under its new manager. There was multi-platform coverage of the national team's games in Denmark, Republic of Ireland, Albania, and Spain with continuing comprehensive coverage of the Euro qualifiers. There were also live streams of the New Saints fixtures in the UEFA Champions League qualifying matches.

The Wales Women's football team's bid to make it to the 2019 World Cup captured the imagination. An audience of 1.1 million watched on BBC 2 across the UK as the team missed out at the final hurdle in a defeat by England at Rodney Parade.



Sam Warburton
Full Contact

The range of coverage around the 2019 Six Nations Championship, including *Six Nations Sin Bin*, *Sam Warburton: Full Contact* and *Tourist Trap Six Nations Special* achieved significant audience impact including a near record of over one million viewers for the crucial Wales v Ireland tournament decider.

The Wales v England fixture attracted 734,000 in Wales – 69 % of the available audience. On average, over 250,000 viewers watched the concluding *Scrum V Six Nations in The Club* to review the campaign, and Steve Spiers' *Scrum V* videos topped a million views on Facebook. Radio Wales, Radio Cymru and TV news all broadcast the team's homecoming celebrations live from the Senedd.

The Women's rugby match against Italy was available to watch on the Red Button and their game against Scotland was on *Scrum V Live*.

Comprehensive coverage of Guinness Pro14 rugby continues despite the loss of the TV broadcast rights. *Scrum V* now regularly features HD coverage of the semi-professional Principality Premiership on BBC Two Wales.

Beyond football and rugby, BBC Wales continues to offer coverage of a variety of sports, including athletics, ice hockey, boxing, swimming, motorsport and horse racing.

BBC Wales once again produced the Wales Sport Awards in collaboration with Sport Wales – a chance to celebrate the best of Welsh sporting talents from grassroots to elite sport. Geraint Thomas was crowned BBC Wales Sports Personality and Baroness Tanni Grey-Thompson received the Lifetime Achievement Award.

The BBC Sport website and social media platforms continue to be a hub of digital innovation with a focus on younger audiences, distinctive short-form storytelling and live streaming.

Elis James' *Feast of Football* podcast goes from strength to strength including special recordings in front of live audiences. It was awarded a Finalist Certificate at the New York Festival's World's Best Radio Awards.

BBC Wales covered the 2018 Cardiff Half Marathon, which marked the 60th anniversary of the 1958 Cardiff Commonwealth Games.

Glamorgan's 2018 campaign enjoyed ball by ball coverage via the BBC Sport website and app. ■

BBC Radio Wales

In 2018, BBC Radio Wales celebrated 40 years on air. The anniversary was an opportunity to head out of the studio to say thank you to audiences across Wales.

Throughout the birthday week, presenters took to the road on a special bus tour. Jason Mohammad, Eleri Sion and Wynne Evans were just some of the presenters to broadcast live from the on-board studio in Aberdare, Kittle, Llandrindod Wells, Barmouth and Connah's Quay. The pinnacle of the celebrations was a gala night of music and comedy at the Swansea Grand Theatre.

The BBC delivered its promise to extend Radio Wales' FM coverage to an additional 400,000 people across Wales, taking its reach from 79% of households in Wales to 91%, with listeners in north-east and mid Wales benefiting the most from the expansion.

There was also digital growth as the number of Radio Wales podcast downloads reached 1.7 million in 2018, with a further 2.6 million requests for our programmes online.

However despite online growth, the radio audience landscape continues to be challenging, prompting changes to the Radio Wales breakfast news programme.

Elsewhere, there was significant audience and industry change in Wales with major commercial broadcasters ending locally-produced breakfast programming.

News and current affairs continues to be at the heart of Radio Wales output. This year, the station has provided comprehensive coverage of major stories through our daily news programmes, including Brexit and the various party leadership changes across Welsh politics. News programmes also joined the rest of the station in marking 70 years of the NHS with an ambitious series of



outside broadcasts telling the story of the health service today.

During major weather events, our audiences often depend on Radio Wales' news programmes for crucial local updates, and this year's Beast from the East was no exception.

It was an incredible year of Welsh sport and Radio Wales was there for all the highlights. There was live coverage of Geraint Thomas winning the Tour De France, full commentary of Wales winning the Six Nations Grand Slam and every kick of the ball in Newport County's incredible run in the FA Cup.

Radio Wales provided commentary of every Wales football game after Ryan Giggs took over as coach of the men's national team. The station also followed the Wales Women's team in their bid to qualify for the 2019 World Cup.

Radio Wales has always been proud to support Welsh comedy writers and performers. In addition to fresh sitcoms and stand-up shows the station supported Welsh comedy further by entering into a new partnership with Machynlleth Comedy Festival. The collaboration saw the creation of the BBC Radio Wales Arena at the festival, which included a special live show with comedian Rhod Gilbert

and a host of other programmes across the festival weekend.

In the station's 40th year, programmes have broadcast from events in every part of Wales, including the Rhyl Airshow, the National Eisteddfod, the Green Man Festival, the Hay Festival, Swansea's Biggest Weekend, Proms in the Park from Colwyn Bay, the Porthcawl Elvis Festival, Focus Wales in Wrexham and the Royal Welsh Show.

2018 saw the launch of BBC Sounds, the BBC's internet streaming, catch-up, and radio service which brings together live radio, music playlists and podcasts. Many Radio Wales podcasts are proving popular, including *Elis James' Feast of Football* and the Monday night comedy programmes. ■



BBC Radio Cymru

It has been a year of innovation and change for BBC Radio Cymru, a year when the station has sought opportunities to reach new audiences and explore the potential offered by new platforms.

Following the launch of a second Welsh language radio service in January 2018, Radio Cymru 2's offer of quality entertainment and music has generated increased awareness of the service, accumulating in a tour across the nation in February by *Y Sioe Frecwast* to mark the station's first year of broadcasting.

The online requests for Radio Cymru 2 to BBC platforms, which indicate that the station is succeeding in reaching younger audiences, has been an important boost to the team seeking to promote the new station as a source of chat, fun and music. For the first time, audiences now have a real choice in the mornings between great journalism on Radio Cymru, and light hearted music-based entertainment on Radio Cymru 2. Having two Welsh language radio stations also means more Welsh-language music is played on the BBC than ever before more Welsh-language music on the BBC than ever before.

Another opportunity to reach new Welsh language audiences emerged in 2018 through the advent of BBC Sounds. This year, the station launched its first ever commissioning round for unique and bespoke content for the service, aimed primarily at those aged under 35. This has prompted a huge number of new ideas from individuals, groups and companies – some of whom are venturing to the world of audio production for the very first time. As a result, a number of new and exciting podcasts will be launched on BBC Sounds in Welsh throughout 2019/20.

Meanwhile Radio Cymru's listening figures continue to indicate that the station is attracting a strong audience. It continues to be the most listened to station for fluent Welsh speakers. Radio Cymru attracted around 120,000 listeners every week and the BBC received around a million online requests for the station's programmes.

Crucially, we remain determined to provide a wealth of high quality programmes for our listeners through the Welsh language. In what has been an incredibly busy political year, the station has been ambitious in its journalistic content – choosing to disrupt its usual schedule to bring its audiences live updates and analysis from Westminster, Brussels and Cardiff Bay on events relating to Brexit.

A desire to be present at events of national significance led us to eisteddfodau and a number of other shows and festivals throughout last summer. Radio Cymru's co-productions with the BBC National Orchestra of Wales have also provided the station with incredible musical highlights from concerts in Bangor, Llandudno and in Cardiff.

Being part of a community is important to Radio Cymru listeners, and this sense of belonging has been reinforced throughout the year by key moments.

The 'Pawen Lawen' tour by Aled Hughes in November 2018 led to 45,114 'high fives' being captured from children and adults across Wales, as well as leading to 377 audience generated videos and visits to 39 schools.

Our commemorations to mark the end of the First World War included *Rhyfelgan*, which took the audience on a journey through the songs and voices of the Great War. Narrated by our team of presenters the songs were performed by Shân Cothi, Trystan Llŷr



Dafydd a Caryl

Griffiths and Rhys Meirion, accompanied by the BBC National Orchestra of Wales.

The recording of 'Titw Tomos Las' by Hogia'r Wyddfa, Band Pres Llareggub and Siddi, was a memorable tribute to cyclist Geraint Thomas during the Tour de France, and was subsequently played during the celebrations of his achievement in the competition on the steps of the Senedd during the National Eisteddfod in August 2018.

The Radio Cymru sports team were also involved in some of our biggest events of the year – not least the Six Nations Competition and the subsequent celebration event with the First Minister and Llywydd of the National Assembly, which was broadcast live on the station in a special programme from Cardiff Bay.

All of this was of course captured on Cymru Fyw too and by our new central social media team which has allowed us to produce new forms of content and reach more diverse audiences. There has also been greater cross-platform cooperation between our audio and online teams in the development and promotion of stories and ideas – and we look forward to taking this collaboration a step further when the teams work together when the station moves to its new home in Cardiff in Central Square. ■



BBC National Orchestra & Chorus of Wales

April 2018 saw BBC National Orchestra of Wales celebrate 90 years of music with its first live-streamed concert from BBC Hoddinott Hall.

The concert took audiences on a journey through the BBC NOW archive and celebrated its historic moments. The installation of a multi-camera system in BBC Hoddinott Hall has enabled BBC NOW to reach a bigger and more diverse audience online, opening up the concert hall experience and enabling more people to enjoy the orchestra's work. This season, audiences on both BBC iPlayer and Facebook were able to watch live streams of the world premiere of *Mass via Victrix [1914-1918]* by composer Stanford – marking 100 years since the end of the First World War – and Berlioz's *L'enfance du Christ* conducted by Sir Andrew Davis. In January 2019, the orchestra marked ten years since moving into its home in Hoddinott Hall and this new system is an evolution of how its musicians use this world class recording studio, concert hall and rehearsal space.

During the summer, BBC NOW made its annual journey to the BBC Proms in London. In 2018 we marked 100 years since the death of Welsh composer Morfydd Owen and the orchestra's performance of Owen's *Nocturne* brought her music to the fore at the BBC Proms. This Prom was also a landmark moment for Radio Cymru who broadcast the orchestra's concert live from the Royal Albert Hall for the first time. Joined by no fewer than five choirs – BBC National Chorus of Wales, BBC Symphony Chorus, London Symphony Chorus and Southend Boys' and Girls' Choirs – the finale of Thomas Søndergård's tenure as BBC NOW's Principal Conductor was on a grand symphonic scale with Mahler's eighth symphony.

Other festival appearances this year included Aldeburgh Festival, St Davids Cathedral Festival and Swansea International Festival, as well as Cheltenham Festival with Sheku Kanneh-Mason. A new collaboration between Gruff Rhys and BBC NOW saw a sell-out gig to almost 2000 people as part of *Festival of Voice* at Wales Millennium Centre to launch Rhys' new album *Babelsburg*.

In a first for BBC NOW, the orchestra joined S4C's *Cyw* to present a series of concerts aimed at nursery children and younger families. The five concerts, which marked *Cyw*'s tenth birthday, took place in BBC Hoddinott Hall as part of the National Eisteddfod and were broadcast on S4C. BBC NOW also featured in BBC Four's *Discovering...* series, in which Katie Derham and members of the orchestra introduced Benjamin Britten's *The Young Person's Guide to the Orchestra*, a classic of the concert hall frequently performed to children and adults alike.



In a world premiere installation and music piece by Welsh composer John Rea, BBC NOW brought the sound and image archive of St Fagans National Museum of History alive as

part of a celebratory opening weekend for the St Fagans Redevelopment Project. The orchestra's celebration of Wales' rich cultural heritage continued in its annual St David's Day concert, which explored the life of the nation's patron saint in a world premiere of *Vita Davidis* by Welsh composer Gareth Glyn performed by Catrin Finch. Leader of the orchestra Lesley Hatfield and Principal Cello Alice Neary were also honoured to represent Wales and BBC NOW at the Royal Wedding in May forming part of a small ensemble accompanying soprano Elin Manahan Thomas.

International touring this year saw the orchestra fostering creative collaborations between China and Wales, supported by Wales Arts International. Performances took place in the National Centre for the Performing Arts in Beijing, Changsha Concert Hall and Qintai Concert Hall in Wuhan with soloists Chinese harpist Shimeng Sun and BBC NOW's Principal Flute Matthew Featherstone. In a second concert in Beijing, the orchestra welcomed Chinese guest soloist, cellist Jiapeng Nie to perform Tchaikovsky's *Rococo Variations*. The final concert of the tour in Shenzhen Concert Hall saw BBC NOW perform alongside musicians from the Shenzhen Symphony Orchestra. This first time collaboration between the two orchestras provided an opportunity for cultural exchange between musicians, and built creative links for future activity in China. The orchestra was led by BBC NOW's Principal Guest conductor, Xian Zhang, who was touring her home country with a European symphony orchestra for the first time and formed part of the British Council's *Inspiring Women in the Arts* campaign. ■



Personalisation has been central to the BBC’s digital activities over the last year with a focus on encouraging more people to create and sign-in to BBC accounts.

Securing prominence for key BBC Wales titles on the BBC iPlayer homepage has seen increased prominence followed by impressive viewing figures for programmes such as *Keeping Faith* and *Hidden*. The number of requests for BBC Wales content on iPlayer trebled during 2018.

This year has seen more tailored content on the bbc.co.uk homepage for signed-in audiences in Wales. Users now see a brilliant blend of the very best the BBC has to offer be that from Wales, the UK or further afield.

Bitesize and Learning is an area where location matters – as there is significant difference between the curriculum in different parts of the UK.

In that context, Bitesize continues to serve audiences the length and breadth of Wales. This year has seen the addition of new content across a number of GCSE subject areas, including Religious Studies, Geography, Chemistry, Biology, Physics and History (in English and Welsh).

In addition, content was developed for Key Stage 2 Maths (Welsh language), Key Stage 3 Welsh as well as app content in Chemistry, Physics, Religious Studies, Geography and History.

The new social media service, *BBC Sesh*, was launched in April 2018, a brand new platform for young and previously unheard voices from across Wales.

Contributors range from Wrexham spoken word artist, Evrah Rose; Katy Gough who vlogs about Autism and Asperger’s; and comedians Leroy Brito and Ignacio Lopez have all produced videos which have generated over three million views. *BBC Sesh* has also been involved in outreach sessions and workshops across Wales, staged a stand-up comedy night for emerging comedians and collaborated with BBC Radio 1.

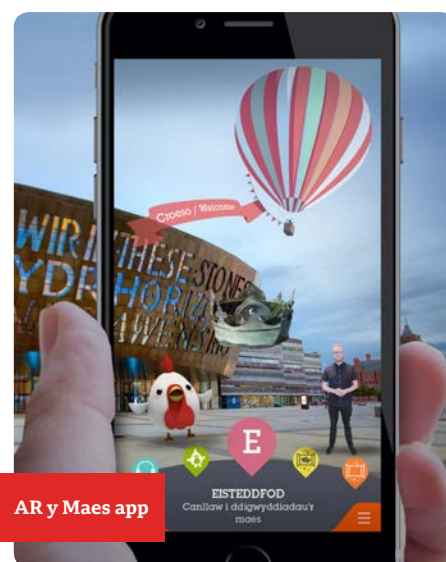
This year has also seen impressive growth in the BBC Wales Facebook and Twitter accounts as it continues to broaden its appeal.

On Facebook, the average number of weekly engaged users and videos views is four times higher than 2017/18. Similarly, the @BBCWales Twitter account has also more than doubled the average number of weekly engagements, and trebled the average number of weekly video views.

We worked in partnership with S4C and National Eisteddfod to test how Augmented Reality (AR) could be used to deliver content to audiences during a major event. The bilingual ‘AR y Maes’ App allowed visitors to the Eisteddfod to access AR content as they walked around the festival site. Users were able to see through the walls of the Wales Millennium Centre and watch the BBC National Orchestra of Wales practice, were taken on a virtual music tour of the Bay by Huw Stephens and see the history of Cardiff Bay come to life.

The digital drama slate continues to grow with high quality digital content to accompany world class BBC dramas such as *Doctor Who*, *Luther* and *Les Misérables*. The content won two Promax Awards in 2018/19, for *Peaky Blinders* and *Requiem*.

The team also delivered a *Doctor Who* Live Lesson – an activity aimed at enriching the curriculum for learners aged 7-11 across the UK and a valuable resource for teachers. ■



Creative Partnerships

BBC Wales continues to work with a range of organisations in order to maximise creative relationships across Wales.

These bodies included national and regional cultural institutions, universities, training organisations, venues, local authorities, charities, voluntary groups and commercial organisations.

Wales' Creative Partner

The partnership with It's My Shout has been a highlight with BBC Wales working with diverse communities across Wales to develop up-and-coming film makers and actors. Four high-quality documentary programmes were commissioned and broadcast under the banner New Voices from Wales.

BBC Writersroom Wales also supported new and experienced writers. It developed a joint initiative with Hartwood West, co funded by ScreenSkills High-End TV Fund, to find and develop the most exciting, up-and-coming TV writers with a strong connection to Wales. From 150 submissions two writers were selected – Alan Harris and Fflur Dafydd. Both are now receiving a 6 month bursary to develop original BBC drama under the guidance of acclaimed Welsh screenwriter Russell T Davies.

Writersroom Wales also worked with BBC Children in Need to match-make writers with Children in Need schemes throughout Wales in order to generate multi-platform drama ideas that authentically portray under-represented communities and reflect a wider, more diverse Wales.

Working with BBC Music, BBC Writersroom Wales produced micro-comedy shorts for The Biggest Weekend Festival. An open call-out and workshop with new writers, led to the production of Kirsty Roderick's *Porta-Lols*, as well as two other shorts which were distributed on the social media service, *BBC Sesh*.

BBC Writersroom Wales also partnered with a range of festivals to deliver bespoke workshops and talks for writers and aspiring writers, including:

- Machynlleth Comedy Festival
- Craft of Comedy Festival
- Abergavenny Writing Festival

Additionally, BBC Wales had a presence as part of the following initiatives:

- Digital Cities
- BBC School Report



BBC Writersroom Wales

Gorwelion/Horizons

During 2018/19 the Gorwelion/Horizons project, a partnership with the Arts Council of Wales, continued to support and promote the work of new music artists from Wales. Gorwelion/Horizons plays an important role in supporting new Welsh music talent; it represents a diverse range of musical styles, and supports collaborations from grassroots level to a much larger scale.

This year's twelve selected artists have benefited from opportunities to reach new audiences, including opportunities to perform in festivals and events throughout the year, such as the Radio 1 Biggest Weekend in Swansea.



Gorwelion/Horizons

Supporting a Creative Economy

The BBC worked with a number of partners in the Cardiff-based Clwstwr Creadigol on a successful bid in September to the Arts and Humanities Research Council (AHRC).

Clwstwr Creadigol is a partnership with Cardiff University, the University of South Wales and Cardiff Metropolitan University, as well as the Welsh Government, all major Welsh broadcasters and more than 60 screen industry businesses. As a result of this collaboration, a multi-million pound research investment into Wales' creative economy has been secured. It will focus on screen industries and journalism with academics from Cardiff's three universities developing research that can help the already thriving creative sector to reach its full potential.

BBC Wales remains committed to developing the next generation of content producers, particularly those from under-represented groups. The focus of these efforts saw the launch of the Digital Journalism Apprenticeship scheme. Developed in partnership with Cardiff and Vale College, it is giving hundreds of young people a taste of digital journalism at locations across Wales, including Beddau, Llanhari, Aberdare, Porth, Aberystwyth, Haverfordwest, Tenby, Llanelli, Bangor, Colwyn Bay, Wrexham, Swansea and Newport. Through this scheme, 10 successful applicants will be awarded 18-month long journalism apprenticeships at BBC Wales starting in September 2019.

Lasting Legacies

Further steps were taken this year to complete the mass-digitisation of BBC Wales' broadcast archive. As a result of this major undertaking involving 180,000 broadcast assets, the BBC hopes to develop a National Broadcast Archive for Wales in partnership with the National Library of Wales. It would join the ITV, S4C and screen and sound archives collected at Aberystwyth.

Subject to final National Lottery Heritage Fund approval, the partnership aims to tell the story of Wales through film, television and radio. Digitised content would be available to view by the public and researchers at the National Library but also at new hubs in Cardiff, Carmarthen and Wrexham.

BBC Wales Television And Radio – 2018/19 Annual Review Figures

Estimated Income	2018/19	2017/18
UK	3,690	3,830
Wales	184	191

Expenditure by service

Direct & indirect spend relating to programmes produced in Wales

Network content	2018/19	2017/18
TV (including sport and children's)	49	50
Radio	3	3
Online and Red Button	1	1
Total network spend	53	54

Local content	2018/19	2017/18
TV – BBC One and BBC Two	33	35
Radio Wales	15	15
Radio Cymru	14	14
Online and Red Button	11	8
Total local spend	73	72
National Orchestra of Wales	5	5
S4C	22	26
Development	1	–
Distribution	25	26
Total	179	183

Analysis of spend by service	2018/19	2017/18
BBC One	66	72
BBC Two	13	12
BBC Four	3	1
CBBC	–	–
CBeebies	–	–
Radio 3	2	2
Radio 4	1	1

Television hours

Local opt-out hours (including repeats)

BBC One and BBC Two	2018/19	2017/18
Drama, comedy, entertainment, music and arts	36	27
Daily, weekly news and current affairs	382	381
Sport and leisure	143	141
Educational, factual and religion	65	63
Origination Hours	626	612
Repeats	99	50
Total Hours	725	662

S4C	2018/19	2017/18
Drama, comedy, entertainment, music and arts	168	174
Daily, weekly news and current affairs	255	263
Sport and leisure	133	97
Educational, factual and religion	1	2
Origination Hours	557	535
Repeats	125	135
Total Hours	682	670

BBC Radio Wales	2018/19	2017/18
News and current affairs	1,826	1,755
General	5,483	5,529
Origination Hours	7,309	7,284
Repeats	143	191
Total Hours	7,452	7,474

BBC Radio Cymru	2018/19	2017/18
News and current affairs	1,177	1,283
General	6,083	5,403
Origination Hours	7,260	6,686
Repeats	371	372
Total Hours	7,631	7,058

Headcount

Average number of persons employed in the year

Individuals employed to directly support the services produced in Wales	990	950
Individuals based in Wales across all services including support functions	1,231	1,208

The management team



Rhodri Talfan Davies
Director BBC Wales



Nick Andrews
Head of Commissioning



Zoë Baker
Senior HR Business Partner



Rhys Evans
Head of Strategy & Education



Michael Garvey
Director National Orchestra
and Chorus of Wales



Sian Gwynedd
Head of Content Production



Garmon Rhys
Head of News



Rhuanedd Richards
Editor BBC Radio Cymru & Cymru Fyw



Colin Paterson
Editor BBC Radio Wales



Gareth Powell
Chief Operating Officer



Richard Thomas
Head of Digital and Marketing



Geoff Williams
Head of Sport

Contacts

If you have a question, comment or complaint about BBC Wales programmes or services, or any other aspect of the BBC's work, please contact our Audience Services unit.

All feedback is carefully registered and regularly distributed to editorial teams and management.

Telephone: 03703 500 700

Lines open weekdays 9.30am–5.30pm
(except bank holidays).

Calls to the 0370 UK-wide rate are charged at no more than 01/02 geographic numbers. Calls may be recorded for training.

Website: bbc.co.uk/aboutthebbc/cymruwales

Write to:

Audience Services

BBC Cymru Wales

Bangor

LL57 2BY

Complaints: for more information about the BBC's complaints process and to submit a complaint online please visit

bbc.co.uk/complaints

Photography

Photographs used are © BBC, or used under the terms of the PACT agreement or with permission from elsewhere. Permission from the copyright holders must be sought before any photographs are reproduced.

The text of this document may be reproduced free of charge in any format or medium providing that it is done accurately and not in a misleading context. It must be accredited to the BBC.

BBC Cymru Wales
Broadcasting House
Cardiff CF5 2YQ
bbc.co.uk/wales
© BBC 2019

Dafydd Elis-Thomas

Deputy Minister for Culture, Tourism and Sport

Welsh Government

17 September 2019

Dear Dafydd,

Fusion programme

Thank you for attending our meeting on 22 May 2019 to discuss our inquiry into tackling poverty and social exclusion through the arts and culture.

As part of this inquiry Members of the Committee spoke to the Fusion programme co-ordinators and some had the opportunity to take part in activities they organised.

The Committee also discussed the Fusion programme with Baroness Andrews at our meeting on 10 July. During the discussion Baroness Andrews said that she was impressed by the Fusion Co-ordinators' submissions to the Cultural Inclusion Board and suggested that these case studies should be shared more widely. Please can you let me know how the information to the Board is used and if it can be publicised more widely?

The evidence to the inquiry suggests that there are many ways in which attendance and participation in cultural activities can be increased. For instance, providing additional funding for incidental costs such as transport and childcare. Our Members have suggested that it would be useful to draw on the experience of the Fusion co-ordinators to determine how best any additional funding to the programme should be directed.

Please can you pass on these questions from our Committee Members to the Fusion programme co-ordinators? We would like to know:

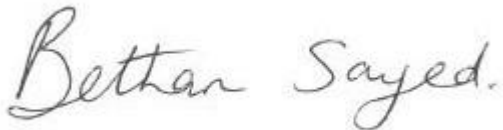
- Given your experience of working in the Fusion programme, how would you prioritise any additional funding?

- In your experience, what is the most frequent barrier to participation in cultural activities for those in poverty or socially excluded?

Can responses be directed to seneddcwlc@assembly.wales by 30 September?

They will be used to inform the report of this inquiry, thank you in advance for facilitating this work.

Yours sincerely,



Bethan Sayed

Chair of the Committee

Yr Arglwydd Elis-Thomas AC/AM
Y Dirprwy Weinidog Diwylliant, Chwaraeon a Thwristiaeth
Deputy Minister for Culture, Sport and Tourism



Llywodraeth Cymru
Welsh Government

Ein cyf/Our ref MA-P-DET-3377-19

Bethan Sayed AM
Chair, CWLC Committee
National Assembly for Wales
Cardiff Bay
Cardiff
CF99 1NA

02 October 2019

Dear Bethan,

Thank you for your recent request for additional information regarding the Fusion Programme.

The Fusion case studies you requested are an integral part of the yearly delivery plan. Additionally, infographics are produced and evaluation carried out by the Welsh Government. This information is all made available on the Welsh Government website <https://gweddill.gov.wales/topics/culture-tourism-sport/tackling-poverty-through-culture/?lang=en> and promoted via our Fusion delivery partners. I have asked my officials to promote the Fusion coordinators' case studies that were provided as evidence to the committee via the Welsh Government website.

My officials have also requested that the Fusion coordinators contact you directly to respond to the further questions you have raised.

I hope this provides you with an update. Thank you again for contacting me regarding this matter. I look forward to receiving your report in due course.

Yours sincerely,

Yr Arglwydd Elis-Thomas AC/AM
Y Dirprwy Weinidog Diwylliant, Chwaraeon a Thwristiaeth
Deputy Minister for Culture, Sport and Tourism

Bae Caerdydd • Cardiff Bay
Caerdydd • Cardiff
CF99 1NA

Canolfan Cyswllt Cyntaf / First Point of Contact Centre:
0300 0604400

Gohebiaeth.Dafydd.Elis-Thomas@llyw.cymru
Correspondence.Dafydd.Elis-Thomas@gov.wales

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.

Response from Fusion Coordinator for Carmarthenshire

I

1: Given your experience of working in the Fusion programme, how would you prioritise any additional funding?

The priorities for Carmarthenshire would be dependent on the allocations of funding that would be provided from the Welsh Government. From my experience if the level of funding was increased, the programme could be expanded, which would enable the development of additional projects across a wider geographical area. This would encourage the development of additional partnerships and networks in the rural areas, inspiring new partners to embed the principles of Fusion into their current and future delivery models.

Fusion has been very well received by the Communities, Partners and Third Sectors and has been critical in tackling poverty through culture at local community levels. From my experience there was a clear service gap within the area, with many organisations working in isolation, with no or poor linkages to community focussed projects. As a result of this, individuals were not accessing cultural or heritage services, placing them at a disadvantage. To reach out to the individuals that are the most unlikely to access services, working with communities is instrumental. Co-production with communities is essential in the creation of sustainable services and long term change. Fusion has enabled this process, which has led to a multi partner approach to tackling poverty, through working together to develop new and innovative methods, targeting the most deprived areas across Carmarthenshire.

With key strategic Welsh Government Programmes such as Communities for Work, Communities for Work Plus, Legacy, Families First, Flying Start and the Youth Services involved in the process, organisations have been provided with opportunities to identify needs and reach out to individuals that historically felt the services provided by the Cultural and Heritage Sectors were “out of their reach”. The perception of culture and heritage opportunities not being accessible, is now beginning to change. Within Carmarthenshire, we have continued to see new individuals accessing projects that they would not have previously. However, to continue the approaches that have been adopted and contribute towards breaking poverty cycles, funding is essential.

If the level of funding continued at the same current levels, maintaining the partnership and network would be critical. Working in partnership is the main factor contributing to the success the programme. It is this approach that ensures the prioritisation of individuals who are most in need, living in deprived areas, or are feeling excluded due to complex barriers or are within a protected characteristic group. The collaborative approach has ensured the sharing of resources and budgets, joint planning and implementation of projects, progression pathways sustainability of delivery models.

The funding of the part time Coordinator has ensured the creation of a collaborative delivery plan, and implementation of new and creative approaches, which are delivered in line with the Future Generations of Wellbeing Act. The role of the Coordinator is essential in this process, and has been instrumental in supporting organisations to form relationships to targeting the key audiences, that are facing poverty, this is critical to narrow the inequality gap that exists between the most affluent and deprived communities.

Response from Fusion Coordinator for Carmarthenshire

2

Within Carmarthenshire the Fusion Programme has become a knowledge hub, with the role of the Coordinator being central to enabling effective communication with communities and informing individuals of the activities that they can participate in, which are of low or no cost. Building up trust through effective community engagement will be key and will help build capacity, encouraging access to services.

To add value to the current delivery, we will analyse the trends in participation, identify non representation and work with the partners on solutions to support individuals to remove the psychological and physical barriers that are preventing active involvement. There will be a focus on labour market needs, identifying current and future career prospects for individuals within the sector. Working with partners to upskill individuals from the most deprived areas, will encourage and enable individuals to access employment opportunities within the Sector.

2: In your experience, what is the most frequent barrier to participation in cultural activities for those in poverty or socially excluded?

There are both physical and psychological barriers to participation in cultural activities. These barriers are individualised and can change radically due to external and internal factors. Individuals' views and opinions can act as a main barrier. Perceptions of "what culture and heritage is" can instil fear. Individuals may feel that they are unable to access the activities, due to their personal status and circumstances. This can prevent individuals from researching and finding out about opportunities and experiences that could benefit them.

For individuals that are living in poverty, cost remains a barrier. With the changes in the benefit systems, individuals are prioritising what they feel are the basic requirements, in order to survive. Cultural and arts activities are often seen as unreachable or perceived as luxuries.

With limited funding or grants available to encourage access, inequality gaps between the most affluent and deprived communities are widening. This can result in young people not having the opportunities to participate in regular cultural activities, which can include music lessons, sports, arts, drama or dance. This can also extend to one off events or activities that take place across Cultural Venues such as the Theatre, National Trust, Wetlands and many more. The skills that are gained through participating in cultural activities are not being acquired by individuals that are living in poverty. This is placing children and young people at a great disadvantage as they are not having an equal opportunity to experience culture and the arts.

Low confidence and self-esteem remains a barrier and can result in individuals not participating in activities. Many of the individuals that we work with have anxiety and depression and only access activities initially if they are supported and encouraged by the team and partner organisations.

Many individuals who are social excluded can live isolated lives and can be reluctant to participate due to low self-esteem and confidence. Many fear being discriminated against, are concerned about language barriers or are worried about access to

Response from Fusion Coordinator for Carmarthenshire

3

services. This has negative effects on the family as a whole and creates a generational cycle, which can then be difficult to break.

To support individuals who have complex needs and multiple barriers it is essential to continue and build partnerships. The Fusion Programme has enabled the formation of localised groups that have made real changes and have actively encouraged community cohesion. Bringing together key services with the Cultural and Heritage Sectors has encouraged services to adopt different approaches to engagement. This engagement has supported many individuals to overcome barriers to participation such as; mental health, low basic skills, isolation, low self esteem, no life skills, individuals at risk of becoming NEETs or are NEET, young people within the youth justice system, and children throughout the communities, who are at a disadvantage.

The evidence to date has demonstrated that more individuals are now feeling confident in accessing services and I confidently believe that the Fusion Programme has been central to this movement.

Response from Fusion Coordinator for Gwynedd

Helo 'na,

Dyma fy ymatebion i'r cwestiynau a ofynnwyd i ni ar gyfer sut y dylid defnyddio unrhyw gyllid ychwanegol yn rhaglen Cyfuno. Dwi ond wedi bod yn y swydd ers mis Mai, felly ddim yn gwybod os mae fy mhrofiad i o Cyfuno yn ddigon eang i rhoi sylwadau/ymatebion llawn, ond ers i mi fod yn y swydd dyma be' dwi wedi'i weld. –

• O ystyried eich profiad o weithio ar y rhaglen Cyfuno, sut y byddech chi'n blaenoriaethu unrhyw gyllid ychwanegol?

Fyswn i'n blaenoriaethu unrhyw gyllid ychwanegol tuag at marchnata a trafndiaeth yn sicr, gan fod hyn yn her fawr wrth ceisio denu pobl at unrhyw weithgareddau, gweithdai neu sesiynau sy'n cael ei gynnal.

Blaenoriaethu cyllideb i'r amcanion cymhwyster, ac hefyd yn cynnal asesiadau o lle mae'r angen fwyaf cyn mentro.

Llawer o'r gwaith yng Ngwynedd hyd yn hyn yn pethau mae Cyfuno wedi bod yn rhan ohonynt, nid pethau mae Cyfuno yn cynnal/neu yn arwain ar – fysa'n dda cael fwy o gyllideb i gallu gwneud hyn ein hunain a rhoi fwy o gyfleoedd i bobl ar draws Gwynedd i gyd.

Hefyd, falla'n cyfle gwych cynnig i gymunedau yn ein ardaloedd ni dod atom ni efo eu syniadau, a rhannu unrhyw gyllideb ychwanegol fel yno. Mae'n digon hawdd cynnig gweithgareddau, ond mae'n gweithio'n well os maent yn cael eu cynnig lle bo angen fwyaf.

• Ar sail eich profiad chi, pa rwystr y mae'r bobl sy'n byw mewn tldi neu sydd wedi'u heithrio'n gymdeithasol yn ei wynebu fwyaf aml o safbwynt cymryd rhan mewn gweithgareddau diwylliannol?

Trafnidiaeth, hyder, mae'n anodd iawn cyrraedd nhw, disgwyl iddyn nhw ddod atoch chi yn lle chi mynd i'w gymuned nhw. Llawer o fudiadau yn ceisio dod a mentrau/cyfleoedd gwahanol i gymunedau tlawd/difreintiedig, heb gofyn iddyn nhw beth mae nhw eisiau yn gyntaf.

Document is Restricted