Making an impact

Making an impact

Channel 4 occupies a unique position in the broadcasting ecosystem: as a mass-market channel reaching large audiences every day, whilst also engaging with groups that other public service broadcasters ('PSBs') find it harder to connect with. Across all audience groups, it delivers public value by being alternative and diverse, taking risks, challenging preconceptions and inspiring change.

annualreport.channel4.com

Reputational impact

Channel 4 measures its public value impact by looking at audience perceptions against key reputational statements linked to its public service remit. The main channel consistently outperforms the other main PSB channels on these statements, providing clear evidence of its distinctiveness compared to other broadcasters. In 2015, audience perceptions of Channel 4's remit delivery were at an all-time high, reflecting the success of the creative renewal strategy: the majority of the reputational trackers were at their highest-ever levels, and the average across the statements was higher than at any time since Channel 4 began reporting them in 2008.

As Channel 4 typically leads the other channels on these metrics by a significant margin, we also look at variations in performance each year by highlighting the main channel's leads over the average for the other main PSB channels. In 2015, Channel 4's most emphatic leads were for "taking risks that others wouldn't" (a lead of 38 percentage points), "tackling issues other channels wouldn't" (36 points), being the 'home for alternative voices' and "taking a different approach to subjects compared to other channels" (both 29 points).

This year, the main channel increased its lead over the average for the other PSB channels for 7 of the 12 reputational statements, relative to 2014, with its lead increasing by up to 3 percentage points, for "challenging prejudice". With the lead for two further statements holding level, this means that in 2015 Channel 4 maintained or increased its lead over the average for the other channels for 75% of the reputational statements (nine out of 12). For the other three statements, its lead only fell by 1 percentage point in each case. On average, across the 12 reputational statements, Channel 4's lead over the average for the other main channels was 27 percentage points, 1 point higher than in 2014.

Television

While viewing in the digital TV space continues to fragment, Channel 4's main channel grew its viewing share by 1% year-on-year – its first share increase since 2006. It performed even better in peak, with an 8% increase in viewing share between 8pm and 11pm; by contrast, viewing to the other main PSB channels was flat or down year-on-year during these hours.

The Channel 4 portfolio was watched by 84% of all TV viewers every month in 2015 – behind only the BBC and ITV amongst the UK broadcasters. This was 1.4 percentage points down year-on-year, in line with the other PSBs, which all suffered declines (of between 0.8 and 1.9 percentage points) as competitive pressures from other digital channels grew.

Channel 4 seeks to engage with hard-to-reach audiences, including young adults and black and minority ethnic ('BAME') groups. We are the only PSB that attracts a significantly larger share of viewing amongst 16–34-year-olds than across the overall UK population, with a 16.5% share amongst this age group across the TV portfolio in 2015 (3% down on last year's 17% share). Amongst BAME groups, Channel 4's TV portfolio viewing share was 10.1% (also 3% down on last year's 10.4% share), and BAME audiences continued to account for a larger proportion of Channel 4's audience than for the audiences of other PSBs.

News and Current Affairs are central to Channel 4's remit. In 2015, over 8 million people watched *Channel 4 News* each month. This was 1% up on the 2014 figure, the first annual increase since 2008. BAME viewers and 16–34-year-olds accounted for a larger proportion of the *Channel 4 News* audience than for the news programmes on the other main PSB channels. These figures were stable in 2015. 16–34-year-old viewing fell by 1 percentage point year-on-year, while BAME viewing was level. *Channel 4 News* also continued to outperform the other main broadcasters' news programmes in terms of viewers' perceptions of their independence from the government and from the influence of big business.

We look at five reputational statements covering the approach and subject matter of the main PSB channels' Current Affairs programmes and strands. Across these statements, *Unreported World* and *Dispatches* had, respectively, the highest and second-highest average scores. *Unreported World* ranked in first place for "showing stories about parts of the world you would rarely see on British TV", "making me see something in a different light" and "giving a voice to groups that aren't always heard in mainstream media".

Online

Channel 4 continued to evolve its presence in digital media in 2015, launching All 4 as the new online hub for its content, including long-form programmes (replacing 4oD), live streaming and digital-only content such as shorts. There were 508 million visits to Channel 4's websites and apps in 2015. Visits to apps rose by 14% year-on-year, but there was an overall decline of 7% in this metric, as website visits were down. 512 million programme views were initiated across all All 4-branded platforms (including PCs, smartphones, tablets, games consoles and connected TVs), 4% up on last year.

Channel 4 also increasingly seeks to use social networks to deliver news content to audiences, especially younger ones. *Channel 4 News* achieved more than 500 million video views on Facebook in 2015.

Audience feedback

Channel 4 draws on feedback from a variety of sources: its Viewer Enquiries Centre, monitoring of social media traffic, bespoke audience research, and information provided by registered online users, including the Core4 community. Alongside these, the 'Buzz' metric shows us which programmes people have talked about the most face-to-face or on social media. The average 'Buzz' score for the ten most talked-about programmes in 2015 was 74%, with *Sarah Beeny's Selling Houses* the most talked about show of the year.

Different voices

24pt lead

over average for other channels for showing different cultures and opinions

+1pt on last year

CULTURAL DIVERSITY

Key programme examples:

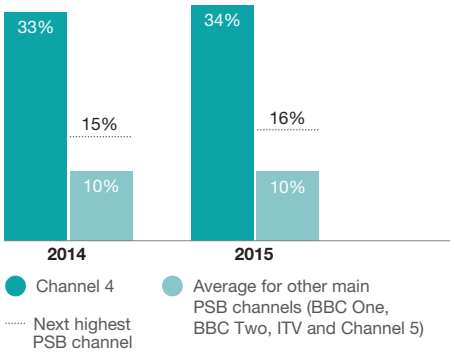
- Walking the Nile
- Gogglebox
- The Tribe
- The Romanians Are Coming

Channel reputations – shows different kinds of cultures and opinions

In 2015, 34% of all respondents selected Channel 4's main channel as being best for showing different kinds of cultures and opinions. This gave Channel 4 a substantial lead, of 24 percentage points, over the average for the other main PSB channels. This lead is 1 percentage point higher than the corresponding lead in 2014. Channel 4's lead over the next highest-scoring channel, BBC One, was 18 percentage points.

The proportion of people selecting Channel 4 rose by 1 percentage point year-on-year (2014: 33%), giving it the joint highest score that the main channel has achieved since Channel 4 began reporting this metric in 2008. Since Channel 4's creative renewal began to impact on the schedules in 2012, the proportion of people choosing the main channel for this metric has been stable (with small year-on-year variations) in the range of 32–34%, compared to the corresponding figures of 27–30% for the prior four years (2008–2011).

Shows different kinds of cultures and opinions



Source: Ipsos MORI commissioned by Channel 4

25pt lead

over average for other channels for challenging prejudice

+3pts on last year

CULTURAL DIVERSITY

Key programme examples:

- Cucumber
- Muslim Drag Queens
- The Romanians Are Coming

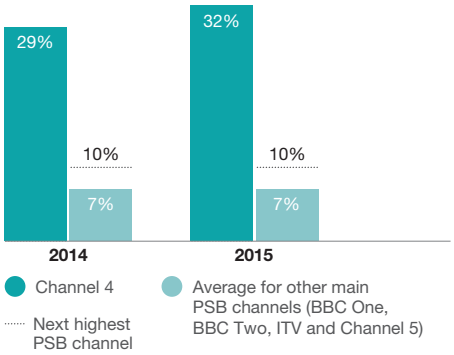
Channel reputations – challenges prejudice

Channel 4's role in challenging prejudice in society is arguably as important now as it ever has been – and its reputation on this metric reached new heights in 2015. 32% of respondents most associated programmes on Channel 4's main channel with challenging prejudice. Not only was this a significantly higher number than for any other channel, it also represented a marked year-on-year increase, and was the highest score that Channel 4 has achieved since it began reporting this metric in 2008.

Channel 4's score was 25 percentage points higher than the average for the other main PSB channels in 2015, a lead that is 3 percentage points higher than that in 2014. Its lead over the next highest channel, BBC One, was 22 percentage points, again 3 percentage points more than the corresponding lead in 2014.

The proportion of people selecting Channel 4 in 2015 was likewise 3 percentage points higher than the 2014 figure (of 29%), and 2 percentage points above the highest score that Channel 4 has previously achieved on this metric (30% in 2013).

Challenges prejudice



Source: Ipsos MORI commissioned by Channel 4

26pt lead

over average for other channels for showing the viewpoints of minority groups

+1pt on last year

CULTURAL DIVERSITY

Key programme examples:

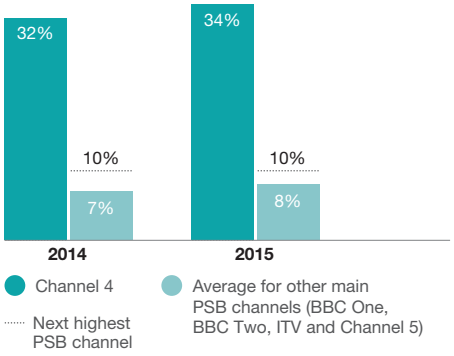
- Cucumber
- Kitchen Impossible with Michel Roux Jnr
- Muslim Drag Queens
- The Autistic Gardener

Channel reputations – shows the viewpoints of minority groups in society

Channel 4 seeks to give a voice to diverse groups in the UK, in particular those that tend to be under-represented on TV. This is reflected in its substantial – and growing – lead over other channels when viewers are asked which channel is best for showing the viewpoints of minority groups in society. In 2015, it achieved its highest score since this metric was first reported in 2012, with 34% of viewers selecting Channel 4's main channel over the other main PSB channels, 2 percentage points more than selected it last year. This gave Channel 4 a substantial lead of 26 percentage points over the average for the other channels (1 percentage point up on 2014), and a 24 percentage point lead over the next highest channel, BBC One (2 percentage points up on 2014).

Channel 4 also tracks which channel is best for showing the viewpoints of particular minority groups, and in 2015 the main channel significantly outperformed the other PSBs, and grew its score year-on-year, in each case. It was selected by 31% of viewers as being best for showing the viewpoints of different ethnic groups in the UK (up 1 percentage point year-on-year), giving it a lead of 23 percentage points over the average for the other main PSB channels. 31% of viewers thought Channel 4 was best for showing the viewpoints of gays and lesbians (up 3 percentage points), 26 percentage points above the average of the other PSB channels. And 27% of viewers thought Channel 4 was best for showing the viewpoints of disabled people (up 2 percentage points), giving it a 21 percentage point lead over the average of the other PSB channels.

Shows the viewpoints of minority groups in society



Source: Ipsos MORI commissioned by Channel 4

Different voices

29pt lead

over average for other channels for allowing people an alternative point of view

+2pts on last year

Key programme examples:

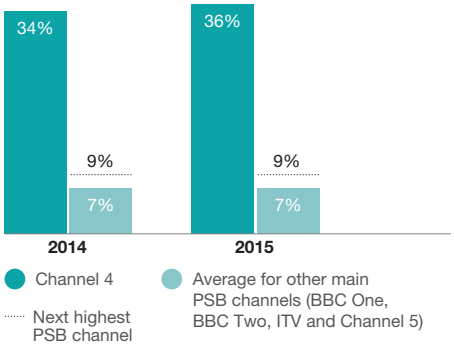
- The Tribe
- The Romanians Are Coming
- Muslim Drag Queens

Channel reputations – home for alternative voices

Channel 4 makes a vital contribution to the plurality of viewpoints and perspectives on UK television by providing a platform for alternative voices. Channel 4 consolidated its position as the home for alternative voices this year, 36% of respondents selected Channel 4's main channel as the home for alternative voices, a figure that is four times larger than the proportion selecting the next highest channel, Channel 5 (9% of people). The proportion picking Channel 4 was 29 percentage points higher than the average for the other main PSB channels.

The proportion of all respondents selecting Channel 4's main channel increased by 2 percentage points year-on-year, as did both its lead over the average for the other main PSB channels and its lead over the next highest PSB channel.

Home for alternative voices



Source: Ipsos MORI commissioned by Channel 4

Distinctive approaches

15pt lead

over average for other channels for making viewers think in new and different ways

+2pts on last year

Key programme examples:

- Humans
- Hunted
- My Son the Jihadi
- Jamie's Sugar Rush

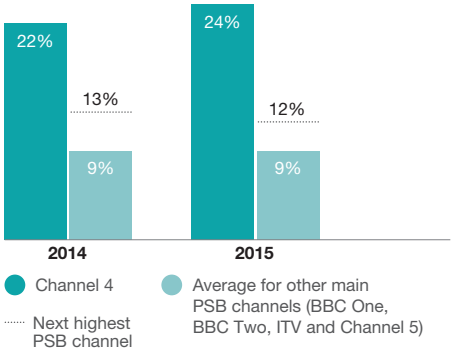
Channel reputations – makes me think about things in new and different ways

In 2015, Channel 4's main channel strengthened its lead over other channels as being best for making people think about things in new and different ways, achieving amongst the highest scores since Channel 4 began reporting this metric in 2008.

24% of respondents selected Channel 4's main channel as being best for making them think about things in new and different ways, 2 percentage points higher than the corresponding figure for 2014, and the joint-highest score achieved since 2008.

This gave Channel 4's main channel a lead over the average for the other main PSB channels of 15 percentage points. This also represents a year-on-year increase of 2 percentage points, and is the joint-highest lead Channel 4 has achieved since 2008. Channel 4's lead over the next highest channel, BBC Two, rose even further in 2015, by 3 percentage points. This gave Channel 4's main channel a 12 percentage point lead over the next highest channel, a stronger lead than at any time since 2008.

Makes me think about things in new and different ways



Source: Ipsos MORI commissioned by Channel 4

36pt lead

over average for other channels for tackles issues other channels wouldn't

-1pt on last year

Key programme examples:

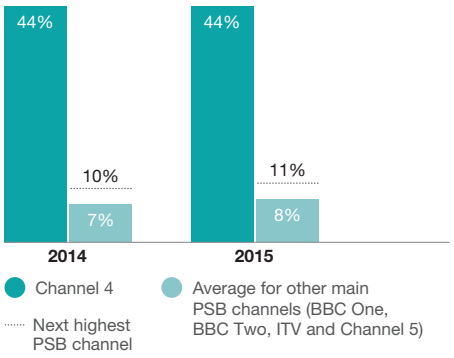
- Revenge Porn
- Sex in Class
- Born Naughty?

Channel reputations – tackles issues other channels wouldn't

Channel 4's main channel was selected by 44% of respondents as being best for tackling issues that other channels wouldn't in 2015 – one of the highest scores achieved in any of the reputational statements. The other main PSB channels were chosen by only 8% of people each on average, giving Channel 4 a huge lead of 36 percentage points. Its lead over the next highest channel, Channel 5, was only slightly lower, at 33 percentage points.

There was little year-on-year change in this metric. The proportion of people selecting Channel 4's main channel was level (2014: 44%), while its lead over the average for the other main PSB channels and its lead over the next highest channel both fell marginally, by 1 percentage point – albeit to levels that remain larger than for most of the other reputational statements. Overall, Channel 4's performance against this metric has been stable since it was first introduced in 2013, and annual variations continue to be within the range of ±1 percentage point.

Tackles issues other channels wouldn't



Source: Ipsos MORI commissioned by Channel 4

Distinctive approaches

29pt lead

over average for other channels for taking a different approach to subjects compared to other channels

= with last year

DISTINCTIVE

Key programme examples:

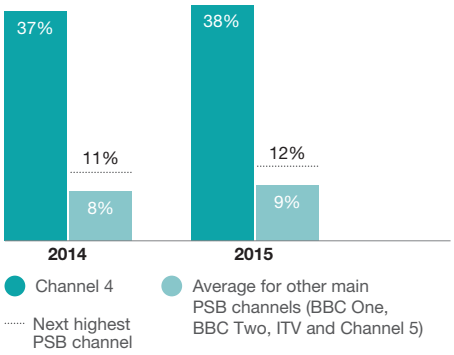
- The Secret Life of 4 Year Olds
- Sex in Class

Channel reputations – takes a different approach to subjects compared with other channels

For the third consecutive year, the proportion of people associating Channel 4's main channel with taking a different approach to subjects compared with other channels rose in 2015. The main channel was chosen by 38% of respondents for this reputational statement, its highest score since Channel 4 began reporting this metric in 2008. The proportion choosing Channel 4 was up by 1 percentage point year-on-year, and is now 9 percentage points higher than it was in 2012. Channel 4's lead over the average for the other main PSB channels was 29 percentage points, level with the corresponding lead in 2014, and remains the joint-highest lead since 2008 for this metric. Its lead over the next highest channel, Channel 5, was 26 percentage points, also level with the corresponding lead in 2014.

Channel 4's ongoing creative renewal succeeded in overturning modest declines between 2010 and 2012, and has driven significant increases since then, taking Channel 4's performance against this metric to new peaks. Over the last two years, this metric has begun to stabilise, after a period of more significant fluctuations, with annual variations within the range of ±1 percentage point.

Takes a different approach to subjects compared with other channels



Source: Ipsos MORI commissioned by Channel 4

210

new or one-off programmes shown on Channel 4 between 6pm and midnight

+16% on last year

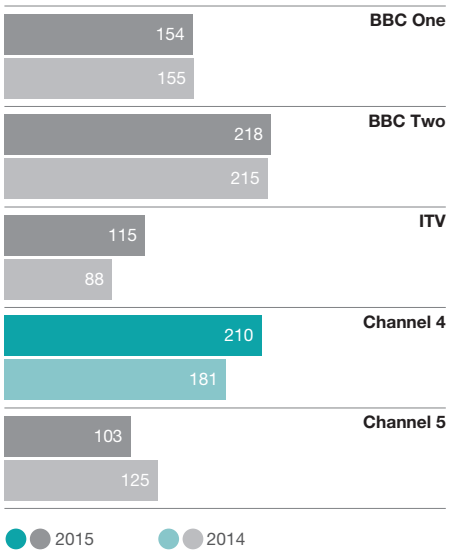
INNOVATE

New and one-off programming

As part of its commitment to experimentation, Channel 4 transmits significant numbers of new and one-off programmes. Focusing on the evening schedules between 6pm and midnight, when audiences are at their highest levels, there were 210 new and one-off programmes on the main channel in 2015. This figure is 16% up year-on-year, with significant growth in particular in the number of Documentary titles contributing to the total.

Only BBC Two showed more new and one-off programmes in the evening schedule than Channel 4 (218 titles, just eight more than Channel 4's total). Channel 4 remained ahead of all the other main PSB channels by substantial margins: it showed 56 more new and one-off titles than BBC One in its evening schedules, 95 more than ITV, and 107 more than Channel 5.

Number of new and one-off programmes shown on the main PSB channels between 6pm and midnight



Source: Attentional commissioned by Channel 4

38pt lead

over average for other channels for taking risks that others wouldn't

-1pt on last year

DISTINCTIVE

Key programme examples:

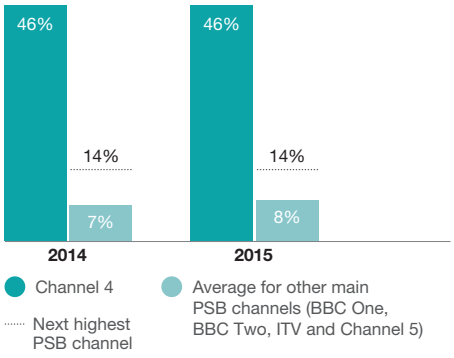
- Married at First Sight
- Revenge Porn
- Drugs Live

Channel reputations – takes risks with programmes that others wouldn't

In 2015, Channel 4's main channel was selected by 46% of respondents as being the one that, more than others, takes risks with programmes that others wouldn't – one of the largest figures for any of the reputational statements. Channel 4's lead over the average of the other main PSB channels was 38 percentage points, and it was 32 points ahead of the next highest channel, Channel 5.

There was very little change in Channel 4's performance against this metric year-on-year: the proportion of people choosing Channel 4, and its lead over the next highest channel, both held level compared to the corresponding 2014 figures. Channel 4's lead over the average for the other main PSB channels was 1 percentage point down, though this remains one of the largest leads for all the channel reputation statements. Overall, Channel 4's performance against this metric remains stable, and annual variations continue to be within the range of ±1 percentage point.

Takes risks with programmes that others wouldn't



Source: Ipsos MORI commissioned by Channel 4

Distinctive approaches

28pt lead

over average for other channels for being experimental

= with last year

INNOVATE

Key programme examples:

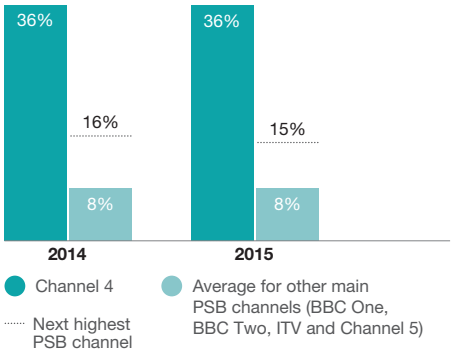
- The Secret Life of 4 Year Olds
- Hunted
- Married at First Sight

Channel reputations – is experimental

Channel 4's commitment to trying new things underpins its role as a creative greenhouse. In 2015, 36% of people associated Channel 4's main channel, over other channels, with being experimental. The proportion of people choosing Channel 4 was 28 percentage points higher than the average for the other main PSB channels, and 21 percentage points higher than the next highest channel, Channel 5.

There was very little year-on-year variation in this metric. The proportion of people selecting Channel 4's main channel was level with the 2014 figure, and its lead over the average for the other main PSB channels was also the same as in 2014. Channel 4's lead over the next highest channel increased by 1 percentage point, giving it the joint-highest lead since Channel 4 began reporting this metric in 2008. Overall, Channel 4's performance against this metric remains stable, and annual variations continue to be within the range of ±1 percentage point.

Is experimental



Source: Ipsos MORI commissioned by Channel 4

Film

25pt lead

over average for other channels for being the best for modern independent film

-1pt on last year

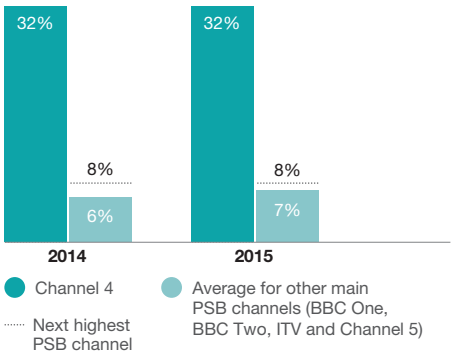
DISTINCTIVE

Channel reputations – is best for modern independent film

In 2015, 32% of respondents picked Channel 4's main channel as being best for modern independent film. Channel 4 had a lead of 25 percentage points over the average for the other main PSB channels, and a 24 percentage point lead over Channel 5, the next highest channel (no other PSB channel was selected by more than 8% of respondents). The most popular films on Channel 4 this year included premieres of Film4 titles *The Inbetweeners 2*, which drew 2.2 million viewers, and *Cuban Fury*, which was watched by 1.7 million people.

There was very little year-on-year variation in this metric. The proportion of people selecting Channel 4's main channel was level with the 2014 figure, while Channel 4's lead over the average for the other main PSB channels fell slightly, by 1 percentage point. Channel 4's lead over the next highest channel remained at the same level as in 2014, the joint-highest lead since Channel 4 began reporting this metric in 2008. Overall, Channel 4's performance against this metric remains stable, and annual variations continue to be within the range of ±1 percentage point.

Is best for modern independent film



Source: Ipsos MORI commissioned by Channel 4

Factual

24pt lead

over average for other channels for being the best for documentaries that present alternative views

+1pt on last year

ALTERNATIVE VIEWS

Key programme examples:

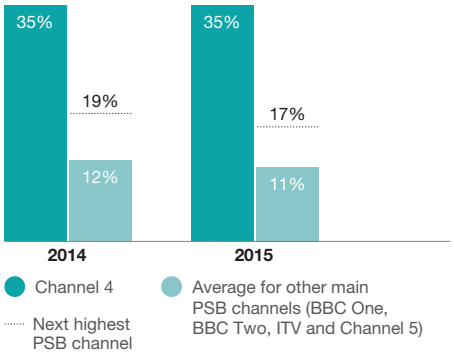
- Things We Won't Say About Race That Are True
- My Son the Jihadi
- The Stranger On The Bridge

Channel reputations – is best for documentaries that present alternative views

Channel 4 seeks to differentiate its documentary programmes from those of other broadcasters through their subject matter and approach, and in particular by presenting alternative views not often shown on television. Viewers continued to recognise Channel 4's distinctive approach in 2015, with 35% of respondents selecting the main channel as being best for documentaries that present alternative views. This represents a substantial lead, of 24 percentage points, over the average for the other main PSB channels, while the lead over the next highest channel, BBC Two, was 18 percentage points.

The proportion of people choosing Channel 4's main channel was level year-on-year, the joint-strongest performance since this metric was first reported in 2010. Channel 4's lead over the average of the other main PSB channels rose by 1 percentage point year-on-year, and its lead over the next highest channel (BBC Two) was up by 2 percentage points – taking Channel 4's leads over the other channels to their highest levels since 2010.

Is best for documentaries that present alternative views



Source: Ipsos MORI commissioned by Channel 4

Factual

63%

of viewers said that Channel 4's factual programmes inspired change in their lives

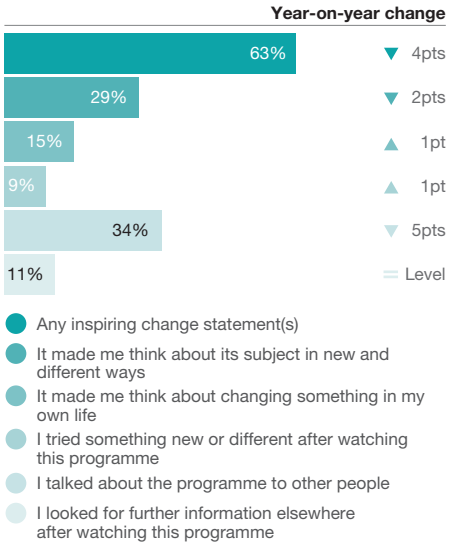
-4pts on last year

Inspiring change through factual programming

In line with its public remit, Channel 4 seeks to inspire people to make changes in their lives through its Factual programming. Programmes may encourage people to think about things in new and different ways, or think about making changes in their own lives. They may also inspire more active engagement: encouraging people to talk about the subjects of the programmes to other people, or to seek out further information. At their most engaging, programmes can lead to people actually trying something new or different. 63% of viewers said that Channel 4's Factual programmes inspired them in one or more of these ways in 2015. The most inspiring programme this year was *The Stranger on the Bridge*, the true story of a man's search to find the stranger who talked him out of jumping off Waterloo Bridge – 81% of respondents who watched this programme agreed that it had inspired change in their lives in some form.

There was a 4 percentage point year-on-year fall in the proportion of respondents who said that Channel 4's factual programmes inspired them in some way in 2015, with declines in the scores for some long-running returning shows.

Percentage of viewers who said that Channel 4's factual programmes inspired change in their lives



Source: Ipsos MORI commissioned by Channel 4

News and Current Affairs

81%

of *Channel 4 News* viewers regard it to be independent from Government

+4pts on last year

Independence of TV news

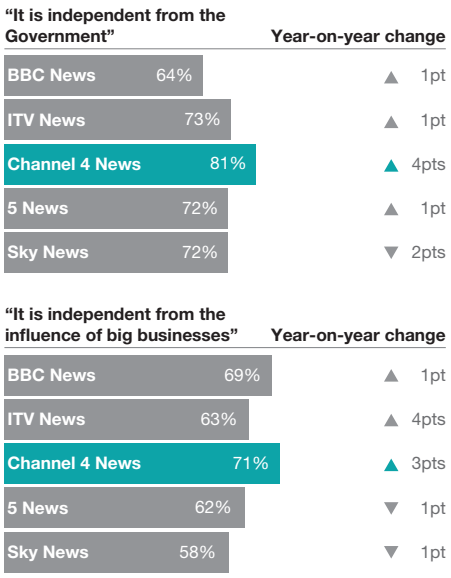
In 2015, *Channel 4 News* reinforced its reputation as the news programme most associated by viewers with being independent from both the government and the influence of big businesses.

81% of regular viewers to *Channel 4 News* regarded it as being independent from the government. This was 11 percentage points more than the average for the other main PSBs' news programmes and *Sky News*, and 8 percentage points more than the corresponding figure for *ITV News*, which was the next highest scoring broadcaster.

71% of regular news viewers to *Channel 4 News* agreed that it is independent from the influence of big businesses in 2015, 8 percentage points more than the average for the news programmes on the other main broadcasters' channels, and 2 percentage points more than the corresponding figure for *BBC News*, which was the next highest scoring broadcaster.

Channel 4 News' scores increased in 2015 on both of these measures: by 4 percentage points for being independent from the government and by 3 percentage points for being independent from the influence of big businesses. *Channel 4 News* also increased its leads over the other broadcasters. For the proportion of regular viewers who believe news programmes to be independent from the government, *Channel 4 News'* lead over the average for the other broadcasters' news programmes rose by 4 percentage points, and its lead over the next highest-scoring news programme (*ITV News* in 2015, *Sky News* in 2014) rose by even more, 5 percentage points. For the proportion who believe news programmes to be independent from the influence of big businesses, *Channel 4 News'* lead over the average of the other broadcasters' news programmes rose by 2 percentage points, and its lead over the next highest-scoring broadcaster (*BBC News* in both years) rose by 2 percentage points. In 2015, *Channel 4 News'* viewing share increased by 7%.

Percentage of regular viewers to TV news programmes in 2015 who agree with the following statements:



Source: Ipsos MORI commissioned by Channel 4

News and Current Affairs

45%

The average programme reputation statement for *Unreported World*

-1pt on last year

40%

The average programme reputation statement for *Dispatches*

-2pts on last year

STIMULATE DEBATE

EDUCATIONAL

ALTERNATIVE VIEWS

INSPIRE CHANGE

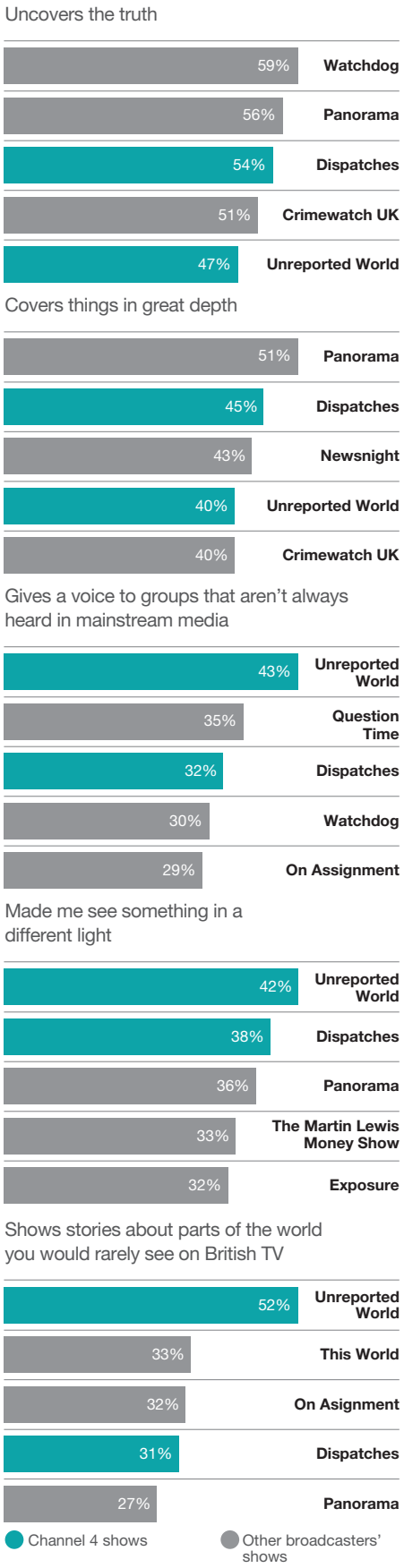
Programme reputation statements – Current Affairs

There are variations in both approach and subject matter in the PSBs' Current Affairs output. Channel 4's two main current affairs strands, *Dispatches* and *Unreported World*, place a particular emphasis on investigative journalism, on challenging viewers to see things differently, on giving a voice to those who might not otherwise be heard and, especially in *Unreported World*, on providing a window on the wider world. Through its one-hour specials, it also commits to delivering in-depth coverage for important stories. Channel 4's strengths in these areas are highlighted by five audience reputational statements that assess perceptions of the Current Affairs programmes – both regular strands and one-offs – on the main PSB channels. *Unreported World* and *Dispatches* continued to score higher on average than any of the other PSBs' Current Affairs programmes and strands (with *Panorama*, on BBC One, coming in third place).

In 2015, *Unreported World* scored higher than any other Current Affairs programme or strand on three of the five reputational statements, for: "showing stories about parts of the world you would rarely see on British TV" (selected by 52% of respondents), "making me see something in a different light" (42% of respondents), and "giving a voice to groups that aren't always heard in mainstream media" (43% of respondents). Across the five statements, its average score was 45%, the highest of any Current Affairs programme or strand on any of the main PSB channels.

Dispatches was rated in the top three places in four of the five reputational statements (and in fourth place for "showing stories about parts of the world you would rarely see on British TV"). Its average score across the five statements was 40%, the second highest average score of all the Current Affairs programmes and strands, behind *Unreported World*.

There were small variations relative to the 2014 figures. The average scores across the five statements for *Unreported World* and *Dispatches* both fell slightly year-on-year, by 1 and 2 percentage points respectively.



Source: Ipsos MORI commissioned by Channel 4

Engaging the audience

83.8%

of all TV viewers reached every month across Channel 4's TV channels

-1.4pts on last year

AUDIENCE IMPACT

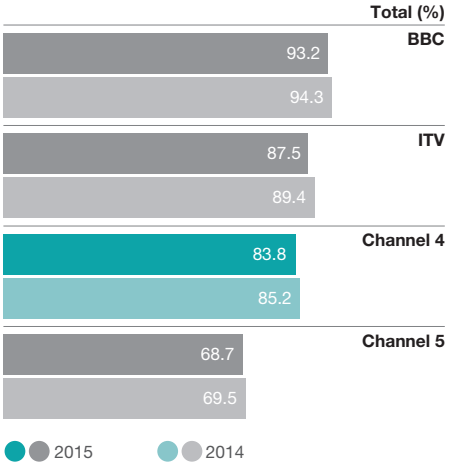
Audience reach

Across its portfolio of TV channels, Channel 4 has the third highest reach of all the UK broadcasters, behind the BBC and ITV, and well ahead of fourth placed Channel 5. The BBC, ITV and Channel 4 are the only UK broadcasters that reach more than three-quarters of all UK viewers every month. 83.8% of all TV viewers watched Channel 4's TV channels for at least 15 consecutive minutes each month on average in 2015. Reach for the main channel alone was 75.9%, while Channel 4's digital TV channels together reached 62.4% of viewers.

In an ever more competitive digital TV landscape, Channel 4's total TV portfolio reach fell by 1.4 percentage points compared to the 2014 figure. For the fourth successive year, all the PSBs suffered declines in reach in 2015, which ranged between 0.8 and 1.9 percentage points.

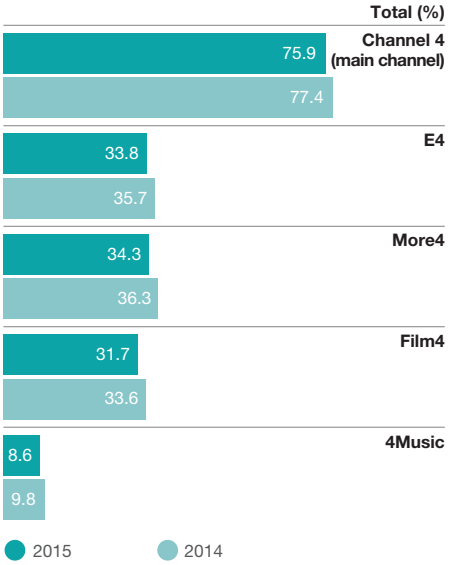
Looking at the individual channels in the Channel 4 TV portfolio, the main channel experienced a year-on-year fall in reach of 1.5 percentage points (a smaller decline than in the previous two years). Each of the digital channels saw declines of between 1.3 and 2.0 percentage points. Taken together, the digital channels marginally increased their contribution to Channel 4's overall portfolio reach in 2015.

Average monthly reach of PSBs' TV portfolios



Source: BARB, 15 minute consecutive, average monthly reach, all people

Percentage reach of individual TV channels in Channel 4 portfolio



Source: BARB, 15 minute consecutive, average monthly reach, all people. See online methodology for further details

Engaging the audience

10.6%

viewing share across the TV channel portfolio

-2% on last year

TV viewing share

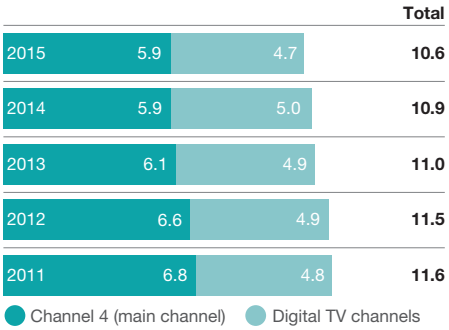
Channel 4's TV channel portfolio achieved a total viewing share of 10.6% in 2015. The main channel's share was 5.9%, while the digital channels had a combined share of 4.7%. E4 was the biggest digital channel, with a 1.9% viewing share, followed by Film4 (1.4%), More4 (1.1%) and 4Music (0.3%).

The main channel's viewing share grew by 1% year-on-year (from 5.87% to 5.92% of viewers; these figures are rounded to one decimal place in the chart). This is the first time the main channel has increased its viewing share since 2006, an impressive performance given that viewing in the digital TV space continues to fragment. Between 8pm and 11pm, there was a substantial increase in viewing to the main channel, of 8%; by contrast, viewing to the other main PSB channels was flat or down year-on-year during these hours.

Across the portfolio, Channel 4's total viewing share fell year-on-year by 2%, equivalent to 0.3 percentage points. This decline was accounted for by a corresponding 0.3 percentage point drop in viewing to the digital channels, with marginal declines – of 0.1 percentage point – in each of the viewing shares of E4, More4 and Film4.

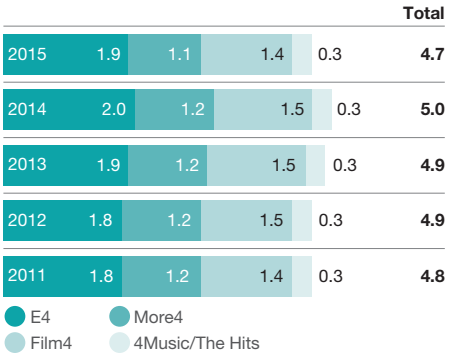
The main channel accounted for 56% of total viewing to the Channel 4 TV portfolio in 2015, up from 54% in 2014. This reflects the impact of Channel 4's strategy this year to focus its budget more on programmes on the main channel, where they typically attract the largest audiences.

Channel 4 portfolio share as a percentage of total TV viewing



Source: BARB
Channel 4 2012 data includes the Paralympics channels.
See online methodology for further details

Viewing share of digital channels as a percentage of total TV viewing



Source: BARB
Channel 4 2012 data includes the Paralympics channels.
See online methodology for further details

Engaging the audience

10.1%

portfolio viewing share amongst BAME audiences

-3% on last year

CULTURAL DIVERSITY

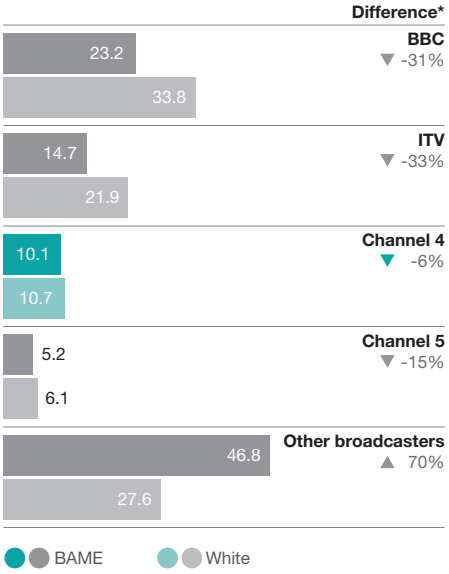
Share amongst hard to reach audiences – BAME

Channel 4's remit requires it to make programmes that appeal to people from different cultural backgrounds, and it is particularly important for the broadcaster to attract ethnic minority audiences. Achieving this is challenging, given that viewers from BAME groups watch disproportionately high levels of digital channels, as a result of which their viewing to the PSBs' channels tends to be lower on average than that of white viewers.

In previous years, Channel 4 has had a smaller differential between its TV portfolio viewing shares amongst BAME and white viewers than that of any of the other PSBs – meaning that BAME audiences represent a higher proportion of Channel 4's total audience than they do of the total audience of other PSBs. This remained the case in 2015. Its TV portfolio share amongst BAME audiences was 10.1%, while the corresponding share amongst white audiences was 10.7%. This gives a differential of 6%, considerably lower than the corresponding BAME/white viewing differentials for the TV portfolios of the other PSBs, which ranged from 15% to 33%.

Relative to the previous year's figures, Channel 4's portfolio viewing share amongst BAME audiences fell by 3%. The 6% viewing differential between BAME and white audiences is marginally higher than the corresponding 5% differential recorded in 2014.

Public service broadcasters' portfolio viewing shares amongst white and BAME audiences as a percentage of total TV viewing by those audiences (2015)



Source: BARB

* Viewing by BAME audiences compared to viewing by white audiences

16.5%

portfolio viewing share amongst 16–34-year-olds

-3% on last year

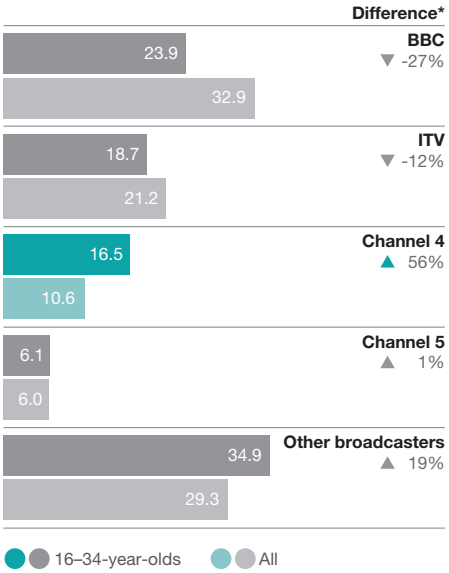
CULTURAL DIVERSITY

Share among hard to reach audiences – 16–34-year-olds

Channel 4 consistently attracts to its TV channels a disproportionately large share of viewing amongst hard-to-reach 16–34-year-olds. In 2015, Channel 4's viewing share amongst 16–34-year-olds was 16.5% (2014: 17.0%) across its TV channel portfolio. This represented a small year-on-year decline, of 3%.

Channel 4's viewing share amongst 16–34-year-olds was 56% higher than its corresponding all-audience share in 2015, making it the only PSB to attract significantly greater viewing amongst this age group than across the general population. By contrast, ITV's 16–34 share was 12% less than its all-audience portfolio share, and the BBC's was 27% less. Channel 4's relative appeal to young audiences was stable this year: the 56% differential between 16–34-year-olds and all audiences is the same as in 2014.

Public service broadcasters' portfolio viewing shares among 16–34-year-olds and all audiences as a percentage of total TV viewing by those audiences (2015)



Source: BARB

* Viewing by 16–34-year-olds compared with all audiences

Engaging the audience

5.1%

viewing share for E4 amongst 16–34-year-olds

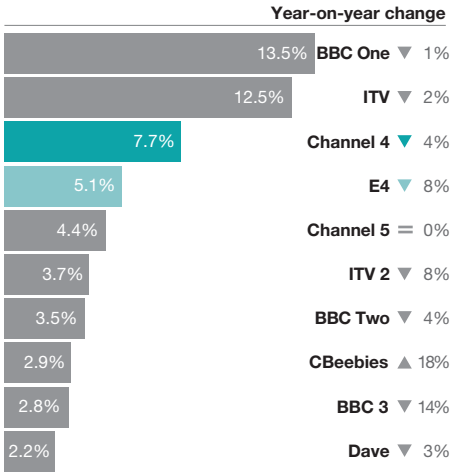
-8% on last year

Most popular channel for young viewers

In 2015, E4 remained the most-watched digital TV channel, and the fourth most popular TV channel overall in the UK, amongst 16–34-year-olds. Its 5.1% viewing share put it behind only BBC One, ITV and Channel 4, and ahead of the other two main PSB channels, BBC Two and Channel 5. E4's viewing share was down year-on-year, by 8%, as some popular US acquired series (such as *How I Met Your Mother*) came to an end in 2014, and viewing to *Hollyoaks* in 2015 fell back after delivering record ratings the year before. Nonetheless, E4's viewing share remained at the joint second-highest level since 2009.

Channel 4's main channel also performs disproportionately well amongst 16–34-year-olds, for whom it is the third most popular TV channel. It achieved a 7.7% share in 2015, 4% down on its 2014 level.

Viewing share for the top ten channels amongst 16–34-year-olds as a percentage of total viewing by this age group



Source: BARB

16%

of viewing to *Channel 4 News* programmes on the main channel in 2015 accounted for by viewers aged 16–34-year-olds

-1pt on last year

14%

of viewing to *Channel 4 News* programmes on the main channel in 2015 accounted for by BAME viewers

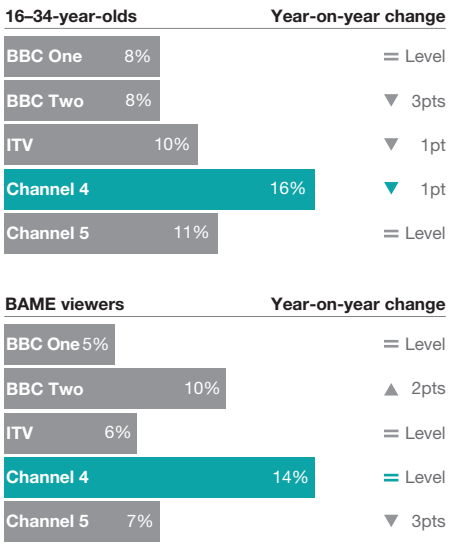
Flat on last year

Viewing to national news

Channel 4's main evening news programme continues to appeal to young and BAME audiences, relative to news programmes on the other main PSB channels. Young audiences aged 16–34 accounted for 16% of viewing to *Channel 4 News* in 2015, compared to shares of just 8–11% of viewing to the national news programmes on the other main PSB channels. Viewers from BAME groups represented 14% of all viewing to *Channel 4 News* – the joint-highest figure achieved on this metric since 2009, and broadly in line with this group's representation in the UK population. The other main PSB channels had disproportionately low shares of BAME viewing to their news programmes, ranging from 5% to 10%.

There continues to be little year-on-year variation in these figures. The proportion of viewing to *Channel 4 News* accounted for by 16–34-year-olds fell by 1 percentage point in 2015, while the proportion of BAME viewers was level with the 2014 figure.

Percentage of viewing to national news programmes on the main PSB channels in 2015 accounted for by 16–34-year-olds and BAME viewers



Source: BARB

8.2m

people watched *Channel 4 News* each month

+1% on last year

Reach of *Channel 4 News*

In 2015, *Channel 4 News* was watched (for at least 15 consecutive minutes) by an average of 8.2 million people a month. This represented a small increase in the programme's reach over the 2014 level, of 1% – the first time that *Channel 4 News* has grown its reach year-on-year since 2008. In terms of viewing share, *Channel 4 News* increased its share by 7% in 2015 over the 2014 level, the second successive year in which its share has increased.

Engaging the audience

19pt lead

over average for other channels for catering for audiences other channels don't cater for

+1pt on last year

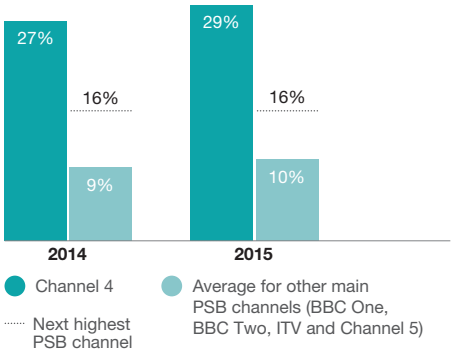
CULTURAL DIVERSITY

Channel reputations – caters for audiences other channels don't cater for

In 2015, Channel 4's main channel consolidated its reputation for being best for catering for audiences other channels don't cater for, with 29% of respondents selecting it over the other main PSB channels – giving Channel 4 its joint highest score since it began reporting this metric in 2008. This was 19 percentage points more than chose the average of the other main PSB channels, and 13 percentage points more than the next highest channel (Channel 5).

The proportion of people selecting Channel 4, and its leads over the other channels, all increased in 2015. There was a 2 percentage point increase both in the overall proportion of people selecting Channel 4, and in Channel 4's lead over the next highest PSB channel, while Channel 4's lead over the average for the other main PSB channels was up by 1 percentage point.

Caters for audiences other channels don't cater for



Source: Ipsos MORI commissioned by Channel 4

512m

programme views initiated on All 4

+4% on last year

DIGITAL

On-demand viewing

In 2015, Channel 4 re-launched 4oD, its video-on-demand service, as All 4. 512 million programme views were initiated across all All 4-branded platforms – including PCs, smartphones, tablets, games consoles and connected TVs. This represents an increase, of 4%, on the corresponding 2014 figure.

On-demand viewing rose in 2015 across a range of platforms. The number of on-demand views more than doubled on FreeSat and Roku devices, while the strongest growth in absolute terms was on Sky Anytime+.

Note: this metric has been respecified to cover All 4-branded platforms only. It no longer includes third-party SVOD or download-to-own platforms such as Netflix, Amazon Prime or iTunes. For this reason, the 2014 figure has been restated from 587m to 492m. See online methodology for further details.

Programme views initiated on All 4 (m)

Source: Channel 4

508m

total visits to Channel 4's websites and apps

-7% on last year

DIGITAL

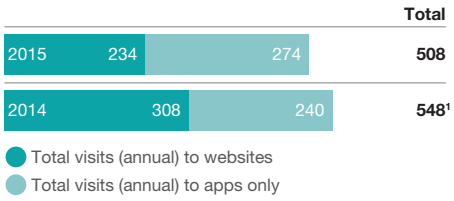
Total visits to Channel 4's websites and apps

Channel 4's websites and apps attracted 508 million visits in 2015, representing a fall of 7% year-on-year. Channel 4's apps – which accounted for 54% of the total – saw a significant increase in the number of visits, 14% up on the 2014 level, as an increasing number of viewers choose to watch Channel 4 content via dedicated apps on smartphones, tablets and connected TVs.

To ensure they have an optimal experience, Channel 4's websites point viewers towards the All 4 app when they try to watch video content on mobile devices. This would then be counted as multiple visits. Given that more people are accessing our content directly from apps rather than via .com – visits to Channel 4's websites were down by 24% year-on-year – we would expect to see an overall decline in this metric.

1 Note: the 2014 data have been restated to remove duplications. See online methodology for details.

Total visits to Channel 4's websites and apps (m)



Source: Channel 4

Engaging the audience

74%

average 'Buzz' score for Channel 4's ten most talked about programmes

+1pt on last year

STIMULATE DEBATE

Producing talked about TV

Channel 4 aims to make an impact with its programming in part by engaging viewers, inspiring conversations and stimulating debate – both in social media and the 'real' world. 'Buzz' scores help Channel 4 to assess audience reactions to its programmes: based on a daily survey of around 1,000 respondents, they track the proportion of Channel 4 viewers who said they talked about programmes that they watched, or commented on them on social media, including Facebook and Twitter.

The average 'Buzz' score for the ten most talked-about programmes across Channel 4's TV portfolio in 2015 was 74%, 1 percentage point higher than in 2014. *Sarah Beeny's Selling Houses* – in which Sarah Beeny travels around the country, allowing home sellers check out rival vendors' properties for inspiration – was the most talked-about programme of the year, with 81% of its viewers talking about it or commenting online. This was a higher figure than that for the most talked-about show last year, which had a 79% 'Buzz' score. Property programmes performed especially well in 2015: *A Place in the Sun* – in which experts give advice to house hunters looking for dream holiday homes in Europe – was the second most talked-about show of the year.

The Top ten was dominated by factual shows, with audiences engaged or inspired by a wide range of topics – including pets (*The Supervet*, *Crufts*), children (*The Secret Life of 5 Year Olds*, *Gogglesprogs*) and the natural world (*Great Canal Journeys*, *The World's Weirdest Weather*). On the digital channels, E4's *Tattoo Fixers* – in which tattoo artists transform extreme inking disasters – resonated particularly strongly with young audiences.

Programme	2015 Buzz (%)
Sarah Beeny's Selling Houses	81
A Place in the Sun	78
The Supervet	75
Tattoo Fixers	75
Channel 4 Racing	73
The World's Weirdest Weather	73
Crufts	72
Great Canal Journeys	71
The Secret Life of 5 Year Olds	70
Gogglesprogs	70
Average 'Buzz' score[1] for 2015 top 10 programmes	**74**
Average 'Buzz' score[1] for 2014 top 10 programmes	**73**

1 'Buzz' measures the proportion of viewers who had talked or communicated about the programme in some way.

Source: Ipsos MORI commissioned by Channel 4

68%

of total viewing across the main channel, E4 and More4 accounted for by network originations

+4pt on last year

Viewing to network originations

'Network originations' – programmes commissioned by Channel 4 and transmitted on any of the channels in its TV portfolio – accounted for 68% of total viewing to the main channel, E4 and More4 in 2015. This represented an increase of 4 percentage points year-on-year.

In volume terms, network originations represented 63% of all hours across the schedules of the main channel, E4 and More4 in 2015 (up 2 percentage points year-on-year). Comparing these two figures, as network originations accounted for a higher share of viewing (68%) than their corresponding share of the volume of programming (63%), it follows that they outperformed acquired programmes, by accounting for a disproportionately high share of overall viewing.

Overall, Channel 4's network originations accounted for 6.2% of total TV viewing in the UK in 2015. This is an increase, of 5%, on the corresponding 2014 viewing share, and is the highest level since 2012.

Note that the Film4 channel is excluded from this metric as, by its nature, its output is primarily made up of acquired feature films.