

Metrics

Channel 4's commitment to innovation extends across the full range of its creative output on the main channel and digital platforms – spanning all genres, the scope and geographical spread of its supplier base, and the diversity of voices and perspectives in its content.

Innovation through content

In 2018, Channel 4's output reflected its strategy to achieve a financial surplus following two years of planned deficits during which it drew on its reserves to boost investment, inevitably resulting in some declines in volume and spend. Investment in originated and acquired content across the TV and digital portfolio totalled £662 million this year. While this is 2% less than last year, it is still the third-highest level in Channel 4's history. Expenditure on Channel 4's own commissions was £489 million in 2018: 4% below last year's record, but still higher than every previous year. At £445 million, investment on the main channel was protected (up £1 million on 2017), with the reduced content budget mostly impacting the digital TV channels and digital media, spend on which fell by 32% between them.

Channel 4 broadcast eight hours of first-run originations every day on average across the TV portfolio in 2018. This was 6% down on last year, with hours on the main channel down by 4% and those on the digital channels down by 26%, reflecting the corresponding declines in originated content investment described above. In peak-time (6-10.30pm), when TV audiences are at their highest, first-run originated programmes accounted for 73% of hours on the main channel – level with 2017 and the joint second-highest figure since 2003. Including repeats, 82% of peak-time hours were taken up with originations (one percentage point up on 2017).

Across the TV portfolio, Factual, Drama and Entertainment together accounted for 60% of the total content budget in 2018. Total spend in Factual, the biggest genre, was £222 million, and there were 1,340 hours of first-run originations. Highlights included new series *Prison* and the return of *The Great British Bake Off*. Investment fell this year, with reductions in peak-time and daytime output: volume and spend were both 13% down.

Investing

In Drama, ambitious new series included *Kiri*, while *Hollyoaks* saw its share grow by 8% amongst 16-to-34-year-olds. In total, there were 159 hours of Drama programming, 7% down year-on-year, while the budget, at £80 million, was 8% down on 2017. In Entertainment, *The Big Narstie Show* and *Stand Up To Cancer 2018* were standouts of the year. Total investment rose by 6%, to £91 million, though Daytime cuts meant that volume was 16% down, at 463 hours. Three other genres saw movements of more than 10% in their budget. Spend on Comedy rose by 21% to £52 million; its expanded slate included acclaimed new series *Derry Girls*. Education was up 70%, to £17 million, with a longer run for *Ackley Bridge* and a *Genderquake* season. And spend on programmes for Older Children was also up, by 16% to £8 million, with new series such as *Class of Mum and Dad*.

Innovation through diversity

As the only PSB that commissions solely from external suppliers, Channel 4 continued to provide vital support for the UK's production sector in 2018. It spent £440 million on first-run external commissions on the main channel, equal with 2017. The digital channels were more affected by the reduction in the content budget: spend was 31% down, at £38 million. Across the TV portfolio, these figures give a total spend of £478 million, 4% down on 2017. Channel 4 worked with 274 creative partners across its commissions in TV, film and digital media this year, 11% down on 2017. Of these suppliers, 34 were new to Channel 4, a 29% decline. As well as the smaller content budget, these falls were due to a shift in All 4's strategy towards acquiring third-party content with similar brand values to Channel 4, resulting in fewer online suppliers.

Channel 4's commitment to regional diversity is reflected in its commissions from across the Nations (Northern Ireland, Scotland and Wales) and the English Regions. In 2018, 59% of hours of first-run originated programmes on the main channel came from suppliers based outside London, two percentage points more than in 2017 and the fourth consecutive year that this figure has risen. In expenditure terms, 45% of Channel 4's investment in first-run originated programming on the main channel came from out-of-London suppliers; after two previous annual increases, this figure held steady this year. Across the TV portfolio, Channel 4 spent

£186 million on programmes from production companies based outside London, marginally down (by 1.5%) on last year's record figure. £33 million of this total came from companies based in the Nations. This was 16% down on the 2017 figure, as cuts in Daytime affected a number of Scottish commissions.

Turning to on-screen diversity, Channel 4 showed 260 hours of originated programmes on the main channel whose subject matter covered issues relating to religion, multiculturalism, disability and sexuality. Programme highlights this year included extensive *PyeongChang 2018 Winter Paralympic Games* coverage from PyeongChang and the *Genderquake* season exploring gender roles and identities. The total included 177 hours of first-run programmes – other than 2012 and 2016, when Channel 4 covered the Summer Paralympic Games, this is the joint-highest level since Channel 4 began reporting this metric. Of these first-run hours, 62 related to programmes shown in peak-time. Looking at year-on-year trends, the volume of all originations rose slightly (by 3%), the volume of first-run originations jumped by 37%, while first-run originations in peak-time fell by 31%, due to the live coverage from PyeongChang mostly occurring in daytime.

Programming with an international theme adds another element of diversity to the schedules. There were 60 hours of first-run non-news programmes covering international topics on the main channel and in the cross-channel *True Stories* documentary strand in 2018. This was 20% down year-on-year, largely due to the decision to discontinue *True Stories* (excluding this strand, the decline falls to 3%). The TV portfolio also continued to showcase foreign language TV shows from Channel 4's Walter Presents service: the opening episodes of 11 foreign language TV series were premiered on the main channel this year, and a further eight series shown in full on the main channel and More4. Taken together, these Walter Presents programmes reached 10.4 million people in 2018, one million more than last year. Meanwhile, the Film4 channel continued to offer a diverse and international slate: 31% of its output came from outside the US, with British films accounting for 15% of total output.

in

innovation

Metrics
(continued)

Innovation through content

£662m

spent on content across all services

Down 2%

on last year

£652m

invested in originated and acquired programming across the Channel 4 TV portfolio (all genres)

Down 2%

on last year

Investment in all content

In 2018, Channel 4's investment in content across its services fell back slightly, by 2%, reflecting its strategy to achieve a financial surplus following two years of planned deficits during which it drew on its reserves to boost investment. Nonetheless, at £662 million, its total content budget was still the third highest in the broadcaster's history. The main channel – which attracts larger audiences than any other channel or service in the portfolio – accounted for 83% of the total budget, equivalent to £548 million. The remaining 17% of investment was spent on digital services: £104 million on the digital TV channels, and £10 million on digital media, comprising Channel 4's websites, cross-platform content and investment in All 4 content, including foreign language TV service Walter Presents.

Content investment on the main channel was up 1% this year (rising by £4 million), meaning that the cuts – of £17 million in total – were shared across the digital services. Investment on the digital channels fell by £15 million (a 12% decline), while expenditure on digital media was £2 million down (20% decline). This meant that total spend across Channel 4's TV portfolio (the main channel and digital channels) was £652 million in 2018, 2% below last year's figure of £663 million.

Focusing on the TV portfolio, five big genres – Film, Drama, Factual, Comedy and Entertainment – accounted for 81% of the content budget in 2018. Two of these genres experienced year-on-year changes in investment in excess of 10%. Spend on Comedy was up by 21% (equivalent to £9 million), with the new Comedy strategy producing an increased slate that included a raft of new titles such as acclaimed series *Derry Girls* and *Lee and Dean*, along with the return of the popular *Friday Night Dinner*. Conversely, Factual was down by 12% (£32 million) as some peak-time titles – including *Eden*, *The Jump* and *Mutiny* – did not return this year, and there were also reductions in commissioned Daytime output such as *Come Dine With Me*. Of the other big genres, there were small investment increases this year in Entertainment (of £5 million) and Film (£1 million), while Drama investment fell by £7 million.

The reduction in Factual spend allowed for increases elsewhere across the schedule, and investment in all the smaller genres either held steady (in the case of News) or rose – there were no decreases. There were notable increases in spend (of more than 10%) in two genres. Education spend rose by 70% (£7 million), with *Ackley Bridge* being given a longer run in its second series, and the insightful *Genderquake* season examining gender and identity. Spend on programmes for Older Children was up by 16% (£1 million), with new series such as *Class of Mum and Dad* and a longer run for *Old People's Home For 4 Year Olds*. Other genres benefited from smaller increases of £1-2 million.

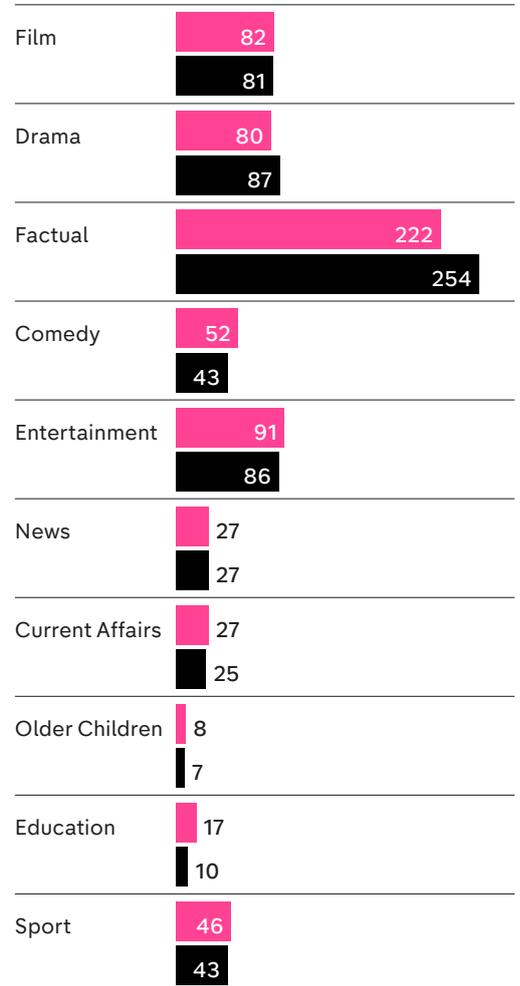
Spend across the Channel 4 network on all content (£m)

| | Channel 4 (main channel) | Digital channels | Digital media (excluding main channel) | Total |
|------|--------------------------|------------------|--|-------|
| 2018 | 548 | 104 | 10 | 662 |
| 2017 | 544 | 119 | 12 | 675 |

■ Channel 4 (main channel) ■ Digital channels
■ Digital media (excluding main channel)

Source: Channel 4.

Total investment in originated and acquired programming across the Channel 4 TV portfolio by genre (£m)



■ 2018 (£652m) ■ 2017 (£663m)

Source: Channel 4.

Metrics
(continued)

Innovation through content

73%

of the main channel peak-time schedule devoted to first-run originations

Equal

with last year

Output mix on Channel 4

Channel 4 typically premieres its original programmes on the main channel during peak-time hours (defined by Ofcom as 6-10.30pm), exposing them to the largest audiences and enabling them to have the greatest impact. In 2018, 73% of all peak-time hours on the main channel were made up of first-run originated programming. This is level with the 2017 figure and represents the joint second-highest figure since 2003. Repeats of original programming accounted for another 9% of peak-time output (up one percentage point year-on-year), meaning that originations comprised a total of 82% of peak-time hours – well ahead of Ofcom’s 70% licence requirement. Channel 4’s daytime schedules include a more balanced spread of originations and acquisitions, with originations representing 63% of output on the main channel across the day in 2018, level with the 2017 figure and again well above the relevant Ofcom quota (of 56%).

There was little year-on-year variation in this metric: in peak-time, there were one percentage point boosts to originated repeats and first-run acquisitions at the expense of acquired repeats. Across the whole day, within both originations and acquisitions, there were very small (one percentage point) movements from first-run programming to repeats.

Percentage of output on the main channel accounted for by originations and first-run programmes

Peak (6-10.30pm)

| | | | | |
|------|----|---|---|----|
| 2018 | 73 | 9 | 7 | 11 |
| 2017 | 73 | 8 | 6 | 13 |

All day

| | | | | |
|------|----|----|---|----|
| 2018 | 30 | 33 | 6 | 31 |
| 2017 | 31 | 32 | 7 | 30 |

■ Originations – first-run ■ Originations – repeat
■ Acquisitions – first-run ■ Acquisitions – repeat

Source: Channel 4.

£489m

spent on originated content across all services

Down 4%

on last year

Investment in originated content

Channel 4 delivers its public remit primarily through the original content that it commissions and invests in. In 2018, total expenditure on originated content (first-run transmissions and repeats) across its TV channels and online services was £489 million. While this is less than the record totals in the last two years, when Channel 4 drew on its reserves to boost investment, 2018’s figure – set at a level to ensure a financial surplus this year – is still 8% higher than that in 2015 and exceeds every earlier year in the broadcaster’s history.

Investment on the main channel – which attracts the biggest audiences and correspondingly accounts for the large majority of Channel 4’s originated content budget (91% of the total in 2018) – was maintained this year: expenditure was £445 million, an increase of £1 million. £221 million of this total was spent on News, Current Affairs, Education programming, Comedy, Drama series and single dramas (including Film4 productions), Arts and Religion (this sum does not include the full range of programming genres e.g. Factual or Sport, where Channel 4 also delivers important public service content).

Beyond the main channel, £39 million was spent on original content for the digital channels, and a further £5 million on digital media content (including websites and cross-platform content). With core channel investment holding steady, reductions in investment this year fell primarily on these digital services. Overall, originated content spend was down by £21 million, a 4% drop.

Spend across the Channel 4 network on originated content (£m)

| | | | | Total |
|------|-----|----|----|-------|
| 2018 | 445 | 39 | 5 | 489 |
| 2017 | 444 | 56 | 10 | 510 |

■ Channel 4 (main channel) ■ Digital TV channels
■ Digital media (excluding main channel)

Source: Channel 4.

Metrics
(continued)

Innovation through content

8.0hrs

of first-run originations every day on average across the Channel 4 portfolio

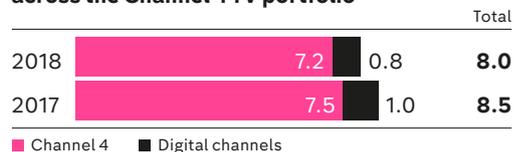
Down 6%
on last year

Originated output across Channel 4 TV portfolio

In 2018, Channel 4 broadcast an average of 8.0 hours of new commissioned programmes (i.e. first-run originations) every day across the main channel, E4, More4 and Film4. The main channel accounted for 7.2 of these daily hours (90% of the total), with the other 0.8 hours on the digital channels.

The volume of first-run originations across the TV portfolio fell by 6% in 2018, with hours on the main channel down by 4% and those on the digital channels down by 26%. These figures correspond closely to the corresponding declines in originated content investment (see 'Investment in originated content' on p109), and reflect Channel 4's prudent strategy, against a background of economic uncertainty, to achieve a financial surplus.

Average daily hours of first-run originations across the Channel 4 TV portfolio



Source: Channel 4.

Metrics (continued)

Innovation through content

2,900hrs

of first-run
originations across
the portfolio

Down 7%

on last year

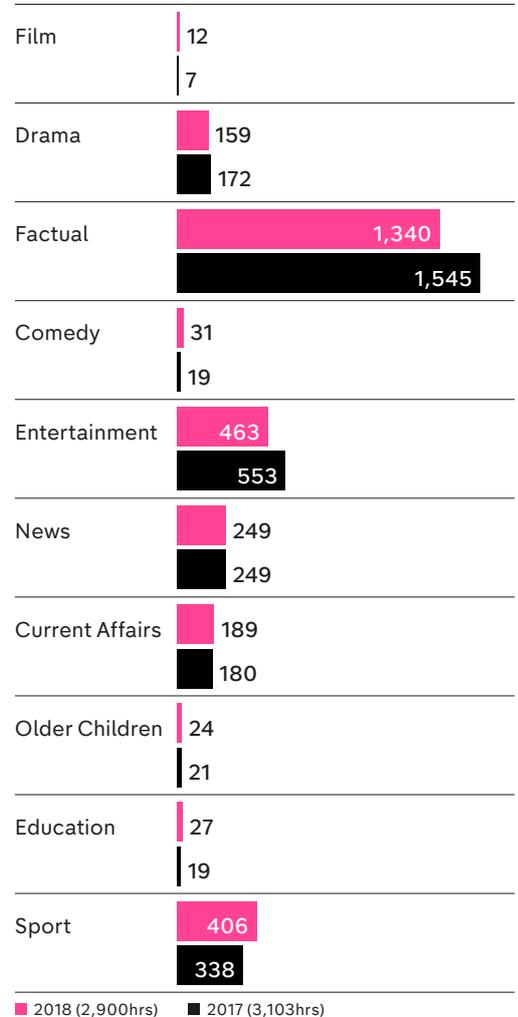
Volume of first-run originations by genre

Channel 4 broadcast 2,900 hours of first-run originated programming across its TV portfolio (main channel and digital channels) in 2018. The three biggest genres were Factual (1,340 hours of first-run originations), Entertainment (463 hours) and Sport (406 hours) – these genres together accounted for 76% of total hours. There was a 7% fall in the total volume of first-run originations this year, equivalent to 203 hours. This decline reflects the fall in originated content investment this year that follows two years when Channel 4 drew on its reserves to boost investment.

The decline in the total volume of first-run originations may be fully accounted for by a similar decline, of 205 hours, in Factual programming (13% down year-on-year). Amongst the highest-volume changes, there were fewer hours this year of *Come Dine With Me*, while other Daytime series such as *My Kitchen Rules* and *French Connection* did not return. Beyond Factual, there was a further rebalancing of output across the schedules. In the big three genres, there was also a significant decline, of 90 hours, in Entertainment programming (a 16% fall); again, the biggest changes were in Daytime, with fewer hours of *Fifteen To One* and series such as *Cheap Cheap Cheap* not returning this year. Much of this was offset by a large increase in Sport programming this year, with 68 additional hours (a 20% rise), primarily due to coverage of the *PyeongChang 2018 Winter Paralympic Games* and the *European Rugby Champions Cup*.

In the rest of the schedule, another four genres experienced year-on-year changes in investment in excess of 10%, all of which were increases. The volume of Comedy programming rose by 12 hours (a 59% rise), with the new Comedy strategy delivering an expanded slate (see 'Investment in all content' on p108). There was an additional eight hours of Education programmes (a 43% rise) and three additional hours of programmes for Older Children (a 15% rise) – again, see 'Investment in all content' for key programming changes in these genres. Film rose by five hours (an 83% jump), as six first-run Film4 Productions were premiered in 2018 compared to three in 2017; these included Sarah Gavron's *Suffragette*, Andrew Haigh's *45 Years* and Ben Wheatley's *Free Fire*. In the genres with smaller changes, Current Affairs programming was up by 5%, the volume of News held steady and Drama was down by 7%.

Hours of first-run originations shown across the Channel 4 portfolio by genre



Source: Channel 4.

Metrics (continued)

Innovation through content

Meeting Channel 4's licence obligations

| Average hours per week | | Compliance minimum | 2018 |
|---|--------------------------|--------------------|------------|
| News | In peak-time (6-10.30pm) | 4 | 4 |
| Current Affairs | Overall | 4 | 6 |
| | In peak-time (6-10.30pm) | 2 | 3 |
| Hours per year | Schools | 1 | 39 |
| Percentage | | | |
| Origination production | Overall | 56 | 63 |
| | In peak-time (6-10.30pm) | 70 | 81 |
| Independent production | | 25 | 49 |
| European independent production | | 10 | 28 |
| European origin | | 50 | 71 |
| Subtitling for the deaf and hard of hearing | | 90 | 100 |
| Audio description | | 10 | 41 |
| Signing | | 5 | 5 |
| Regional production | | 35 | 45 |
| Regional hours | | 35 | 59 |
| Production in the Nations | | 3 | 8 |
| Nations hours | | 3 | 10 |

Metrics (continued)

Innovation through diversity

£440m

investment in first-run external UK commissions on the main channel in 2018

Equal

with last year

Broadcasters' investment in the production sector

Channel 4 is unique amongst the main public service broadcasters in that it has no in-house production base of any kind, and is therefore required to source 100% of its original programming from external suppliers. An intrinsic part of Channel 4's model, this ensures that its investment in content provides maximum benefit to the UK's independent production sector. In 2018, Channel 4 spent £440 million on first-run originations from external suppliers for the main channel. 47% of this total was spent on qualifying independent production companies. There was another £38 million of investment on the digital TV channels, taking Channel 4's total investment in first-run originations from external suppliers across its TV portfolio to £478 million. This total is down on the corresponding figures in the last two years, when Channel 4 drew on its reserves to boost investment. On the main channel, spend was protected and equal with last year. Investment on the digital channels fell further, by 31%, resulting in an overall decline in spend across the TV portfolio of 4%.

Compared to other broadcasters, Channel 4 plays a disproportionately important role in supporting the independent production sector. Cross-industry data published in earlier years by Ofcom showed that Channel 4 consistently spends more on first-run external commissions than any of the other main public service broadcasters. Equivalent expenditure data was not available for other channels this year from Ofcom (their most recent data, for 2016, was reported in Channel 4's last Annual Report).

Expenditure by public service broadcasters on first-run external commissions (£m)

| | | | Total |
|------|-----|----|-------|
| 2018 | 440 | 38 | 478 |
| 2017 | 440 | 56 | 496 |

■ Main channel ■ Digital channels

Source: Channel 4.

Metrics
(continued)

Innovation through diversity

274

companies working with Channel 4 portfolio across TV, film and digital media in 2018 of which 154 were independent TV production companies

Down 11%
on last year

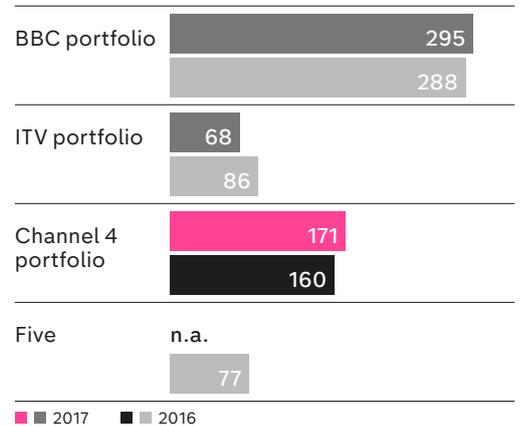
Diversity of supply base

Channel 4 punches above its weight in terms of the number of independent TV production companies that it works with. In 2017, the most recent year that comparative TV industry data is available, Channel 4 worked with 171 independent TV production companies. Only the BBC – whose TV portfolio content budget (£1.6 billion in 2017-18, according to its Annual Plan) is more than double that of Channel 4 – worked with more companies (295 in total). Channel 4 also worked with significantly more companies than ITV, which also has a much larger content budget than Channel 4 (68 companies).

According to Channel 4’s most recent data, for 2018, a total of 274 companies supplied the TV, film and digital media content that it commissioned. In TV, this included 154 independent production companies (2017: 171 companies, as compared to other broadcasters above). A further 44 non-independent producers gave a total of 198 programme suppliers. In other media, there were 36 online suppliers and 68 film companies (some suppliers worked across TV, film and online). Across all types of content, 34 companies were new suppliers to Channel 4.

Looking at year-on-year changes, the principal driver was the shift in All 4’s strategy to focus on acquiring long-form third-party content, rather than commissioning original short-form content. Channel 4’s online suppliers declined from 84 suppliers in 2017 to 36 suppliers in 2018. TV suppliers also fell slightly across the year (from 212 to 198, down 7% year-on-year) and film suppliers reduced from 71 to 68 (down 4% year-on-year). There was also a decline in the number of new suppliers (29% down), which is also largely attributable to the shift in our online strategy. When duplicates are removed (suppliers working across more than one media), the total number of companies worked with in 2018 was 274.

Number of independent TV production companies supplying the PSBs



Source: Channel 4, Broadcast (Other channels), 2018 data not available for other PSB channels

59%

of first-run originated programme hours

Up 2pts
on last year

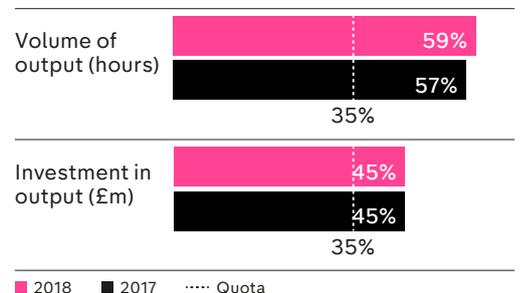
Investment in the Nations and Regions (main channel)

In 2018, Channel 4 reached its highest ever level of investment in the Nations and Regions in volume terms. It sourced a record 59% of the hours of first-run originated programmes on its main channel from suppliers based outside London. Up two percentage points on the 2017 level, this is the fourth consecutive year that this figure has risen. The proportion of programming from suppliers in the Nations and Regions is now eight percentage points higher than it was in 2014. This performance is strikingly different from that in the first 30 years of Channel 4’s history: up until 2013, the proportion of out-of-London suppliers had never reached 50%.

Turning to spend, 45% of Channel 4’s expenditure on first-run originated programming on the main channel was on programmes from suppliers outside London. After two previous years of increases, this figure held steady in 2018, matching the 2017 level.

Both of these figures exceed by a significant margin the 35% licence quotas set by Ofcom.

Proportion of first-run originated output and spend on Channel 4 which is made outside London



Source: Channel 4.

45%

of the value of first-run originations

Equal
with last year

Metrics
(continued)

Innovation through diversity

10%

of first-run originated programme hours

Down 2pts

on last year

8%

of the value of first-run originations

Down 1pt

on last year

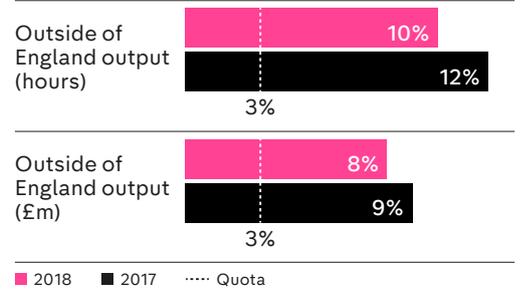
Investment in the Nations (main channel)

In 2018, Channel 4's commissions in the Nations represented just over 10% of total hours of first-run originated programming on the main channel. While this total fell by two percentage points year-on-year, it is still above the 2%-9% range achieved over the preceding decade (2007-2016). It also exceeds not only the current 3% licence quota set by Ofcom but also the increased 9% quota which comes into effect in 2020. Looking at the individual Nations, Scotland accounted for 4.8% of the total this year, Wales 4.2% and Northern Ireland 1.1%.

In spend terms, the Nations represented almost 8% of the total budget for first-run originated programmes on the main channel (with 3.3% spent in Scotland, 3.4% in Wales and 1.1% in Northern Ireland). While this is one percentage point down year-on-year, it remains at the top end of the 2%-8% range achieved over the preceding decade. Again, it exceeds Ofcom's current 3% licence quota and is just one percentage point short of the upcoming 9% quota for 2020.

Commissions from the Nations provided 238 hours of first-run programming on the main channel in 2018, 20% down year-on-year. This decline was driven primarily by cuts in Daytime which affected Scottish commissions: volume was 47% down, dropping to 113 hours (2017: 214 hours), and spend fell by 52%, from £27.4 million to £13.3 million. There were fewer hours of *Fifteen To One* and some shows, e.g. *Best Of Both Worlds* and (in peak-time) *Eden*, did not return. Reductions in Scotland were partly offset by increases elsewhere. In Wales, the volume of programme commissions rose by 51% to 100 hours (2017: 66 hours), while total investment rose by 53%, to £13.8 million (2017: £9 million), boosted by this year's rugby coverage, more episodes of *Extreme Cake Makers* and new drama *Kiri*. In Northern Ireland, volume was up by 40% to 25 hours (2017: 18 hours), while total investment more than doubled, rising by 107% to £4.3 million (2017: £2.1 million), with new series *My Family Secrets Revealed* and *Derry Girls*.

Proportion of first-run originated output and spend on Channel 4 which is made outside of England



Source: Channel 4.

Metrics
(continued)

Innovation through diversity

£186m

spent on production companies based outside London

Down 1.5%
on last year

£33m

spent on production companies in the Nations

Down 16%
on last year

Spend by region across the Channel 4 TV portfolio

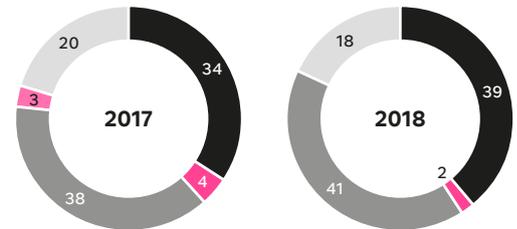
In 2018, Channel 4 spent £186 million across its TV portfolio on content commissioned from production companies based in the Nations and the English Regions. While this was 1.5% down on last year's record figure (a £3 million drop), it is still higher than in any year prior to 2017 and is £37 million above its 2015 level.

Expenditure on content from production companies in the Nations was £33 million this year, £6 million below its 2017 level (£39 million). This decline was driven by a 48% year-on-year decline in spend on content from Scotland, which fell from £27.6 million in 2017 to £14.4 million this year, primarily due to cuts in Daytime (see previous metric above). There were substantial percentage increases in spend in the other Nations. In Wales, spend was up by 53%, equivalent to an additional £4.8 million, taking this year's total to £13.8 million. Northern Ireland benefited from a 110% increase in spend, equivalent to £2.3 million, giving a total spend of £4.4 million. New programmes in the Nations this year included *Emergency Helicopter Medics* (from Scotland), *Kiri* (Wales) and *Derry Girls* (Northern Ireland).

Turning to the English regions, Channel 4's TV portfolio spend rose for the third consecutive year, to £152 million. It increased by 5%, equivalent to £7 million, relative to 2017's £145 million total. Major commissions from the English Regions this year included *The Great British Bake Off* (South of England), *Travel Man* (the Midlands), and *Countdown* (North of England). A further £1 million was spent on multi-region content in 2018, down from £6 million in 2017.

Note: these investment figures for the Nations cover spend across the Channel 4 TV portfolio, and differ slightly from those in the previous metric (see above), which relates to the main channel.

Percentage of Channel 4's expenditure across the TV channel portfolio outside London by region (£m)



■ North of England ■ Midlands ■ South of England
■ Multi-Region ■ Nations (Scotland, Wales and Northern Ireland)

Source: Channel 4.

Metrics
(continued)

Different voices

60hrs

of first-run programmes covering international topics on Channel 4 (excluding News) and *True Stories* across the portfolio

Down 20%

on last year

203hrs

of first-run foreign language content across the portfolio

Equal

with last year

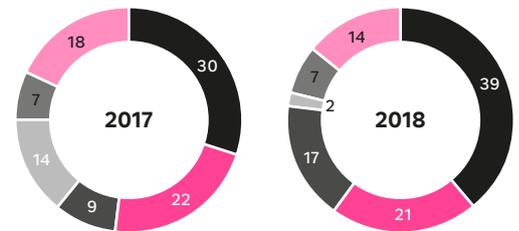
Range of international programming

Channel 4's coverage of international themes extends across all parts of the schedule, from the most vital geopolitical issues to lively authored explorations of different parts of the globe. Excluding *Channel 4 News*, there were 60 hours of first-run programmes in 2018 with an international theme on the main channel and in the dedicated international documentary strand, *True Stories*, which runs across the main channel and Film4. This was a reduction of 20% on last year's figure of 74 hours (a reduction of 14 hours).* The bulk of this decline is due to the decision to discontinue the *True Stories* strand, which accounted for 19 hours of the total in 2017, and just six hours in 2018 (a 13-hour drop year-on-year). Excluding *True Stories*, there were 56 hours of first-run originations with an international theme this year, six hours fewer than last year (a fall of 3%).

As was the case last year, Current Affairs was the biggest single genre in 2018, accounting for 39% of total first-run hours of non-news international programming (2017: 30%). Programmes included the long-running *Unreported World* strand, along with powerful *Dispatches* films such as *Myanmar's Killing Fields*, in which secret recordings provided evidence of years of repression, violence and mass murder by the Myanmar authorities; *Russian Spy Assassins: The Salisbury Attack*, which explored potential motives for the poisoning of former double agent Sergei Skripal; and *The UN Sex Abuse Scandal*, a harrowing report looking at continuing allegations of sexual exploitation and abuse by UN peacekeepers. New series this year included timely looks inside major institutions in *Inside The American Embassy* and *Carry On Brussels*. Filmed over two years, *The FGM Detectives* was a hard-hitting examination of female genital mutilation, which is still practised in some communities in the UK despite being banned by the UN and World Health Organization.

The second biggest genre was Documentaries, with 21% of the total (2017: 22%). Programmes ranged from powerful series such as *Meet the Drug Lords: Inside the Real Narcos*, in which ex-Special Forces soldier Jason Fox travelled through South America revealing the brutal hidden worlds of the drug cartels, to lighter fare such as Guy Martin's travelogue *Our Guy In Russia*. With 17% of the total (2017: 9%), Factual Entertainment was the third biggest genre this year, which included *Our Wildest Dreams*, which saw British families starting over in some of the furthest corners of the planet, and the return of Richard Ayoade in *Travel Man*. In Religion (7% of the total, level with 2017), *Grayson Perry: Rites of Passage* saw Grayson travel the world exploring the rituals that govern the big moments in our lives. History programming this year (2% of the total, down from 14% in 2017) comprised *Holocaust: The Revenge Plot*, which told the remarkable story of a secret group of Holocaust survivors who decided to avenge the Holocaust by poisoning German cities' water supplies.

Genres covered by international-themed originations on Channel 4 (main channel) as a percentage of total first-run hours



■ Current Affairs ■ Documentaries ■ Factual Entertainment
■ History ■ Religion ■ Other

Source: Channel 4.

Metrics (continued)

Different voices

In addition to these programmes, Channel 4's acquired TV programmes and films also include a diverse range of content from around the world. These include tie-ins with Walter Presents, Channel 4's innovative on-demand service curating the best foreign language TV shows. This year, the launch episodes of 11 series were premiered on the main channel, with viewers being pointed to All 4 to watch the rest of the series. The most popular title was Italian drama *Maltese: The Mafia Detective*, the opening episode of which attracted 513,000 TV viewers. A further eight series were shown in their entirety on the main channel and More4, of which the most popular, Swedish thriller *Rebecka Martinsson: Arctic Murders*, averaged 373,000 viewers across seven episodes. Taken together, the Walter Presents-branded foreign language dramas shown on the main channel and More4 reached 10.4 million people in 2018 (one million more than in 2017), equating to 17.2% of the population. Overall, there were 203 hours of first-run foreign language TV shows and films across the TV portfolio. After three years of significant rises, this figure held steady in 2018 (there was no change in percentage terms, though in absolute terms it fell marginally, by one hour). On the Film4 channel, a total of 796 hours of films from outside the UK and US were shown in 2018 (this figure includes first-runs and repeats, and films shown both in the English language and in foreign languages). This is a significant rise, of 14% (equivalent to 95 additional hours) relative to the 2017 figure.

* Note: a change has been made this year to the genres shown in the pie charts, to better reflect the overall genre mix and reduce the volume of programming included in the "Other" category. The pie charts for both 2017 and 2018 reflect this new genre list. The 2017 data has also been restated: for consistency, *Travel Man* is now counted (in both years) as International programming (within the Factual Entertainment genre).

Metrics
(continued)

Different voices

177hrs

of first-run originations covering diversity issues on the main channel

Up 37%

on last year

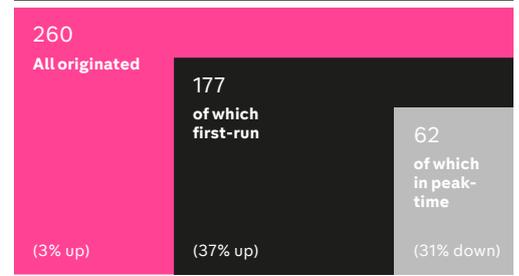
Diversity output on the main channel

As one part of Channel 4’s goal to reflect the diversity of the UK – which spans its entire output – it broadcasts programmes whose subject matter specifically covers diversity issues. It showed 260 hours of originated programmes on the main channel whose subject matter covered diversity issues (relating to religion, multiculturalism, disability and sexuality) in 2018. Of these originated hours, 177 were first-run programmes (the others being repeats), and 62 of the first-run hours related to programmes shown in peak-time (i.e. between 6pm and 10.30pm, following Ofcom’s definition). Highlights this year were Channel 4’s extensive coverage of the *PyeongChang 2018 Winter Paralympic Games* and the *Genderquake* season exploring gender roles and identities. Other programmes included *Grayson Perry: Rites of Passage* (Religion), *Indian Summer School* (multiculturalism), popular series *The Last Leg* and *The Undateables* (disability) and new comedy drama *The Bisexual* (sexuality).

The volume of first-run originations rose by 37% in 2018; other than years which feature coverage of Summer Paralympic Games (i.e. 2012 and 2016), this was the joint-highest level since Channel 4 began reporting this metric in 2008. The volume of all originations was also up slightly year-on-year, by 3%. However, first-run originations in peak-time were down in 2018, by 31%, in large part because the bulk of the live coverage of the *PyeongChang 2018 Winter Paralympic Games* took place outside peak hours.

Channel 4’s impact on diversity includes far more than the programme commissions covered by these figures. The broadcaster continues to support a range of initiatives that promote diversity. In 2018, it announced a new strategy to embed inclusion across the organisation, creating more space for diverse and under-represented voices on screen, off screen and in-house. Channel 4 also continues to improve access to opportunity to those with different backgrounds via its C4 Pop Ups, Production Training Scheme and Work Experience and Apprenticeship programmes. Read more about Channel 4’s work on diversity on pages 70-77.

Total hours of programming covering diversity issues shown on the main channel (2018 with trends relative to 2017)



Source: Channel 4.

Metrics (continued)

Film

31%

from outside the US

Down 1pt

on last year

15%

from the UK

Down 2pts

on last year

Diversity of Film4 channel schedule

The Film4 channel – which grew its share amongst 16-to-34-year-olds this year – continued to showcase a diverse and alternative range of films from around the world in 2018, with a substantial share of the schedule devoted to non-Hollywood studio titles. British films – including ones that were co-funded by Film4 Productions – accounted for 15% of total programming hours in the schedule. Other non-US films made up a further 16% of the schedule, meaning that a total of 31% of hours of output were devoted to films from countries other than the US. (Note that this figure includes films that were co-productions between the US and other countries; in 2018, 6% of output on the channel comprised US/non-US co-productions, one percentage point more than in 2017.)

Year-on-year variations in these figures were small. The total proportion of non-US films in the Film4 channel schedule fell by one percentage point this year (2017: 32%), with a two percentage point fall in the share of UK films (2017: 17%) partially offset by a one percentage point increase in the share of other non-US films (2017: 15%).

2018 saw the return of the entire Studio Ghibli slate, introducing the animated classics to a new generation. The films were available both in much-loved dubbed form and in the original Japanese language. This year, the season was complemented by a new *Ghibliothèque* podcast series, produced by Little Dot Studios, that rose to the top of Apple's iTunes charts (for Arts and Film & TV), and was highly praised by listeners and critics around the world. The Film4 Channel marked the 100th anniversary of the suffragette movement with a month-long, female-focused season *Phenomenal*, which celebrated women in film, both in front of and behind the camera. This landmark celebration culminated on International Women's Day with an all-female film line-up, including the acclaimed Film4 production *Suffragette*.

Metrics (continued)

News and Current Affairs

376

long-form News and Current Affairs programmes in peak-time

Up 3%

on last year

Commitment to long-form journalism

At a time when much of the news media focuses on 'snackable' digests intended to be consumed quickly, News and Current Affairs programmes with extended running times allow topics to be covered in greater depth, providing higher levels of rigour and analysis. Channel 4 believes this to be especially valuable in the context of growing concerns about the levels of trust in, and accuracy of, news sources. This metric looks at long-form journalism in the News and Current Affairs output on the main PSB channels, defining 'long-form' programmes as those running for at least 45 minutes for News and 15 minutes for Current Affairs.

In 2018, Channel 4's main channel showed 376 long-form News and Current Affairs programmes in peak-time (between 6pm and 10.30pm, as defined by Ofcom). This is substantially more than the number of long-form News and Current Affairs programmes in peak-time on the other main PSB channels (220 programmes between them). Moreover, while the other channels reduced their commitment to long-form journalism in peak-time, with a 19% year-on-year reduction in the number of long-form News and Current Affairs programmes between them, the number of such programmes on Channel 4 rose by 3% year-on-year, making this year's figure the highest since 2012 (the oldest year using the current methodology).

Some News and Current Affairs programmes are broadcast later in the evening (most notably *Newsnight* on BBC Two, which usually begins at 10.30pm), so this metric also considers output over a longer period each evening so that these programmes can be captured. Between 6.30pm and midnight, Channel 4 showed 446 'long-form' News and Current Affairs programmes on its main channel in 2018. This was also 3% higher than the previous year's figure and the highest for Channel 4 since 2012. It was also considerably greater than that for any of the other main PSB channels. The channel with the next highest number of titles was BBC Two, with 313 'long-form' News and Current Affairs programmes (only 35 of which were shown in peak-time), 133 fewer than Channel 4.

Number of long-form News programmes and single story Current Affairs programmes with a duration of at least 45 minutes and 15 minutes respectively shown on the main channel between 6pm and midnight

| | | | | Total |
|-----------|------|-----|-----|-------|
| BBC One | 2018 | 94 | 105 | 199 |
| | 2017 | 128 | 106 | 234 |
| BBC Two | 2018 | 35 | 278 | 313 |
| | 2017 | 52 | 265 | 317 |
| ITV1 | 2018 | 86 | 26 | 112 |
| | 2017 | 92 | 32 | 124 |
| Channel 4 | 2018 | 376 | 70 | 446 |
| | 2017 | 364 | 67 | 431 |
| Five | 2018 | 5 | | 5 |
| | 2017 | 0 | | 0 |

■ Peak-time ■ Off-peak

Source: Channel 4, BARB (other channels).