

MAKING AN IMPACT

Channel 4 occupies a unique position in the broadcasting ecosystem. It is a mass-market channel that reaches large audiences every day, including under-served groups that other public service broadcasters ('PSBs') struggle to connect with. It measures its impact by considering both the numbers of people who view its programmes across different audience groups and the public value it achieves by delivering its remit to be alternative and diverse, take risks, challenge preconceptions and inspire change.

Reputational impact

Channel 4 assesses its public value impact by looking at audience perceptions of 12 reputational statements linked to its public service remit and comparing its main channel's performance to that of the other main PSB channels (BBC One, BBC Two, ITV and Channel 5). As Channel 4 typically leads the other channels on these metrics by a significant margin, we look at annual variations in performance by highlighting the main channel's leads over the average for the other main PSB channels.

Averaged across the 12 statements, Channel 4's lead over the average for the other main PSB channels was 27.0 percentage points in 2017 – slightly below the all-time record of 27.3 points achieved in 2016, but still the second-highest lead since Channel 4 began reporting the reputational trackers in 2008. This year, Channel 4's most emphatic leads over the average for the other main PSB channels were for "taking risks that others wouldn't" (a lead of 38 percentage points), "tackling issues other channels wouldn't" (35 points) and being the "home for alternative voices" (30 points). There was very little year-on-year variation across the reputational trackers: Channel 4's lead was the same as in 2016 for six of the 12 statements, and for the other six statements its lead changed by no more than one percentage point.

Television

While audience fragmentation continued in the UK television market, viewing to Channel 4's TV portfolio was stable in 2017, with the main channel actually growing its share slightly, to 5.9% – level with 2016 when reported to one decimal place, and 1% up year-on-year based on the unrounded figures.

This is only the second time in the last decade that the main channel's share has increased. The digital channels had a combined viewing share of 4.6% (2016: 4.6%), giving a total TV portfolio viewing share of 10.5% (also level with 2016). Share was stable amongst the individual digital channels, with variations of no more than 0.1 percentage point.

Channel 4's portfolio was watched by 81.4% of all television viewers every month on average in 2017, behind only the BBC and ITV. Reach fell by 2.1 percentage points this year, in line with the declines experienced by the other PSBs (whose portfolios all saw declines of between 1.7 and 2.2 percentage points).

A key Channel 4 strength is its ability to engage with hard-to-reach audiences, including young adults and black and minority ethnic ('BAME') groups. We are the only PSB to attract a disproportionately high share of viewing amongst 16-34-year-olds: in 2017, TV portfolio viewing share amongst this age group was 16.4%, an increase of 1% relative to the 2016 share. Amongst BAME audiences, Channel 4's portfolio share was 10.0%. While this was 2% down on the 2016 figure, BAME audiences continued to account for a larger proportion of Channel 4's audience than for the audiences of the other PSBs.



▲ Old People's Home for 4 Year Olds



◀ Dispatches

News and Current Affairs lie at the heart of Channel 4's remit. In 2017, *Channel 4 News* was watched by an average of 8.2 million people each month. This figure was 2% down year-on-year; this may be attributed to declines in the overall UK TV audience, with *Channel 4 News*' TV viewing share rising by 2% this year (its fourth successive annual increase).

Channel 4 News also has a particular appeal to young adults and BAME viewers: 16-34-year-olds accounted for 13% of *Channel 4 News* viewing in 2017, above their 7%-9% shares of viewing to the national news programmes on the other main PSB channels. And viewers from BAME groups represented 15% of *Channel 4 News* viewing, the second-highest figure since 2009, and well ahead of the corresponding 6%-9% shares for the other PSB channels' news programmes. The proportion of viewing to *Channel 4 News* accounted for by 16-34-year-olds fell by two percentage points in 2017, while the proportion of BAME viewers was down by one percentage point. These declines are due in part to falling TV viewing amongst young people in general (this also affects BAME viewing, which skews young).

Channel 4 seeks to differentiate its News and Current Affairs output from that of other broadcasters through its independent and distinctive approach. On its independence, *Channel 4 News* performed particularly strongly in 2017: the proportion of its viewers who agree it is independent from the Government was at its joint-highest ever level, while its perceived independence from the influence of big business was higher than at any time since these metrics were first reported in 2009. On both measures, *Channel 4 News*' perceived independence amongst its viewers was higher than that for the other main broadcasters' news programmes amongst their viewers.

In Current Affairs, Channel 4 tracks five reputational statements covering the approach and subject matter of the main PSB channels' programmes and strands in this genre. Across these statements, *Unreported World* and *Dispatches* had the highest average scores amongst the PSB channels. The leader, *Unreported World*, ranked first for "showing stories about parts of the world you would rarely see on British TV", "giving a voice to groups that aren't always heard in mainstream media" and "making me see something in a different light". While both strands' average scores fell slightly in 2017, by one to two percentage points, *Dispatches* extended its lead over the next highest-scoring programme or strand (BBC One's *Panorama*).



Online

Channel 4's dedicated All 4 app, which launched in 2015, offers long-form programmes, live streaming and digital-first Originals and Exclusives on a wide range of PCs, smartphones, tablets, games consoles and connected TVs. Channel 4's strategy is to encourage All 4 usage where possible to ensure viewers have the best possible experience viewing video content on screens of all sizes. It achieves this in part by pointing website visitors towards the All 4 app when they try to watch video content on mobile platforms, hastening a migration from website usage to the All 4 app.

In 2017, a record 719 million programme views were initiated across the full range of All 4-branded platforms, a significant year-on-year increase of 16%. The strongest growth this year was on 'Big Screens' (connected TVs and streaming devices that plug into TVs).

Channel 4's websites and apps attracted a total of 588 million visits in 2017. This was 13% more than in 2016, the biggest annual increase since 2012. Visits to Channel 4's apps rose by an impressive 27% year-on-year, to 411 million. Conversely, visits to Channel 4's websites fell by 11%, to 177 million, reflecting the strategy to direct mobile viewers to All 4 apps for video viewing. Overall, app visits increased their share of total visits to all Channel 4's websites and apps from 62% of the total in 2016 to 70% in 2017.

Channel 4 increasingly uses digital and social networks to deliver news content to audiences, especially younger ones, and *Channel 4 News* is one of the UK's biggest news brands for video on social media. In 2017, its videos received 1.98 billion views across Facebook and YouTube.

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 indicates which programmes people have talked about the most, face-to-face or on social media (a new supplier in 2017 tripled the sample to 3,000 people daily). The average 'Buzz' score for the 10 most talked-about programmes this year was 60%. The top ten was dominated by a diverse range of Factual shows, including the uplifting *Old People's Home for 4 Year Olds* and a fascinating hidden history of women's football in the UK, *When Football Banned Women*.

METRICS CONTINUED

DIFFERENT VOICES

24pt

LEAD OVER AVERAGE FOR OTHER CHANNELS FOR SHOWING DIFFERENT CULTURES AND OPINIONS

= WITH LAST YEAR

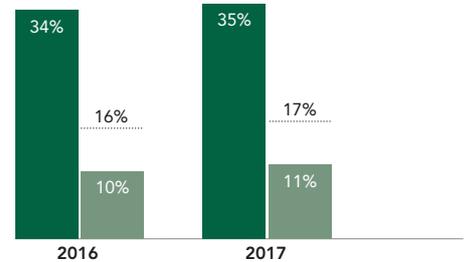
● CULTURAL DIVERSITY

CHANNEL REPUTATIONS – SHOWS DIFFERENT KINDS OF CULTURES AND OPINIONS

Channel 4's reputation as being best for showing different kinds of cultures and opinions was stronger than ever in 2017. The main channel was selected by 35% of all respondents, the highest score it has achieved since Channel 4 began reporting this metric in 2008. This equated to a substantial 24 percentage point lead over the average for the other main PSB channels, and an 18 percentage point lead over the next highest-scoring channel, BBC One.

The proportion of respondents selecting Channel 4 rose by one percentage point year-on-year, while its leads over the average for the other main PSB channels and the next highest-scoring channel were both the same as in 2016. Channel 4's creative renewal, which began to impact on the schedules in 2012, has helped this metric to stabilise at a higher level: between 2013 and 2017, the proportion of people choosing the main channel was between 33% and 35%, compared to 27%-32% in the previous five years (2008-2012).

Shows different kinds of cultures and opinions



● Channel 4 ● Average for other main PSB channels (BBC One, BBC Two, ITV and Channel 5)
 Next highest PSB channel

Source: Ipsos MORI, commissioned by Channel 4

26pt

LEAD OVER AVERAGE FOR OTHER CHANNELS FOR CHALLENGING PREJUDICE

-1PT ON LAST YEAR

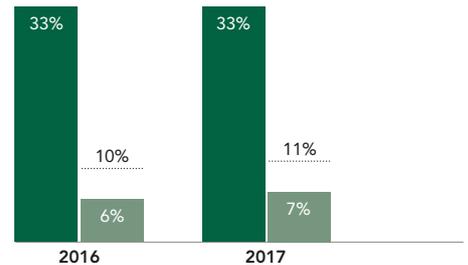
● CULTURAL DIVERSITY

CHANNEL REPUTATIONS – CHALLENGES PREJUDICE

When asked which of the main TV channels they most associate with challenging prejudice, 33% of respondents chose Channel 4's main channel in 2017 – a joint-record figure since this metric was first reported in 2008. Between 2013 and 2017, the proportion of people selecting Channel 4 has been in the range of 29%-33%, compared to 25%-29% over the previous five years (2008-2012).

In 2017, Channel 4 had a significant lead of 26 percentage points over the average score for the other main PSB channels, and of 22 points over the next highest channel, BBC One. Both of these leads were marginally down, by one percentage point each, relative to their 2016 figures.

Challenges prejudice



● Channel 4 ● Average for other main PSB channels (BBC One, BBC Two, ITV and Channel 5)
 Next highest PSB channel

Source: Ipsos MORI, commissioned by Channel 4

26pt

LEAD OVER AVERAGE FOR OTHER CHANNELS FOR SHOWING THE VIEWPOINTS OF DIFFERENT MINORITY GROUPS

-1PT ON LAST YEAR

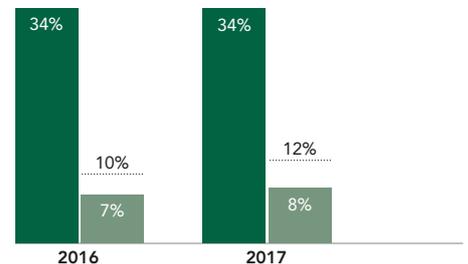
● CULTURAL DIVERSITY

CHANNEL REPUTATIONS – SHOWS THE VIEWPOINTS OF MINORITY GROUPS IN SOCIETY

Channel 4 seeks to give a voice to a diverse range of groups, including those that are often under-represented on TV. In 2017, 34% of viewers selected Channel 4's main channel over the other main PSB channels when asked which channel is best for showing the viewpoints of minority groups in society. This was level with the corresponding figure over the previous two years, and is Channel 4's joint-highest score since this metric was first reported in 2012. Channel 4 had a substantial 26 percentage point lead over the average for the other channels (one percentage point down on 2016), and a 22 percentage point lead over the next highest channel, BBC One (two points down year-on-year).

Channel 4's main channel also significantly outperforms the other PSBs for showing the viewpoints of individual minority groups. It was selected by 32% of viewers as being best for showing the viewpoints of different ethnic groups in the UK (one percentage point lead year-on-year), giving it a lead of 24 percentage points over the average for the other main PSB channels. 35% of viewers thought Channel 4 was best for showing the viewpoints of lesbian, gay, bisexual and transgender people (again up by one percentage point), 30 percentage points above the average of the other PSB channels. And 31% of viewers thought Channel 4 was best for showing the viewpoints of disabled people, giving it a 24 percentage point lead over the average of the other PSB channels. While the proportion of respondents selecting Channel 4 was marginally down year-on-year, by one percentage point, it remained higher than the corresponding figures in the previous three years (of 26%-28%).

Shows the viewpoints of minority groups in society



● Channel 4 ● Average for other main PSB channels (BBC One, BBC Two, ITV and Channel 5)
 Next highest PSB channel

Source: Ipsos MORI, commissioned by Channel 4

DIFFERENT VOICES

30pt

LEAD OVER AVERAGE FOR OTHER CHANNELS AS THE HOME FOR ALTERNATIVE VOICES

-1PT ON LAST YEAR

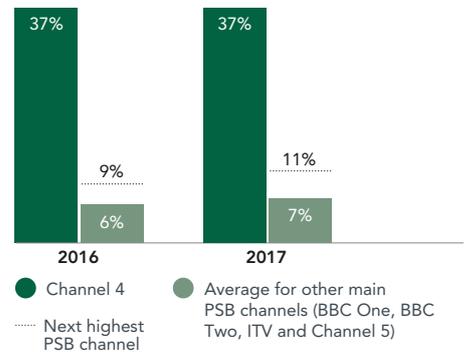
● ALTERNATIVE VIEWS

CHANNEL REPUTATIONS – HOME FOR ALTERNATIVE VOICES

At a time when ‘filter bubbles’ in digital and social media risk constraining the range of viewpoints and perspectives that people encounter, Channel 4 makes a vital contribution to plurality by providing a mainstream platform for alternative voices. 37% of respondents selected Channel 4’s main channel as being the home for alternative voices in 2017, level with 2016 and the joint-highest figure since this metric was first reported in 2013. This figure is more than three times larger than the proportion selecting the next highest channel, Channel 5 (11% of people), and a huge 30 percentage points higher than the average for the other main PSB channels.

Channel 4’s main channel’s lead over the average for the other main PSB channels fell marginally year-on-year, by one percentage point, while its lead over the next highest PSB channel fell by two percentage points.

Home for alternative voices



Source: Ipsos MORI, commissioned by Channel 4

DISTINCTIVE APPROACHES

16pt

LEAD OVER AVERAGE FOR OTHER CHANNELS FOR MAKING VIEWERS THINK IN NEW AND DIFFERENT WAYS

+1PT ON LAST YEAR

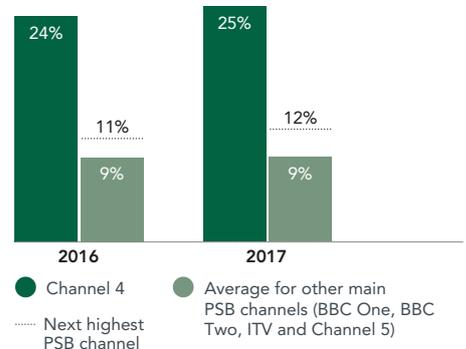
● INSPIRE CHANGE

CHANNEL REPUTATIONS – MAKES ME THINK ABOUT THINGS IN NEW AND DIFFERENT WAYS

Channel 4 achieved its highest ever scores for making people think about things in new and different ways in 2017. 25% of respondents selected its main channel as being the best of the main PSB channels on this metric, the highest figure since Channel 4 began reporting it in 2008. This corresponded to a lead over the average for the other main PSB channels of 16 percentage points, also a higher lead than in any earlier year. Its 13 percentage point lead over the next highest channel, BBC One, was the joint-highest level since 2008.

Compared to 2016, the proportion choosing Channel 4’s main channel in 2017, and its lead over the average for the other main PSB channels, both rose by one percentage point. Its lead over the next highest channel was level year-on-year.

Makes me think about things in new and different ways



Source: Ipsos MORI, commissioned by Channel 4

35pt

LEAD OVER AVERAGE FOR OTHER CHANNELS FOR TACKLING ISSUES OTHER CHANNELS WOULDN'T

-1PT ON LAST YEAR

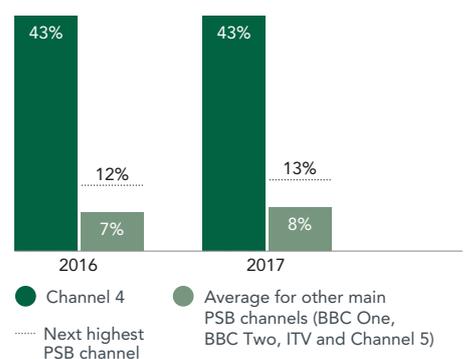
● DISTINCTIVE

CHANNEL REPUTATIONS – TACKLES ISSUES OTHER CHANNELS WOULDN'T

In 2017, Channel 4’s main channel was selected by 43% of respondents as being best for tackling issues that other channels wouldn’t, amongst the highest scores achieved in any of the reputational statements. This was more than three times the score achieved by the next highest channel, Channel 5: it was chosen by 13% of respondents, giving Channel 4’s main channel a 30 percentage point lead over it. The other main PSB channels were chosen by 8% of people on average, resulting in a massive 35 percentage point lead for Channel 4 over them.

Channel 4’s performance against this metric remains stable. The proportion of people selecting Channel 4’s main channel was level year-on-year, while its leads over the average for the other main PSB channels and the next highest channel each fell by one percentage point. Channel 4’s own scores have remained within the narrow range of 43%-44% since 2013.

Tackles issues other channels wouldn't



Source: Ipsos MORI, commissioned by Channel 4

METRICS CONTINUED

DISTINCTIVE APPROACHES

29pt

LEAD OVER AVERAGE FOR OTHER CHANNELS FOR TAKING A DIFFERENT APPROACH TO SUBJECTS COMPARED TO OTHER CHANNELS

= WITH LAST YEAR

● DISTINCTIVE

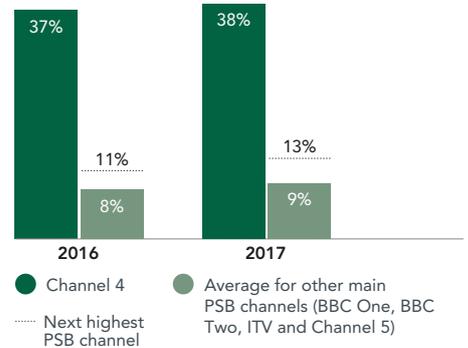
CHANNEL REPUTATIONS – TAKES A DIFFERENT APPROACH TO SUBJECTS COMPARED WITH OTHER CHANNELS

In 2017, 38% of people associated Channel 4's main channel with taking a different approach to subjects compared with other channels, its joint-highest score since Channel 4 began reporting this metric in 2008. This gave Channel 4 a substantial lead, of 29 percentage points, over the average for the other main PSB channels, also a joint-highest figure since 2008. Its lead over the next highest channel, Channel 5, was 25 percentage points.

Since 2014, annual variations in Channel 4's own score and its leads over the other main PSB channels have been within the range of ±1 percentage point. In 2017, the main channel's score was one percentage point up on the 2016 figure, its lead over the average for the other main PSB channels was level with the 2016 figure, and its lead over the next highest channel was one percentage point down year-on-year.

Following an earlier period of greater fluctuations, this metric has stabilised at higher levels over the last five years (2013-2017) since Channel 4's creative renewal began to impact the schedules. The main channel's scores have been in the range 36%-38% over this period, compared to scores of 29%-33% between 2008 and 2012. Its lead over the average for the other main PSB channels has stabilised within an even narrower range of 28%-29%, markedly higher than its leads of 19%-23% in the previous five years. While Channel 4's lead over the next highest channel has fallen slightly from 27% in 2013 to 25% in 2017, it remains significantly higher than the 19%-22% range in the previous five years.

Takes a different approach to subjects compared with other channels



Source: Ipsos MORI, commissioned by Channel 4

190

NEW OR ONE-OFF PROGRAMMES SHOWN ON CHANNEL 4 BETWEEN 6PM AND MIDNIGHT

+9% ON LAST YEAR

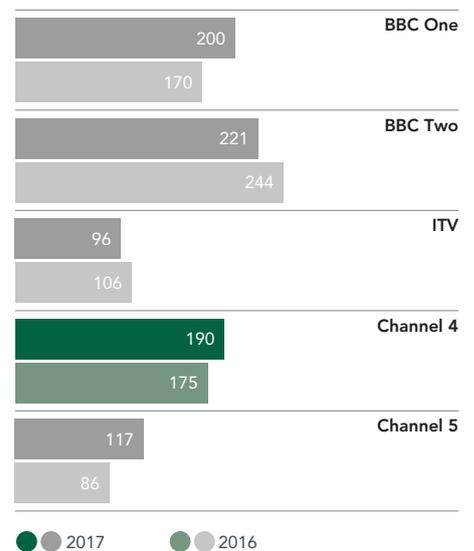
● INNOVATION

NEW AND ONE-OFF PROGRAMMING

As part of its commitment to experimentation, Channel 4 shows a large number of new and one-off programmes. This metric focuses on the number of such programmes in the evening schedules, when audiences are at their highest levels. In 2017, 190 new and one-off programmes were shown on the main channel between 6pm and midnight, 9% more than in 2016.

Looking at the other main PSB channels, BBC One and BBC Two each showed more new and one-off programmes in the evening schedule than Channel 4 this year (with 200 and 221 titles, respectively). However, Channel 4 remained well ahead of the other commercially-funded PSB channels, with almost double the 96 new and one-off titles on ITV and 73 more titles 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

DISTINCTIVE APPROACHES

38pt

LEAD OVER AVERAGE FOR OTHER CHANNELS FOR TAKING RISKS THAT OTHERS WOULDN'T

= WITH LAST YEAR

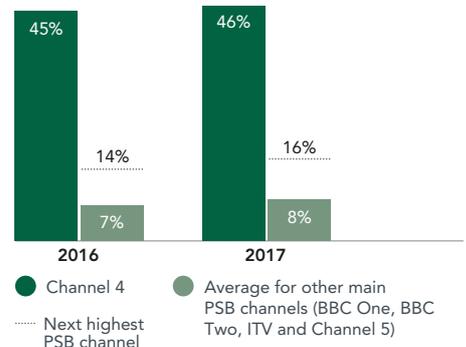
● DISTINCTIVE

CHANNEL REPUTATIONS – TAKES RISKS WITH PROGRAMMES THAT OTHERS WOULDN'T

Risk-taking is a central element of Channel 4's public remit, and its scores are particularly strong when respondents are asked which channel is best for taking risks with programmes that others wouldn't. In 2017, Channel 4's main channel was selected by 46% of respondents on this metric, and its lead over the average of the other main PSB channels was 38 percentage points – both figures were the highest achieved on any of the reputational statements. Channel 4 was 30 percentage points ahead of the next highest channel, Channel 5, the largest lead across the reputational statements this year.

Channel 4's performance against this metric remains stable, and annual variations continue to be within the range of ±1 percentage point. The proportion of people choosing Channel 4 rose by one percentage point year-on-year, its lead over the average for the other main PSB channels held level compared to the 2016 figure, while its lead over the next highest channel fell by one percentage point.

Takes risks with programmes that others wouldn't



Source: Ipsos MORI, commissioned by Channel 4

29pt

LEAD OVER AVERAGE FOR OTHER CHANNELS FOR BEING EXPERIMENTAL

= WITH LAST YEAR

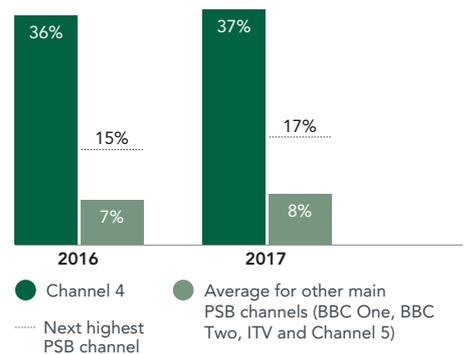
● INNOVATION

CHANNEL REPUTATIONS – IS EXPERIMENTAL

Channel 4's commitment to trying new things drives its role as Britain's creative greenhouse, and this is recognised by audiences. In 2017, 37% of respondents associated its main channel, more than any other channel, with being experimental. The proportion of people choosing Channel 4 was 29 percentage points higher than the average for the other main PSB channels, and 20 percentage points higher than the next highest channel, Channel 5.

Channel 4's performance against this metric remains stable. The proportion of people selecting the main channel in 2017 was one percentage point up year-on-year, and its lead over the average for the other main PSB channels was level with the 2016 figure. While its lead over the next highest channel fell slightly, by one percentage point, it remains just one point short of its highest figure (of 21%) since this metric was first reported in 2008. Annual variations in Channel 4's scores and leads over other channels have remained within the range of ±1 percentage point for the last four years.

Is experimental



Source: Ipsos MORI, commissioned by Channel 4

METRICS CONTINUED

FILM

26pt
LEAD OVER AVERAGE FOR OTHER CHANNELS FOR BEING THE BEST FOR MODERN INDEPENDENT FILM

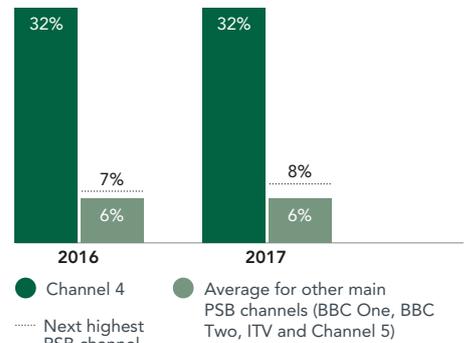
= WITH LAST YEAR
● DISTINCTIVE

CHANNEL REPUTATIONS – IS BEST FOR MODERN INDEPENDENT FILM

32% of respondents picked Channel 4’s main channel as being best for modern independent film in 2017. This gave it a lead of 26 percentage points over the average for the other main PSB channels, the joint-highest lead since Channel 4 began reporting this metric in 2008. Its lead over the next highest channel, Channel 5, was 24 percentage points (no other PSB channel was selected by more than 8% of respondents). The top-rated films on Channel 4 this year included the premiere of Film4 title *Room*, which drew an audience of 1.9 million viewers, with impressive audience shares of more than 10% of all individuals and 15% of 16-34-year-olds.

Channel 4’s performance against this metric continued to be stable. The proportion of people selecting the main channel in 2017, and its lead over the average for the other main PSB channels, both held steady year-on-year. Its lead over the next highest channel dropped by one percentage point, but remained just one point short of its highest figure (of 25%) since this metric was first reported in 2008. Annual variations in Channel 4’s scores and leads over other channels have remained within the range of ±1 percentage point for the last three years.

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

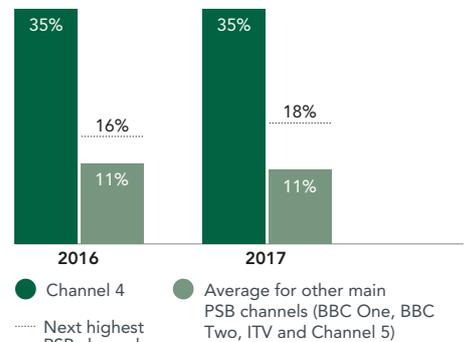
= WITH LAST YEAR
● ALTERNATIVE VIEWS

CHANNEL REPUTATIONS – IS BEST FOR DOCUMENTARIES THAT PRESENT ALTERNATIVE VIEWS

Channel 4 seeks to differentiate its documentary programming from that of other broadcasters through its subject matter and approach, with a particular focus on offering alternative viewpoints less frequently seen on television. 35% of respondents selected Channel 4’s main channel as being best for documentaries that present alternative views in 2017, giving it a substantial lead, of 24 percentage points, over the average for the other main PSB channels. These figures were level with the corresponding ones in both 2015 and 2016, and represented the joint-highest levels since this metric was first reported in 2010. Channel 4’s lead over the next highest channel, BBC One, was 17 percentage points, two points down on its lead in 2016.

While this metric experienced a degree of volatility between 2010 and 2013, it has stabilised over the last four years. Since 2014, annual variations in Channel 4’s scores and leads over other channels have remained within the range of ±2 percentage points.

Is best for documentaries that present alternative views



Source: Ipsos MORI, commissioned by Channel 4

FACTUAL

65%

OF VIEWERS SAID THAT CHANNEL 4'S FACTUAL PROGRAMMES INSPIRED CHANGE IN THEIR LIVES

= WITH LAST YEAR

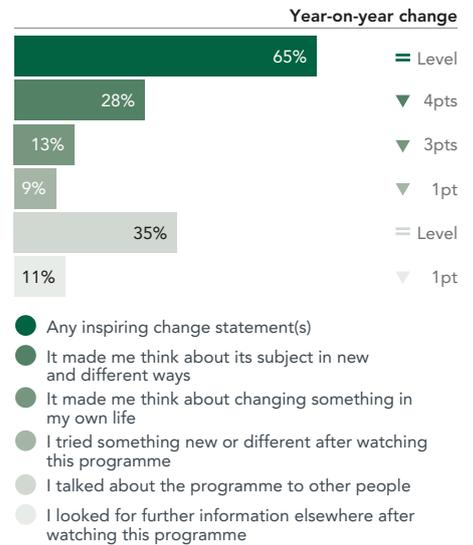
● INSPIRE CHANGE

INSPIRING CHANGE THROUGH FACTUAL PROGRAMMING

Reflecting 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. In 2017, 65% of viewers said that Channel 4's Factual programmes inspired them in one or more of these ways. With a score of 83%, *The Trouble With Dad* – which explored the relationship between comedian David Baddiel and his father, who has Pick's disease – was the best-performing programme of the year on this metric. Top-scoring programmes on individual statements included *Old People's Home for 4 Year Olds* (the most talked-about programme) and *How to Stay Well* (which inspired the most people to think about changing something in their lives).

The proportion of respondents who said that Channel 4's factual programmes inspired them in some way held steady in 2017, although there were year-on-year declines of up to four percentage points in the individual "inspiring change" statements.

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

84%

OF CHANNEL 4 NEWS VIEWERS REGARD IT TO BE INDEPENDENT FROM GOVERNMENT

+7PTS ON LAST YEAR

● DISTINCTIVE

INDEPENDENCE OF TV NEWS

Audience recognition of the independence of the main UK broadcasters' news services was higher than ever in 2017, and of those, *Channel 4 News* continued to be the news programme that viewers most associated with being independent from the Government and from the influence of big businesses.

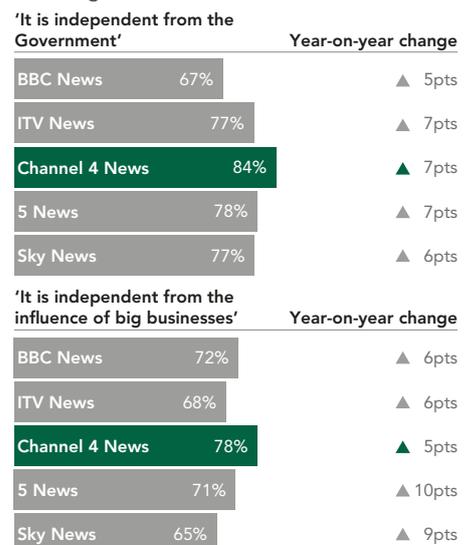
84% of regular viewers to *Channel 4 News* regarded it as being independent from the Government, its joint-highest score since this metric was first reported in 2009. This was nine percentage points more than the average for the other main public service broadcasters' news programmes and *Sky News*, and six percentage points more than the corresponding figure for the next highest-scoring news programme.

78% of regular viewers to *Channel 4 News* agreed that it is independent from the influence of big businesses, its highest score since 2009. This was also nine percentage points more than the average for the news programmes on the other main broadcasters' channels and six percentage points more than the corresponding figure for the next highest-scoring news programme.

Perhaps reflecting greater recognition of the value of TV news relative to other news sources, all the main broadcasters' news programmes achieved year-on-year increases in both metrics of at least five percentage points in 2017. For independence from the Government, *Channel 4 News*' score rose by seven percentage points, while its leads over the average for the other broadcasters' news programmes and over the next highest-scoring news programme (*5 News* in 2017, *Sky News* in 2016) both held steady year-on-year. For independence from the influence of big businesses, *Channel 4 News*' score rose by five percentage points, while its leads over the average for the other broadcasters' news programmes and over the next highest-scoring news programme (*BBC News* in both years) fell by three percentage points and one point respectively.

In 2017, *Channel 4 News*' viewing share increased by 2%, its fourth consecutive year of growth.

Percentage of regular viewers to TV news programmes in 2017 who agree with the following statements:



Source: Ipsos MORI, commissioned by Channel 4

METRICS CONTINUED

NEWS AND CURRENT AFFAIRS



-2PTS ON LAST YEAR



-1PT ON LAST YEAR

● STIMULATE DEBATE

PROGRAMME REPUTATION STATEMENTS – CURRENT AFFAIRS

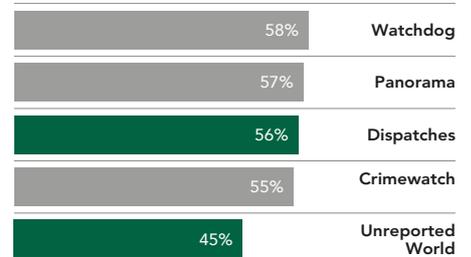
The public service broadcasters' Current Affairs programmes are differentiated from each other in terms of their approach and subject matter. Channel 4's longstanding Current Affairs strands, *Dispatches* and *Unreported World*, place a particular emphasis on investigative journalism, on challenging 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. In addition, one-hour Current Affairs specials allow Channel 4 to deliver in-depth coverage of important stories.

Channel 4's strengths in these areas are reflected in five audience reputational statements that assess perceptions of the Current Affairs programmes on the main PSB channels, covering both regular strands and one-offs. In 2017, *Unreported World* and *Dispatches* continued to score higher on average than any of the other PSBs' Current Affairs programmes and strands (with BBC One's *Panorama* in third place).

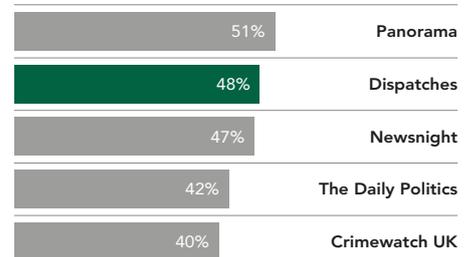
With an average score across the five reputational statements of 45%, *Unreported World* was the highest-scoring Current Affairs programme or strand on any of the main PSB channels in 2017. It scored higher than any other Current Affairs programme or strand on three of the five statements, for: "showing stories about parts of the world you would rarely see on British TV" (selected by 57% of respondents), "giving a voice to groups that aren't always heard in mainstream media" (43% of respondents), and "making me see something in a different light" (42% of respondents). Its average score across the five reputational statements was two percentage points lower than in 2016.

Dispatches had an average score across the five statements of 42% in 2017, the second highest average score of all the Current Affairs programmes and strands, behind *Unreported World*. While its average score across the five reputational statements fell slightly year-on-year, by one percentage point, it extended its lead over the next highest-scoring programme or strand (*Panorama*) to three percentage points, up from one point in 2016.

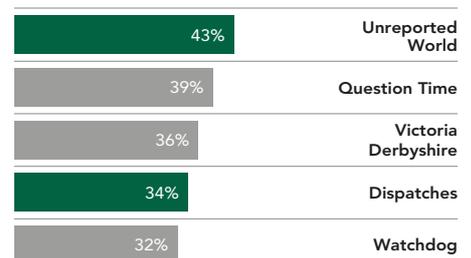
Uncovers the truth



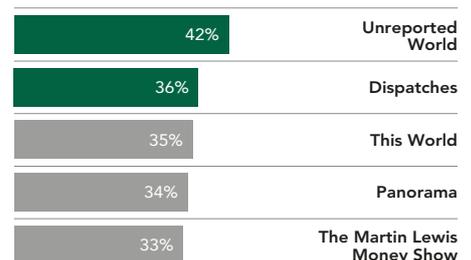
Covers things in great depth



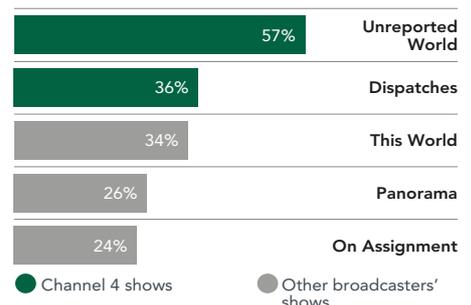
Gives a voice to groups that aren't always heard in mainstream media



Made me see something in a different light



Shows stories about parts of the world you would rarely see on British TV



● Channel 4 shows ● Other broadcasters' shows

Source: Ipsos MORI, commissioned by Channel 4

ENGAGING THE AUDIENCE

81.4%

OF ALL TV VIEWERS REACHED EVERY MONTH ACROSS CHANNEL 4'S TV CHANNELS

-2.1PTS ON LAST YEAR

AUDIENCE IMPACT

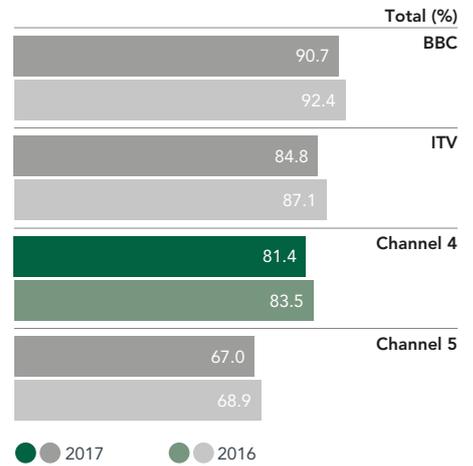
AUDIENCE REACH

Channel 4 remains the third-biggest UK broadcaster in terms of the audience reach of its TV channel portfolio, behind only the BBC and ITV. 81.4% of all TV viewers watched Channel 4's TV channels for at least 15 consecutive minutes each month on average in 2017. The BBC, ITV and Channel 4 were the only broadcasters that reached more than three-quarters of all UK viewers every month this year (fourth-placed Channel 5's portfolio reach trailed Channel 4's by almost 15 percentage points).

In a highly competitive digital TV landscape, the public service broadcasters have all experienced declines in the reach of their TV portfolios over the last five years, and their reach continued to decline in 2017 by between 1.7 and 2.2 percentage points (BBC and ITV respectively). Channel 4's portfolio reach fell by 2.1 percentage points.

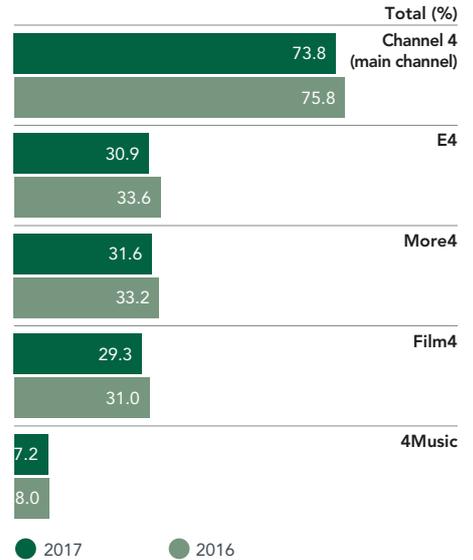
Looking at the individual channels in the Channel 4 TV portfolio, reach for Channel 4's main channel was 73.8%, while Channel 4's digital TV channels together reached 58.7% of viewers. The main channel experienced a year-on-year fall in reach of two percentage points. The digital channels all saw declines in their audience reach ranging from 0.8 percentage points (4Music) to 2.7 percentage points (E4). There was a marginal (0.1 percentage point) decrease in the digital channels' collective contribution to Channel 4's overall portfolio reach in 2017.

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

METRICS CONTINUED

ENGAGING THE AUDIENCE

10.5%

VIEWING SHARE ACROSS THE TV CHANNEL PORTFOLIO

= LAST YEAR

● AUDIENCE IMPACT

TV VIEWING SHARE

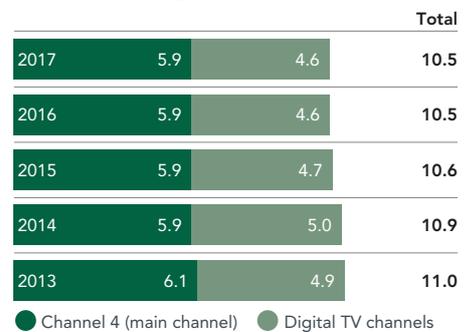
Channel 4's TV channel portfolio achieved a total viewing share of 10.5% in 2017, level with the 2016 figure. This was the first time since 2011 that the TV portfolio share has not declined year-on-year – a notable achievement given the fragmentation of viewing in the digital TV space.

The main channel's share was 5.9%, while the digital channels had a combined share of 4.6%. When reported to one decimal place, both of these figures held steady relative to 2016. The unrounded figures show a 1% year-on-year increase in the main channel's viewing share (from 5.87% to 5.92% of viewers) – only the second time in the last decade that its share has increased – and a 1% decrease in the digital channels' combined share.

There was very little variation in the individual digital channels' viewing share, with year-on-year changes in the range of ±0.1 percentage points. E4 was the biggest digital channel, with a 1.8% viewing share, 0.1 percentage points down on 2016. The other channels with viewing shares above 1%, Film4 (1.4% share) and More4 (1.1% share), both held steady year-on-year when reported to one decimal place, though the unrounded figures show that both channels registered increases in viewing in 2017, of 2% and 1% respectively. 4Music's share in 2017 was 0.3% (2016: 0.2%).

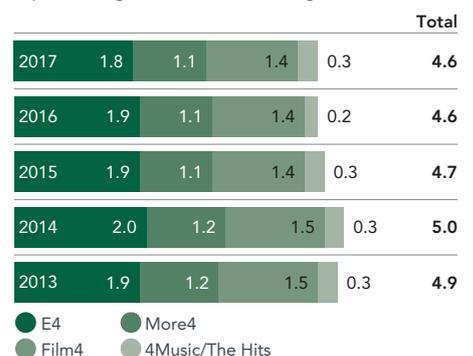
The main channel continued to account for 56% of total viewing to the Channel 4 TV portfolio in 2017 (level with the 2016 figure).

Channel 4 portfolio share as a percentage of total TV viewing



● Channel 4 (main channel) ● Digital TV channels
Source: BARB
See online methodology for further details

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



● E4 ● More4
● Film4 ● 4Music/The Hits
Source: BARB
See online methodology for further details

719m

PROGRAMME VIEWS INITIATED ON-DEMAND

+16% ON LAST YEAR

● DIGITAL

ON-DEMAND VIEWING

In 2017, viewing of Channel 4 content continued to rise through All 4, the on-demand service that replaced 4oD in 2015. 719 million programme views were initiated across all All 4-branded platforms, which include PCs, smartphones, tablets, games consoles and connected TVs. This represents a significant year-on-year increase, of 16%, to a new record level.

The strongest growth this year was on 'Big Screen' devices, i.e. connected TVs (such as Samsung TV) and streaming devices that plug into TVs. The latter includes Amazon Fire TV, which was the standout platform in 2017, with All 4 viewing more than trebling year-on-year.

Programme views initiated on All 4 (m)



Source: Channel 4

ENGAGING THE AUDIENCE

10%

PORTFOLIO VIEWING SHARE AMONGST BAME AUDIENCES

-2% ON LAST YEAR

● CULTURAL DIVERSITY

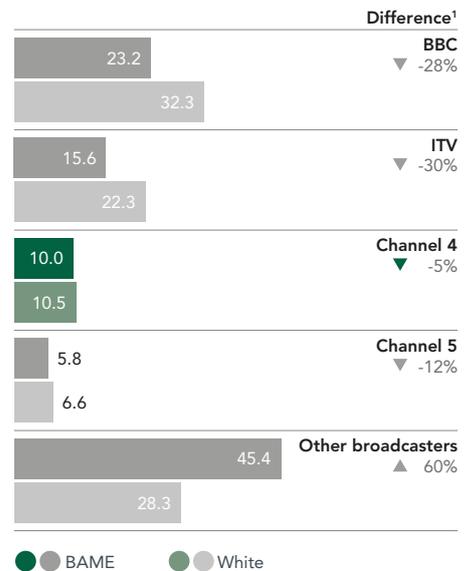
SHARE AMONG HARD-TO-REACH AUDIENCES – BAME

Channel 4's remit requires it to make programmes that appeal to people from different cultural backgrounds, and it is especially important for the broadcaster to attract ethnic minority audiences. While all the PSBs have lower viewing shares amongst BAME audiences than white audiences, Channel 4's ambition is to make this differential as small as possible.

In 2017, Channel 4's TV portfolio viewing share amongst BAME audiences was 10%, a small decline of 2% (equivalent to 0.2 percentage points) on the 2016 figure. Relative to the viewing share amongst white audiences, which was 10.5% this year, the differential in viewing share between BAME and white audiences was 5%. While this differential is slightly bigger than in 2016 (when it was 4%), it remains equal to or lower than the corresponding differential in every previous year going back to 2009.

Channel 4 had a substantially smaller differential between its TV portfolio viewing shares amongst BAME and white viewers than any of the other PSBs this year. Its 5% viewing share differential compares to a corresponding figure of 12% for Channel 5 and much larger differentials of 28% and 30% for the BBC and ITV. As a result, BAME audiences represented a higher proportion of Channel 4's total audience than they did of the total audience of the other PSBs.

Public service broadcasters' portfolio viewing shares amongst white and BAME audiences as a percentage of total TV viewing by those audiences (2017)



Source: BARB

1 Viewing by BAME audiences compared to viewing by white audiences

16.4%

PORTFOLIO VIEWING SHARE AMONGST 16-34-YEAR-OLDS

+1% ON LAST YEAR

● CULTURAL DIVERSITY

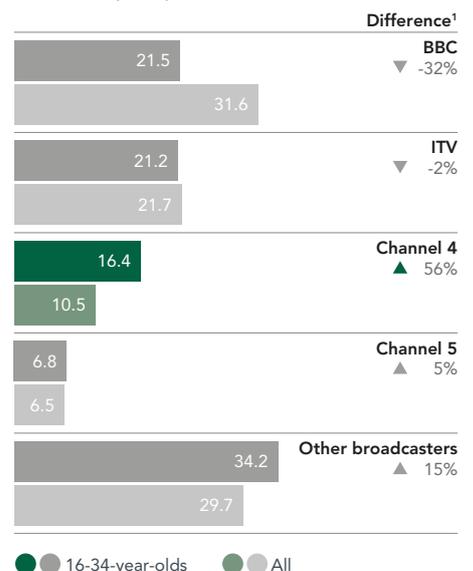
SHARE AMONG HARD-TO-REACH AUDIENCES – 16-34-YEAR-OLDS

A key distinguishing feature of Channel 4's TV channels is that they consistently attract a disproportionately large share of viewing amongst hard-to-reach 16-34-year-olds. In 2017, Channel 4's viewing share amongst this age group was 16.4% across its TV channel portfolio. This represented a 1% increase relative to the 2016 share (equivalent to a 0.2 percentage points rise year-on-year).

Channel 4's viewing share amongst 16-34-year-olds was 56% higher than its corresponding all-audience share in 2017, 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-year-olds share was 2% less than its all-audience portfolio share, and the BBC's was a substantial 32% less. The only other PSB that appealed more to 16-34-year-olds than to the overall population was Channel 5, albeit with a differential of just 5%.

Channel 4's relative appeal to young audiences increased in 2017: the 56% differential between 16-34-year-olds and all audiences was two percentage points up on the 2016 figure, and was the joint-highest differential achieved since 2012, when this metric was first reported in the current format.

Public service broadcasters' portfolio viewing shares among 16-34-year-olds and all audiences as a percentage of total TV viewing by those audiences (2017)



Source: BARB

1 Viewing by 16-34-year-olds compared with all audiences

METRICS CONTINUED

ENGAGING THE AUDIENCE

5.2%
VIEWING SHARE FOR E4
AMONGST 16-34-YEAR-OLDS

+5% ON LAST YEAR

AUDIENCE IMPACT

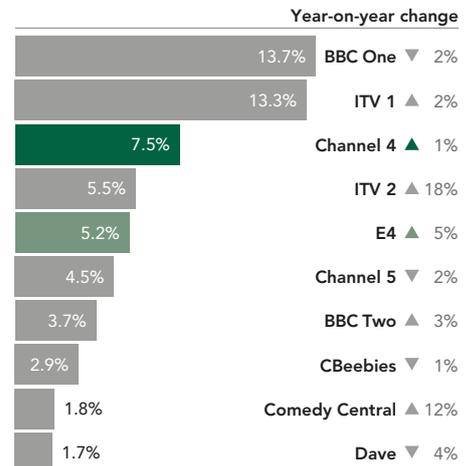
MOST POPULAR CHANNEL FOR YOUNG VIEWERS

In 2017, E4 grew its viewing share amongst 16-34-year-olds to 5.2%, its second-highest figure ever. Its share rose by 5% year-on-year, overturning two previous years of small declines, thanks to growth in viewing to *Hollyoaks* first-runs and successful new originations such as *Don't Tell the Bride*.

As in earlier years, this put E4 ahead of two of the main PSB channels, BBC Two and Channel 5, in terms of popularity amongst 16-34-year-olds. However, a surge in viewing to ITV2 put it ahead of E4 for the first time this year: ITV2's share rose 18% year-on-year, to 5.5%, driven by *Love Island* and repeats of US acquisitions such as *Family Guy*. As a result, E4 was the second most-watched digital TV channel in the UK, and the fifth most popular TV channel overall (slipping one place in the rankings on both measures).

Channel 4's main channel continued to perform disproportionately well in 2017 amongst 16-34-year-olds, for whom it was the third most popular TV channel. It increased its viewing share amongst this age group by 1%, giving it a 7.5% share.

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



Source: BARB

13%
OF VIEWING TO CHANNEL 4
NEWS PROGRAMMES ON THE
MAIN CHANNEL IN 2017
ACCOUNTED FOR BY VIEWERS
AGED 16-34

-2PTS ON LAST YEAR

15%
OF VIEWING TO CHANNEL 4
NEWS PROGRAMMES ON THE
MAIN CHANNEL IN 2017
ACCOUNTED FOR BY BAME
VIEWERS

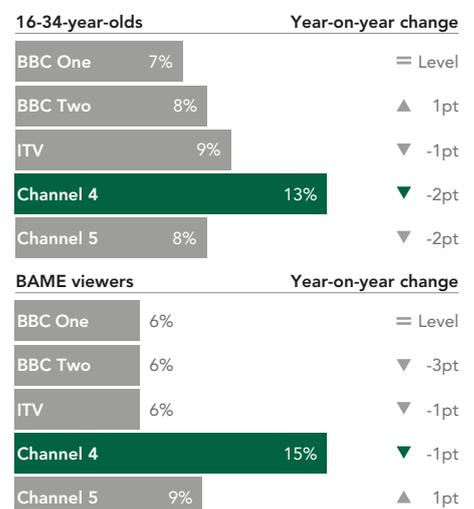
-1PT ON LAST YEAR

DISTINCTIVE

VIEWING TO NATIONAL NEWS

Channel 4 News continues to have particular appeal to young and BAME audiences. 13% of its viewing in 2017 was accounted for by people aged 16-34, while BAME audiences represented 15% of viewing. Both these figures continue to be markedly higher than the corresponding ones for news programmes on the other main PSB channels. Year-on-year trends: compared to 2016, the proportion of viewing to *Channel 4 News* accounted for by viewers aged 16-34 was down two percentage points (2016: 15%, 2017: 13%) and the proportion of BAME viewers was down one percentage point (2016: 16%).

Percentage of viewing to national news programmes on the main PSB channels in 2017 accounted for by 16-34-year-olds and BAME viewers



Source: BARB

ENGAGING THE AUDIENCE

8.2m

PEOPLE WATCHED CHANNEL 4 NEWS EACH MONTH

-2% ON LAST YEAR

● DISTINCTIVE

REACH OF CHANNEL 4 NEWS

In 2017, *Channel 4 News* was watched (for at least 15 consecutive minutes) by an average of 8.2 million people each month. After two years of growth, this figure was down slightly year-on-year, by 2% (0.1 million viewers in absolute terms).

This small fall may be attributed to declines in the overall UK TV audience: in terms of share of TV viewing, *Channel 4 News*' performance was up in 2017. Its viewing share rose by 2% year-on-year, the fourth successive year in which its share has increased.

21pt

LEAD OVER AVERAGE FOR OTHER CHANNELS FOR CATERING FOR AUDIENCES THAT OTHER CHANNELS DON'T CATER FOR

-1PT ON LAST YEAR

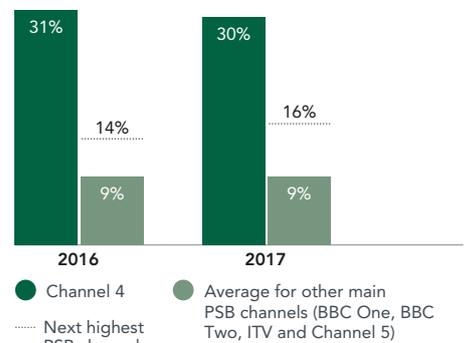
● CULTURAL DIVERSITY

CHANNEL REPUTATIONS – CATERING FOR AUDIENCES OTHER CHANNELS DON'T CATER FOR

After achieving its best ever scores in 2016 when audiences were asked which channel is best for catering for audiences other channels don't cater for, Channel 4's performance on this metric fell back a little this year. Nonetheless, 2017 was still one of the strongest years in the decade since this metric was first reported in 2008.

30% of respondents selected Channel 4's main channel over the other main PSB channels in 2017, just one percentage point behind the record set in 2016, and a higher proportion than in any other year going back to 2008. Channel 4's lead over the average of the other main PSB channels was 21 percentage points – again, just one point behind the 2016 record and a higher proportion than in any other year since 2008. Channel 4's lead over the next highest channel (Channel 5) was 14 percentage points; while this was two points down on the 2016 record, it was still the third-highest figure since 2008.

Caters for audiences other channels don't cater for



Source: Ipsos MORI, commissioned by Channel 4

588m

TOTAL VISITS TO CHANNEL 4'S WEBSITES, MOBILE SITES AND APPS

+13% ON LAST YEAR

● DIGITAL

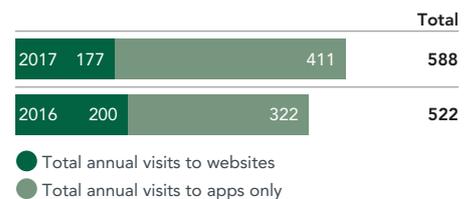
TOTAL VISITS TO CHANNEL 4'S WEBSITES AND APPS

Channel 4's websites and apps attracted a total of 588 million visits in 2017. This was 13% more than in 2016, the biggest annual increase in visits since 2012.

Channel 4's strategy centres on the dedicated All 4 app, which launched in 2015, and is available on a wide range of smartphones, tablets and connected TVs. Channel 4 seeks to encourage app usage where possible to ensure viewers have the best possible experience when viewing content – achieving this goal by making the All 4 app ever more attractive (e.g. with regular feature updates) and by pointing visitors to its websites towards the All 4 app when they try to watch video content on mobile platforms.

This strategy is reflected in trends in visitor levels to Channel 4's apps and website. Visits to Channel 4's apps continued to enjoy double-digit growth in 2017, rising by an impressive 27% year-on-year, from 322 million in 2016 to 411 million. Conversely, visits to Channel 4's websites fell by 11%, from 200 million in 2016 to 177 million in 2017, with viewers being directed to All 4 apps for video viewing. As a result, app visits increased their share of total visits to all Channel 4's websites and apps from 62% of the total in 2016 to 70% in 2017.

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



Source: Channel 4

METRICS CONTINUED

ENGAGING THE AUDIENCE

60%

AVERAGE 'BUZZ' SCORE FOR CHANNEL 4'S TEN MOST TALKED-ABOUT PROGRAMMES

● 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 through a daily survey that tracks the proportion of Channel 4 viewers who said they talked about programmes that they watched, or commented on them on social media such as Facebook and Twitter. At the end of 2016, Channel 4 switched to a new supplier (YouGov) and boosted the daily sample from 1,000 people to 3,000 people.

In 2017, the average 'Buzz' score for the ten most talked-about programmes across Channel 4's TV portfolio was 60%.

Current Affairs programmes accounted for two of the three most talked-about programmes of the year. *May vs Corbyn Live: The Battle for Number 10* saw Jeremy Paxman interrogate the main party leaders ahead of the General Election, attracting a 'Buzz' score of 74%. *Brexit: How to Get a British Passport* was a *Dispatches* investigation that revealed that hundreds of thousands of passport-less children are being thrown into a legal limbo in the wake of Brexit (66% 'Buzz' score).

There were also two Documentaries in the top ten. *When Football Banned Women* (68% 'Buzz' score) saw Clare Balding reveal the fascinating hidden history of women's football in the UK – from its success in the 1920s to it being outlawed by the FA. *Battling the Bailiffs* (55% 'Buzz' score) was a *Cutting Edge* film following a group of campaigners as they seek to defend people who stand to be evicted from their homes.

In Factual Entertainment, *First Dates USA*, the US version of the hit UK Channel 4 series, had a 'Buzz' score of 59%, while *Finding Me a Family* (55% 'Buzz' score) was a two-part series following children hoping to be adopted who meet prospective parents at potentially life-changing activity days.

Programmes in four other genres completed the top ten. In Entertainment, a Stand Up To Cancer celebrity special edition of *Gogglebox* generated a 'Buzz' score of 58%. In Education, *Old People's Home for 4 Year Olds* (also with a 58% 'Buzz' score) was an uplifting intergenerational experiment, in partnership with Age UK, in which pre-schoolers shared their classroom with pensioners for six weeks, bringing beneficial impacts to all involved. Channel 4's coverage of *Crufts*, the largest dog event in the world, was the most talked-about Sporting event (55% 'Buzz' score), giving host Clare Balding her second appearance in the top ten. Finally, *Grayson Perry: Divided Britain* was an Arts programme (also with a 55% 'Buzz' score) in which Grayson spoke to a range of people on both sides of the Brexit divide about their beliefs and desires, using the results to inspire his pots for Leave and Remain.

Note: the new methodology means that it is not appropriate to report year-on-year changes as the 2016 and 2017 data were collected under different surveys. Please refer to the methodology document for further details.

Programme	2017 Buzz (%)
May vs Corbyn Live: The Battle for Number 10	74
When Football Banned Women	68
Brexit – How to Get a British Passport: Channel 4 Dispatches	66
First Dates USA	59
Gogglebox: Celebrity Special for SU2C	58
Old People's Home for 4 Year Olds	58
Crufts 2017	55
Finding Me a Family	55
Battling the Bailiffs	55
Grayson Perry: Divided Britain	55
Average Buzz score for 2017 top ten programmes	60

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

ENGAGING THE AUDIENCE

71%

OF TOTAL VIEWING ACROSS
THE MAIN CHANNEL, E4 AND
MORE4 ACCOUNTED FOR BY
NETWORK ORIGINATIONS

**+1PT UP ON LAST
YEAR**

VIEWING TO NETWORK ORIGINATIONS

Channel 4's output can be divided between 'network originations' – i.e. programmes commissioned by Channel 4 and transmitted on any of the channels in its TV portfolio – and programmes that were acquired by Channel 4 (primarily US content). The former category is important as Channel 4 delivers its public remit primarily through its investment in original content.

In 2017, network originations accounted for 71% of total viewing to the main channel, E4 and More4, an increase of one percentage point year-on-year. This is the fourth consecutive year that this figure has grown (from 63% in 2013), and represents a new record level: network originations account for a higher proportion of Channel 4's viewing than at any time since 2008, when this metric was first reported.

In volume terms, network originations represented 64% of all hours across the schedules of the main channel, E4 and More4 in 2017, one percentage point down on the record level set in 2016. A comparison of the viewing and output figures indicates that network originations were responsible for a disproportionately high share of Channel 4's overall viewing – outperforming acquired programmes – as they generated a higher share of viewing (71%) than their corresponding share of the volume of programming (64%).

Overall, Channel 4's network originations accounted for 6.3% of total TV viewing in the UK in 2017, level with the corresponding 2016 figure and the joint-highest viewing share 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. Note also that network originations differ from the narrower Ofcom definition of 'originations', which only count programmes on the individual channel that commissioned them. Network originations better reflect the multichannel world by taking into account the multiple opportunities broadcasters can provide viewers to catch up on programmes across their digital TV portfolios.
