



S4C /

MWY NA SIANEL DELEDU
MORE THAN A TV CHANNEL

2030 STRATEGY

S4C's Purpose is to

Show our world through
the Welsh language

Our Mission is to

Inspire, entertain and
reflect Wales with great
content for everyone

Table of Contents

04	Introduction
05	Strategy Overview
06	S4C's Values
07	Context
10	Strategic Objectives
11	Expanding Viewing with our Content
12	Transforming to Digital-First
13	Collaborating to make Wales Thrive
14	Next Steps

Introduction

Delyth Evans / Chair

Geraint Evans / Chief Executive

S4C has always been more than a TV channel. It was established not only in response to a public campaign, but also as a promise to the future – to ensure that the Welsh language has its rightful place in contemporary media to protect it, celebrate it, help it grow and make it a natural part of everyday life.

Since 1982, S4C has been an integral part of the cultural fabric of Wales, a prominent leader in the creative economy and a backbone in the development of our language.

But leadership demands more than retrospection; it calls for courage, pushing boundaries and embracing change.

Public service broadcasters across the world are facing profound challenges, including unprecedented shifts in audience consumption patterns, financial uncertainty, and increasing competition from international streamers and digital media. For S4C, these challenges are made more complex by the unique mission to serve the Welsh language, reaching audiences with Welsh content, wherever they may be.

In this context, we are determined to ensure that S4C is relevant, bold and creative in offering the platform that Wales deserves – and nothing less. There is work to do.

This strategy sets out a firm course for the next five years. The vision is clear, the commitment is unwavering and the plan is deliverable. Our strategy will guide the organisation through a period of transformation. We are committed to providing strategic leadership, encouraging innovation, ensuring accountability and protecting the organisation's core values. Above all, we will put our audiences at the heart of every decision we make.

S4C is more than a TV channel. Over the next five years, you'll see S4C redefining how it commissions and distributes content in order to stand out in a competitive market – making the most of its unique Welsh provision. You'll see S4C embracing the opportunities to serve different audiences across various platforms – moving confidently towards being a digital-first service. And you'll see S4C working with the production sector and others to extend its impact beyond the screen – strengthening its contribution to the growth of the language, culture and creative economy across Wales.

Moving forward, the ingenuity, energy and dedication of the S4C team will be key to ensuring that we continue to lead, inspire and thrive. By working together and with S4C's partners, we are confident that we can secure a flourishing platform for the Welsh language for many years to come.





EXPANDING VIEWING WITH OUR CONTENT

1

S4C is more than a TV channel –

it is a unique creative destination that connects us to contemporary life in Wales through the Welsh language. Engaging, impactful content that inspires and reflects Wales today – that's the aim. Through smart and bold commissioning and promotional approaches, we will expand the reach of our content and raise S4C's profile among various audiences.

TRANSFORMING TO DIGITAL-FIRST

2

S4C is already more than a TV channel –

its content lives on a range of popular platforms. But we must adopt a digital-first mindset – not just in terms of commissioning and publishing content but across all aspects of our work. Only through transforming in this way can we compete, innovate, and make the Welsh language prominent in the digital age.

COLLABORATING TO MAKE WALES THRIVE

3

S4C has always been more than a TV channel –

it is a vital tool in the future of the Welsh language, a creative force in Welsh culture and a catalyst for the creative economy. To fully realise this vision and contribute to a confident, inclusive and prosperous Wales, S4C must work with others in order to combine creativity, resources and ambition across sectors.

S4C's Values

S4C will implement this strategy guided by our core values, ensuring that every decision – big or small – reflects the principles that define us as an organisation. These values are more than words; they are at the core of everything we do. We are motivated to work together with respect and an open mind, to serve our audiences with care and honesty, and to respond courageously to challenges and opportunities.

Our core values are:



At Your Best:

We encourage each other to grow, develop and perform to our full potential. We support each other to be proactive, motivated and committed.



Proud of S4C:

We believe in S4C's mission and are proud of the platform we provide for the Welsh language and its culture. We are all ambassadors for S4C and the work we do.



Go For It:

We are brave, creative and ready to innovate. We are focused on solutions, and driven to make a difference for our audiences and communities.



Celebrating Everyone:

We value diversity and commit to creating an inclusive environment where everyone feels welcomed, respected and valued. We embrace different voices and experiences, and take pride in each other's successes.

Context

At the heart of S4C's work is the belief that public service should begin with a clear understanding of our audiences – their needs, expectations and preferences.

Despite the abundance of global content and services, there remains a strong demand for media that reflect contemporary Wales, shine a light on issues that matter to our communities and offer opportunities to hear Welsh as a living language.

This strategy was developed with our various audiences at its heart. Our strategic priorities for the next five years have also been shaped by major changes in the media and Welsh-language landscape, public policy developments and the financial challenges facing public service media.





Audience Dynamics

Two major shifts in audience behaviour will demand our attention over the next five years: the ongoing move from traditional broadcast viewing (terrestrial, satellite and cable) to internet-based streaming, and – within that – the shift from linear viewing (following a schedule) to on-demand viewing (at a time convenient for the viewer).

These trends will only intensify during the period of this strategy. And unless S4C adapts and delivers a viewing experience that responds to this shift, it will become increasingly difficult to prevent audience decline.

Despite significant change, content from broadcasters remains highly valued. According to Ofcom's Media Nations report, live and on-demand TV from broadcasters accounted for 56% of all viewing in Wales in 2024. Around 16% of viewing was on subscription streaming services such as Netflix and Amazon, and 15% on video-sharing platforms such as YouTube.

The behaviour of S4C's audiences is already evolving: 14% of all S4C viewing hours come via iPlayer, S4C Clic and YouTube, and that figure is rising year on year. And while digital viewing is growing across all age groups, the younger generation has turned to digital platforms sooner: a third of S4C viewing by 16–44-year-olds comes via digital platforms, and increasingly on TV sets rather than other devices.

This change presents a significant challenge for S4C, but it is also an opportunity to reimagine and adapt how we deliver content to audiences, whenever and wherever they choose to watch.

The Media Landscape

Public service broadcasting is a cornerstone of the UK's media landscape. But unprecedented competition from international streamers and digital media has disrupted the traditional broadcasting model for several years. Viewers of all ages are spending less of their time watching traditional TV, and more time on digital platforms like Netflix, YouTube and TikTok.

In the face of this great change, S4C has already taken important steps by investing in our digital services and publishing a broad range of content across multiple platforms. We have begun the journey; but in order to compete and extend the reach of Welsh-language content, we must go further in adapting, innovating and investing with a clear vision for S4C's unique offering.

Meanwhile, the financial sustainability of public service media such as S4C is under increasing pressure. By 2027, we will make the case for sufficient funding for the future – funding to enable us to deliver a modern, inclusive and ambitious service across all platforms. We will also seek long-term financial certainty to enable strategic planning in a competitive market.

The Media Act 2024 has provided an important foundation for S4C's prominence on connected TVs, but it also requires significant technological investment over this next period. And while this legislation is a step forward, it does not address prominence on video-sharing platforms such as YouTube and TikTok, where the real battle for young audiences' attention is taking place.

In addition, advances in artificial intelligence (AI) are already reshaping the media landscape. It is inevitable that AI will transform the way we create and share content. We have a clear responsibility to explore its potential to improve audience experience, increase efficiency and offer new ways to engage viewers. At the same time, we must protect the creativity, reliability and linguistic identity of our content.





The Welsh Language

The Cymraeg 2050 goals have attracted broad support, but reaching one million speakers and doubling the daily use of Welsh by that date remains challenging. According to the Census, for several decades, around one in five people in Wales can speak Welsh.

The language has expanded geographically in urban areas where it was not commonly heard a generation ago, while its use has declined in its traditional heartlands.

Today, more children are coming to the language through the education system rather than the home. This has reshaped the linguistic landscape, with around half of Welsh speakers today living in households where not everyone speaks the language.

This new reality requires a bold and creative response from S4C in how it commissions, distributes and promotes content. S4C must be more than a TV channel – to reach new audiences, young people, those less confident in their Welsh, people in bilingual households, and all those who primarily use digital platforms to consume content.

In the digital space, where English-language content dominates through scale, funding and algorithms, it is a challenge to ensure that the Welsh language is prominent and easily discoverable – not only on smart TVs, but also on video-sharing platforms and social media. Three-quarters of young people who speak Welsh use social media almost entirely in English according to a 2025 report by the Welsh Language Commissioner; we must bring the Welsh language to the forefront of the digital world.

S4C must invest creatively and intelligently in content that makes the Welsh language a natural and inspiring medium that sparks pride. This is more than broadcasting – it's about sustaining an ecosystem where the Welsh language can thrive because it belongs to everyone.

Strategic Objectives

Expanding Viewing with our Content

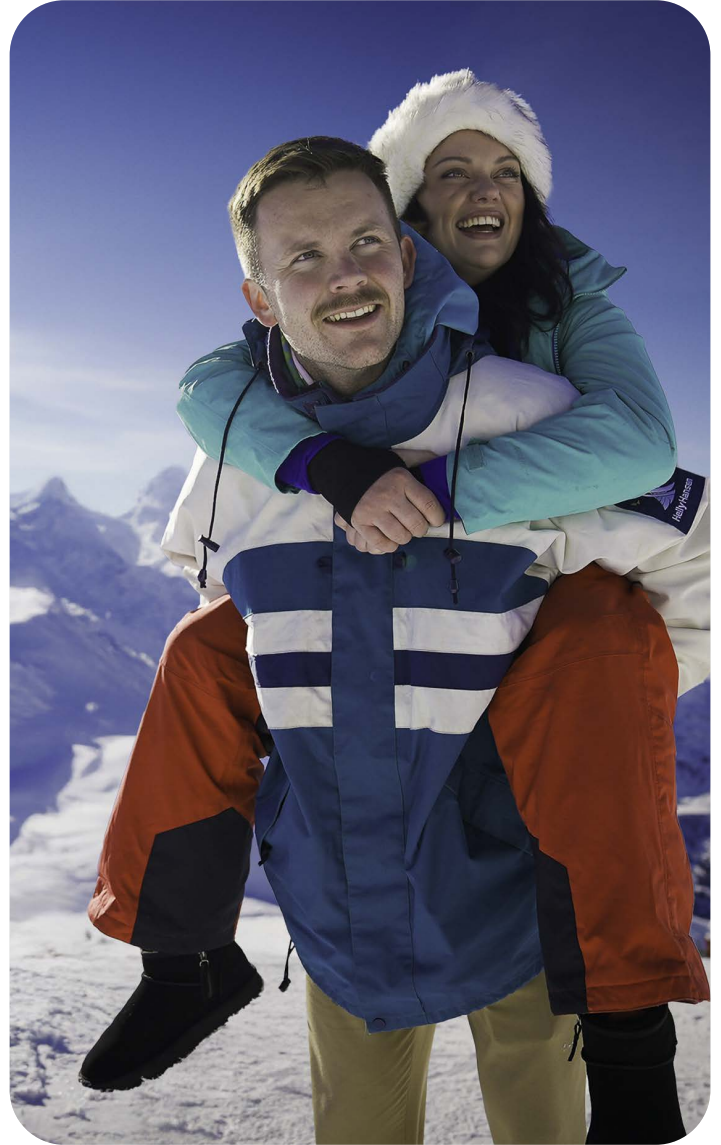
S4C is more than a TV channel –

it is a unique creative destination that connects us to contemporary life in Wales through the Welsh language. In a world of infinite choice, S4C must stand out with content that creates noise, offers a unique experience and attracts diverse audiences. With the unique responsibility of reflecting the culture and communities of Wales, S4C must expand its reach. We need to move beyond filling a TV schedule to a strategic commissioning model that uses data to target specific audiences across our platforms, creating content that aligns with modern viewing habits. S4C may not be everything to everyone all the time, but our goal is to offer something for everyone. By expanding viewership through engaging content, we will ensure that S4C provides a thriving platform for the Welsh language.

Actions

Over the course of the strategy, we will:

- Prioritise content that is impactful, is easy to promote and draws audiences to S4C.
- Commission content that feeds new consumption habits on digital platforms, deepening and enriching our overall offering.
- Move beyond filling a linear schedule to a strategic commissioning approach that drives viewing across platforms.
- Adapt how we measure the performance of our content, drawing on detailed data about various audiences' engagement with our content across different platforms.
- Target specific audience cohorts with our content in order to expand the number of viewers engaging with the Welsh language and S4C.
- Ensure that we reflect communities across Wales, changing perceptions of the S4C brand.
- Be home to festivals and national events for people of all backgrounds across the whole of Wales to enjoy, enhancing that viewing experience across our platforms.
- Secure, where possible, exclusive rights to popular live sport in order to attract and serve broad audiences.
- Earmark budget for world-class content – from children's programmes to drama – which will win awards and bring prestige and new opportunities for S4C internationally.



What will success look like?

- ✓ Expanding S4C's reach in Wales, among Welsh speakers, and across the UK.
- ✓ Increasing the number of younger viewers, viewers who are less confident in their Welsh or live in mixed-language households, and lower-income audiences.
- ✓ Improving perceptions of the S4C brand and its content among different audience groups.

2

Transforming to Digital-First

S4C is already more than a TV channel –

it exists across multiple popular digital platforms where Welsh speakers find their content. As more viewers turn to streaming, building a strong presence across digital platforms is essential. To continue this journey, we must adopt a digital-first mindset – not only in terms of commissioning and publishing content – but across all parts of the organisation. That means transforming systems, workflows and our organisational culture to be flexible, responsive and ready to serve the digital audiences who are now central to our mission. Only by transforming to digital-first can we compete, innovate, and make the Welsh language prominent in the digital age.

Actions

Over the course of the strategy, we will:

- Develop our content publishing strategy with a digital-first mindset.
- Encourage more online viewing – ensuring that digital viewing represents an increasingly higher share of total viewing – and support audiences in making the shift to digital.
- Improve the prominence of S4C Clic on connected TV platforms by strengthening our relationships with providers.
- Facilitate the discovery of our content across digital platforms by optimising the way we share metadata.
- Strengthen the presence and prominence of S4C content on the iPlayer through additional features and personalisation.
- Increase the use of curated live streams to improve access to relevant content for specific audience groups.
- Extend the on-demand viewing window so that a rich library of S4C content is available to enjoy over a longer period.
- Continue to evolve S4C’s digital news service to provide trusted news via digital platforms.
- Use social media to publish short-form content that reaches new audiences, and promotes both our brand and the Welsh language.
- Experiment with, and integrate new technologies into, our offer, ensuring that S4C is innovative and meets the expectations of digital audiences.
- Adapt workflows, systems and processes, and reallocate internal resources to support the digital-first vision, including driving greater use of AI.



What will success look like?

- ✓ Increasing S4C viewing hours across streaming platforms.
- ✓ Improving the prominence and discoverability of S4C on connected TV platforms.
- ✓ Growing the number of weekly and monthly active users on S4C Clic and iPlayer.

3

Collaborating to Make Wales Thrive

S4C is more than a television channel –

it is a backbone of contemporary Welsh culture and a creative force that invigorates the Welsh language. In a time of change, it remains a vital tool in securing the future of our language by making it alive, relevant and a source of pride. S4C is also a catalyst for economic growth across the country, nurturing talent and providing a platform for Welsh voices from all backgrounds. But to fully realise this vision, S4C must work in partnership with others – bringing together creativity, resources and ambition across sectors – to contribute to a confident, inclusive and prosperous Wales, where the Welsh language belongs to everyone and is a natural part of everyday life.

Actions

Over the course of the strategy, we will:

- Promote and support the Welsh language across all our activities, including contributing to the realisation of the Cymraeg 2050 goals.
- Act as an anchor organisation through our partnerships across the culture, arts and production sectors in Wales to support growth and skills development.
- Offer opportunities to nurture talent from diverse and under-represented backgrounds through job opportunities and apprenticeships.
- Encourage co-productions and strategic partnerships across the UK and internationally as a means of helping production companies to grow their skills and experiences, strengthening their ability to compete in the industry.
- Facilitate access to the sector for new production companies, supporting them to pitch ideas to S4C and helping them develop the capability to deliver high-quality content.
- Collaborate with other UK broadcasters to promote and safeguard a sustainable future for public service media, for the benefit of audiences in Wales and beyond.
- Develop S4C Masnachol's commercial strategy to maintain commercial income as an important contribution to our public service budget, and to foster new commercial partnerships in Wales.
- Reduce the carbon footprint of S4C's activities.
- Strengthen S4C's reputation as an open and inclusive employer that invests in its people, and offers jobs and opportunities across the whole of Wales.



What will success look like?

- ✓ Increasing regular engagement with S4C, and consequently regular use of the Welsh language, particularly among Welsh speakers and young people.
- ✓ Extending the economic and social impact of S4C's activities.
- ✓ Improving on-screen and off-screen representation of under-represented communities.

Next Steps

Since its launch in 1982, S4C has worked hand in hand with the production sector in Wales to create world-class content, nurture creative talent and strengthen the creative industries across the country. This partnership has been central to our success, and remains at the heart of our vision for the future.

This strategy challenges us to aim higher, act boldly and set clear ambitions for the years ahead. In a rapidly evolving world, our goal is to strengthen our connection with audiences of all ages and backgrounds, wherever and however they choose to watch.

To ensure the successful delivery of this strategy, the executive team will report on progress to the Board on a quarterly basis, and the strategy itself will be reviewed annually to ensure it remains relevant, effective and ambitious.

As we look to the future, we are determined to build on the strong foundations laid over the past decades. Together with our partners and audiences, we will continue to develop a platform that places the Welsh language centre stage, fuels creativity across Wales and extends its impact far beyond the screen.

