

TAC follow-up to Welsh Assembly Culture, Welsh Language & Communications Committee, March 2017

Appendix - S4C research

There was a discussion around changing in viewing habits among younger audiences and TAC mentioned research which it had seen from S4C. S4C has agreed to allow TAC to supply to the committee a reproduction of research that was conducted independently for S4C by Enders.

The first of the following graphs shows audience trends among 16-34-year-olds.

We entirely accept that it shows that the 'Other' Screens section is growing year on year. Nevertheless, it is still less than a third of total viewing, and it is important to note that people still view live TV or on catch-up via devices other than TV sets. If you consider alongside this the steep rise in views of S4C on iPlayer, then it is reasonable to assume that at least some of this change in viewing device is still used to view 'traditional' TV, but with different technology.

The committee will also note that the trend towards use of other devices is forecast to slow down and virtually plateau to around a third by 2020.

We would also point to the second graph, which shows an overwhelming proportion of 65+ viewers to the traditional viewing. It should also be noted that there continues to be a debate as to the extent that, as people grow older, their viewing habits change and they are more likely to view linear TV in a more traditional manner in front of the TV set. So an assumption that such behaviour will see a significant long-term change ought to be treated with caution. This audience has a right to be catered for in the manner to which it has become accustomed, i.e. high-quality TV content delivered on a linear terrestrial channel.

None of these are arguments to deny that it is important to diversify S4C's presence across platforms, and develop and increase the amount of content which suits the habits of a more mobile, younger demographic. As we explained, producers are investing in equipment and techniques to produce this content. However, it should be noted that there is not necessarily a cost saving to be made in the way that is sometimes assumed. Producing a well-designed 5-minute video to go online can take the same amount of set preparation, makeup, and camera setup as a 30-minute programme.

And any content associated with S4C's brand needs to have the quality that its audience will expect. If its short-form content takes on an 'unprofessional' look, this will only serve to diminish it and, as we explained, run the risk of it appearing to be a second-class service. If a young person's first encounter with S4C is a poor-quality video clip, that could have a very damaging effect on the likelihood of their becoming part of S4C's audience in the future.

Atodiad i lythyr dilyniant TAC at y Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu, Mawrth 2017

Ymchwil S4C

Bu trafodaeth parthed newidiadau i arferion gwyllo ymhlith cynulleidfaoedd iau, ac fe gyfeiriodd TAC at ymchwil a welwyd gan S4C. Mae S4C wedi rhoi caniatâd i TAC rannu copi o'r ymchwil perthnasol, a gynhaliwyd yn annibynnol ar gyfer S4C gan gwmni Enders, â'r pwyllgor.

Mae'r graff cyntaf o'r isod yn dangos patrymau cynulleidfa yn y grŵp oedran 16-34 oed.

Rydym yn derbyn yn llwyr fod yr adran Sgriniau 'Eraill' yn tyfu bob blwyddyn. Er gwaethaf hynny, mae'n dal i gyfrif am lai nag un rhan o dair o gyfanswm y gwyllo, ac mae'n bwysig nodi bod pobl yn dal i wyllo teledu byw neu ar alw ar declynnau ar wahân i'r set deledu. O ystyried hyn ochr yn ochr â chynnydd sylweddol yn niferoedd gwyllo S4C ar iPlayer, mae'n rhesymol i dderbyn bod cyfran o'r newid hwn mewn teclynnau gwyllo, o leiaf, yn parhau i wyllo teledu 'traddodiadol', ond drwy dechnoleg wahanol.

Dylai'r pwyllgor nodi yn ogystal y rhagwelir y bydd y duedd at ddefnydd teclynnau eraill yn arafu ac yn aros oddeutu'r traean erbyn 2020.

Hoffem gyfeirio at yr ail graff, sy'n dangos cyfran lethol o wylwyr 65+ i'r gwyllo traddodiadol. Dylid nodi hefyd fod trafodaeth yn parhau parthed i ba raddau mae arferion gwyllo pobl yn newid wrth iddynt heneiddio, a bod y gynulleidfa hon yn fwy tebygol o wyllo teledu unionlin mewn modd traddodiadol o flaen set deledu. Felly dylid gochel rhag tybio y bydd ymddygiad o'r fath yn newid yn sylweddol yn y tymor hir. Mae gan y gynulleidfa hon hawl i ddarpariaeth maent wedi dod i ddisgwyl ei gwyllo, h.y. cynnwys teledu o safon uchel wedi ei ddarlledu ar sianel ddaearol, unionlin.

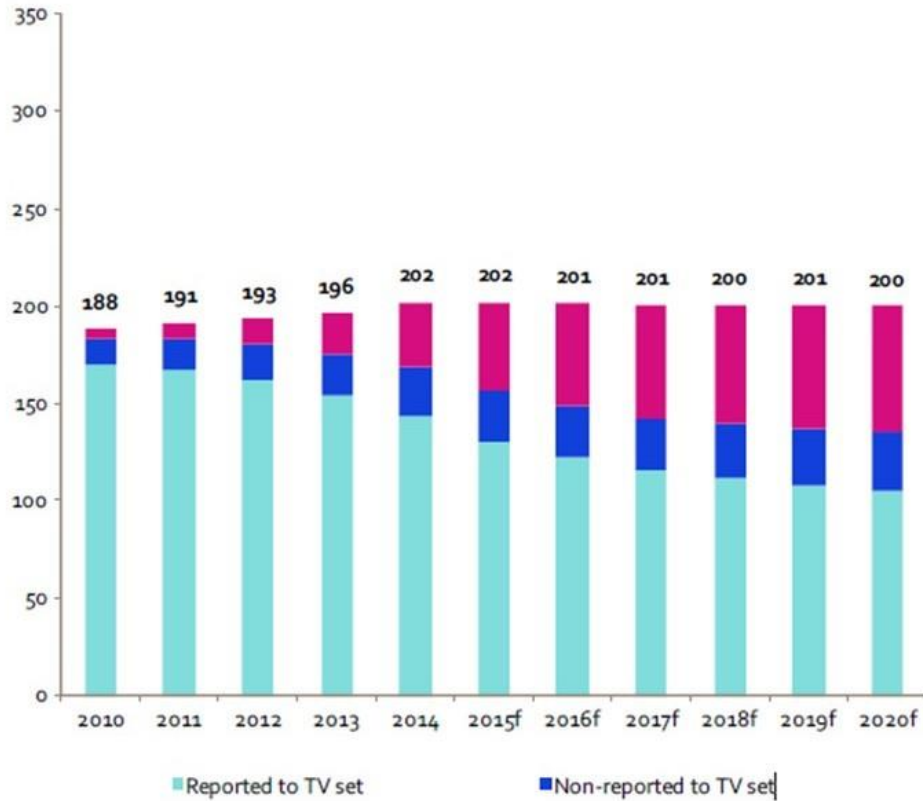
Nid nod yr un o'r dadleuon hyn yw gwadu ei bod yn bwysig amrywio presenoldeb S4C ar lwyfannau gwahanol, a datblygu a chynyddu faint o gynnwys sy'n gweddu i arferion demograffeg symudol, iau. Fel yr eglurodd ein cynrychiolwyr, mae cynhyrchwyr yn buddsoddi mewn offer a thechnoleg i ddatblygu cynnwys o'r fath. Dylid nodi, fodd bynnag, nad oes arbedion cost i'w gwneud o anghenraid, fel y rhagdybir yn aml. Gall cynhyrchu fideo o safon 5-munud i'w lwytho ar-lein olygu'r un faint o waith paratoi'r set, colur a camera â rhaglen 30-munud.

Bydd angen i unrhyw gynnwys a gyslltir â brand S4C barhau i gynnal y safon mae ei chynulleidfa'n ei disgwyl. Os bydd ei chynnwys ffurf fer i'w weld yn 'amhroffesiynol', bydd hyn yn ei ddibrisio, ac fel yr eglurwyd, peryg y byddai hyn y creu argraff o wasanaeth eilradd. Os mai clip fideo o ansawdd gwael yw profiad cyntaf person ifanc o S4C, gallai hynny fod yn andwyol i'r posibilrwydd y daw yn aelod o gynulleidfa S4C yn y dyfodol.

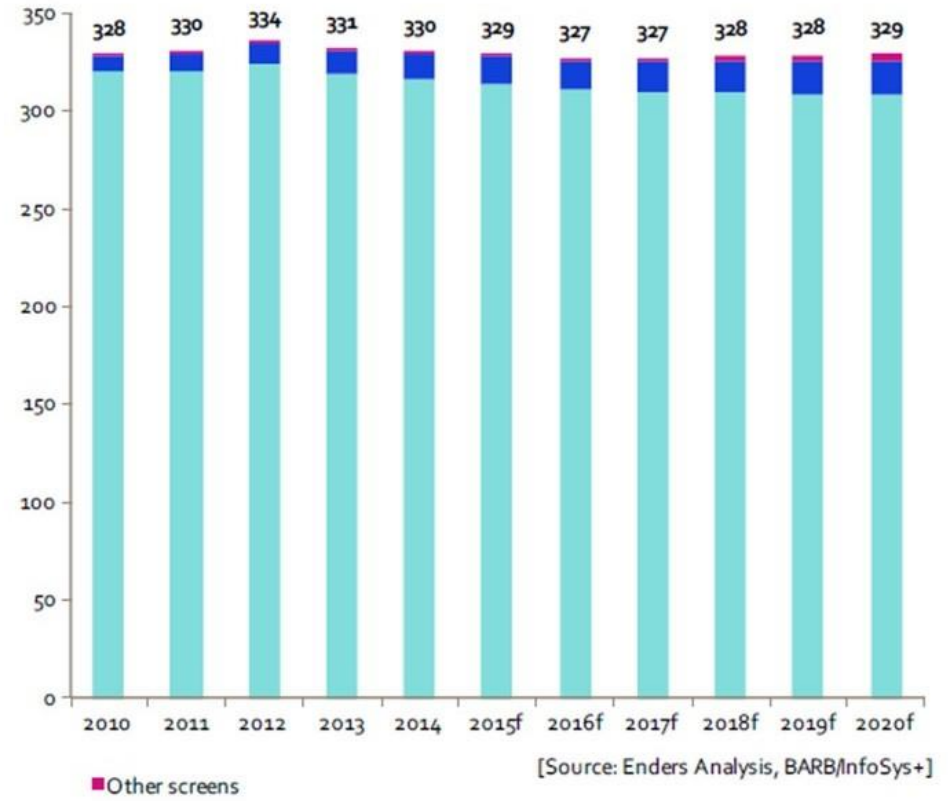
Information provided to TAC by S4C, March 2017

Gwybodaeth a ddarparwyd i TAC gan S4C, Mawrth 2017

Average viewing minutes per day: adults 16-34



Average viewing minutes per day: adults 65+



[Source: Enders Analysis, BARB/InfoSys+]

Key Guide

Reported to TV set (Light blue) = BARB reported viewing: live and up to 7-day consolidated timeshift/catch-up

Non-reported to TV set (dark blue) = All other viewing of video content on the TV set, but excluding video games

Other screens (pink) = All viewing of video content on other screens, whether long form or short form

Allwedd

Anfonwyd at y set deledu (glas golau) = gwyllo o adroddiad BARB: byw a hyd at 7 diwrnod o wyllo wedyn/dal i fyny

Heb ei anfon at y set deledu (glas tywyll) = pob math arall o wyllo cynnwys fideo ar y set deledu, ac eithrio gemau fideo

Sgriniau eraill (pinc) = holl wyllo cynnwys fideo ar sgriniau eraill, boed hynny'n ffurf hir neu ffurf fer