

S4C: REVIEW OF PROGRAMMING POLICY

For the period 01 April 2025 – 31 March 2026

Introduction

S4C serves a diverse audience by providing content that entertains, excites and reflects contemporary Wales in all its diversity. To sustain this, a production sector that is geographically distributed across the country is required – one that delivers original ideas with production values that meet the standards expected by today's audiences, regardless of platform.

In our Statement of Programming Policy for 2025–26, we committed to commissioning bold and popular content that would attract a broad audience, including younger viewers, lighter viewers and Welsh speakers from C2DE backgrounds; and for S4C to remain the home of Welsh sport, compelling drama, powerful documentaries and bold content for young people.

In September 2025, midway through the reporting period, *Strategy 2030: More than a TV Channel* was published, setting out a clear direction under three objectives: to expand viewing of our content, to become digital-first, and to collaborate to see Wales thrive. This review therefore covers a transitional period between two strategic contexts, with content assessed primarily against the commitments of the 2025–26 Statement of Programming Policy.

When evaluating, it is important to consider successes as well as areas for improvement. In an industry where we aim to anticipate viewing habits 6–10 months ahead or more, and within a broadcasting landscape that continues to evolve rapidly, challenges are inevitable – but valuable lessons can be learned to inform our work moving forward.

Drama

The year delivered a broad slate of drama, with particular success in reaching younger and less fluent audiences.

Bariau returned, attracting a young audience, a significant proportion of C2DE socio-economic groups, and 48% of its viewers being less fluent or non-Welsh speakers, supported by a marketing campaign targeted at north Wales. The response confirms that the series continues to meet audience expectations.

In the autumn, *Y Golau: Dŵr* was released as a box set – a follow-up to *Y Golau* and one of our most popular dramas on Clic and iPlayer since the launch of our on-demand services. The series reached the shortlist for 'Best Returning Drama' at the Broadcast Awards 2026.

Stad returned in November, with a strong proportion of mixed-language households among viewers, and a second series of *Dal y Mellt* was also broadcast during the year.

Work to build a digital audience for our soap dramas continued, with online viewing for *Pobol y Cwm* and *Rownd a Rownd* increasing again this year – the latter celebrating its 30th anniversary in September 2025. From January 2026 onwards, episodes began to be released on-demand on the morning of their linear broadcast, representing a practical first step towards a digital-first model for these dramas.

S4C: REVIEW OF PROGRAMMING POLICY

For the period 01 April 2025 – 31 March 2026

In film, *Effi o Blaenau* was screened at the Glasgow Film Festival, with the *The Guardian's* chief film critic awarding it a four-star review, and the drama opera *Tanau'r Lloer* was broadcast on the same night as Channel 4.

Sport

Broadcasting sport from across Wales and beyond remains a key priority for S4C.

Over the summer, the opening match of the Lions tour against Argentina was broadcast live – a new initiative to co-produce an international match with Irish broadcaster TG4, with S4C holding exclusive UK broadcast rights. The broadcast achieved a strong audience across the UK, with on-demand requests among the highest for any live sport on S4C.

In international rugby, exclusive rights to Friday night URC matches were secured for the first time – an important step in our regional rugby coverage. During the Autumn internationals, although viewing figures declined compared to the previous year, streaming grew significantly in line with changing viewing habits. A new four-year agreement with the Six Nations was also secured from 2026 onwards.

In men's football, in a new partnership with BBC Wales, we followed the Wales team through the qualification campaign, with S4C's performance notably strong despite direct competition from the BBC. This coverage was complemented by *Craig Bellamy: Byd y Bêl a Mi* ahead of the crucial play-off match. In women's football, all Wales matches from the Euro 2025 finals in Switzerland were broadcast live.

One of the new developments in 2025–26 was live darts coverage – a decision that has proved a resounding success. Following the Six Nations Darts Cup from Merthyr Tydfil, the opportunity was taken to broadcast the WDF World Championship from Lakeside, delivering exceptional performance on YouTube and social media.

In rallying, we continued our digital-first strategy tracking Elfyn Evans in the WRC, with significant growth in social media engagement compared to 2024.

The final stage of the Tour of Britain was broadcast live from Cardiff on 7 September 2025 – Geraint Thomas's final race as a professional cyclist – and our offer was expanded further with boxing coverage.

Beyond major sports, our coverage of community outdoor events continued – including the Cardiff Half Marathon, the Snowdonia Marathon and Triathlon Cymru – all attracting a notably high proportion of 16–44-year-old viewers. This demonstrates how participatory sport – not only professional sport – can reach a different audience.

News and Current Affairs

One standout piece of content during 2025–26 was *O Brifathro i Bedoffeil: Neil Foden* – the culmination of over a decade of investigative work – which revealed for the first time how Foden was allowed to rise to a position of trust and respect while concealing the true horror of his actions, raising broader questions about accountability and oversight. The production was a clear example of Welsh-language journalism competing with the highest international standards.

S4C: REVIEW OF PROGRAMMING POLICY

For the period 01 April 2025 – 31 March 2026

Additionally, *Maxine Hughes: Canser ar ba gost?* saw Maxine draw on her own personal experience of cancer diagnosis to scrutinise the quality and consistency of cancer care in Wales.

Reform UK: Tu Ôl i'r Llenni was also broadcast – an observational documentary with unprecedented access to party members and volunteers in Carmarthenshire. Work to strengthen our news and current affairs service across both digital and linear platforms continued.

There was clear growth in our S4C Digital News service, particularly on Instagram, with the digital audience remaining younger than that of traditional linear news programmes.

Factual

The year saw a strong factual slate, combining powerful single documentaries and investigative series.

Y Crwydryn, our feature film celebrating country singing in Wales, was one of the year's greatest successes. It was named "Pick of the Day" in *The Observer*, one of the week's top seven programmes in *The Guardian*, and won Best Documentary at the RTS Cymru Awards alongside recognition at several other film festivals.

Y Llinell Las returned with a special episode, "Lladron Gwartheg", appealing particularly to C2DE audiences and less fluent viewers from mixed-language households.

Stori'r Iaith also returned with Cerys Matthews, Sarra Elgan, Ian Gwyn Hughes and Guto Harri, generating lively engagement on social media, with clips reaching well beyond linear broadcast audiences.

Seren Jones: Yn Fyw yn y Dŵr won Presenter of the Year at the RTS Cymru Awards 2026.

Y Cyfweliad – a new series based on the global format *Les Rencontres du Papotin* – reached a young audience, received consistent praise, and has now been commissioned for a further two series.

Other powerful documentaries were also released: *Cariad heb Ffiniau: Poliamori a Fi*, which resonated strongly with younger online audiences and received widespread attention across the UK; and *Fy Ffrind ar Death Row*.

Mari Grug: Un Dydd ar y Tro – the presenter's personal story following her cancer diagnosis – became one of our most popular documentaries over the autumn and winter.

Entertainment

Y Llais remained among our strongest performers, with its first series attracting a notably high proportion of viewers under 45 – unique among public service broadcasters in Wales. During the Urdd Eisteddfod 2025, it was announced that a second series would be produced, with the first episode of the new series in 2026 already surpassing the previous series in television, YouTube and social media performance.

S4C: REVIEW OF PROGRAMMING POLICY

For the period 01 April 2025 – 31 March 2026

Amour a Mynydd succeeded as an original Welsh format that maintained its freshness in its second series. There was clear growth compared to the first series – both in viewing figures and social media impressions – and a third series was commissioned before the second had finished.

In comedy, *Ganol Nunlle* – S4C’s first ever vertical comedy – shifted perceptions among TikTok viewers of what S4C represents, alongside a series of seven short-form digital comedies to develop new voices.

Mike Bubbins: Un Mewn Miliwn reached a particularly young audience, with a large proportion aged 16–44 – among the highest of all content this year.

Y Deis – an original Welsh quiz format co-produced with TG4 – became a cornerstone of the linear schedule.

National Welsh events remained central to our offer. The National Eisteddfod in Wrexham drove further growth in digital viewing, with significant increases in iPlayer viewing hours and social media impressions compared to the previous year; a new daily online package from the Chaining and Crowning ceremonies was introduced in response to audience feedback. The Urdd Eisteddfod, the Royal Welsh Show and Tafwyl were also key, with Tafwyl further demonstrating the appetite for live music.

Young People

The challenge in this area is identifying opportunities – and maximising them.

Several new long-form series were introduced on *Hansh: Bar Hansh*, its first ever international reality series, following six young Welsh people running the first Welsh bar in Zante; *GISDA*, following young people in North Wales supported by the charity; and *Ar Led*, blending entertainment with sensitive topics around sex education.

International success came with the short film *Teth*, commissioned for the opening night of the Iris Festival, which has travelled globally and won numerous awards.

Yr Alwad was also commissioned – the first vertical drama by any UK broadcaster, created specifically for TikTok – demonstrating platform-specific commissioning and S4C’s willingness to innovate and take risks.

Children

S4C’s children’s content remains as important as ever to the overall strategy. Providing 40 hours of children’s content every week, alongside Cyw content on YouTube and other children’s platforms, ensures a wide range of choice for children and families.

Bluey launched in November 2025 at Cardiff Airport, achieving the highest reach of all our children’s content this year – clear evidence of its strong appeal to families.

Also within the Cyw offer, *Help Llaw* launched, featuring children with profound learning needs and disabilities as the stars; and *Parc Glan Gwil* proved a success, with remarkable iPlayer viewing figures given the size of its target audience.

S4C: REVIEW OF PROGRAMMING POLICY

For the period 01 April 2025 – 31 March 2026

For older children, a second series of *Y Coridor* (for viewers aged 11+) was announced, with strong digital viewing figures and positive engagement from schools teaching Welsh as a second language.

The drama *Hafiach*, set in Rhyl and created for viewers aged 13+, aired during the summer. It has already been adopted by secondary schools as an A-level second-language text and reached the shortlist for the *C21 International Drama Awards*.

Tekkers continued to grow in popularity among children, with every Welsh-medium primary school in Wales requesting to take part in the series, and TG4 has now acquired the format.

In animation, *Egin Bach* – a new original Welsh-language animation – was commissioned as a step toward building indigenous intellectual property. Special festive animations were also broadcast, including the co-production *Nolig* (S4C, TG4 and BBC NI), and the films *Shrek the Halls* and *Puss in Boots*.