Channel 4 continues to occupy a unique position in the broadcasting ecosystem. It is a mass-market channel that reaches large audiences every day, while also engaging with groups that other public service broadcasters ('PSBs') find it harder to connect with. Its impact is measured not only by the number of people who view its programmes across different audience groups, but also by the public value it delivers to these audiences by being alternative and diverse, taking risks, challenging preconceptions and inspiring change.
REPUTATIONAL IMPACT
Channel 4 measures 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). Channel 4 typically leads the other channels on these metrics by a significant margin, so we look at annual variations in performance by highlighting the main channel’s leads over the average for the other main PSB channels.

In 2016, audience perceptions of Channel 4’s remit delivery reached new all-time highs, reflecting the success of the creative renewal strategy. In terms of their absolute scores, most of the reputational trackers were at their highest-ever levels. And averaged across the 12 statements, Channel 4’s lead over the other main PSB channels rose from 26.3 percentage points in 2015 to 27.3 points, the highest level since Channel 4 began reporting the reputational trackers in 2008.

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’ (36 points) and ‘never letting at risk voices go silent’ (31 points). Compared to 2015, the main channel either maintained or increased its lead for all 12 of the reputational tracker statements in 2016: its lead remained level for six statements and increased – by between one and three percentage points – for the other six statements.

TELEVISION
While UK television viewing continues to fragment, audiences to Channel 4’s TV portfolio largely held steady in 2016, with only marginal changes. The main channel’s viewing share was 5.9%, while the digital channels’ combined viewing share was 4.6%, giving an overall portfolio viewing share of 10.5%. This was down year-on-year by 0.1 percentage point, with each individual channel’s share either holding level or changing by less than 0.1 point.

Across the portfolio, Channel 4 was watched by 83.5% of all television viewers every month on average in 2016, only the BBC and ITV had higher levels of total reach. Compared to 2015, this represented a small fall of 0.3 percentage points – Channel 4’s smallest annual decline in reach since 2011, and a smaller decline than that experienced by the BBC and ITV channel portfolios (whose reach fell by 0.8 and 0.4 percentage points respectively).

Channel 4 seeks to engage with hard-to-reach audiences, including young adults and black and minority ethnic (‘BAME’) groups. In 2016, we remained the only PSB to attract a significantly larger share of viewing amongst 16–34-year-olds than across the overall UK population, with a 16.2% share amongst this age group across the TV portfolio (2% down on last year’s 16.5% share). Amongst BAME groups, Channel 4’s TV portfolio viewing share was 10.2% in 2016. This was an increase of 1% on the 2015 share, as a consequence of which BAME audiences’ share of Channel 4’s overall viewing was at a higher level than at any time since 2009. BAME audiences also continued to account for a larger proportion of Channel 4’s audience than for the audiences of the other PSBs.

News and Current Affairs lie at the heart of Channel 4’s remit. In the year of the Brexit vote and US Election, an average of 8.3 million people watched Channel 4 News each month in 2016, 1% up year-on-year. This was the second consecutive year in which the programme has increased its reach. As with Channel 4’s overall output, its News programming has a particular appeal to young adults and BAME viewers: 16–34-year-olds accounted for 15% of Channel 4 News viewing in 2016, higher than their 7%–10% shares of viewing to the national news programmes on the other main PSB channels. And viewers from BAME groups represented 16% of all Channel 4 News viewing, the highest figure since 2009, and well ahead of the corresponding 6%–9% shares for the other PSB channels’ news programmes. These figures remained stable in 2016: the proportion of Channel 4 News viewing accounted for by 16–34-year-olds fell by one percentage point, while the proportion of BAME viewers rose by two points.

Channel 4 seeks to differentiate its News and Current Affairs output from that of other broadcasters through its independent and distinctive approach. Channel 4 News scores more highly amongst its viewers when asked about its perceived independence from the government and from the influence of big business than do the other main broadcasters’ news programmes amongst surveys of their viewers.

Turning to 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 had the highest average score across all the PSB channels – ranking 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’ – with Dispatches in second place. Both strands increased their average scores year-on-year by two to three percentage points.

ONLINE
Following the launch of All 4 in 2015 – offering long-form programmes, live streaming and digital-first Originals and Exclusives – Channel 4’s websites and apps attracted a total of 522 million visits in 2016, 3% more than in 2015. In keeping with a general trend for viewers to seek out the best to suit their needs, the number of visits to Channel 4’s suite of mobile and TV apps rose by 18% year-on-year while visits to the web site decreased. Channel 4 also works to deliver news content to audiences, especially younger ones. There were almost 2 billion video views of Channel 4 News content on Facebook/all platforms in 2016, 500% up on last year.

All 4, which launched in 2015, is available on a growing range of smartphones, tablets and connected TVs. Channel 4’s strategy is to make All 4 available across a range of devices and platforms to ensure viewers can choose the best possible experience available to them, including watching content on mobile devices and, increasingly, on TVs and devices connected to TV screens.

The number of visits to Channel 4’s apps rose from 24 million in 2015 to 200 million in 2016, reflecting a trend for viewers to choose the best available screen on which to enjoy their chosen programmes.

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. The average ‘Buzz’ score for the 10 most talked-about programmes in 2015 was 76%, two percentage points higher than in 2015. The top 10 was dominated by a diverse range of factual shows, from the life-affirming The Undateables: Holiday Romance through to the award-winning Interview with a Murderer.
Different voices

CHANNEL REPUTATIONS: SHOWS DIFFERENT KINDS OF CULTURES AND OPINIONS
In 2016, Channel 4’s main channel maintained its reputation as being best for showing different kinds of cultures and opinions. It was selected by 34% of all respondents, giving it a 27 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. Since Channel 4’s creative renewal began to impact on the schedules in 2012, the proportion of people choosing the main channel for this metric has been stable, in the range of 32% – 34% (with only small annual variations), compared to the corresponding figures of 27% – 30% for the prior four years (2008–2011). This stability continued in 2016: the proportion of respondents selecting Channel 4, its lead over the average for the other main PSB channels, and its lead over the next highest-scoring channel were all the same as in 2015.

Key programme examples:
• First Contact: Lost Tribe Special
• Walking the Himalayas

CHANNEL REPUTATIONS: CHALLENGES PREJUDICE
For the second consecutive year, Channel 4 achieved record scores when viewers were asked which of the main TV channels they associate most with challenging prejudice. Channel 4’s main channel was selected by 33% of respondents in 2016, one percentage point higher than the 2015 figure, which was Channel 4’s previous record since it began reporting this metric in 2008. Over the last five years, the proportion of people selecting Channel 4 has been in the range of 29% – 33%, compared to 25% – 28% between 2008 and 2011. Channel 4 had a significant lead, of 27 percentage points, relative to the average score for the other main PSB channels in 2016, two percentage points up on the corresponding lead in 2015. Its lead over the next highest channel, BBC One, was 23 percentage points, one percentage point more than in 2015.

Key programme examples:
• The Paralympics
• Born To Be Different
• Grayson Perry: All Man

CHANNEL REPUTATIONS: SHOWS THE VIEWPOINTS OF MINORITY GROUPS IN SOCIETY
Channel 4 seeks to give a voice to diverse groups in the UK, including those that are often under-represented on TV. In 2016, it maintained its strong lead over other channels when viewers were asked which channel is best for showing the viewpoints of minority groups in society. 34% of viewers selected Channel 4’s main channel over the other main PSB channels, level with the corresponding 2015 figure, giving Channel 4 its joint-highest score since this metric was first reported in 2012. Channel 4 also achieved a record 27 percentage point lead over the average for the other channels (one percentage point up on 2015), and a 24 percentage point lead over the next highest channel, BBC One (the same lead as in 2015).

Key programme examples:
• The Last Leg
• 2016 Rio Paralympic Games
• Breaking The Silence Live

Shows different kinds of cultures and opinions

Challenges prejudice

Shows the viewpoints of minority groups in society

Source: Ipsos MORI commissioned by Channel 4
Different voices

CHANNEL REPUTATIONS: HOME FOR ALTERNATIVE VOICES
Channel 4 makes a vital contribution to the plurality of viewpoints and perspectives on UK television by providing a platform for alternative voices. In 2016, audience recognition of this element of its remit strengthened further. 37% of respondents selected Channel 4’s main channel as being the home for alternative voices, the second consecutive year that this figure has increased. This figure is more than four times larger than the proportion selecting the next highest channel, Channel 5 (9% of people), and a massive 31 percentage points higher than the average for the other main PSB channels.

The proportion of all respondents selecting Channel 4’s main channel increased by one percentage point year-on-year, as did its lead over the next highest PSB channel, while its lead over the average for the other main PSB channels was up by two percentage points.

Distinctive approaches

CHANNEL REPUTATIONS: MAKES ME THINK ABOUT THINGS IN NEW AND DIFFERENT WAYS
In 2016, Channel 4’s main channel consolidated its lead over other channels as being best for making people think about things in new and different ways, achieving amongst the highest scores since Channel 4 began reporting this metric in 2008.

24% of respondents selected Channel 4’s main channel as being best for making them think about things in new and different ways, level with the corresponding figure for 2015, and the joint-highest score achieved since 2008.

This gave Channel 4’s main channel a lead over the average for the other main PSB channels of 15 percentage points – again, level with the corresponding figure for 2015 and the joint-highest score Channel 4 has achieved since 2008. Channel 4 also set a new record for its lead over the next highest channel, for the second consecutive year: its lead over BBC One was 13 percentage points, one percentage point more than its corresponding lead in 2015 (when BBC Two was the next highest channel).

CHANNEL REPUTATIONS: TACKLES ISSUES OTHER CHANNELS WOULDN’T
Channel 4’s main channel was selected by 43% of respondents as being best for tackling issues that other channels wouldn’t in 2016 – one of the highest scores achieved in any of the reputational statements. The other main PSB channels were chosen by only 7% of people each on average, giving Channel 4 a huge lead of 36 percentage points, while its lead over the next highest channel, Channel 5, was 31 percentage points.

The proportion of people selecting Channel 4’s main channel fell marginally year-on-year, by one percentage point. Its lead over the average for the other main PSB channels held steady, while its lead over the next highest channel fell by two percentage points.

Overall, Channel 4’s performance against this metric has been stable since it was first introduced in 2013: annual variations in the proportion of people selecting Channel 4, and its lead over the average for the other main PSB channels, have fallen within a ±1 percentage point range. Although there has been a small decline over this period in its lead over the next highest channel, this remains larger than for most of the other reputational statements.
Distinctive approaches

CHANNEL REPUTATIONS: TAKES A DIFFERENT APPROACH TO SUBJECTS COMPARED TO OTHER CHANNELS
In 2016, 37% of people associated Channel 4’s main channel with taking a different approach to subjects compared with other channels. This represented a substantial lead over the average for the other main PSB channels, of 29 percentage points – the joint-highest lead since Channel 4 began reporting this metric in 2008 – while its lead over the next highest channel, Channel 5, was 26 percentage points.

The early period of Channel 4’s ongoing creative renewal overturned modest declines in performance against this metric between 2010 and 2012, and has driven significant increases since then. After a period of more significant fluctuations, performance has stabilised over the last three years, with annual variations within the range of ±1 percentage point. In 2016, the proportion of people choosing Channel 4’s main channel fell by one percentage point, though it remained six percentage points above its level in 2008–2009. Its leads over both the average for the other main PSB channels and the next highest channel were level year-on-year.

NEW AND ONE-OFF PROGRAMMES
As part of its commitment to experimentation, Channel 4 shows a large number of new and one-off programmes – including in its evening schedules, when audiences are at their highest levels. In 2016, there were 175 new and one-off programmes on the main channel between 6pm and midnight. This is 17% less than the corresponding figure in 2015 (which was 210), taking the total close to the figure in the previous year (2014: 181). The decline in 2016 – which in particular saw a marked reduction in the number of new and one-off Documentaries – was a consequence of the success of Channel 4’s creative renewal, which has produced more returning series in the schedule.

While BBC Two showed more new and one-off programmes in the evening schedule than Channel 4 (244 titles), Channel 4 remained ahead of all the other main PSB channels, in most cases by substantial margins: it showed 5 more new and one-off titles than BBC One in its evening schedules, 69 more than ITV, and 89 more than Channel 5.

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

<table>
<thead>
<tr>
<th>Channel</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC One</td>
<td>170</td>
<td>154</td>
</tr>
<tr>
<td>BBC Two</td>
<td>244</td>
<td>216</td>
</tr>
<tr>
<td>ITV</td>
<td>106</td>
<td>115</td>
</tr>
<tr>
<td>Channel 4</td>
<td>175</td>
<td>210</td>
</tr>
<tr>
<td>Channel 5</td>
<td>86</td>
<td>103</td>
</tr>
</tbody>
</table>

Source: Attentional commissioned by Channel 4
Distinctive approaches

CHANNEL REPUTATIONS: TAKES RISKS WITH PROGRAMMES THAT OTHERS WOULDN’T
Channel 4’s reputation for risk-taking remains one of the strongest elements of its public remit. In 2016, the main channel was selected by 45% of respondents as being the one that, more than other channels, takes risks with programmes that others wouldn’t. Channel 4’s lead over the average of the other main PSB channels was 38 percentage points, and it was 31 points ahead of the next highest channel, Channel 5. These are amongst the largest figures for any of the reputational statements.

While there were some marginal declines year-on-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, and its lead over the next highest channel, both fell by one percentage point, while its lead over the average for the other main PSB channels held level compared to the corresponding 2015 figure.

CHANNEL REPUTATIONS: IS EXPERIMENTAL
Channel 4’s commitment to trying new things underpins its role as a creative greenhouse, and it consolidated its reputation for experimenting in 2016. 36% of people associated its main channel, more than any of the other channels, 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 21 percentage points higher than the next highest channel, Channel 5.

There continued to be very little year-on-year variation in this metric. The proportion of people selecting Channel 4’s main channel was level with the 2015 figure. Its lead over the next highest channel also held steady year-on-year, maintaining its joint-record lead since this metric was first reported in 2008. There was a one percentage point increase in Channel 4’s lead over the average for the other main PSB channels. Overall, Channel 4’s performance against this metric remains stable, and annual variations continue to be within the range of ±1 percentage point.
**Film**

**CHANNEL REPUTATIONS: MODERN INDEPENDENT FILM**

In 2016, 32% of respondents picked Channel 4’s main channel as being best for modern independent film. Channel 4 had a lead of 26 percentage points over the average for the other main PSB channels, and a 25 percentage point lead over Channel 5, the next highest channel (no other PSB channel was selected by more than 7% of respondents). The top 10 films on Channel 4 this year included premieres of Film4 titles *12 Years A Slave* and *Amy*, which drew impressive audiences of 2.4 million viewers and 2.3 million viewers respectively (both of which represented audience shares of more than 10%).

The proportion of people selecting Channel 4’s main channel was the same as in 2015, while there was a one percentage point increase in its lead over the average for the other main PSB channels. Its lead over the next highest channel also rose by one percentage point, to a record high since Channel 4 began reporting this metric in 2008. Overall, Channel 4’s performance against this metric continued to be stable, with annual variations within the range of ±1 percentage point.

**Factual**

**CHANNEL REPUTATIONS: 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 not often shown on television. In 2016, 35% of respondents selected Channel 4’s main channel, giving it a substantial 24 percentage point lead over the average for the other main PSB channels. Both these figures were the same as the corresponding ones in 2015, 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 19 percentage points, a new record for this metric.

While there has been some volatility in Channel 4’s performance against this metric in earlier years, it began to stabilise in 2016, with annual variations within the range of ±1 percentage point.

**Key programme examples:**

- *President Trump: Can He Really Win?*
- *The Jihadis Next Door*
Factual

INSPIRING CHANGE THROUGH FACTUAL PROGRAMMING
In line with its public remit, Channel 4 seeks to inspire people to make changes in their lives through its Factual programming. Programmes may encourage people to think about things in new and different ways, or think about making changes in their own lives. They may also inspire more active engagement: encouraging people to talk about the subjects of the programmes to other people, or to seek out further information. At their most engaging, programmes can lead to people actually trying something new or different. 65% of viewers said that Channel 4’s Factual programmes inspired them in one or more of these ways in 2016. The programme that received the highest score this year, of 84%, was What British Muslims Really Think, a survey of the views of British Muslims on a range of issues. Top-scoring programmes on individual statements included The Undateables (the most talked-about programme) and Jamie’s Super Food (which inspired the most people to try something new or different).

The proportion of respondents who said that Channel 4’s factual programmes inspired them in some way rose by two percentage points in 2016, with year-on-year increases in all five of the ‘inspiring change’ statements.

News and Current Affairs

INDEPENDENCE OF TV NEWS
At a time when trust and independence in news are more important than ever, Channel 4 News continued to be the television news programme that viewers most associated with being independent from the government and from the influence of big businesses in 2016.

77% of regular viewers to Channel 4 News regarded it as being independent from the government. 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 (a tie between 5 News and Sky News). 73% of regular news viewers to Channel 4 News agreed that it is independent from the influence of big businesses, 12 percentage points more than the average for the other news programmes on the other main broadcasters’ channels, and seven percentage points more than the corresponding figure for BBC News, which was the next highest-scoring news programme.

Year-on-year variations in Channel 4 News’ scores across the two metrics were mixed. The proportion of regular viewers who believe Channel 4 News to be independent from the government fell by four percentage points in 2016, while its leads over the average for the other broadcasters’ news programmes and over the next highest-scoring news programme (Sky News in 2016, ITV News in 2015) were both two percentage points down. Conversely, the proportion of regular viewers who believe Channel 4 News to be independent from the influence of big businesses rose by two percentage points in 2016, and its leads over the average for the other broadcasters’ news programmes and over the next highest-scoring news programme (BBC News in both years) were both up by four percentage points.

In 2016, Channel 4 News’ viewing share increased by 3%, the third consecutive year of growth for the programme.

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

<table>
<thead>
<tr>
<th>Year-on-year change</th>
<th>65%</th>
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<tbody>
<tr>
<td>▲ 2pts</td>
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</table>

Percentage of regular viewers to TV news programmes in 2016 who agree with the following statements:

‘It is independent from the Government’

<table>
<thead>
<tr>
<th>Programme</th>
<th>Year-on-year change</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC News</td>
<td>62%</td>
</tr>
<tr>
<td>ITV News</td>
<td>70%</td>
</tr>
<tr>
<td>Channel 4 News</td>
<td>77%</td>
</tr>
<tr>
<td>5 News</td>
<td>71%</td>
</tr>
<tr>
<td>Sky News</td>
<td>71%</td>
</tr>
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</table>

‘It is independent from the influence of big businesses’

<table>
<thead>
<tr>
<th>Programme</th>
<th>Year-on-year change</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC News</td>
<td>66%</td>
</tr>
<tr>
<td>ITV News</td>
<td>62%</td>
</tr>
<tr>
<td>Channel 4 News</td>
<td>73%</td>
</tr>
<tr>
<td>5 News</td>
<td>61%</td>
</tr>
<tr>
<td>Sky News</td>
<td>56%</td>
</tr>
</tbody>
</table>

Source: Ipsos MORI commissioned by Channel 4
News and Current Affairs

PROGRAMME REPUTATIONS: CURRENT AFFAIRS

There are variations in both approach and subject matter in the PSBs’ Current Affairs output. 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 for important stories.

Channel 4’s strengths in these areas are highlighted by five audience reputational statements that assess perceptions of the Current Affairs programmes – both regular strands and one-offs – on the main PSB channels. In 2016, Unreported World and Dispatches continued to score higher on average than any of the other PSBs’ Current Affairs programmes and strands (with Panorama, on BBC One, coming in third place). Both strands also registered increases in their performance this year.

Unreported World consolidated its position as the highest-scoring Current Affairs programme or strand on any of the main PSB channels across the five reputational statements in 2016, with an average score of 47%. 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 58% of respondents), ‘giving a voice to groups that aren’t always heard in mainstream media’ (48% of respondents), and ‘making me see something in a different light’ (45% of respondents). Its average score across the five reputational statements was two percentage points higher than in 2015.

Dispatches was rated in the top three places in all five reputational statements. Its average score across the five statements was 43%, the second highest average score of all the Current Affairs programmes and strands, behind Unreported World. Its average score across the five reputational statements rose by three percentage points relative to the corresponding figure in 2015.
Engaging the audience

AUDIENCE REACH
Channel 4 has the third highest reach of all the UK broadcasters across its portfolio of TV channels, behind only the BBC and ITV, and well ahead of fourth-placed Channel 5. The BBC, ITV and Channel 4 are the only UK broadcasters that reach more than three-quarters of all UK viewers every month. 83.5% of all TV viewers watched Channel 4’s TV channels for at least 15 consecutive minutes each month on average in 2016. Reach for the main channel alone was 75.8%, while Channel 4’s digital TV channels together reached 61.5% of viewers.

In a highly competitive digital TV landscape, the public service broadcasters have all suffered declines in reach in the previous four years. In 2016, Channel 4’s total TV portfolio reach continued to fall, but only by 0.3 percentage points. This was Channel 4’s smallest annual decline in reach since 2011, as well as a smaller decline in 2016 than that experienced by the BBC and ITV channel portfolios (whose reach fell by 0.8 and 0.4 percentage points respectively).

Looking at the individual channels in the Channel 4 TV portfolio, the main channel experienced a marginal year-on-year fall in reach, of just 0.1 percentage points, a much smaller decline than in any of the previous four years. E4 also saw a very small decline in reach, of 0.2 percentage points. The other digital channels saw declines of between 0.7 and 1.1 percentage points. There was a marginal (0.2 percentage point) decrease in the digital channels’ collective contribution to Channel 4’s overall portfolio reach in 2016.

Average monthly reach of PSBs’ TV portfolios

<table>
<thead>
<tr>
<th>Total (%)</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC</td>
<td>92.4</td>
<td>92.2</td>
</tr>
<tr>
<td>ITV</td>
<td>87.1</td>
<td>87.5</td>
</tr>
<tr>
<td>Channel 4</td>
<td>83.5</td>
<td>83.8</td>
</tr>
<tr>
<td>Channel 5</td>
<td>68.9</td>
<td>68.7</td>
</tr>
</tbody>
</table>

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

Percentage reach of individual TV channels in Channel 4 portfolio

<table>
<thead>
<tr>
<th>Total (%)</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel 4 (main channel)</td>
<td>75.9</td>
<td>75.9</td>
</tr>
<tr>
<td>E4</td>
<td>33.6</td>
<td>33.8</td>
</tr>
<tr>
<td>More4</td>
<td>33.2</td>
<td>34.3</td>
</tr>
<tr>
<td>Film4</td>
<td>31.0</td>
<td>31.7</td>
</tr>
<tr>
<td>4Music</td>
<td>8.0</td>
<td>8.6</td>
</tr>
</tbody>
</table>

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

TV VIEWING SHARE
Channel 4’s TV channel portfolio achieved a total viewing share of 10.5% in 2016. The main channel’s share was 5.9%, while the digital channels had a combined share of 4.6%. E4 was the biggest digital channel, with a 1.9% viewing share, followed by Film4 (1.4%), More4 (1.1%) and 4Music (0.2%).

While viewing in the digital TV space in which Channel 4 competes for audiences continues to fragment, the performance of its TV channels was stable this year. Across the portfolio, each individual TV channel either held its audience share or saw marginal year-on-year changes of less than 0.1 percentage point.

When reported to one decimal place, the main channel’s viewing share held steady in 2016, although the unrounded figures indicate a marginal decline of 1% year-on-year (from 5.92% to 5.87% viewers).

Across the portfolio, Channel 4’s total viewing share also fell marginally year-on-year, by 1%, equivalent to 0.1 percentage points. Viewing to the digital channels fell by 0.1 percentage points collectively, with E4’s viewing share holding steady, marginal increases in viewing to More4 and Film4 (not shown at one decimal place) and a marginal decline in viewing to 4Music.

The main channel continued to account for 56% of total viewing to the Channel 4 TV portfolio in 2016 (level with the 2015 figure).

Channel 4 portfolio share as a percentage of total TV viewing

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<tr>
<td>TV</td>
<td>TV</td>
<td>TV</td>
<td>TV</td>
<td>TV</td>
</tr>
<tr>
<td>Total</td>
<td>10.5</td>
<td>10.6</td>
<td>10.9</td>
<td>11.0</td>
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</tbody>
</table>

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

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<tbody>
<tr>
<td>TV</td>
<td>TV</td>
<td>TV</td>
<td>TV</td>
<td>TV</td>
</tr>
<tr>
<td>Total</td>
<td>4.6</td>
<td>4.7</td>
<td>5.0</td>
<td>4.9</td>
</tr>
</tbody>
</table>

ON-DEMAND VIEWING
2016 was the first full year in which viewers were able to access Channel 4 content through All 4, its new on-demand service (which replaced 4oD in 2015). Across the year, 620 million programme views were initiated across all All 4-branded platforms – including PCs, smartphones, tablets, games consoles and connected TVs. This represents a significant year-on-year increase, of 21%.

On existing platforms, growth in on-demand viewing via All 4 was especially strong for the iOS simulcast (63% up year-on-year), Android (50% up) and Roku (45% up). Viewing was also boosted by All 4’s launch on new platforms in 2016 (most notably PlayStation 4) and in the last two months of 2015 (YouView and Amazon Fire TV).

Programme views initiated on All 4 (m)

<table>
<thead>
<tr>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>620</td>
<td>512</td>
</tr>
</tbody>
</table>

Source: Channel 4
Engaging the audience

SHARE AMONGST HARD-TO-REACH AUDIENCES – BAME

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

In 2016, Channel 4’s performance in terms of attracting ethnic minority audiences was particularly strong, in comparison with the other PSBs. Its TV portfolio viewing share amongst BAME audiences rose year-on-year, from 10.1% (in 2015) to 10.2%. Relative to the viewing share amongst white audiences, which was 10.6% this year, the differential in viewing share between BAME and white audiences was just 4%. This differential is smaller than in 2015 (when it was 6%), and indeed in any previous year going back to 2009.

Channel 4 also had a smaller differential between its TV portfolio viewing shares amongst BAME and white viewers than that of any of the other PSBs. Its 4% differential is markedly less than the 13% differential in viewing share for Channel 5, and substantially less than the 29% and 31% differentials for the BBC and ITV. This means that BAME audiences represent a higher proportion of Channel 4’s total audience than they do of the total audience of the other PSBs.

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

Channel 4’s TV channels consistently attract a disproportionately large share of viewing amongst hard-to-reach 16-to-34-year-olds. In 2016, Channel 4’s viewing share amongst this age group was 16.2% across its TV channel portfolio. This represented a small year-on-year decline, of 2%, relative to the 2015 share (which was 16.5%).

Channel 4’s viewing share amongst 16–34-year-olds was 54% higher than its corresponding all-audience share in 2016, ensuring that it remained 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 7% less than its all-audience portfolio share, and the BBC’s was 31% less. The only other PSB that appealed more to 16–34-year-olds than to the overall population was Channel 5, but its differential was just 10%. Channel 4’s relative appeal to young audiences was marginally down this year: the 54% differential between 16–34-year-olds and all audiences is two percentage points down on the 56% differential in 2015.
Engaging the audience

MOST POPULAR CHANNELS FOR YOUNG VIEWERS
In 2016, E4 maintained its position amongst 16-to-34-year-olds as the most-watched digital TV channel in the UK, and the fourth most popular TV channel overall. It had a 5.0% viewing share, putting it behind only BBC One, ITV and Channel 4, and ahead of the other two main PSB channels, BBC Two and Channel 5. After a marked decline in viewing in 2015, after some popular US acquired series had come to an end, E4’s viewing share stabilised in 2016, with a marginal decline in audience share of 2% (2015 share: 5.1%).

Channel 4's main channel also performs disproportionately well amongst 16-to-34-year-olds, for whom it is the third most popular TV channel. It achieved a 7.4% share in 2015, 3% down on its 2015 level.

Channel 4 News
Channel 4’s main evening news programme has a particular appeal to young and BAME audiences, in comparison to the news programmes on the other main PSB channels. Young audiences aged 16–34 accounted for 15% of viewing to Channel 4 News in 2016, notably higher than their corresponding 7% – 10% shares of viewing to the national news programmes on the other main PSB channels.

Channel 4’s performance relative to the other main PSB channels was even more marked with respect to BAME viewers. Viewers from BAME groups represented 16% of all viewing to Channel 4 News. This was the highest figure since 2009, and is broadly in line with – if not ahead of – this group’s representation in the UK population (estimated to be around 13% – 14%). By contrast, the other main PSB channels had disproportionately low shares of BAME viewing to their news programmes, ranging from 6% to 9%.

There continues to be little year-on-year variation in these figures. The proportion of viewing to Channel 4 News accounted for by 16–34-year-olds fell by one percentage point in 2016, driven by a decline in the final quarter, while the proportion of BAME viewers rose by two percentage points.

REACH OF CHANNEL 4 NEWS
In 2016, Channel 4 News was watched (for at least 15 consecutive minutes) by an average of 8.3 million people each month. This was the second consecutive year in which the programme has increased its reach, by 1% in each of the two years, after six previous years of decline.

Channel 4 News also increased its viewing share in 2016, by 3%. This was the third successive year in which its share has increased.
Engaging the audience

CHANNEL REPUTATIONS – CATERING FOR AUDIENCES OTHER CHANNELS DON’T CATER FOR
In 2016, Channel 4 achieved its best ever scores when audiences were asked which channel is best for catering for audiences other channels don’t cater for. 31% of respondents selected Channel 4’s main channel over the other main PSB channels, giving Channel 4 its highest score since it began reporting this metric in 2008. This was 22 percentage points more than chose the average of the other main PSB channels, and 17 percentage points more than the next highest channel (Channel 5).

The proportion of people selecting Channel 4, and its leads over the other channels, all increased in 2016, in each case setting new records for this metric. The proportion of people selecting Channel 4 was up by two percentage points, its lead over the average for the other main PSB channels rose by three percentage points, and its lead over the next highest PSB channel rose by four percentage points.

TOTAL VISITS TO CHANNEL 4’S WEBSITES AND APPS
Channel 4’s websites and apps attracted a total of 522 million visits in 2016, 3% more than in 2015.

Channel 4’s dedicated All 4 app, which launched in 2015, is available on a growing range of smart phones, tablets and connected TVs. Channel 4 sought to encourage app usage where possible, so viewers have the best possible experience viewing content. To promote this strategy, as well as making its All 4 app ever more attractive (e.g. with regular feature updates), Channel 4’s websites point viewers towards the All 4 app when they try to watch video content on mobile platforms.

The number of visits to Channel 4’s apps rose by 18% year-on-year, from 274 million in 2015 to 322 million in 2016. App visits have accounted for a growing proportion of total visits to all Channel 4’s websites and apps over the last few years, and this trend continued in 2016, with apps accounting for 62% of all visits, up from 54% in 2015 (and more than double their 30% share of total visits in 2012). Visits to Channel 4’s websites declined by 15% (from 234 million in 2015 to 200 million in 2016), reflecting the strategy to push viewers – directly or indirectly – to All 4 apps for video viewing.
Engaging the audience

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

In 2016, the average ‘Buzz’ score for the 10 most talked-about programmes across Channel 4’s TV portfolio was 76%. This was two percentage points higher than the corresponding figure in 2015, continuing this metric’s steady rise since 2011 (when the metric was first introduced). Between 2011 and 2016, the average ‘Buzz’ score for Channel 4’s 10 most talked-about programmes in the year has increased by 17 percentage points (from 59% in 2011).

This year, Channel 4 Racing was the most talked-about programme of the year, with 86% of its viewers talking about it or commenting online. As was the case in 2015, the top 10 was dominated by Factual shows covering a range of themes. In joint-second place, with 80% ‘Buzz’ scores, were Great Canal Journeys, in which Timothy West and Prunella Scales went in search of London’s lost canal routes, and The Undateables: Holiday Romance, which saw couples who had met previously on the show being sent off on romantic holidays. Factual Entertainment, Leisure and Lifestyle programmes represented another three of the top 10 programmes, with A Place in the Sun (77% ‘Buzz’ score), Ramsay’s Kitchen Nightmares USA (76%) and Rescue Dogs to Super Dog (71%).

At the more hard-hitting end of the Factual spectrum, the top 10 included the award-winning Interview with a Murderer, a one-off documentary in which criminologist Professor David Wilson conducted a series of interviews with convicted murderer Bert Spencer, who was widely suspected of killing a paperboy in 1978 – a crime he had never been charged with and which he has always denied (72% ‘Buzz’ score).

In scripted genres, two US comedies broadcast on E4, New Girl and Jane the Virgin, were also in the top 10, with ‘Buzz’ scores of 79% and 73% respectively. The most talked-about drama of the year was the second series of Indian Summers, Channel 4’s period drama set at the time of the British Raj (70% ‘Buzz’ score).

<table>
<thead>
<tr>
<th>Site</th>
<th>2016 Buzz (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel 4 Racing</td>
<td>86</td>
</tr>
<tr>
<td>Great Canal Journeys</td>
<td>80</td>
</tr>
<tr>
<td>The Undateables: Holiday Romance</td>
<td>80</td>
</tr>
<tr>
<td>New Girl</td>
<td>79</td>
</tr>
<tr>
<td>A Place in the Sun</td>
<td>77</td>
</tr>
<tr>
<td>Ramsay’s Kitchen Nightmares USA</td>
<td>76</td>
</tr>
<tr>
<td>Jane the Virgin</td>
<td>73</td>
</tr>
<tr>
<td>Interview with a Murderer</td>
<td>72</td>
</tr>
<tr>
<td>Rescue Dogs to Super Dog</td>
<td>71</td>
</tr>
<tr>
<td>Indian Summers</td>
<td>70</td>
</tr>
</tbody>
</table>

Average Buzz score for 2016 top 10 programmes 76

Average Buzz score for 2015 top 10 programmes 74

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

This metric measures Buzz for programmes transmitted from 1 January 2016 to 31 August 2016 only. Data from 1 September to 31 December is not available.

Source: Ipsos MORI commissioned by Channel 4
Engaging the audience

Network originations accounted for 70% of total viewing to the main channel, E4 and More4. This represented an increase of two percentage points year-on-year, the third consecutive year of growth. Network originations now represent 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 65% of all hours across the schedules of the main channel, E4 and More4 in 2016 (also up two percentage points year-on-year). Comparing these two 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 (70%) than their corresponding share of the volume of programming (65%).

Overall, Channel 4’s network originations accounted for 6.3% of total TV viewing in the UK in 2016. This is a small increase, of 1%, on the corresponding 2015 viewing share, and is 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.