

S4C

Dyfodol Teledu Cymraeg
The Future of Welsh Language Television

S4C

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Introduction

This is S4C's first public contribution to the discussion about the future of Welsh language broadcasting beyond 2017.

S4C is a public service broadcaster which provides the only Welsh language television channel in the world. Its contribution to the lives of the people, the culture and the modern day economy of Wales is far-reaching and unique.

The Secretary of State for Culture, Media and Sport has a statutory duty to ensure sufficient funding for S4C. Currently, this is achieved by funding from two different sources, the television licence fee, through agreement with the BBC Trust, and direct government funding. We place a high value on this duality of funding and support.

The Licence Fee Agreement between the UK Government and the BBC Trust runs out in March 2017 and discussions regarding a new BBC Charter can be expected to take place well before that.

We regard it as essential that the needs of Welsh language broadcasting be given comprehensive and timely consideration within the same timeframe.

We hope that this paper provides a constructive starting point to such discussions and look forward to engaging with all our stakeholders and partners, in Wales and in Westminster, with our audience and with the industry, over the coming months.

Huw Jones
Chair

Ian Jones
Chief Executive

27 May 2014

Background

S4C is a public service broadcaster (PSB) established, by statute, specifically to serve the Welsh-speaking community. It serves this particular audience both within Wales and across the UK. As the only Welsh-language television service in the world, S4C is unique, and is the UK's most clear-cut example of public service broadcasting: its services would not be sustainable without public intervention.

S4C's aim is to deliver content and media services in the Welsh language that provide entertainment, information and inspiration, that place S4C at the centre of the everyday lives of the people of Wales and make a progressive and key contribution to Wales and the Welsh language.

S4C was launched in November 1982 and operates under a publisher-broadcaster model. The channel commissions all of its content from the independent and commercial sectors, including from ITV Cymru Wales, and under the terms of a strategic partnership with BBC Cymru Wales, receives a minimum of 10 hours of programmes a week – including its **Newyddion** (news) service, the long-running TV-drama **Pobol y Cwm** and some sport output.

Since 1982 the media landscape has changed significantly – both in Wales and beyond. S4C launched as the Welsh fourth channel, however since digital switchover and with the development of IPTV and online television services, audiences now have a choice of hundreds of channels across different platforms. S4C remains the only Welsh-language television service, but must increasingly offer its content and services across all platforms in order to deliver for its audiences.

Context

Under the terms of the licence fee settlement of October 2010, responsibility for the majority of S4C funding transferred from the UK Government's Department for Culture, Media and Sport (DCMS) to the BBC Trust through the licence fee, with a reduction in funding equivalent to 36% in real terms. The licence fee contribution is guaranteed until the current licence fee settlement ends in 2017. From 1 April 2013 therefore, 90% of S4C's funding (£76 million) derives from the licence fee with 8% (£6.787 million) maintained by DCMS until March 2016. The DCMS contribution for 2016-17 is not yet known, but S4C values highly this duality of funding and the continued relationship with Government. The remaining 2% comes from commercial income.

The statutory duty to ensure sufficient funding for S4C is enshrined in section 31 of the Public Bodies Act 2011:

(1) The Secretary of State shall secure that in 2012 and each subsequent year the Welsh Authority are paid an amount which he considers sufficient to cover the cost to the Authority during that year of –
(a) providing the Authority's public services (within the meaning of section 207 of the Communications Act 2003), and
(b) arranging for the broadcasting or distribution of those services.

(2) The Secretary of State may discharge the duty in subsection (1) by making payments himself or entering into an agreement with another person for that person to do so (or both).

The framework agreement between DCMS and the BBC Trust includes a DCMS commitment to review S4C's strategy and finances before

the end of 2014/15. We stand ready to take part in this process whenever it takes place. In addition, the current BBC Charter runs until December 2016, and although negotiations for its replacement will not formally start for the next twelve months or so, parameters for the debate are already being set.

It is appropriate therefore that S4C considers, within this context, its role and remit during the period of the next Charter – until 2027. We have spent time considering predictions for the future media landscape, mapping our audience's needs and expectations and looking at S4C's role in Wales. This report is S4C's first public contribution to the debate. It sets out some of the main considerations and ambitions of the channel to inform debate and discussion with stakeholders and partners, in order to ensure the continuation of the channel's editorial, operational and managerial independence as well as its sufficient funding.

S4C Today

Vision, Mission and Core Values

The audience is at the heart of everything that S4C does. Within parameters set out by the Communications Act 2003 and prior legislation, S4C's **Vision** is to be at the centre of the everyday lives of the people of Wales.

With a **Mission** to:

- deliver content and media services in Welsh, that provide entertainment, information and inspiration, and place S4C at the centre of the everyday lives of the people of Wales;
- make a progressive and key contribution to Wales and the Welsh language.

Our **Core Values** are to be:

- Unique;
- Welsh;
- Audience-centred;
- Accessible;
- Creative; and,
- Collaborative

Unique

As the only Welsh-language channel in the world, S4C has to appeal to a core audience of fluent Welsh speakers, to those who are less fluent, to learners, to those that aspire to learn as well as providing an inclusive service that makes its content and services accessible to non-Welsh speakers.

S4C celebrates the everyday lives, culture and traditions of the whole of Wales through the medium of Welsh. We are confident, unique and proud of our editorial and operational independence. In a multi-platform, converging, media landscape, we are single-minded in our desire to deliver excellent content and media services by inspiring people and working closely with audiences and communities.

Welsh

The Welsh language is at the heart of S4C's remit and existence.

Our aim therefore is to serve fluent Welsh speakers as well as to nurture less fluent Welsh speakers and learners - both in Wales and the Welsh diaspora. Our Children's services and programmes aim to provide children of all ages with a strong linguistic foundation based on programmes that will inspire and entertain.

We strive to bring audiences together regardless of where they live or what language they speak. Non-Welsh speakers are encouraged to access our services through subtitling and red button facilities, and we offer award-winning provision for Welsh learners too.

Audience-Centred

The audience is at the heart of everything we do. We encourage dialogue and will respond to the changing needs of the audience in order to provide value for money, and diverse, high-quality content to the widest possible audience. We will be accessible to ALL and shall engage in a national dialogue and debate on all matters that are important to the people of Wales.

Accessible

S4C aims to entertain, educate and inform; any time, on all available platforms and wherever our audience might be. We will continue to innovate to meet this challenge as convergence occurs and new platforms become available to our audiences.

Creative

Creativity is one of S4C's cornerstones. We nurture and celebrate creativity in the Welsh language, building our services on the ability and talent of our creative industries. In doing this, we aim to take Wales to the world and bring the world to Wales, whilst offering unique value to the people of Wales.

Collaborative

In the current economic climate, we need to build creative partnerships with individuals, communities and organisations across Wales and beyond to maximise opportunities and ensure public value. We bring together and inspire people and communities to work with us and with each other, as we face the challenges and opportunities of the future.

S4C's services

Content

S4C provides a wholly Welsh language programme service from seven a.m. until late at night, each weekday, and from six a.m. at the weekends. We broadcast over 115 hours of programmes each week, including sport, drama, music, factual, entertainment and events, across a range of platforms, including online. S4C also offers comprehensive services for children and young people: the award-winning **Cyw** for younger viewers, **Stwnsh** for older children and programmes for teenagers. With one television channel, we provide a comprehensive Welsh language content service across a wide range of genres, for all parts of the community in Wales.

From **Cyw**, teenage apps and games like **Enaid Coll** and **Madron**, to innovative drama like **35 Diwrnod** and **Y Tir**, and internationally celebrated factual programmes **Defaid a Dringo** and **O'r Galon**, history series like **Creu Cymru Fodern** and **Y Plas**, as well as science programmes like **Dibendraw** and natural history series **Y Tychwyr**, we offer something that will appeal to everyone. Against a backdrop of well-loved favourites: **Pobol y Cwm**, **Cefn Gwlad**, **Newyddion**, rugby and our daily magazine programme **Heno**, our programmes offer appointment-to-view television. So too does our coverage of national events, with the traditional **Urdd Eisteddfod**, **Royal Welsh Show** and **National Eisteddfod** programmes remaining a highlight in the schedule as newer features like **Band Cymru** and **Ysgoloriaeth Bryn Terfel** are introduced. Our renowned sport coverage continues to draw strong audiences, and allows us to reach a broad and varied audience.

Award-winning S4C commissions such as **Y Gwyll** / **Hinterland** are

bringing some of our nation's finest creative talent to viewers' screens - not just in Wales, but in the rest of the UK and internationally too.

S4C's Present-day audience

S4C is one of the main threads of Welsh life, vital to the very fabric of modern-day Wales.

In 2013, our programmes reached 6.5 million people, with over 576,000 viewers reached throughout the UK in an average week.

S4C has a divided audience to serve in terms of need. Our audience is as diverse as the population of Wales, and has different dimensions including language use, culture, age, geography, and general life outlook. The channel is highly appreciated for portraying the whole of Wales, both urban and rural, and its cultural and sporting events. S4C is also seen as playing an important role in keeping the Welsh language alive and vibrant. Yet by its very nature, S4C's diverse audience - and that audience's varied expectations - also represents a unique challenge: the need to offer something that appeals to everyone.

Joint research commissioned during 2012, between the Welsh Government, BBC Cymru Wales and S4C, shows that 81% of adults who speak Welsh stated they had used the S4C television service in the month leading up to the survey (Beaufort Research, November 2012).

Our core audience is loyal, with our occasional viewers dipping in and out of the service for particular programmes and genres - something that is made

easier with digital television and online services like our recently relaunched online and catch-up service **Clic**. With such advances and with multi-platform distribution - from **Clic**, **Sky** and **Virgin Media** to **YouView**, **TVCatchup** and **TV Player** - as well as international co-production opportunities, our content is being consumed and enjoyed by an increasingly technologically sophisticated audience. The success of **Clic** and our growing range of apps, enable viewers to connect with S4C in new and innovative ways, at a time of their choosing. We saw a 41% increase in online viewing sessions in 2013 - up to almost 4 million.

But these same tools have also led to far more consumer choice than ever before. In a multi-platform, digital world, S4C, with its one linear channel, must offer the breadth of public service content that is available in English on BBCs One, Two, Three and Four, CBeebies, CBBC, ITV, Channel Four and Five - without mentioning the hundreds of commercial broadcasters that now also exist. S4C must, and does, offer content that educates, informs and entertains, for people of all ages.

Viewers are discerning. They expect a comprehensive, high-quality service on television in the current standard and high definition formats as well as in any future formats projected to become the norm. Viewers want to access content on an increasingly diverse range of platforms. They also expect to be able to enjoy S4C's content on the same, multiple platforms they use to watch that of other broadcasters. There are of course cost implications to distributing content on multiple platforms.

These, and infrastructure costs, are likely to increase in the future as new platforms and multimedia devices continue to be developed.

Whilst our content is available across all platforms, in line with other public service broadcasters, S4C is amongst the only peer organisation to broadcast only in SD. With a 36% real-term reduction in our funding since 2010, difficult decisions have had to be taken - including the closure of our Freeview HD service, Clirlun, in December 2012. The suspension of S4C's HD service was one that was always going to be reviewed as the landscape developed. Subject to efficiency savings, our ambition is to relaunch an HD service to a wide audience by 2016.

Audiences in Wales must not be disadvantaged or left behind: they must be able to enjoy Welsh language content as easily as they enjoy English content, and with the same up-to-date technology. Ensuring the ease of access of Welsh language content is also intrinsic to the long-term future of the language. Partnership developments, such as the one with the BBC iPlayer, which will see S4C content available to watch on close to 650 devices through a dedicated S4C iPlayer channel from the end of 2014, are paramount in achieving this new universality of service.

Against this multi-media backdrop, we must at the same time ensure plurality of media within Wales. At a time when it is being argued that not enough Wales-based choice is offered to them, Welsh audiences need content that reflects their nation in all its diversity.

Within this wider context and landscape, Welsh language broadcasting that is operationally, editorially and managerially independent has a more important role than ever.

Performance Measurement, Efficiency and Value for Money

The Authority has developed a wide range of performance measures - such as viewing figures and qualitative measures - which presents a broad picture of the use and impact of S4C's services. These include the provision of service, economic impact, audience appreciation, trust, successful provision for learners, children's programming, and a positive impact on the development of the language and awareness of Welsh culture.

The nine performance measures presented in the 2012 annual report demonstrate that despite the challenges faced, S4C's services continue to be valued by the audience and S4C continues to operate in an efficient manner which ensures value for money. The cost per hour of S4C's commissioned content has, on average, reduced from just over £52,700 in 2009 to £31,100 per hour in 2013/14, with the cost per hour of all S4C broadcasts reducing from just over £16,400 to just over £10,800 in 2013/14. These are significant reductions, and are reductions which the independent production companies have been able to deliver for S4C.

Viewed in isolation, individual performance measurements can potentially lead to a skewed interpretation of S4C's value. As the only Welsh-language television service, it has a unique and valuable role to play. As a PSB, its purpose is to deliver a comprehensive and wide-range of high-quality content for and about Wales. S4C is not a ratings chaser; its role is not to compete with the commercial

broadcasters for ratings and audiences. The value of public service broadcasting in a minority language to its audience is about much more than cost per hour alone.

In 2013, S4C's annual reach across the UK increased significantly, with 6.5 million people viewing our content. Our monthly reach amongst Welsh speakers in Wales continued to demonstrate stability over the longer term. Overall monthly and weekly reach in the UK and Wales, however, saw a decrease, though a good deal of this is a result of a reduction in our ability to acquire the rights to broadcast high-quality sport, as a result of fiercer competition which is likely to continue, and to changes in the BARB audience measuring panel. And of course, no broadcaster is completely immune to audience fragmentation as a result of increased media and content choice.

S4C's Impact

Economic Impact and the Independent Sector in Wales

Since its creation in 1982, S4C's publisher-broadcaster model has resulted in a strong, innovative, independent production sector, which has had a significant impact on the Welsh economy – including bringing in direct investment. The Hargreaves Review of Creative Industries in Wales (March 2010) recognized that “without S4C, Wales may well not have any independent television companies at all.”

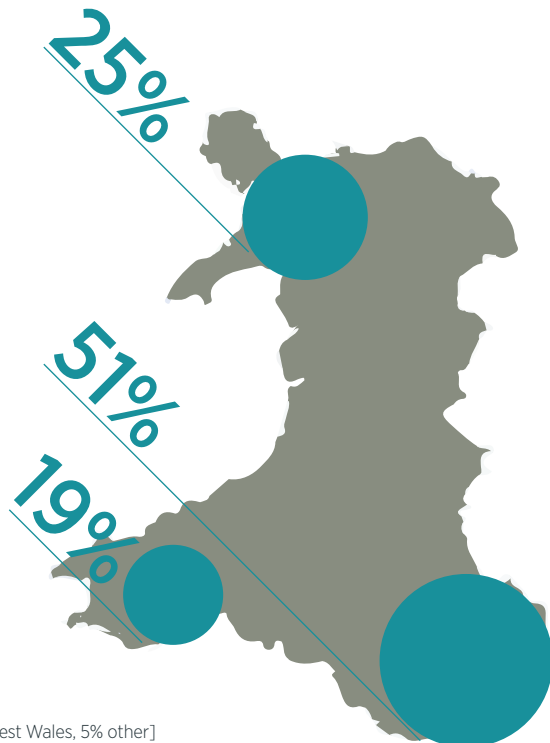
The Welsh independent production sector has grown and developed alongside S4C. Wales is a small nation that repeatedly punches above its weight in the creative industries. The independent companies, many of which have a significant presence in communities across Wales, offer world-class content which is increasingly valued by S4C's audiences and enjoyed by audiences outside of Wales and internationally. Broadcast's Indie Survey 2014 places Boom Pictures, Tinopolis and Rondo Media in its top 45 UK independent companies. Tinopolis and Boom Pictures also featured in the Broadcast list of the top 10 UK owner/consolidator companies.

Like S4C, the independent companies also have a significant impact on the economy. Recent analysis conducted for S4C (Arad Research, 2013) demonstrated that:



- S4C's investment of £63.7m in the creative industries in Wales in 2012 was responsible for creating additional expenditure of £60.5m in the Welsh economy and total economic impact on the creative industries in Wales of £124.3m; and
- every pound invested by S4C in the creative industries in Wales is worth almost £2 (£1.95) to the Welsh economy.

Investment in Content from Companies across Wales 2013



[51% south Wales, 25% north Wales, 19% west Wales, 5% other]

S4C invests in and commissions content from companies across Wales. This means that the economic impact and value of S4C is spread within communities in north, west and south Wales. Major companies such as Rondo, Cwmni Da and Antena in Caernarfon, Tinopolis in Llanelli, Boom Pictures in Cardiff, and Telesgôp in Swansea all have a substantial effect on their local economies and contribute to a highly-skilled workforce in their respective areas – and beyond, as productions travel the country to film content that reflects Wales. Filming productions for S4C also has an effect therefore on the economy of the areas where the programmes are made, irrespective of where the independent production company might be based.

For example, during much of 2013, filming of *Y Gwyll / Hinterland* (Fiction Factory, Tinopolis, All3Media International and S4C) took place in Ceredigion. Many of the cast and crew members were based in Aberystwyth and the surrounding area, and a considerable amount of the expenditure associated with the production of the series was made in the area. Analysis by Arad Research for S4C on the production (December 2013) demonstrated that:

- the combined effect of the direct, indirect and induced rounds spending of **Y Gwyll** equated to an estimated £1,040,000 spend in Aberystwyth over the course of the production;
- every pound of direct expenditure made in Aberystwyth as a result of filming **Y Gwyll** generated an additional spend of 57p in the local economy.

It is estimated that S4C's recurring drama series **Rownd a Rownd** (Rondo Media) has contributed £62 million to the economy of Menai Bridge and the Caernarfon area in the 19 years since it launched, with 95% of the series spend local to the area. The production employs around 130 locally-based freelance workers for some 10 months of the year. The series has nurtured and developed a wealth of creative talent, including actors (Owain Arthur from the hit West End play 'One Man Two Guv'nors' is a notable example), as well as providing opportunities for first-time writers and directors. Rondo Media has permanent offices based in Cardiff, Caernarfon and Menai Bridge. The company has invested over £700,000 in a post-production and studio facility in Caernarfon and also a post-production base in Cardiff. S4C has been a vital enabler in terms of Rondo succeeding also to produce content for BBC One and Channel 4.

The format for the factual series, **Fferm Ffactor** (produced by Caernarfon-based Cwmni Da) has been sold to broadcasters in Denmark, Finland, and China, with options on the series also taken up by companies based in Spain and the USA. The company has had considerable

success internationally, securing co-productions and inward investment with producers in Canada, the Commonwealth Broadcasting Association, Tele5, ZDF, TG4, the Broadcasting Council of Ireland and YLE. Cwmni Da currently employs 63 full-time members of staff along with a significant number of freelance workers. The company's salaries are higher than the average for the area, and its value to the local economy is significant. The company is also a catalyst for regeneration – the development of its new state-of-the-art offices and facilities in a disused building in Caernarfon attracted £2.1million of funding from a range of sources including a Single Investment Grant of £500,000 from the Welsh Government and a £40,000 grant from the Welsh historic environment service CADW.

S4C's weekday magazine programmes **Prynhawn Da** and **Heno** are produced in Llanelli by Tinopolis. Before the company moved its headquarters to Llanelli in 1998, there was no television industry in the town. Since then, Tinopolis has been a catalyst to the regeneration of the town and to Welsh Government and Carmarthenshire Council plans – including Ffwrnes, a £15 million cultural and social enterprise development for the performing

arts, media and community events. The company employs over 150 staff in Wales, more than 90% of whom live in the Llanelli area earning salaries well ahead of those generally available locally. New staff members are recruited from the area and over the past 12 months, more than 20 local young people have been given placements and training opportunities with the company. Tinopolis has trained more than 400 young people since it was founded. Its programmes have been exported to 186 territories worldwide: starting off as a supplier only to S4C the company has built on the channel's commissions and support to build one of the largest independent production companies in the world with offices around the UK and in the USA, the Middle East and South East Asia.

The award-winning **Cyw** and **Stwnsh** children's services are produced for S4C by Cardiff-based Boom Plant (Boom Pictures' RTS and BAFTA award-winning children's division). A team of approximately 50 staff produces some 350 hours of content annually. The S4C contracts have enabled Boom Pictures to build an industry recognised level of expertise in the children's genre, and have been fundamental to the group

winning commissions from UK Broadcasters CBBC and Disney and becoming the largest children's producer by volume in the UK. The division consistently collaborates with Welsh schools to enable children to be included on screen, expanding their experience of entertainment and media alongside their Welsh medium education. Boom Pictures is one of the largest independent production companies in Wales and the UK. The company recently merged with Plymouth-based Twofour. Boom Pictures employs around 220 full-time employees in Wales, together with a substantial pool of freelance staff on a production specific basis. Employees and freelance staff include writers, actors, performers, technical and production staff from across Wales.

Of course, this is only part of a wider picture; over 40 companies produced programmes for S4C in 2013 - including Antena, Avanti, Green Bay Media and Telesgôp. These and others, combine to create a diverse and vibrant supply chain that provides a substantial cultural, social and economic impact for Wales. Each and every one of our programmes and the independent companies - large and small - that produce them have an impact, on their local economies, on their local workforce and on-screen. Only S4C commissions content from across Wales like this, enabling the companies to thrive, as we bring content that is relevant to Wales to our audience.

The continued existence of a healthy supply chain is essential to delivering quality content to the widest possible audience in a cost-efficient manner, which delivers value for money for the audience. It must evolve as the TV and content landscape continues to evolve. In addition to supplying S4C with content, these independent companies

also produce content for other broadcasters outside Wales, again, adding to their economic impact on Wales and their reach.

Both the UK and the Welsh Governments have in recent years focused on the creative industries as key drivers for economic growth. The existence and scale of the industry in Wales, and the impact of long-term and stable funding by S4C, has been identified by the Welsh Government as a cornerstone of its success in attracting investment from US drama companies and Pinewood Studios. Investments such as these are bringing economic activity and locally sourced employment to a number of relatively deprived areas including Swansea and Newport. At a UK level our television industry has brought massive economic benefit over the last ten years, linked to UK government intervention such as the Terms of Trade rights ownership framework. Increasingly, suppliers created to service S4C are playing their part in this British success too.

Developing Skills and Nurturing the Talent of the Future

Of course a world-class industry needs the best talent. S4C supports the development of the skills needed to work in the sector, and we remain committed to the talent of the future. We work with Cyfle and Creative Skillset Cymru to offer training and learning opportunities that ensures the industry thrives in Wales. Working with partners, agencies and with a range of FE, HE and other training providers, we deliver key projects - such as our innovative new partnership project for new authors **Y Labordy** - to enable the creative talent of the future to develop and to make world-class content in Wales.

S4C and its partnership with the supply chain and TAC will be instrumental in ensuring that the Welsh TV sector continues to develop and evolve the necessary skills base to deliver Welsh language content until 2027 in any way shape or form. S4C wants to ensure the continued existence of a vibrant independent TV sector that is able to produce programming, which compares favourably with other such independent companies within the UK.

Cultural Impact

S4C also has a significant cultural impact on Wales.

Not only do we broadcast from major national events like the Royal Welsh Show and the National, Urdd and Llangollen Eisteddfodau, our presence at these – and many more – bring our service and our characters directly in to the viewers' lives. Thousands of children enjoyed **Cyw** and **Stwnsh** events across Wales in 2013 – with over 7,000 attending our children's shows at the National Eisteddfod alone. There is an additional impact too in that S4C's presence at, and coverage of, these events attracts and encourages audiences to attend, increasing the cultural and economic impact across Wales. We share one-off opportunities like the **WOMEX** Festival 2013 – a partnership with the Arts Council Wales – with viewers and give smaller events of national interest a platform too.

Our factual coverage over the past year has included the multi-award-winning portrayal of one of Wales' greatest poets **Gerallt**, as well as portrayals of other figures who have made key contributions to our nation's cultural heritage – including Dr Meredydd Evans and Dr John Davies. Of course, culture is broader than the traditional 'pethe' definition; the very way lives are lived, and traditions played out across Wales contribute to our unique cultural heritage. Remarkable day-to-day stories and lives are shared with the nation through **Heno**, **Prynhawn Da** and **Cefn Gwlad** as well as the award-winning **Byd Mawr y Dyn Bach** and the internationally-fêted **Defaid a Dringo**, enriching and informing lives.

The Welsh language is also an intrinsic part of the nation's culture. Our audience believes that our content supports the Welsh language and helps keep it alive. Indeed, S4C's 2013 image tracker survey confirms that we continue to be seen as the channel for Wales by our viewers with 82% stating that S4C is a part of their everyday life:



94% feel that S4C contributes to the culture of Wales;



94% believe that S4C is the channel that has the best coverage of events in Wales;



85% believe that S4C is a channel that shows what it's like to live in Wales;



80% choose S4C as a channel that reflects modern Welsh life;



83% choose S4C as a channel that reflects rural Wales;



84% of Welsh speaking viewers felt that they had learnt something through watching S4C; and



80% choose S4C as a channel that shows programmes about their area of Wales.

Relocation of S4C's Headquarters

Following a detailed feasibility study, it was announced on 14 March 2014 that, subject to contract, the S4C Authority had approved proposals to move the channel's headquarters to Carmarthen by 2018. The Carmarthenshire bid, led by the University of Wales Trinity St David, is transformational: it is envisaged that the brand-new centre proposed will create a linguistic, cultural and economic powerhouse as well as providing new benefits for S4C's service – creatively and operationally. It will also deliver savings to S4C and value for money for the audience. A number of other organisations have already shown an interest in sharing the site and the next steps in the project are already underway. The Authority has also approved the principle of co-locating elements of S4C's work, such as transmission, with the BBC in Cardiff. Discussions about this are ongoing with BBC Cymru Wales.

Partnerships

Partnerships play a vital role at S4C. Working in conjunction with others – local, national and international partners – gives us an opportunity to collaborate at the heart of Welsh life.

In the current media landscape and economic climate, partnerships and creative collaborations enable diminished resources to be shared and pooled in order to deliver the best, most ambitious content possible for S4C's audiences. From enabling the co-financing and delivery of high-end content – such as *Y Gwyll* / *Hinterland* – to strategic partnerships with other organisations and partners in the creative sector – such as Radio Cymru, Arts Council Wales, the Welsh Book Council, Llenyddiaeth Cymru, Urdd Gobaith Cymru and Theatr

Genedlaethol Cymru – S4C strives to collaborate where appropriate. As the only Welsh-language television service, we can have an increasing linguistic, economic, cultural and social impact, and serve the widest audience possible – fluent Welsh speakers and learners – as well as enabling non-Welsh speakers to enjoy our content.

The Broadcasting Landscape of the Next BBC Charter Period

Given this context therefore, what sort of services should S4C provide over the next 10 and 20 years? Since the end of 2013, S4C has been examining what our audience expects from us, exploring what the needs of our future audience are likely to be, how people will use our services in future, and what the funding that is sufficient to deliver this will be.

S4C's Future Audience

It is likely that Wales will be consistent with the general broadcast and audience trends seen in the rest of the UK, particularly as connectivity improves over the next few years.

Television remains the main way of watching content, but there is an increasing migration of the audience. Already, 12% of our viewing is non-linear and we had almost 4 million online viewing sessions in 2013/14. The lack of broadband connectivity has been an issue in Wales – for the rural audience in particular – but roll-out will enable more of our audience to watch and to engage with us online.

Our programmes are increasingly being sought by the Welsh diaspora. Outside Wales, we have a growing audience, as shown when S4C became available on

the Virgin Media platform across the UK at the end of 2012. Since then, our average weekly reach on that platform outside Wales is 48,000 – all wholly additional viewers and in addition to those watching online. There is further unserved demand outside Wales, and also certainly outside the UK, as shown in constant requests to the S4C Viewers' Hotline for reception of S4C on Freeview outside Wales, and for viewing S4C content online outside the UK.

The make-up of S4C's audience will change over the next thirteen years and beyond too, with the challenges and opportunities that go with it, not least from a linguistic basis.

The Welsh Language

The nature and the landscape of the Welsh language is evolving.

Language is important, and Welsh is at the very core of our heritage and culture as a nation. The availability of locally produced mass media, is essential to the existence, survival and future of any language – and particularly so for a minority one against a broader background of linguistic and cultural homogenisation. As a nation, we have a plurality and diversity of culture, and, as the only Welsh language national broadcaster, S4C has a duty to reflect and to enable this.

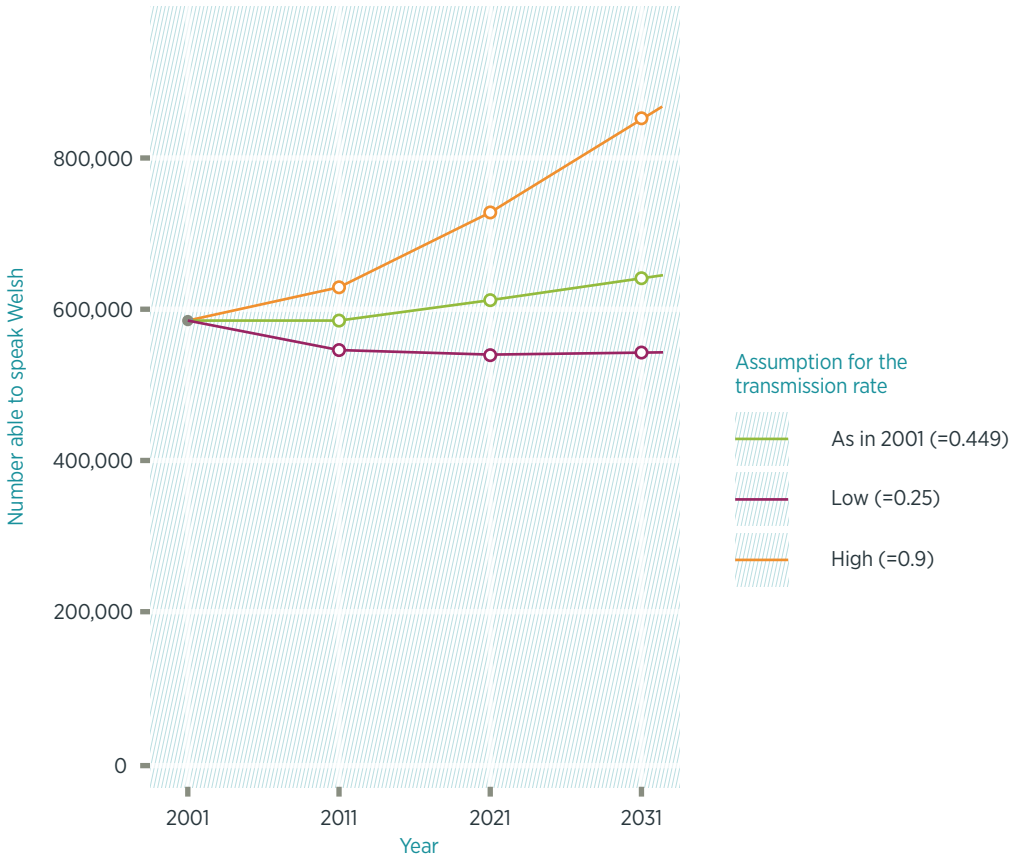
Consequently, S4C must acknowledge any changes in the audience and that audience's expectations if we are to continue to provide a relevant and high-quality service. In general, we are hopeful about the future of the language. The Welsh speakers elements of the 2011 census were published in January 2013 and showed that 562,000 people in Wales could speak the language. There has been a great deal of debate since the data were released – understandably so for

something that is so intrinsic to our nation and our identity. It cannot be denied that elements of the census data give cause for concern: the decrease in Welsh speakers in the more traditional heartlands has, for example, been widely debated over the past seventeen months. S4C remains committed to participating in the wider public conversation about how we in Wales can address such issues. Indeed, we can contribute to the solution: our relocation plans, which will see S4C's headquarters located in Carmarthen from 2018 onwards, are forecast to have a significant beneficial impact on

the language in Carmarthenshire. Likewise, our content takes the language directly to homes and audiences across Wales, and beyond, every day.

Yet the census data also included some positive signs for the future of the language. Language forecasts suggest that there could be a heartening growth in the number of Welsh speakers in Wales over the next 10 and 20 years. Analysis (Welsh Language Board, 2012) and projected forecasts, suggests the number of Welsh language speakers could increase to 800,000 by 2031.

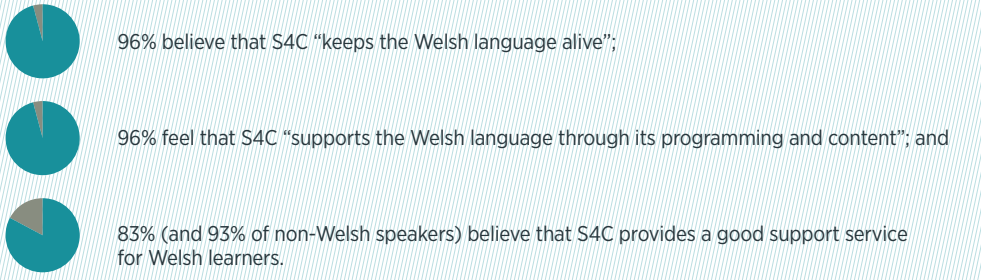
Projections: number able to speak Welsh, 2001-33



[Welsh Language Board, *A Statistical Overview of the Welsh Language*, 2012]

We are aware of the impact that S4C's services can and do have on the development of the Welsh language, and are keen to understand the possible effect of this forecast growth in the numbers of Welsh speakers over the next 10 and 20 years. S4C has a duty to ensure we continue to provide a high-quality service to our current - and future audiences - and we engage with them to ensure we deliver this.

S4C's 2013 image tracker survey found that our viewers believe that S4C has a positive impact on the development of the Welsh language and people's awareness of the culture of Wales:



(Source: SPA)

Our role is to create an environment where the language is thriving, vibrant and living, one where people can discuss entertainment, news, sport and the arts - at work and at home. Our role is not only to contribute to an environment where the language becomes, and remains, a natural way of receiving information and of communicating, but one where it can flourish. This is not something that S4C can, or even should, achieve alone. Others - organisations and movements, companies, schools, societies, government and partners - are also working to the same aim, that of nurturing and developing the language. S4C is part of something bigger and we are committed to ensuring that Welsh continues to be a living language over the next 10 and 20 years - and beyond.

Against this background and forecasts, we can safely assume that the language base of S4C's viewers will change.

The projection is that more children and young people will be able to speak Welsh. We will also see more mixed-language households, which will change the audience's viewing habits. This change in the linguistic make-up of Wales will lead to S4C playing a more important role than ever in terms of the Welsh language. We will need to continue to deliver content for fluent speakers, for those who are less fluent, for those who are learning as well as those who may not be able to speak Welsh. Through subtitles and red-button technology for example, we will need to ensure our audiences continue to have the support they need to enjoy our content.

And we will support those who wish to learn and to improve their Welsh. S4C's new learners' strategy and programmes, which will be launched later this year, will enable new and progressing learners to continue to develop their language skills. At the same time, ensuring high-quality, engaging content for our more fluent viewers will remain a cornerstone too. But with an increasingly mobile population, it must also be remembered that Welsh speakers living in the rest of the UK were not included in the census figures. The usage of S4C's service and feedback from the audience across the UK suggests that a significant number of Welsh speakers live outside of Wales and, using newer technology and platforms, regularly access Welsh language services such as S4C.

Technology and Platforms

We cannot consider S4C's role from 2017 onwards without looking at the wider broadcasting landscape and our peers. Data by media and technology experts Deloitte (*Technology, Media and Telecommunications Predictions 2014*) suggests that the changes that have taken place in the average household since the beginning of the millennium are largely complete, leaving consumers better served than ever before in terms of receiving content. Living rooms across Wales and the rest of the UK are now almost completely digital, with Wales the first UK nation to switchover. Yet in a devolved Wales, with its hundreds of channels, only one is wholly dedicated to content relevant to Wales and through the Welsh language.

Just a few years ago, we lived in a standard definition, terrestrial world with very few connected devices. Only a few homes had dial-up internet connection access, and smartphones, e-readers, smart televisions and tablets were just beginning to appear on the horizon. These devices and platforms are now increasingly prevalent and familiar, and have led to quite radical changes in the way certain demographics watch TV – with interactive second screens in hand or accessing additional content through the red button. Laptops, smartphones and tablets are the portable devices with the highest UK penetration, each capable of accessing TV content online via websites and dedicated apps.

Audiences can also now access video on demand (VoD), including additional paid-for services. We have seen direct evidence of this with all our online platforms, including Clic, increasing year-on-year. In 2013, there were nearly 4 million online viewing sessions – compared to

2.8million in 2012 with an increase in monthly visits to our website from 201,000 in 2012 to 226,000 in 2013. In the same year, downloads of our children's and **Cyw** apps also increased by 110% (from 61,896 to 129,845) whilst the **Cyw** service remains popular on TV, with 221,000 viewers a month watching the service last year (up from 185,000).

What has surprised some commentators however is that whilst the digital world has led to changes to the ways people watch, some of the more traditional audience behaviour hasn't changed. The amount of time people spend watching TV has increased amongst all age groups apart from adults aged 25-34. On average, viewers watched four hours of television a day in 2012 – an increase from 3 hours and 42 minutes in 2004. (Ofcom, *Communications Market Report 2013*, p.181).

Despite the increase in time-shifted viewing, most viewing is still linear. Live television is still the most popular way of watching programme and is forecast to remain so for the foreseeable future. (Ofcom, *CMR 2013*, p. 145 and Enders Analysis, *The Rise of Connected TV*, January 2013). Come what may, S4C will need to continue to provide a comprehensive linear television service. Audiences still enjoy the so-called 'water-cooler moment' of discussing the previous evening's programme the following day, but they also expect to be able to download and access content at a time and place of their choosing. It seems that downloads are in addition to, rather than instead of, linear watching, though this may change if we consider the behaviour of early adopters of new technology and younger audiences.

Whilst this also means that S4C will have to offer its content in the way that all segments of

the audience wish to receive it, it also offers us the opportunity to engage differently with the audience. We will be able to experiment with offering content online before it is broadcast – as we recently did with **Ochr 1**, and to offer exclusive online content – as we did with **PyC** in 2013 and with **Y Tir**. We will be able to send and direct audiences from one platform to another, and to offer additional content for the audience even though we are limited to one linear television channel. Our innovative multi-platform project **Madron**, which is aimed at young people, is already experimenting with this: it begins on-screen, before migrating to an app format.

Programming with an element of interactivity is becoming increasingly popular as audiences seek to engage not only with the content itself, but to share and interact with audience members outside their own households. This is already evident with twitter engagement around S4C's programmes – when **Y Gwyll / Hinterland** originally broadcast on S4C in October 2013, the programme was one of the most-talked about on Twitter, with the series trending second throughout the UK and demonstrating clearly the phenomenon of 'talked about' programmes. There was clear evidence of new viewership, and a change in perceptions among many lighter or non-viewers. Media meshing - interacting or communicating about TV content being watched - was prevalent during the viewing of **Y Gwyll**. Such programmes can shift a channel's image – a very difficult thing for an individual series to do.

Our audience is therefore increasingly interacting with us online. Whilst this largely remains specific to a certain audience demographic at present, it is likely to expand, and we expect this to continue to grow over

the next thirteen years and beyond. For example, 10 years ago, Facebook use was limited to those of college/university age. By 2014, the demographic has changed vastly, with people of all ages now using the medium; indeed, it is now the social media site with the most users aged 50+ (Ofcom, *Adults' Media Use and Attitudes Report 2014*).

Younger audiences are constantly looking for newer social media platforms, and S4C will need to remain abreast of these if it is to connect with the harder-to-reach group of 16-24 year olds, who tend to be the lightest viewers (Ofcom, *CMR 2013*). This age group already watches content in a very different way to their parents, they are very technologically savvy, and we will need to continue to engage with them as we maintain a linear service – particularly given that the current cohort is an important one for language transmission from one generation to the next.

Against this backdrop, connectivity within areas remains an issue in Wales too. Superfast broadband rollout across the nation will enable more of our audience to access S4C's services online and through smart TVs. As more and more people watch online TV and pay for VoD services, broadband and cable providers must ensure the capacity and broadband speeds are sufficient to enable this.

Audience Expectations

Five, ten and fifteen years hence, we can safely forecast:

- greater take-up of and familiarity with digital technology of all sorts;
- a continued growth in the number of people who are online;
- greater ease with on-line behaviour in general among the population, including the older age groups who will have eased into the technology over time;
- the continued importance of a comprehensive linear television service; and
- the potential growth of the Welsh-speaking audience.

We can also forecast some of our future key areas of focus:

- technologically, it is likely that 'busy, connected lives' will continue as a future theme. Anything technological that S4C can do that 'helps' with busy lives will have great appeal. This could be providing information or educational portals, or practical and commercial applications of all sorts. Engaging young people is key, and we will work to reach this important demographic;
- availability of S4C applications on all platforms and devices will be expected as a given – any problems with platforms, certain devices, issues with subtitles on any platforms, are all very disappointing for consumers and reduces ease of viewing. S4C will be expected to have a clear identity of its own on Smart TVs and other platforms;
- viewing content online will be easier and more usual, with more connectivity and smart TVs a part of this phenomenon. We can expect that watching content online at first broadcast will become a normal event, giving us the opportunity to target new programmes (such as comedy or content for young people) in this manner;
- the schedule will still have an important role to play in terms of the audience finding content to watch. S4C's current EPG position should be maintained to ensure Welsh language content can continue to be readily found and enjoyed;
- beyond the TV set, UK consumers own a growing portfolio of portable and non-portable devices which can be used to access online TV services. This will be true in Wales too;
- just as our audience will be increasingly mobile, so too must our content be and viewers must be able to enjoy it wherever they may be;
- viewers will feel increasingly involved with S4C – watching new programming online & giving feedback on that programming as part of the online experience. Online measurement will enable us not only to measure viewing more precisely but to engage with the audience more;
- S4C will remain unique, with a need to fulfil the audience's needs on a much more personal, relevant and local level than any other content medium or TV channel in their lives. Audiences will expect content that shows Wales to the world, reflects people's 'real' lives and exploits this valuable USP;
- there will still be a call, as in recent years, for S4C to continue to have content that is entertaining, relevant and local yet also wider in outlook, with 'talked-about' programming also part of the mix; and,
- further growth in the availability of media internationally will offer new opportunities for S4C's content, but will also strengthen the need to safeguard and build media plurality and parity in Wales.

S4C in 2017 and beyond

This backdrop frames S4C's services and vision from 2017. Our main focus will be to:

- maintain S4C's role as a national Welsh broadcaster and contribute to media plurality in Wales;
- ensure that Welsh language broadcasting is safeguarded for future audiences and generations throughout the period of the next Charter, with provision for an independent, sufficiently funded, Welsh television channel;
- deliver a comprehensive content service for Welsh audiences, wherever they may be, and to evolve and innovate;
- maintain and grow our audience in a multi-platform, competitive world; and
- have an impact on the creative industries, and local economies and communities across Wales and support growth in the Welsh language

Future Remit, Provision and Ambition

Looking ahead therefore, S4C will continue to have a unique and vital role to play in Welsh life. In addition to being adequately and fairly represented in the BBC Charter Review process, S4C's remit and structure must also be updated to enable it to deliver to its audiences in the most appropriate ways possible up until 2027 and beyond. Audiences in Wales must have confidence that their national broadcaster, in addition to being sufficiently funded, is able to operate on a level-playing field with the other PSBs where their remits have already been updated.

The media landscape has changed significantly since S4C was launched in 1982, and will likely change significantly over the next thirty years. Yet S4C's remit remains rooted in the more static, linear broadcast landscape. Developments in digital technology and the web suggest that elements of the act by which the channel was established are now out-dated. Given the transient nature of society and technological development, it is illogical today to conceive that the S4C services should only be available for use "wholly or

mainly by members of the public in Wales" as laid out in section 204 of the Communications Act 2003.

We currently seek the widest possible audience by offering access services including optional subtitling and occasionally an optional English language audio track. Our services are made available to audiences on Freeview across Wales and also on Sky, Virgin Media, Freesat, You View, You Tube, TV Player and TVCatchup across the UK, but only in standard definition.

S4C's on-line service Clic is available throughout the UK. S4C content will also be available on the BBC iPlayer in late 2014, and, where rights permit, S4C's content is available on a worldwide basis. One of our aims therefore is not only to be available to everybody in Wales - across multiple platforms - but also to be available for the Welsh diaspora across the UK and where possible on a worldwide basis across as many platforms as possible. This pushes the 'geographical' boundaries laid out by the Communications Act 2003

as well as the more traditional television only aspects of the current remit.

To retain its unique role within the creative future of Wales, S4C must remain editorially, operationally and managerially independent as well as sufficiently funded.

Our remit must be fit for the digital, creative, future, and we look forward to working with Government and stakeholders to ensure that this is the case.

Vision, Mission and Strategic Aims

Looking to the end of the next BBC Charter, S4C's Vision and Mission will be to:

- be at the centre of the everyday lives of the people of Wales;
- deliver content and media services in Welsh, that provide entertainment, information and inspiration and place S4C at the centre of the everyday lives of the people of Wales;
 - wherever they may be;
 - in whichever way they wish to consume;
 - at whatever time they wish to do so; and
 - to make a progressive and key contribution to Wales and the Welsh language.

Future Content

- We will develop a cross-platform content offering of the highest quality;
- S4C content will be available across all current programme genres, representing the best that public service broadcasting has to offer.

As the only Welsh-language television service in the world, S4C has an obligation to offer content that will appeal to everyone, across all programme genres. This is at the heart of S4C's public service broadcasting duty to our audience. One of S4C's primary goals has been to ensure parity for our audience; to ensure that the audience or users are not disadvantaged when compared to those of other PSBs. We will therefore continue to deliver a wide range of programming to the widest possible audience and from a plurality of suppliers.

The strategic agreement with the BBC has provided an average 10 hours a week of programming in the Welsh language to S4C, free of charge since 1982 – an important contribution to the service. Under the current agreement, the BBC provides much-valued news and current affairs programming as well as **Pobol y Cwm**. It is envisaged that provision in this form and at this level will continue into the future.

Providing a wide range of content, in order that users can choose which content to consume is fundamental to S4C's future. Our vision is that this should continue and include:

Children

As a PSB, S4C is committed to provide a high standard of service for children, and to inform and entertain through the medium of Welsh. Children are the future viewers, consumers and users of Welsh language content. Dedicated children's services are therefore vital - not only to S4C's future - but also to the cultural, social and linguistic future of Welsh communities (be they local, transient or even living outside Wales) and to the language itself. We will continue to support key elements such as numeracy and literacy through our children's programming as well as working with partners to ensure our content is available for use in an educational context where possible.

Children's programming may not necessarily contribute to S4C's reach, but our commitment is total, and the contribution of the service to the audience is vital. They will therefore remain at the heart of S4C's services for the foreseeable future.

Young People

Young people represent a significant proportion of the potential Welsh-speaking audience - and one which will, in all likelihood, grow. Their viewing habits tend to differ from those of older viewers in that they consume their content in a less linear way, without necessarily an 'appointment to view'. S4C will therefore continue its provision of programming targeted at young people across multiple platforms and will experiment with ways to better reach and serve this important part of the audience.

News and Current Affairs

High-quality news programmes and specials are provided under the strategic agreement with BBC Cymru Wales. It is envisaged that this provision will continue at the same level for the foreseeable future. We will also seek to maintain our vision for current affairs programming, which is to continue to ensure plurality of current affairs programming from a range of suppliers.

Factual

Factual programming will need to continue to reflect the rich history, culture and communities of Wales - both urban and rural - whilst ensuring that S4C content also reflects Wales and the world and brings the world to Wales. As a significant number of Welsh-speaking communities are rural, a percentage of factual programming will continue to be provided specifically for these communities. We will also strive to encourage and enable co-productions, including international ones.

Drama

Drama must remain a cornerstone of S4C's future content schedule. It is however, the most expensive programme genre. Reductions to S4C's income streams in recent years have led to a reduced provision and we have not been able to broadcast as much new drama as we would like. By reallocating resources, we intend to gradually increase our provision of new drama series outside of soaps throughout the year, and to encourage new authors and voices who represent the wider, modern Wales.

Entertainment and Comedy

The opportunity to be entertained in one's own language would be high on any international happiness index, while the ability of a wide-ranging television channel to entertain its audience is a key touchstone of its success.

Regular, well-crafted, memorable comedy and a range of entertainment provision which touches chords with different ages and tastes will remain a high priority.

Welsh Learners

We will continue to support and engage with learners as they learn Welsh.

S4C's new multi-platform Welsh learners' strategy will be launched later in 2014. It will steer our services and programmes for the immediate future and will support a language continuum to intermediate and more advanced learners. Our long-term learners' services will enable the changing audience to connect with S4C's core service and to improve their Welsh language skills within the broader cultural context.

Culture, Music and Events

The audience regularly ranks S4C highly for its coverage of the arts, and our output plays an important nurturing strand in the ecology of the arts in Wales.

We will continue to focus on events coverage including the Urdd and National Eisteddfodau, the Royal Welsh Show and other premier cultural events of national importance. This events coverage as much as anything places S4C at the heart of the core audience. Our music coverage will also remain a regular and prominent feature of the future schedule.

Lifestyle and Magazine

This genre provides an opportunity to interact with the audience in their communities and to reflect the cultural and social activities that occur on a regular basis around Wales. S4C will continue to commission daily programmes in this genre. Wales' religious life, both traditional and contemporary, needs to be regularly reflected and discussed in appropriate programmes.

Sport

Sport has an ability to draw in new viewers and users to Welsh language content and helps place S4C at the heart of an audience of fluent, less fluent, learners and non-Welsh speakers. Maintaining a healthy provision of sport against a background of increasingly expensive sports rights is essential, to appeal to the widest possible audience. Sports programming is amongst our most popular, delivering consistently strong reach and audiences – many of whom might watch solely for our sports coverage.

The sports rights landscape has evolved dramatically over the past decade. Newer entrants to the market have led to increased competition for sports rights, with the traditional public service broadcasters – S4C included – often outbid. Welsh audiences have a right to be able to enjoy free-to-air sports coverage, and we will seek to work creatively, and in partnership, to ensure that this is achieved.

Summary

The media landscape of the next twenty years and beyond will be challenging. It is also a landscape that offers new and exciting opportunities for broadcasters. These could have far-reaching implications, not only for Wales, but on the future of the Welsh language itself.

S4C will need to take advantage of technology and platforms as they evolve to continue to offer our audience the widest range of content possible. S4C has a vital role to play in Wales. Our value, our impact and our contribution to the nation is about much more than viewing figures alone. Our audience needs and expects a comprehensive range of innovative programmes: we are committed to delivering this in future and to continuing to engage with our audience as it evolves over the next 10 and 20 years. But our services, our contribution to Welsh life – to the economy, to the language, to education and to sustaining our nation's diverse culture – can only be maintained with sufficient funding.

If the previous funding formula had remained in place, S4C's current income would have been £135 million. Today, it is £83 million, with the content budget at £65 million – this is the same as it was in 1996 such is the scale of the cutbacks we have faced. We are mindful of the economic climate in which the changes were made in 2010, and subsequent UK government spending rounds. We value highly the duality of our funding with the proportion still coming from government acting as an important signifier of our independence. We also appreciate the security of 90% of our funding until 2017, but will have had no increase to reflect growing costs or the recovering economy.

S4C's overheads remain low – just 4.4% of our budget. 79.5% of our income flows immediately into the private sector programme supply chain and is instrumental in creating employment and a substantial economic impact. All other spending is either content or programme-related – including distribution and broadcast. The independent companies have made consistent savings and deliver efficient programmes. Any additional reduction in S4C's budget would have a direct and significant impact on the creative industries in Wales, on the Welsh independent sector, on the economy, and on the language – across Wales.

To date, savings have been delivered off-screen as far as possible – without affecting S4C's programmes on screen. This will not be the case with any future reduction to the budget.

The funding decisions of the next Charter period will look at 2017 and ahead – and must not be made with a retrospective glance at the economic situation of 2010. They must also be taken in the context of the BBC and the licence fee, the product of which has increased to £3.6 billion per annum. This is funding for high-quality public service broadcasting, and the role of S4C as the only editorially, operationally and managerially independent Welsh language television service must be guaranteed within that context.

This discussion document has set out clearly S4C's duty to provide the audience with high-quality Welsh language content, the key contribution S4C can make to the growth and development of the Welsh language and S4C's significant cultural and economic impact. This is the basis of the discussion about S4C's future service and its sufficient funding.

As Chair and Chief Executive, it is our sincere belief therefore, that:

- if S4C is to continue to deliver a comprehensive Welsh-language public media service; and
- if that service is to be available on all widely-used platforms,

we cannot experience further loss of income (either directly or indirectly through rising costs) without serious damage to our offer to audiences.

We look forward to engaging with policy makers, stakeholders and with our audience over the next few months and to contributing to the wider debate about ensuring the healthy future of television, and media plurality in Wales.

S4C

Cynnwys gwreiddiol o Gymru
Original Welsh content



Drama o safon ryngwladol
Internationally acclaimed drama



Digwyddiadau cenedlaethol
National events



Materion cyfoes gafaelgar
Engaging current affairs

S4C Clic

Hafan

Dal i fyny

Gwyllo yn fyw

English

Chwilio



Cyw



Pobol y Cwm



Cysgod Rhyfel

Y Tyrchwyr gyda Iolo Williams

Ochr 1

Rygbi: Principlity

Cynnwys digidol arloesol
Innovative digital content

Cysylltu â ni

Mae S4C wastad yn falch i glywed barn ein gwylwyr.

Os ydych yn dymuno cyflwyno eich barn am ein rhaglenni neu os ydych eisiau gwybodaeth bellach, fe fyddem yn falch i glywed gennych.

Fe allwch gysylltu ag S4C dros y ffôn, drwy ebost, twitter, facebook neu drwy lythyr.

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Facebook

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Gwefan

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Doc Fictoria

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Contacting us

S4C is always pleased to hear our viewers' opinions.

If you want to share your opinion about our programmes or if you want further information, we'd be happy to hear from you.

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