

2020 at a glance

Putting digital first

£161m record digital advertising revenue (+11% year on year)

making up 17% of total corporation revenue and reflecting Channel 4's strong strategic focus on accelerating digital

1.25bn programme streaming views (+26%)

the highest-ever level and biggest-ever annual increase in absolute terms

14,500 hours of content available on streaming

making All 4 the biggest free streaming service in the UK

24m

viewers registered on All 4, including 80% of all 16-24-year-olds and 16-34-year-olds in the UK, making it the youngest-profiling UK PSB streaming service



Grayson's Art Club



Financial sustainability despite uncertain times

£934m corporation revenue (-£51m on 2019)

revenues remained resilient (down only 5% on 2019) even as Covid-19 hit demand for advertising

£74m pre-tax surplus (+£100m on 2019)

the highest surplus in our 38-year history, delivered as a result of Channel 4's swift and decisive financial response at the start of the pandemic and the rapidly-improving ad market towards the end of the year

£201m net cash reserves* (+£64m on 2019)

the second-highest positive cash flow in our history and the first time Channel 4 has been cash positive since 2015 (see p130)

* Cash reserves reflect the sum of the Group's cash and cash equivalents and other financial assets net of cash borrowings at the balance sheet date, defined on p186.

Supporting the British creative industries

£522m total content spend (2019: £660m)

identifying up to £150m of cuts to our content budget during the year, two-thirds of which were for programmes that could no longer be made in 2020. This allowed us to focus on the productions that could still go ahead, enabling us to maintain our support for the creative industries through the pandemic and to release funds for content investment later in the year, as the situation improved

£370m spend on originated content (2019: £492m)

despite the originated content budget being reduced, we ring-fenced the budget where we could to ensure that we could create content that audiences needed to get through these unprecedented times

47% of spend on first-run originations came from the Nations and Regions (2019: 46%)

the highest-ever percentage of investment outside of London on the main channel

161 independent producers worked with in 2020 (2019: 166)

274 producers worked with in total (equal with 2019), of which 37 were new suppliers (2019: 43)

£250k donated to the Film and TV Charity

supporting the mentoring and training for those in the industry during Covid-19

Danielle: The Boy Next Door

Must-watch content

+2% growth in viewing share to our TV channel portfolio to 10.1%

our first year-on-year increase since 2011, as viewers turned to PSBs for news and entertainment during 2020

+3% growth in main channel viewing share to 5.9%

despite increased competition in the linear TV space and the migration of viewers to streaming services

+7% growth in main channel viewing share among 16-34-year-olds to 8.6%

the highest share since 2011, and 15% growth in peak-time share to 10.7% (the highest level since 2007)

+2% growth in main channel viewing share among ethnically-diverse viewers to 5.2%

our highest ethnically-diverse yearly share since 2013



The Great British Bake Off





Pages 28-29



Pages 30-31



Pages 34-35



Pages 38-39



Pages 42-43

Represent

unheard voices

Channel 4 commits to being representative of the whole of the UK. Diversity of thought is as important to us as other characteristics. This means hearing from people right across the UK, from voices that are often not heard on TV and from a wide range of diverse communities.



Take Your Knees Off My Neck

Diverse views

Channel 4 is proud of its long history of inclusion and diversity. Ensuring that diverse voices are portrayed on screen in an authentic manner is a key element of our public service remit.

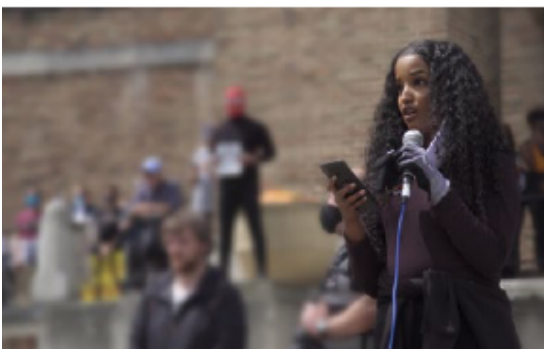
Highlights on All 4 and Channel 4 this year included positive and accurate representations of all facets of diversity – whether disability or gender, sexuality or ethnicity, diversity of thought or diverse voices from all over the UK – in the likes of Lucy Kirkwood's *Adult Material*, a dark comedy series about the porn industry; *Me and My Penis*, which took an uncompromising look at 21st-century masculinity; or *Peter: The Human Cyborg*, a film that documented the life of scientist Peter Scott-Morgan as he navigates life with Motor Neurone Disease.

Our daily live lunchtime show, *Steph's Packed Lunch*, filmed in Leeds, regularly featured a range of voices, ranging from politicians such as Michael Portillo, Baroness Warsi, Anna Soubry and Alan Johnson, to many regional and diverse voices from across the UK.

Divided Britain: The Lockdown Debate saw Channel 4 News' Krishnan Guru-Murthy chair a debate about the October Covid-19 lockdowns. Featuring a range of voices – from hospitality business owners to police officers, intensive care doctors to entrepreneurs and head teachers – the debate asked whether the lockdown was too tough or too late, too far or not far enough.

The Yorkshire Jobcentre went behind the scenes at a busy job centre in Leeds, revealing the lives of those living on benefits and the job coaches' efforts to help them. Viewers described it as "informative", "honest" and "thought-provoking", with more than 75% of those surveyed agreeing that it "gave a voice to those typically marginalised in society" and that it reflected the diversity of the UK.

Take Your Knee Off My Neck



46.5%

The Black and Proud season reached 46.5% of the population (28.2 million viewers)

Supporting proud black voices

Three weeks after George Floyd was killed, and as Black Lives Matter protests spread around the world, Channel 4 announced a series of five original shorts by black filmmakers, to be available on streaming and to watch on linear TV. The *Take Your Knee Off My Neck* series formed a collective – and urgent – protest about the systemic racism and injustice black people continue to face in Britain. They included personal stories of racial abuse in *My First Time*; a powerful call to action by George the Poet; and an exploration of the impact of the toppling of Edward Colston's statue in *The Shadow of Slavery*.

Channel 4 also commissioned *The Talk*, in which Tinie Tempah, Emeli Sandé and other well-known Black Britons shared their poignant and emotional experiences of the conversations parents have to help their children face racism. The programme was described as "emotive", "eye-opening" and "honest", with nine in ten viewers saying it highlighted the importance of having open discussions about race, and seven in ten agreeing that it explored racism in a way they'd not seen before on TV.

To mark Black History Month in October, Channel 4 curated a season of classic and new programming, on All 4 and across our channels, under the Black and Proud banner. Compared to 2019, views of our collection celebrating Black History Month on All 4 were up by 67%.

The season included documentaries such as *Damilola: The Boy Next Door* and *Hair Power: Me and My Afro*; comedies such as iconic sitcom *Desmond's* and Michaela Coel's E4 hit *Chewing Gum* and Film4 titles such as *12 Years a Slave* and *Hidden Figures*. The season reached a huge 46.5% of the population, equivalent to more than 28 million viewers. Eight in ten viewers agreed that the programmes helped to break taboos, while 85% said they sparked conversations on racism in society.

We also announced a Black Takeover Day to showcase black talent on screen in 2021. A year on from the death of George Floyd and leading into Black History Month, this will encompass every genre and service, and will be one of the most radical diversity interventions in the channel's history.





Council House Britain

Deadwater Fell





A Day in the Life of Coronavirus Britain



...a beautiful programme. Heartbreaking, hopeful, uplifting, funny, poignant and real.

A Day in the Life of Coronavirus Britain

In March 2020, as the UK approached its first lockdown, Channel 4 was confronted with the challenge of how best to respond editorially to Covid-19. A key early decision was to commission fast-turnaround programming throughout the crisis, to respond to our audience's needs and to support the independent production industry.

An editorial priority was to reflect how the pandemic was affecting people's lives. Amongst a series of highly reactive current affairs programmes, *A Day in the Life of Coronavirus Britain* was an extraordinary film from Leeds-based Candour Productions that brought together footage shot by over 3,000 members of the public to capture a snapshot of British life in lockdown during a 24-hour period. It epitomised our ability to move quickly: planned in two and a half weeks, it was filmed on a single Friday, edited over the weekend and then broadcast on the following Monday, 6 April. The documentary captured the many acts of creativity and kindness that characterised the first lockdown alongside the trials and tribulations of home-schooling, caring for people who were ill or self-isolating and working from home. Its large cast included police, nurses, doctors, binmen and supermarket shelf stackers.

A Day in the Life of Coronavirus Britain reached almost two million people and was applauded for making them smile, cry and feel good, with one viewer from Leeds summing it up as "...a beautiful programme. Heartbreaking, hopeful, uplifting, funny, poignant and real." A superhuman effort in production, it was rewarded with an Edinburgh Festival TV Award nomination for Creativity in Crisis and an AIB nomination for Best Domestic Affairs Documentary.

8.6%

main channel share for 16-34-year-olds (+7% year-on-year), the highest figure since 2011

Reaching young people

We continue to work hard to engage with young people, however and wherever they watch TV. In 2020, record numbers of people watched our content on All 4, with views up 26% to significantly over one billion for the first time ever – of which 16-34-year-olds accounted for just under half.

In addition, a growing number of shows – including *Leaving Neverland: Michael Jackson and Me*; *Spencer*, *Vogue* and *Wedding Two*; and *Celebs Go Dating* – now attract more young viewers on All 4 than on traditional TV.

Viewing to our main channel among young people also rose by 7% year-on-year to 8.6%, the highest figure since 2011. During the first lockdown in the spring, Channel 4 was watched by more 16-34-year-olds than any other TV channel in the 8-11pm slot for 12 consecutive Friday nights, thanks to the performance of *Gogglebox* and *Friday Night Dinner*.

Channel 4 remains the third most popular TV channel for young people, behind only ITV and BBC One – and it grew more strongly than either of them.

Our youth-focused channel, E4, saw the 16-34-year-old share fall by 17% in 2020, to 3.9%, its lowest level in the last decade. Increased competition amongst digital channels was exacerbated this year by the pause in filming of popular soap *Hollyoaks* due to Covid-19; with 37% fewer episodes being aired, this impacted overall E4 viewing by young people. Nevertheless, E4 remained the second-most-watched digital TV channel in the UK for 16-34-year-olds, behind only ITV2. And across Channel 4's whole TV portfolio, total 16-34-year-olds viewing held steady year-on-year.



Turned Friday m



Gogglebox

night into laughter night.



Quentin Blake's Clown



Positive and thought- provoking...

The Daily Telegraph

Younger viewers

For younger viewers, our focus was on popular mainstream programming that reflects their lives and interests and helps them to better understand the world around them.

Meat the Family, in which families considered their eating habits by caring for animals at home, had a strong appeal to 14-19-year-olds with its educative content; 57% of viewers said they spoke about the issues raised in the programme with others.

Award-winning *The School That Tried to End Racism* attracted a substantial 17% viewing share amongst 10-15-year-olds, 148% above slot average for this age group. Almost half of the parents who watched it said that the programme motivated them to ensure their children mix with friends from different racial or cultural backgrounds. *The Daily Telegraph* called it "positive and thought-provoking", while the *Daily Mail* said it was a "brave and thought-provoking initiative".

Older children were also treated to a festive treat in *Quentin Blake's Clown*, a glorious animated adaptation narrated by Helena Bonham Carter, at Christmas.

The School That Tried to End Racism









The soap most willing to take on challenging issues – and do them justice.



Hollyoaks

Hollyoaks

Twenty-five years since *Hollyoaks* hit our screens, the young-skewing soap continues to earn a reputation for grit as well as glamour, breaking hard-hitting stories and bravely tackling taboos that affect young people's lives.

2020 saw *Hollyoaks* launch on Snapchat's Discover platform, with short-form made-for-mobile episodes going live immediately after airing on E4, All 4 and Channel 4. The launch also featured an innovative bespoke augmented reality lens, which allowed Snapchat users to create their own cliff-hanger finale, complete with the *Hollyoaks* theme tune and end credits.

Major storylines featured during the year included child exploitation, male depression and post-partum psychosis, helping to start conversations on big social issues and boldly going where no soap has gone before.

Like other broadcasters' soaps, production of *Hollyoaks* was suspended in March 2020, which affected its performance, especially on linear. We were forced to reduce the number of weekly episodes transmitted before having to take it off air completely over the summer months. The resumption of production allowed *Hollyoaks* to return to the screens in September. Despite these disruptions, per-episode views on All 4 were up by 10% year-on-year amongst young audiences.

Performance was also strong on social platforms, where *Hollyoaks* continues to innovate – from its multi-award-winning #DontFilterFeelings campaign to made-for-mobile shows on Snapchat's Discover platform, where users can create their own cliff-hanger endings. Nearly 90% of viewers aged 16–34 think the show is “for people like me” (answering six or above on a ten-point scale).

Hollyoaks was named ‘Best Soap or Continuing Drama’ at last year's Broadcast Awards, where judges described it as “the soap most willing to take on challenging issues – and do them justice”.

Interview with Steph McGovern



Leeds Dock



We don't pretend
the hard stuff isn't
happening...

Q Why is it important that *Steph's Packed Lunch* is broadcast live from Leeds?

A We are rooted in a part of the country that doesn't usually have a live national TV show coming out of it. This makes us distinct in terms of our studio backdrop at Leeds Dock, but it also means that we've been able to provide work to a lot of talented people, on and off air, based in the North who can't – or don't want to – move to London to work on national TV.

Q What impact are you looking to have on viewers?

A We've thought hard about what our audience needs and wants right now. We aim to entertain but also give them a lot of information to help in their lives. For example, we received a heartbreaking letter from a mum struggling to feed her children. She asked for our help, so we tailored a cooking item to help with cooking on a small budget.

It's about creating an inclusive environment on the show. We don't judge, so our guests feel comfortable to be open, such as Chris Kamara talking about the racism that he suffered in his football career, which touched so many of our viewers.

We're also the only daytime show running a job clinic where we get employers on to talk about the vacancies they have and give advice on applying for them – so far, we've highlighted more than 30,000 roles.

Q Why is it so important to provide a positive boost for viewers, to help them navigate through these tough times?

A Public service broadcasting is about more than news. We use our platform to entertain and inspire our audience. We don't pretend the hard stuff isn't happening, but we aim to motivate and inspire people through it, while also being part of their daily routine at a time when most other habits have disappeared. We bring everyone together; we laugh and then hopefully we leave people feeling like they are a bit more prepared to tackle whatever is coming next.



Gogglebox

Since hitting our screens eight years ago, Gogglebox has captivated viewers with its intimate glimpse inside the nation's living rooms, presenting a modern Britain and becoming one of the most representative shows anywhere on TV, offering regional, economic, ethnic and political diversity.

Filming during the pandemic required a more complex production process using rigged cameras and a remote crew, but it was worth the effort. As people were stuck at home watching TV, watching other people stuck at home watching TV provided welcome light relief, and series 16 of Gogglebox drew its highest audience ever across both volume and share (as well as its biggest-ever 16-34-year-old share, at 39.2%). The series gained a further 2.0 million viewers on the main channel year-on-year, with an average of 5.8 million consolidated viewers per episode and a 25% viewing share, while on All 4 it was consistently amongst the top three shows for all ages. Its geographically diverse cast contributed to its strong regional appeal; viewers in Wales and the North of England were 16% more likely to tune in than those in the rest of the UK.

With the sense of companionship and shared experience it gave viewers during the pandemic, 81% of viewers rated Gogglebox as "good" or "great", more than any other Channel 4 show during lockdown. "It's the one tiny bit of normalcy and routine that brightens up my week," said one viewer. Others described Gogglebox as "an old friend", "the light at the end of the tunnel" and "the healing balm I so desperately needed". It's the show that "turned Friday night into laughter night" and "captured the mood of the nation".



It's the one tiny bit of normalcy and routine that brightens up my week.





4 All the UK

Our 4 All the UK programme – which supports creative talent and companies across the UK – made good progress in 2020.

Our new Bristol office in Finzels Reach formally opened in January. We now have more than 220 employees – including key Commissioners across multiple content genres – working in the Nations and Regions. This includes the Head of Features & Daytime based in Glasgow, and the Head of Drama and Head of Sport based in Leeds.

Despite the disruption from Covid-19, we increased the proportions of our content sourced from the Nations and Regions in 2020. In spend terms, we achieved our highest-ever level of investment outside London on the main channel, with 47% of our expenditure on first-run originated programming sourced from suppliers in the Nations and Regions (one percentage point up year-on-year). Across our TV portfolio, we spent £141 million on programmes from production companies based outside of London. Reflecting the Covid-19-related reduction in the overall content budget, this was down 25% on 2019's record level of £189 million.

Industry engagement continued throughout 2020. Independent producers from across the UK attended a series of genre briefings and insight sessions held in early summer, while our Indie Growth Fund (see page 77) made its first investment into a Wales-based independent producer, Yeti. We also launched the Emerging Indie Fund, to provide financial assistance for slate development underpinned by significant Commissioner commitment to help enable small, emerging indies across the UK grow. 11 companies, representing every genre, were selected from more than 140 applications.

We continued to strengthen talent pools and create opportunities in the Nations and Regions. Some 1,300 people participated in a four-week virtual training programme that Channel 4 hosted in conjunction with the National Film and Television School ('NFTS'), specifically aimed at independent producers and freelancers outside of London. In October, we launched our new commitment to training and development, 4Skills. This initiative is focused on attracting people from diverse backgrounds into our industry and progressing the careers of those already within the sector, with a particular focus on the Nations and Regions. We also led on the creation of a new employment initiative in the North of England, partnering with TV Talent North to link indies with freelancers who are looking for work. Delivered over social platforms, the initiative attracted 3,000 members in just three months. Our aspiration is to roll this out to other parts of the UK in 2021.

And we built on our relationships with the Nations' screen agencies. A new funding partnership with Screen Scotland supported the development of creative output from independent production companies based in Scotland; a model we also hope to replicate elsewhere.

Film4

The closing of cinemas, curtailing of the film festival circuit and difficulty of shooting under Covid-19 restrictions for much of the year meant that Film4 was as impacted as many other parts of Channel 4. Production was disrupted, as was the release of films that had already been shot. A number of planned cinema releases were postponed until 2021, and most of those that were released in 2020 were either premiered on streaming platforms or had just a very limited theatrical release in the few short periods of the year when some cinemas were open. Despite these challenging circumstances, Channel 4's feature film division still achieved notable successes.



Everybody's Talking About Jamie



Six Film4 productions were shot and completed in the last four months of the year, working within the lockdown restrictions. Eva Husson's adaptation of Graham Swift's *Mothering Sunday* led the way, starring Oscar-winners Olivia Colman and Colin Firth. Film4 backed new films from two other rising European female auteurs: *Enwig* from Lucile Hadžihalilović, and *Titane*, Julia Ducournau's highly anticipated follow-up to her debut *Raw*. Michael Pearce followed up his BAFTA-winning Film4-backed debut *Beast* with the US-set *Invasion*, starring Riz Ahmed and Octavia Spencer. And *Boxing Day*, a Christmas-set romantic comedy with an all-black cast from writer-director-star Aml Ameen was the first of two comedy debuts to shoot, alongside *Brian & Charles*, featuring the comic creation of writer-star David Earl.

Steve McQueen began shooting his first documentary feature, *The Occupied City*, in November. Basil Khalil got under way with his debut feature *A Gaza Weekend*. John Michael McDonagh's *The Forgiven*, starring Ralph Fiennes and Jessica Chastain, was able to wrap late-summer after being

The Personal History of David Copperfield went on to gross

£6m

at the UK box office

shut down during the first lockdown. And Film4 also backed a collection of five short films from new voices, visions of British dystopia/utopia through a black cultural lens.

Turning to films that were released this year, Armando Iannucci's witty and charming take on Dickens' classic *The Personal History of David Copperfield*, starring Dev Patel, was the sole Film4 title that had something close to a full theatrical run before the pandemic closed cinemas in Britain. Released in January, it went on to gross over £6 million at the UK box office, and was widely praised by critics. Other titles that launched in the first quarter of the year – Michael Winterbottom's fast fashion satire *Greed*; Justin Kurzel's revisionist take on a mythical Australian outlaw *True History of the Kelly Gang*; and Nick Rowland's thrilling debut *Calm With Horses* – were all impacted to some degree by the introduction of Covid-19 restrictions.

Later in the year, Coky Giedroyc's adaptation of Caitlin Moran's bestselling semi-autobiographical novel *How to Build a Girl* pivoted from a planned summer cinema release to a debut on Amazon Prime; and *Rocks*, the critically acclaimed slice-of-life drama about a multicultural group of East London schoolgirls from director Sarah Gavron, similarly pivoted to Netflix after a brief bow in cinemas. Rose Glass's debut *Saint Maud* – named by film critic Mark Kermode as one of his top ten films of the year – grossed a creditable £800k in cinemas with social distancing limits in place, just before the country returned to lockdown in November.

High-profile films whose releases were pushed back to 2021 include the adaptation of *Everybody's Talking About Jamie* from the creators of the original smash hit stage musical; Edgar Wright's *Last Night in Soho*, starring *The Queen's Gambit*'s Anya Taylor-Joy; awards frontrunner *The Father* starring Anthony Hopkins and Olivia Colman, adapted by Florian Zeller from his own play; and the incredible true story of a prize-winning Welsh racehorse, *Dream Horse*.

Ben Sharrock's *Limbo*, a wry comedy-drama about asylum seekers awaiting the outcome of their asylum application on a remote Scottish island, sold to distributors around the world after becoming an international film festival hot ticket. The film made its world premiere in Toronto, after being awarded the Cannes 2020 selection label and following the festival's cancellation due to Covid-19. Cathy Brady's debut feature *Wildfire* is also slated for cinema release in 2021 following a Toronto bow.

Film4 finished 2020 on a high, with 52 nominations for the British Independent Film Awards, with *Saint Maud*, *Rocks* and *Calm With Horses* comprising three of the four most highly nominated films.



Mothering Sunday

Calm With Horses



Working off screen

In 2020, Channel 4 turbocharged its efforts to find and develop diverse talent behind the camera by launching a new training and development initiative called 4Skills. It aims to make Channel 4 even more open to new talent and fresh voices from underserved parts of the UK. Apprenticeship schemes and outreach programmes will target school kids and college students from diverse backgrounds – people who might never have considered a career in broadcasting.

We joined The Valuable 500, a global initiative to put disability on the business leadership agenda, and doubled our workforce disability target, which will increase from 6% to 12% by 2023.

We doubled down on fighting racism, outlining a six-point plan to drive change and publicly declaring ourselves an “anti-racist organisation”. Taking action to narrow our ethnically-diverse pay gap, we launched a new mentoring scheme for diverse employees, and set targets of at least 20% of all staff, and 20% of the top 100 highest-paid staff, being ethnically-diverse by 2023.

As part of our programming plans, we pledged to double the number of commissions from ethnically-diverse-led independent producers by 2023. To help with this, we launched an Indie Accelerator scheme that gave ten ethnically-diverse-led indies – including Afro-Mic Productions (Northern Ireland), Meridian Line Films (York) and Ranga Bee Productions (London) – unprecedented access to Commissioners and bespoke support to help supercharge their progression. We also partnered with The TV Collective to run a series of online events to help ethnically-diverse industry professionals through the Covid-19 crisis, addressing their specific challenges and offering a mix of free live talks with experts, Q&As and career advice.

In 2020, 85% of our programmes met our Commissioning Diversity Guidelines, which set on and off-screen diversity targets in each genre for the people working on the programmes that we invest in, as part of our efforts to promote diversity within our industry. This is an increase on 2019 and reflects the commitment across Commissioning to ensure that programmes meet the guidelines despite the challenges of Covid-19.

Beyond our programmes, for our £1 million Diversity in Advertising Award initiative, this year we invited agencies to create advertising campaigns focusing on the authentic portrayal of UK ethnically-diverse cultures. EA Sports and its creative agency adam&eveDDB won the prize, with their ad airing in 2021.

Ade Adepitan – The Talk





Yinka Bokinni – Damilola: The Boy Next Door

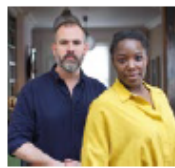


Channel 4
helped
me take my
first steps
down a
new path.

Yinka Bokinni



Pages 48–49



Pages 50–51



Pages 52–53



Pages 56–57



Pages 58–59

Challenge

with purpose

Peppered with shows that have something sharp to say about modern Britain, Channel 4's creative slate stands out from other public service broadcasters and global streamers.

Adult Material





Channel 4 News

Challenge with purpose continued

At its most impactful, our content exposes the truth and acts as a powerful catalyst for change. By testing conventional thinking and inspiring critical thought, we offer something unique and distinctive to the country.

Channel 4 News

2020 saw Channel 4 News achieve huge success in reaching audiences digitally, as people spent more time at home. During the first lockdown, as record numbers of viewers watched Channel 4 News, viewing increased by nearly 80%. Through the year, more than half a billion views were recorded to Channel 4 News content on Twitter, Facebook and YouTube, as viewers sought unbiased news and expert commentary. Channel 4 News is the biggest news programme on social media in the UK.

More than 1.5 billion minutes of Channel 4 News content were watched on social media over 2020 (11% up year-on-year) and, in total across Facebook, YouTube, Twitter and Instagram, Channel 4 News had 9.5 million followers or subscribers by the end of 2020. 50% of its YouTube audience and 60% of its Facebook audience are under 35 years old.

When the country first went into lockdown in March, Channel 4's response epitomised our ability to act fast and to respond to what was happening, giving British viewers content that they wanted and needed as the pandemic spread and people were forced to make some of the biggest-ever adjustments to their lives overnight. This made us stand out strongly in a market where global streamers had a limited response to the pandemic.

Channel 4 boosted its News and Current Affairs output, regularly extending bulletins to as long as one hour and 45 minutes and adding additional programmes. Across the whole year, we provided a greater volume of news programming in peak-time than in any other year in our history.

Produced in the most challenging of circumstances – with the Channel 4 News team presenting live from their living rooms at times –

Fatima Manji



our enterprising journalism combined powerful storytelling with compassion and engaging reportage during the year. Ofcom's research found Channel 4's news provision to be the most trusted national TV source for information about the pandemic. It also continues to be the most highly regarded news provider in terms of its perceived independence from the government and from the influence of big businesses, leading other public service broadcasters by clear margins (see page 118).

The programme's comprehensive Covid-19 coverage, led by Health and Social Care Editor Victoria Macdonald and a team of regional journalists, was committed to exploring and scrutinising the government's handling of the pandemic, exposed injustices and charted the devastating toll of the Covid-19 tragedy on the UK.

Beyond Covid-19, key editorial highlights in 2020 included *Channel 4 News'* Detering Democracy investigation. Sparked by a leaked file from Donald Trump's 2016 Presidential campaign, the investigation revealed its strategy to deter 3.5 million black Americans from voting. It became an international news story. On social media, it drove more views than any other Twitter video from Channel 4 last year. "*Channel 4 News* unearthed perhaps the best American political story a British broadcaster has ever come up with," commented UK media columnist Raymond Snoddy.

Channel 4 News had an outstanding year delivering world-class original journalism, hard-hitting investigations, access-based films and a raft of exclusive news stories. The flagship news programme, broadcast at 7pm each weekday, recorded a 14% increase in viewing share during the year and also reached more young and diverse viewers, with 52% growth among 16-34-year-olds and 8% among ethnically-diverse audiences.

Channel 4 News' reputation extends far beyond the UK's shores: its international recognition included two International Emmy® Awards, a Peabody Award and a Rory Peck Award in 2020.

Channel 4 News
is the biggest news
programme on
social media in the
UK, with more than

9.5m
followers

Current Affairs and Documentaries

Beyond the news, we also responded with a slate of Factual and Current Affairs commissions that confronted the challenges of the pandemic head-on. Channel 4's mission was to keep viewers informed and connected; to help them navigate the extraordinary new circumstances; and to bring them the human stories of those on the frontline of the crisis and the scientists and experts racing to tackle it.

We commissioned 29 Current Affairs films and documentaries that addressed different aspects of the crisis, with a number of them ranking among our highest-rating shows of the year. Together, they reached 22.7 million people, or 38% of the UK population, including over one-quarter of all 16-34-year-olds and over one-third of ethnically-diverse viewers.

A Day in the Life of Coronavirus Britain was planned in two and a half weeks and shot in one day. The documentary brought together footage shot by over 3,000 members of the public to capture life in lockdown: the trials and tribulations of home-schooling; caring for people who are ill or self-isolating; working from home; police; nurses; doctors; binmen; supermarket shelf stackers; and the many acts of creativity and kindness (see case study, page 31)



Viewers described the show *NHS Heroes: Fighting to Save Our Lives* as “moving”, “eye-opening”, “important” and “informative”.

NHS Heroes: Fighting to Save Our Lives





We acted fast, commissioning 29 Current Affairs films and documentaries in response to the crisis; combined, these reached

38%
of the UK
population



Coronavirus: How to Isolate Yourself

Rated by viewers as the most relevant and interesting programme shown by Channel 4 during the pandemic, *NHS Heroes: Fighting to Save Our Lives* gave a glimpse into what it's like to be a doctor or nurse in the thick of the pandemic, as they filmed powerful and tearful testimonials from their smartphones. Viewers described the show as "moving", "eye-opening", "important" and "informative".

Coronavirus: Can You Avoid It? was Channel 4's most-watched Covid-19-related programme of the year. Presented by Dr Helen Lawal, the one-hour special explored how the virus is spread; it featured interviews with experts in virology, microbiology and epidemiology; and offered strategies for staying healthy. With audiences craving such practical and relevant advice, the show attracted 1.9 million viewers (an 8.6% share).

Other most-viewed pandemic programmes included *Coronavirus: How to Isolate Yourself*, with expert tips from Dr Xand van Tulleken and psychologist Kimberley Wilson on coping in lockdown; *Coronavirus: How Clean Is Your House?* on making sure your home stays virus free; and *Race Against the Virus: Hunt for a Vaccine* on how Covid-19 spread unstopably throughout the world, told through the eyes of key scientists.





Tackling global social issues

Starbucks and Nespresso: The Truth About Your Coffee was a painstaking and lengthy *Dispatches* investigation, conducted over several months, into Starbucks' and Nespresso's claims of not using child labour.

The film relied on cultivating sources and gathering documentary evidence and then involved undercover filming in remote and hostile parts of Guatemala. It proved conclusively that young children were used on farms that supply beans to both international corporations, contrary to their public statements. Not only were these children filmed picking for very long hours for minimal pay, but sometimes they were working in hazardous conditions.

Following our reporting, Nespresso launched its own investigation which confirmed that child labour in breach of international regulations was being used and pledged to eradicate the practice by introducing a "zero-tolerance" policy against child labour in its supply chains and a programme providing safe spaces for children during harvest season. Starbucks also launched an immediate investigation and pledged to increase third-party audits of coffee farms and pilot regional community and childcare centres.

Attracting
1.8m
viewers (an 8.5%
viewing share) was
*Trump's Coronavirus
Catastrophe*



*Dispatches: Starbucks and Nespresso:
The Truth About Your Coffee*

Dispatches and Unreported World

Channel 4's investigative journalism seeks to hold power to account in a duly impartial way. Last year, across 21 episodes, our award-winning current affairs programme *Dispatches* tackled important topics ranging from big tobacco and traveller crime to the Covid-19 jobs crisis and Hong Kong's battle for freedom.

The most-watched episode in 2020, attracting 1.8 million viewers (an 8.5% viewing share), was *Trump's Coronavirus Catastrophe*. As America prepared to go to the polls, Matt Frei gained extensive insider access to investigate the US President's policies, actions and decisions during the pandemic. On the other side of the Atlantic, reporter Anja Popp looked into stories of criminality and lawlessness, as well as prejudice and attack, in English Traveller sites in *The Truth About Traveller Crime*, the second-most-watched programme in the series with 1.7 million viewers (a 6.7% share). Closer to home, *The Great Charity Scandal* investigated how celebrities charged huge fees to support charities.

Our foreign affairs series *Unreported World* uncovered a range of extraordinary international stories. Marcel Theroux met the Japanese schoolgirls seeking pop stardom, performing for mostly older male fans, and travelled to Thailand to investigate the controversial Dhammakaya movement. Sahar Zand went to Kenya on the trail of the worst swarm of locusts in decades, while Adnan Sarwar followed migrants crossing the Alps risking hypothermia and death. In the most-viewed documentary in the series, Karishma Vyas visited California's 'TradWives', who abhor feminism, embrace submissiveness and want Trump re-elected.



Crime and Punishment



Barrymore: The Body in the Pool

Justice and injustices

A number of revelatory documentaries got the nation talking this year. At a time when television is becoming ever more global and content is designed to appeal to audiences around the world, these quintessential public service programmes stood out for being distinctly British and different.

Nineteen years after Stuart Lubbock was found dead at popular entertainer Michael Barrymore's home, *Barrymore: The Body in the Pool* forensically explored the full story behind one of Britain's most high-profile unexplained deaths.

This painstaking investigation re-engaged the public with a shocking failure of the justice system and led to the reopening of the police investigation. The 90-minute documentary was a hit on our streaming service All 4, helping it to achieve its best-ever first quarter of any year. On linear, the programme consolidated to 2.7 million TV viewers, double the slot average.

Channel 4's searing, BAFTA-nominated *Crime and Punishment* also returned in 2020, exploring the challenges faced by the police, prosecution and prison systems in the wake of cuts and limited resources across six hour-long episodes.

A tough watch, key themes included rape, domestic violence, anti-social behaviour, young offenders and historical sex abuse cases – with the films looking at the situations from multiple perspectives, including those of the women involved, the police and the Crown Prosecution Service. Viewers praised the series for its “absolutely amazing insight into our public services”.



Absolutely
amazing insight
into our public
services.





Meat the Family

Meat the Family reached 1.9 million viewers.

Changing behaviours

At the start of the year, Channel 4 broadcast a suite of provocative programmes during 'Veganuary' designed to stimulate debate about how our food is produced.

Meat the Family challenged viewers' attitudes to eating meat. In a unique experiment, four families were asked to care for farm animals at home for three weeks, at the end of which they were given a choice: spare their animals from slaughter or send them back into the food chain to be processed by a farm and then returned to them as meat.

The programme, which reached 1.9 million viewers, was described by viewers as "eye-opening" and as successfully demonstrating the moral dilemmas involved. It was Channel 4 at its best: noisy, entertaining and thought-provoking.

And it helped change people's behaviour: as a direct result of watching *Meat the Family*, one in five viewers claimed that they or a family member have given up meat altogether, 57% said they had spoken about the issues raised with other people, and 49% said the series made them think about how they could reduce their own carbon footprint.

Other programmes in the season included environmental campaigner George Monbiot's hard-hitting documentary *Apocalypse Cow: How Meat Killed the Planet*, while *How to Steal Pigs and Influence People* followed a unique community of vegan influencers.

Apocalypse Cow: How Meat Killed the Planet





1.6m

viewers watched
The Write Offs,
an 8.6% share
– up 23% against
the slot average

The Write Offs

Imagine not being able to read a book, use the internet or fill out a form. Five million people in Britain wake up to that reality every day, with one in five adults considered functionally illiterate. Too often condemned as “unintelligent”, they are frequently locked out of the job market and shamed by society.

The Write Offs, a two-part series hosted by Sandi Toksvig, offered a group of adults – aged as young as 22 all the way up to 66 – the chance to improve their literacy and transform their lives with 16 weeks of intensive, one-to-one tuition. Charting their struggles, courage and triumphs, this joyous show tackled an important and largely overlooked issue.

Watched by an average 1.6 million viewers (an 8.6% share – up 23% against the slot average), *The Write Offs* helped to challenge perceptions and lift the stigma around illiteracy. Nearly 90% of viewers said they were positively impacted by the series: more than one-third claimed it made them “think about the programme’s subject in new and different ways” and they had “discussed the programme with others”.





The Write Offs
helped challenge
perceptions and
lift the stigma
around illiteracy.



The Write Offs



Challenging preconceptions and shaping culture

At our best, our shows drive the national conversation and challenge preconceptions. Our ability to engage mass audiences and shape culture can bring positive changes to viewers' lives.

The School That Tried to End Racism was a bold and successful new series that followed a South London school's ground-breaking programme to combat prejudice by taking the controversial step of racially segregating 11-12-year-old pupils and encouraging them to talk freely about their attitudes to race. It performed exceptionally well for ethnically-diverse audiences (up 212% for volume and up 201% for share compared to other programmes in its slot) and reached 3.1 million of the population overall.

Its impact on viewers was strong, with nine in ten saying that the programme highlighted the importance of having open discussions about race, particularly from a young age, and seven in ten agreeing that it made them think about their own possible unconscious biases when it comes to race.

Our long-running documentary series *Born to Be Different* also returned to our screens. The programme has been following the lives of six children since 2003 as they grow up with different disabilities and, across the past two series, the programme has reached 4.3 million viewers.

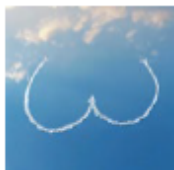
This is one of Channel 4's most impactful programmes in terms of challenging preconceptions about disability, and the latest series was no different, with 85% of viewers saying that *Born to Be Different* made them think differently about the challenges facing those with a disability. Amongst viewers with a disability themselves or with a disabled family, 95% agreed that the show showed disability issues in a true light and helped to challenge preconceptions around disability.



Pages 62–63



Pages 64–65



Pages 66–67



Pages 68–69



Pages 74–75

Reinvent

entertainment

Our remit encourages us to push creative boundaries, take risks and experiment through our programming and across our business, in ways that other broadcasters do not. We have tasked ourselves to continuously refresh what we do creatively, to find new ways of reaching audiences, new ways of delivering our content and new ways of working.





Jamie: Keep Cooking and Carry On

Reinvent entertainment continued

Channel 4 responded directly to Covid-19 and lockdowns with fast-turnaround shows and public messaging, and with a speed and focus on UK viewers that made Channel 4 more responsive than any other broadcaster. All of this happened because of our remit to take risks and experiment.

Richard & Judy: Keep Reading and Carry On



The Stay At Home Academy

Covid-19 required us to act quickly to adapt our schedule and programmes to address the impact that the pandemic was having on audiences across the country. Few, if any, broadcasters moved as quickly as Channel 4 to bring to screen a range of programmes designed to entertain viewers having to newly adapt to life under lockdown.

Producers and Commissioners showed huge inventiveness in finding ways to make shows at reduced tariffs and with Covid-19 restrictions, with significant effort going into keeping our major shows on air – or producing them as soon as conditions allowed. This was rewarded with record audiences for many of Channel 4's biggest titles.

Just two days after the Prime Minister announced that people must stay at home, we announced our 'Stay At Home Academy': a slate of shows with the mission to help audiences navigate through the crisis and stay connected with the rest of the country, and to help families stay occupied in isolation and, most importantly, keep their spirits high.

Produced at incredible pace, the Stay At Home Academy programmes were anchored by some of Britain's most-loved presenters: Grayson Perry creating art with the whole nation (*Grayson's Art Club* – see case study, on next page); Kirstie Allsopp sharing craft ideas for all the family (*Kirstie: Keep Crafting and Carry On*); Jamie Oliver helping people cook with store cupboard essentials (*Jamie: Keep Cooking and Carry On*); Richard Madeley and Judy Finnegan revealing their best reads (*Richard & Judy: Keep Reading and Carry On*); and Dick and Angel Strawbridge offering homemade help (*Escape to the Chateau: Make Do and Mend*). Combined, they reached 21.1 million viewers, a substantial 35% of the population.

Among viewers of the programmes, there was very strong agreement (82%) that Channel 4 is always trying something new. Just under two-thirds agreed that Channel 4 captured the spirit of the country with its 'Stay At Home' lifestyle programming, and the same proportion agreed that "you wouldn't find programmes like this on services such as Netflix and Amazon".



Escape to the Chateau: Make Do and Mend

Kirstie: Keep Crafting and Carry On

Grayson's Art Club

During the first lockdown, Grayson's Art Club saw Turner Prize-winning artist Grayson Perry encourage the British public to pick up their paint brushes and unleash their creative side. The show truly captured the zeitgeist of lockdown Britain better than any other show last year.

The six-episode series, hosted from Grayson's own studio, featured masterclasses and top tips on how to get started with art. Grayson and his wife, psychotherapist and author Philippa Perry, talked to a string of famous faces, such as comedian Jenny Eclair and sculptor Antony Gormley, to discover their creative inspirations. Viewers were encouraged to take part in an array of artistic challenges, from drawing a portrait of a family member or housemate to depicting the view from their windows.

Grayson's Art Club was one of the best-performing series from Channel 4's Stay At Home Academy, attracting more than one million viewers per episode and causing a spike in online sales for craft specialists. Nearly 10,000 people submitted their art to Grayson and Philippa – a selection of which went on display at Manchester Art Gallery, providing a visual record of Britain in isolation.

Viewers described the show as "positive", "therapeutic", "stress releasing", "inclusive" and "authentic". It was hailed by *The Daily Telegraph* as "one of the most joyous bits of television made during lockdown, a tonic amid all the gloom".

Grayson's Art Club was commissioned for a second series in 2021, featuring a host of celebrities from across the UK.



One of the most joyous bits of television made during lockdown, a tonic amid all the gloom...

The Daily Telegraph

Grayson's Art Club





Vital public health messaging

As a free-to-air broadcaster available in all households, Channel 4 has a reach and trusted relationship with audiences that is unique to the PSBs, and we were well placed to communicate vital public health information and advice during the crisis.

After lockdown was announced, we activated a 'Stay At Home' digital on-screen graphic that appeared on screen – all day and every day – during Channel 4's programming across our channels. The message was later changed to 'Stay Safe' from mid-May, to reflect the next phase of lockdown. The first public service broadcaster to do this, it was a very simple but powerful way to remind viewers to keep vigilant, and these messages succeeded in reaching 79% of the UK population.

Even more inventive, we showed a series of ten-second, fly-on-the-wall-style films featuring celebrities carrying out mundane tasks at home, from Jon Snow ironing his ties to Big Narstie mowing the lawn and Scarlett Moffatt pairing her socks. Targeted at hard-to-reach young male viewers, they further amplified the important public health message to stay home and save lives. In addition, a cheeky Channel 4 brand film encouraged viewers to stay at home featuring the voice of comedian Matt Berry crying, "Britain! When was the last time you did something that really mattered, with your arse? We need your buttocks. No ifs. Just butts. Because we'll beat this faster, clenched together, on the sofa."

Over the summer, as the country grappled with important social issues and moved out of lockdown, we revealed a Stay Safe #BeMoreRainbow film to remind viewers of the need to carry on being community-minded, to be kind to each other and to stay safe.

Produced by our in-house creative agency 4Creative, the film featured an animated 80s-style sparkly talking rainbow, who recounted how busy he was representing both the NHS and Pride while also standing up for all communities during the Covid-19 pandemic. The trail reached 45% of the UK population, with two-thirds of viewers agreeing that campaigns like these brought people together.





#StayAtHome campaign



We Need Your Butt campaign

#StayAtHome campaign



Britain! When was the last time you did something that really mattered, with your arse? We need your buttocks. No ifs. Just butts. Because we'll beat this faster, clenched together, on the sofa.

We Need Your Butt campaign





It's the same old
Bake Off... familiar,
comforting, lovely.



The Great British Bake Off

11.5m

viewers – the final
was the highest-
rating individual
Channel 4 episode
since modern TV
viewing records
began in 2002

The Great British Bake Off

"It's the same old Bake Off," said judge Prue Leith at the start of season 11. "Familiar, comforting, lovely."

Filming *The Great British Bake Off* during a pandemic required the production team to entirely rethink its approach. To make sure the series could be made safely – and would look as familiar as possible – the cast and crew were tested three times before filming began, before going on to live together in a self-contained 'biosphere' bubble at Down Hall Hotel in Essex for the six-week shoot. All of this meant that Paul Hollywood's famous handshake didn't have to be replaced with an elbow bump, and that viewers could continue to find reassuring warmth and nostalgia in the Bake Off tent – a place where the worst thing that can happen is a pineapple upside-down cake ending up on the floor.

It was the escapist entertainment and sugar-coated version of reality that the nation craved. The season was watched by an average of 10.6 million viewers and a 40% share of the audience, making it Channel 4's second-biggest series ever, after *A Woman of Substance* in 1985. Drawing 2.5 million young viewers, it was also the second-highest-rating series on TV for 16-34-year-olds this year, behind ITV's *I'm a Celebrity... Get Me Out of Here!* The programme has always been comfort food but, at times this year, it almost transcended television, "said *The Guardian*. "It felt like a hug. It felt like medicine."

And with 11.5 million viewers, the final was the highest-rating individual Channel 4 episode since modern TV viewing records began in 2002, and the most popular *Bake Off* final ever for 16-34-year-olds across all channels. Viewers described it as "a little escape from reality", "therapeutic" and "the perfect antidote to 2020". "Loving #GBBO. They just need to make a vaccine out of it and save the world."



Best On Demand TV Service

2020 Edinburgh TV Festival Awards





Deadwater Fell



Record streaming growth

With over 14,500 hours of content, All 4 is the UK's biggest free streaming service. Viewers turned to All 4 in record numbers in 2020, surpassing one billion views for the first time ever. Across the year, All 4 reached a total of 1.25 billion views (26% up year-on-year), of which 49% were from 16-34-year-olds. All 4 now has 24 million registered viewers, an increase of 11% year-on-year.

Digital viewing made up 11.3% of Channel 4 viewing as viewers move to a digital world. Streaming growth is at the heart of our new Future4 strategy, which aims to double All 4 viewing by 2025.

When on-demand viewing started to accelerate during the first lockdown, we focused on ensuring operational resilience on the All 4 platform to ensure a high-quality and consistent viewer experience, with some infrastructure enhancements to improve the service's reliability.

While Covid-19 and our swift cost-saving measures curtailed some of our plans to develop the All 4 platform, we rolled out a number of improvements this year to make it a more personalised and targeted experience. We redesigned and rebuilt the 'big screen' experience from the ground up to ensure that it is faster and more modern, and to facilitate future enhancements. We significantly increased the number of shows available in HD, with most of the catch-up and most-watched archive now available in HD. And we started to roll out new personalisation features, including smarter recommendations, and tested a new preference centre to allow viewers to identify their most-loved shows.

Our paid-for service, All 4+, which allows viewers to watch TV shows without ads, continued to grow, with the introduction of in-app payments on iOS and new content in the autumn.

Over the year, the All 4 platform significantly increased both its total reach and its share relative to commercial competitors. During the second quarter of 2020, at the time of the first lockdown, All 4 experienced similar rates of growth to Netflix.

Growth has been fuelled by our deep archive of Channel 4 originations – which includes popular shows such as *Friday Night Dinner*, *The Inbetweeners* and *Scrubs* – and exclusive, bingeable box-sets such as *ER*, *The West Wing*, *Married at First Sight Australia* and *Buffy the Vampire Slayer* (many of which had their original UK transmission on our channels).

Simulcasting of hit shows such as *Gogglebox*, *The Great British Bake Off* and *Hollyoaks* also strongly contributed to All 4's growth. Viewing to new titles – including hits such as *Deadwater Fell*, *Murder in the Outback*, *Barrymore: The Body in the Pool* and *The Great House Giveaway* – further drove up views during the year.

Driven by its unrivalled content library and our continued innovations, All 4 was recognised by the industry by winning 'Best On Demand TV Service' at the 2020 Edinburgh TV Festival Awards.



Alternative Christmas Message

11bn

views of our content on
social media platforms and
the creation of 4Studio

Deepfakes and misinformation

Channel 4's *Alternative Christmas Message* 2020, usually a message of hope and unity, was an innovative but stark warning about how advanced technology is enabling the proliferation of misinformation and fake news in a digital age.

Created by Oscar-winning VFX studio Framestore, the four-minute film featured renowned actress Debra Stephenson as a 'deepfake' Queen Elizabeth II on screen. It was one of Channel 4's most pioneering and challenging programmes of the year.

Deepfake technology can be used to create convincing (yet entirely fictional) video content of people in the public eye and, therefore, can be used to spread misinformation. With such advancements in technology enabling a slick and believable presentation of misinformation across all areas of life – from politics to public health – it has never been more important for viewers to seek out trusted sources, such as Britain's regulated public service broadcasters.

Through the film, we created a sequence that was entertaining enough that it would be seen by a significant number of people while spreading the very real message that images cannot always be trusted. The broadcast averaged 1.2 million viewers, which was double the volume of 2019's *Alternative Christmas Message*.



Alternative Christmas Message

4Studio: reaching new audiences

2020 was a transformative year for Channel 4's social media ambitions, with more than 11 billion views of our content on social media platforms and the creation of 4Studio. This department was established to embody the Future4 strategy by fostering digital-first talent, diversifying revenue streams and driving digital education across the business – all with a clear focus on reaching young audiences wherever they are consuming content.

The 49-strong 4Studio team is based in Leeds and the surrounding Yorkshire area, supporting our vision to establish our new National HQ as a hub of digital excellence.

During the year, we signed landmark agreements with key social platforms such as YouTube and Snapchat (see next page). These multi-faceted agreements enable us to work in close partnership with these major platforms to drive audience growth and enable us to monetise our content.

4Studio has data at its heart, and much of the year was spent building a data warehouse which enables us to understand the holistic impact of the content we publish on social platforms. Supported by a team of Social Analysts, this ensures that our digital strategies become as agile as the platforms we publish upon.


We diversified our social media strategy in a number of ways. Several digital original series were commissioned to entertain and educate young, diverse audiences online via series such as *True Stories* and *The B@it*, as well as one-off documentaries such as *The Boy Who Climbed The Shard*. The introduction of Channel 4's branded entertainment proposition also saw the creation of brand-funded digital commissions such as *Mission: Accessible*, to critical and commercial success. Through both types of digital commissions, we supported our core PSB remit and diversified new revenue streams.

Whether embedding a 4Studio Social Producer on *Steph's Packed Lunch* to help engage audiences, creating an exclusive behind-the-scenes special to support our *Alternative Christmas Message*, supporting and amplifying our successful public health Covid-19 campaigns, or using data to inform digital-first content commissions, 2020 was a year of great experimentation and success on social media.



Rock and Merry





124m
social engagements
achieved across
Facebook, Twitter,
YouTube and Snapchat

Scaling through partnerships

Channel 4 has always believed in the power of partnerships and – as an organisation without any in-house production capacity, which relies entirely on external suppliers – our model makes us a naturally networked business. Being open to partnering with other platforms gives us the best chance of serving the widest audience possible. It is a complex ecosystem and striking the right partnerships remains key for us to be successful.

In 2020, we expanded our social partnerships to further build on our social reach with great success. Channel 4 brands achieved 11 billion social views and 124 million social engagements across Facebook, Twitter, YouTube and Snapchat.

A major new partnership with Snapchat was agreed in June for upwards of 300 short-form excerpts and edits of Channel 4 content to be posted on Snapchat's Discover platform over a 12-month period. In 2020, Channel 4 content saw over 44 million unique global viewers on Snapchat from 25 shows including *Tattoo Fixers*, *Hollyoaks*, *How To Get Rich Quick*, *Celebs Go Dating* and *Divided America*.

In addition to social platforms, we have continued to work on securing more innovative partnerships to increase Channel 4's reach and partner strategically with services and devices that increase the scale of All 4. We will also continue to work with other public service broadcasters to highlight the importance of prominence and look at how we position our unique PSB content in an increasingly IP-delivered world.



£20m

Indie Growth Fund has a remit to generate commercial returns for Channel 4

Investing in the future

The Indie Growth Fund has a remit to generate commercial returns for Channel 4 by investing in and helping to grow early-stage production companies across the UK. All profits from the fund's ventures are invested back into the delivery of Channel 4's public service remit.

Now six years old, the Indie Growth Fund has invested in 19 companies to date, with eight exits so far and 11 companies remaining in the fund by the end of 2020. This year, the fund invested in two new companies: Cardiff-based indie Yeti Media, and Proper Content, which produces engaging factual programmes with social purpose. There were two successful exits: Whisper Films and Eleven Film were both sold to Sony Pictures Television.

Sitting alongside the Indie Growth Fund, 2020 saw the launch of our Emerging Indie Fund, which is specifically designed to help small, new or emerging indies outside of London break through with support at key stages of early growth. Announced in December, 11 production companies from across the UK benefited from the inaugural fund. They received financial assistance for slate development, and continue to receive mentoring sessions and expert advice. The Bristol and Glasgow Heads of Hub granted discretionary awards to five further companies.

The Commercial Growth Fund was rebranded as Channel 4 Ventures in 2020. The fund invests in high-growth digital consumer businesses, offering media airtime in exchange for equity. This fund has 17 active equity investments that had a balance sheet value of £16.5 million at 31 December 2020 (2019: £20 million).

Channel 4 Ventures made five new investments this year. They included what3words, a location technology providing an easy way to identify precise locations; DeadHappy, a challenger brand in life insurance; and B-North, a firm building a regional SME lending bank for the UK.

Global Format Fund

In 2020, as part of our Future4 strategy, we launched a new Global Format Fund – which will be investing £30 million over coming years – to invest in new British-created and produced content formats with global potential. We will partner with a range of producers to create content focused on delivering both UK audience appeal and potential for exploitation in international territories. The fund is focused on those genres with the greatest potential for global format success, including Daytime, Factual Entertainment, Features, Entertainment, Documentaries and Specialist Factual.

Using a research and development approach, the Global Format Fund guarantees minimum runs and recommissioning triggers upfront, as well as minimum levels of marketing support. It leverages Channel 4's creative, marketing and audience insights to support producers with their international exploitation of the format. Within the UK, content created by the Global Format Fund is subject to the current Terms of Trade.

Ramy



Metrics

Channel 4's commitment to innovation extends across the full range of its creative output on TV and digital, while off-screen it spans the geographical spread of its supplier base and the diversity of voices brought to the screen.

Engaging the audience

In 2020, television viewing trends were heavily impacted by external factors – more so perhaps than in any previous year in Channel 4's history. Complicating matters, these factors pulled in different directions. On the one hand, when the Covid-19 pandemic reached our shores and everyone was forced to stay at home, demand for trustworthy news and high-quality entertainment shot up, and Channel 4 was well-positioned to benefit. On the other hand, lockdown restrictions meant that TV production was curtailed across the industry, and reduced advertising revenues led to reduced budgets and fewer new programmes to attract viewers. And meanwhile, the existing trend for viewing to migrate from traditional TV channels to video-on-demand ('VoD') services accelerated this year – to the benefit of our streaming service All 4 but putting pressure on our linear channels.

Even with fewer new commissions and increased competition from VoD services, when combined with our strong creative response, the overall net impact of these external factors was mostly positive for Channel 4. Testament to the quality and value of our output – including our evening news and a range of fast-turnaround lockdown programmes – we enjoyed increases in both the total volume of viewing to our digital TV portfolio and in its viewing share, as well as a surge in viewing to All 4 and big increases in consumption of our news programming. Alongside these positive trends, there were areas where viewing declined: there were small reductions in portfolio share by ethnically-diverse audiences and in overall viewing to E4.



Hair Power: Me and My Afro



The Big Narstie Show



The Yorkshire Jobcentre

Engaging the audience

10.1%

viewing share across the TV channel portfolio

Up 2%

on last year

TV viewing share

In a year in which viewers turned in increasing numbers to the PSBs for news and entertainment, Channel 4 increased its TV portfolio viewing share year-on-year for the first time since 2011. Total viewing was 10.1% across the TV channel portfolio in 2020, an increase of 0.2 percentage points (equivalent to a 2% rise).

The main channel's share rose by 0.1 percentage points to 5.9% (a rise of 3%), taking it back to the same level as between 2014 and 2018. This means that, apart from the 0.1-point dip in 2019, share has held steady since 2014 at 5.9% – an impressive record given the increased competition in the linear TV space and the migration of younger viewers to video-on-demand services.

In 2020, the main channel's share grew by 7% year-on-year amongst 16-34-year-olds (to 8.6%), its highest figure since 2011. Share in the peak-time hours of 7-11pm was 10.7%, the highest figure since 2007 amongst this demographic. For ABC1 adults, viewing share rose by 2% to 6.6%, the highest figure since 2017; and the 7-11pm share was 8.6%, the highest figure since 2008.

Turning to the digital channels, the viewing share figures show little year-on-year variation in their performance, with E4, Film4 and the Box music channels holding steady, while More4's share rose by 0.1 percentage points. Looking at the exact figures, Film4 and E4 experienced declines in viewing, of 2% and 5% respectively. E4's share has fallen gradually since 2017 and is now 0.4 points below its 2016 level; this may be attributed to increased competition for young audiences amongst digital channels – E4 has not had any new hits of the scale of ITV2's *Love Island* over this period. The other digital channels enjoyed growth in their viewing share in 2020: More4 was up by 8%, with a range of daytime shows (such as *Four in a Bed* and *Find It, Fix It, Flog It*) performing well, while the Box music channels' share rose by 24%.

Channel 4 portfolio share as a percentage of total TV viewing

			Total
2020	5.9	4.2	10.1
2019	5.8	4.1	9.9
2018	5.9	4.3	10.2
2017	5.9	4.6	10.5
2016	5.9	4.6	10.5

■ Channel 4 (main channel) ■ Digital channels

Source: BARB

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

					Total
2020	1.5	1.1	1.3	0.3	4.2
2019	1.5	1.0	1.3	0.3	4.1
2018	1.6	1.1	1.4	0.2	4.3
2017	1.8	1.1	1.4	0.3	4.6
2016	1.9	1.1	1.4	0.2	4.6

■ E4 ■ More4 ■ Film4 ■ Box/4Music

Source: BARB

Engaging the audience

73.0%

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

Down 2.8pts

on last year

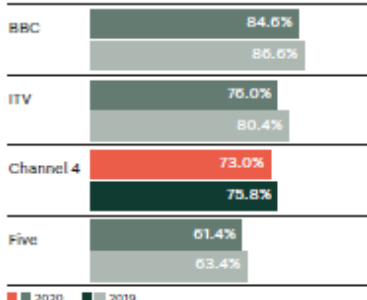
Audience reach

Channel 4 is the third-biggest UK broadcaster in terms of audience reach, behind only the BBC and ITV. In 2020, almost three-quarters (73.0%) of individuals in homes with a TV watched Channel 4's TV channels for at least 15 consecutive minutes each month on average (live or catching up within a week of transmission). With viewing continuing to migrate to streaming services (including the broadcasters' own streaming services, which are not reported in this metric), overall TV reach fell by 2% year-on-year. The main PSBs all suffered reductions in the reach of their traditional TV channels – as they did in the previous three years – with declines ranging from 2.0 percentage points (for the BBC and Channel 5) up to 4.4 points (ITV). At the lower end of this range of PSB declines, Channel 4's reach fell by 2.8 percentage points year-on-year (equivalent to a 3.7% fall).

These declining reach figures do not paint a complete picture of what was a strong year for TV overall and for Channel 4 in particular. The total amount of traditional viewing – measured in terms of the volume of viewers across the day – rose in 2020 for TV overall, by 6% for all viewers. It rose by even more for Channel 4, by 7% across the portfolio; and by more still for the main channel, whose volume of viewing was up by 8%. Moreover, the reported decline in reach only covers traditional viewing and is offset by the continued increase in video-on-demand viewing to Channel 4 (see 'On-demand viewing' on page 87).

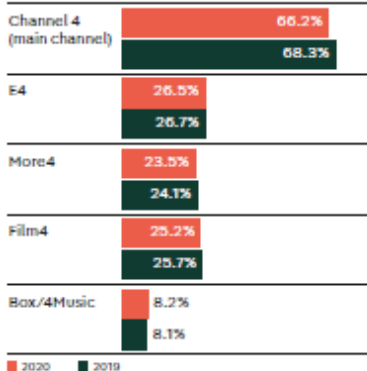
Turning to the individual channels in Channel 4's TV portfolio, the main channel's reach fell by 2.1 percentage points year-on-year (less than 2019's 2.8-point drop). Looking at the trends in more detail reveals notable variations across the year: at the time when audiences had the greatest need for reliable information and entertainment, during the lockdowns, Channel 4's performance was especially strong: during the first lockdown in March and April, the main channel's reach was up by 1% relative to the same months in 2019. Of the digital channels, E4, More4 and Film4 all experienced small annual declines in reach, of less than one point, this year.

Average monthly reach of public service broadcasters' 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.

Engaging the audience

1,253m

programme views
initiated on demand

Up 26%

on last year

On-demand viewing

The arrival of lockdown accelerated existing trends in television viewing in 2020, most notably the rise in consumption of TV programmes via on-demand services, especially amongst younger audiences. Channel 4 continued to respond to these trends, for example by making more new TV series available to binge as box-sets on its streaming service, All 4, as well as investing in exclusive content for the platform (see 'Reinvent entertainment' chapter on page 60).

This resulted in record growth in on-demand viewing of All 4 content this year as total views passed the 1 billion mark for the first time. The number of programme views initiated through All 4-branded platforms – which include PCs, smartphones, tablets, games consoles and connected TVs – rose by 26% to reach 1.25 billion. With more than 250 million more views than in 2019, this is the biggest ever increase in absolute terms for this metric, and the joint-highest growth rate in percentage terms since 2010.

As was the case for the last two years, the strongest area of growth in 2020 was on 'big screen' devices, i.e. connected TVs and streaming devices that plug into TVs, with viewing up by more than 50%. Within this group, individual platforms on which growth was especially high included Freeview Play and tvOS (Apple TV).

On-demand viewing (million)

2020	1,253
2019	995

Source: Channel 4.

Engaging the audience

8.9%

portfolio viewing share amongst ethnically-diverse audiences

Down 3%

on last year

5.2%

main channel viewing share amongst ethnically-diverse audiences

Up 2%

on last year

Share among hard-to-reach audiences – ethnically-diverse

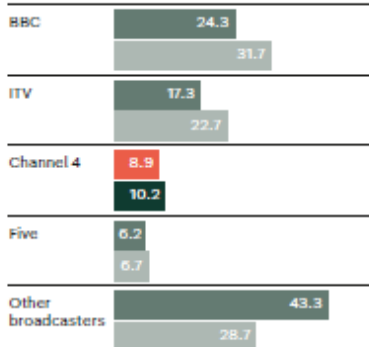
As part of Channel 4's remit to make programmes that appeal to people from different cultural backgrounds, it is important for the broadcaster to attract ethnically-diverse audiences. While the PSBs all have lower overall viewing shares amongst ethnically-diverse audiences than white audiences across their portfolios, Channel 4 strives to make this differential as small as possible.

In 2020, Channel 4's TV portfolio attracted an 8.9% viewing share amongst ethnically-diverse audiences. The corresponding share amongst white audiences was 10.2%, giving a viewing share differential between ethnically-diverse and white audiences of 13%. Relative to the other PSBs, the BBC and ITV had higher viewing share differentials, of 23% and 24% respectively, but for the first time this year Channel 5's was lower. Its 7% differential reflected strong growth in ethnically-diverse viewing to its digital TV channels (by as much as 86% for the Paramount Channel, which assumed the EPG positions vacated by 5Spice in January 2020).

Channel 4's TV portfolio viewing share amongst ethnically-diverse audiences fell by 0.3 percentage points year-on-year. In percentage terms, this was a 3% decline, and contrasts with the corresponding 2% increase amongst white audiences. As a result, the 13% differential is five percentage points higher than last year's figure, and sits above the 4% – 11% range achieved over the prior decade (between 2010 and 2019).

The widening of the differential in viewing between ethnically-diverse and white audiences was driven by Covid-19-related factors in 2020. During the lockdowns, there was a general migration of viewing to the main PSB channels and to the dedicated news channels, particularly during daytime. This benefited Channel 4's main channel, whose viewing share amongst ethnically-diverse audiences rose this year, by 2%, to 5.2% – its highest level since 2013. But Channel 4's digital channels suffered from this migration, most notably E4, whose viewing share fell this year, in large part due to the reduced number of episodes of *Hollyoaks* – the soap, which performs disproportionately well amongst ethnically-diverse viewers, contributed to a huge 23% decline in ethnically-diverse viewing to E4 this year, versus a much smaller decline of just 3% amongst white audiences.

Public service broadcasters' portfolio viewing shares amongst white and ethnically-diverse audiences as a percentage of total TV viewing by those audiences (2020)



■ Ethnically diverse ■ White

Source: BARB

Engaging the audience

15.7%

portfolio viewing share amongst 16-34-year-olds

Equal

with last year

8.6%

main channel viewing share amongst 16-34-year-olds

Up 7%

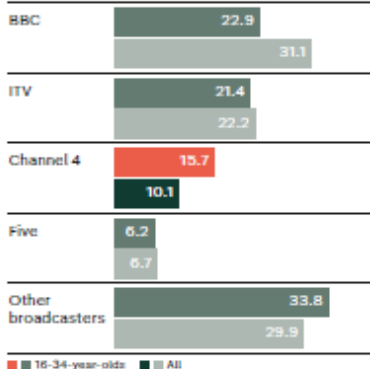
on last year

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

Channel 4 is unique amongst the PSBs in that its TV channels attract a disproportionately large share of viewing amongst hard-to-reach 16-34-year-olds. Across its TV channel portfolio, Channel 4's viewing share amongst 16-34-year-olds was 15.7% in 2020, a figure that is 55% higher than the corresponding all-audience share of 10.1%. Conversely, the other PSBs' 16-34 viewing shares were below their all-audience shares across their portfolios – by amounts ranging from 4% (for ITV) up to as much as 26% (for the BBC, which has an especially strong appeal to older audiences).

Channel 4's 55% viewing differential was slightly lower than the corresponding 2019 figure of 59% (a drop of four percentage points). While viewing amongst 16-34-year-olds held steady year-on-year (0% change in share), across all audiences it rose by 0.2 percentage points (equivalent to 2%) year-on-year, leading to the small decline in the ratio of 16-34-year-olds to all-audience viewing share.

Public service broadcasters' portfolio viewing shares amongst 16-34-year-olds and all audiences as a percentage of total TV viewing by those audiences (2020)



Source: BARB

Engaging the audience

3.9%

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

Down 17%

on last year

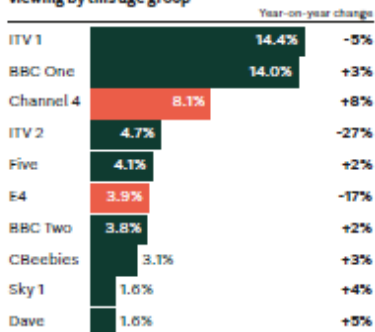
Most popular channels for young viewers

Viewing to Channel 4's channels by 16-34-year-olds was significantly impacted by the scheduling changes that resulted from Covid-19. Youth-focused channel E4 was negatively affected, primarily due to the pause in filming of *Hollyoaks* due to Covid-19 restrictions, as a result of which the number of episodes transmitted was cut back for most of the year, with just 162 new episodes airing this year compared to 256 in 2019 (a 37% reduction). At the same time, as with other age groups, 16-34-year-olds turned to the main channel in bigger numbers this year for its news and mainstream entertainment, boosting its viewing share. These effects cancelled each other out across Channel 4's TV portfolio, with overall viewing share by 16-34-year-olds holding steady year-on-year.

E4 was hit hard by the reduced volume of *Hollyoaks* episodes; after a record 16-34 share in 2019, viewing to the soap fell by 19% this year, to its lowest share in five years. 2020 was also the first year in which there were no new episodes of popular US comedy *The Big Bang Theory*, following its finale in 2019. As a result, overall viewing to E4 by 16-34-year-olds fell by a substantial 17%, to 3.9%. This fall, of 0.8 percentage points, gave E4 its lowest 16-34 viewing share in the last decade. Nonetheless, it remained the second-most-watched digital TV channel in the UK for 16-34-year-olds (behind only ITV2, whose own share fell by 27% after the cancellation of 2020's *Love Island* due to the pandemic). Across all channels, E4 fell behind Channel 5 (16-34 share: 4.1%), making it the sixth most popular TV channel overall for this audience (of the main PSB channels, it remained ahead of BBC Two).

Conversely, Channel 4's main channel enjoyed its biggest year-on-year increase in viewing by 16-34-year-olds in the last decade, rising by 8%. The resulting share, of 8.1%, was the highest figure since 2013. This increase, equivalent to 0.6 percentage points, offset most of the declines suffered by E4 this year. The main channel remains the third most popular TV channel for 16-34-year-olds, behind only ITV and BBC One, and performed more strongly in terms of its growth than either of those channels (ITV's 16-34 share fell by 5% year-on-year, while BBC One's share rose by 3%).

Viewing share for the top 10 channels amongst 16-34-year-olds as a percentage of total viewing by this age group



Source: BARB

Engaging the audience

11%

of viewing to Channel 4 News programmes on the main channel in 2020 accounted for by viewers aged 16–34

Up 1pt

on last year

15%

of viewing to Channel 4 News programmes on the main channel in 2020 accounted for by ethnically-diverse viewers

Down 1pt

on last year

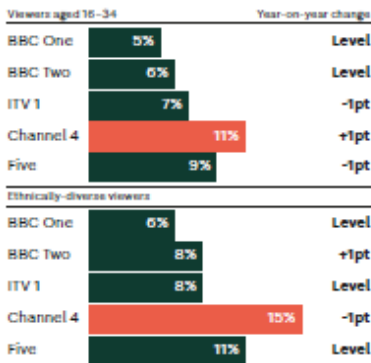
Viewing to national news

Channel 4 News maintained its uniquely strong appeal to young and ethnically-diverse audiences in 2020. 16–34-year-olds accounted for 11% of its audience this year, higher than the corresponding viewer profiles of the other main PSB channels' national news programmes, which ranged from 9% (Channel 5) down to as little as 5% (BBC One).

Channel 4 News' profile of 16–34-year-olds was one percentage point up year-on-year, recovering slightly from the low point reached in 2019 following years of gradual decline as young audiences migrate faster than other age groups to digital and social media for their news consumption (see 'Reach of Channel 4 News', on page 92 for its growth on other platforms). While the increase is small, Channel 4 was the only main PSB channel to increase its 16–34 profile for its national news programmes in 2020, and it is the first time since 2010 that it has recorded a year-on-year rise.

Channel 4 News' appeal is more marked, and more stable, for ethnically-diverse audiences. This group represented 15% of its total viewing in 2020. While this is one percentage point down on 2019, it remains at the top end of the 11% – 16% range achieved over the last decade. Channel 4 remains the only main PSB channel whose news viewing by ethnically-diverse audiences matches or even exceeds this group's representation in the UK population (estimated to be around 13% – 14%); the other channels' news programmes had ethnically-diverse viewing profiles in the range of 6% – 11%.

Percentage of viewing to national news programmes on the main PSB channels in 2020 accounted for by 16–34-year-olds and ethnically-diverse viewers



Source: BARB.

Engaging the audience

9.8m

people watched
Channel 4 News each
month

Up 25%

on last year

Reach of Channel 4 News

In 2020, an average of 9.8 million people watched Channel 4 News for at least 15 consecutive minutes each month, across the main weekday evening programme, as well as the daytime and weekend news bulletins on the main channel. This is a massive 25% increase on the 2019 figure – by some margin, the biggest year-on-year rise since this metric was first reported in 2008. After a period of gradual decline over the last decade as audiences migrated to digital and social media for their news, reach jumped back to its highest level since 2011. While the other PSBs also saw growth this year, Channel 4 News enjoyed bigger gains than the other main national news programmes – on BBC One, ITV and Channel 5 – whose corresponding rises in average monthly reach ranged from 10% (BBC One) down to 4% (Channel 5).

Looking at the main weekday evening programme specifically (which usually airs at 7pm), for the second year running it enjoyed significant increases in its viewing share, rising by 14% year-on-year to 4.2% of viewing – its highest level since 2008 (when it was 4.3%), a hugely impressive performance given the increased competition in the digital space since then. With overall TV audiences up this year, its absolute viewing figures rose even more in 2020, by 18%, to 768,000.

Growth was also very strong amongst key demographic groups. Amongst ethnically-diverse audiences, the main weekday news programme's share rose by 8% this year, to 8.0%, its highest figure since ethnically-diverse audiences were added to the BARB measurement system in 2010. ABC1 adult share also rose by 8%, to 5.6%, the highest figure since 2007. And share amongst 16-34-year-olds increased by a huge 52%, to 4.6%, the highest level since 2010.

The figures above exclude the programme's growing presence on digital and social media. A highlight in 2020 was Channel 4 News' investigation into Trump's campaign data, which drove more views than any other Twitter video from Channel 4 across the year. Overall growth was particularly strong on YouTube, with video views rising by 50% to 280 million. This year, Channel 4 News expanded its touchpoints among younger audiences by launching on Snapchat with new shows such as *Divided America* and *Rated*. In the month of the US election, Channel 4 News' Snapchat show *Divided America* saw over 6.1 million global unique viewers. Across the main social platforms (Facebook, YouTube, Twitter, Instagram and Snapchat), Channel 4 News had 9.4 million followers/subscribers by the end of 2020.

Engaging the audience

18pt

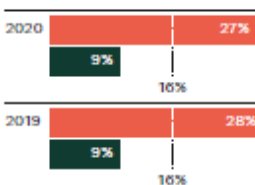
lead over average for other channels for catering for audiences that other channels don't cater for

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

In 2020, 27% of respondents selected Channel 4's main channel over the other main PSB channels as catering for audiences other channels don't cater for. This gave Channel 4 a lead of 18 percentage points over the average of the other main PSB channels.

There were slight declines in Channel 4's scores year-on-year. The proportion of people selecting the main channel, its lead over the average of the other main PSB channels, and its lead over the next-highest-scoring channel all fell by one percentage point. Nonetheless, this metric remains stable: Channel 4's average lead over other channels is at the upper end of the 10-22-point range it has occupied over the last decade.

Caters for audiences other channels don't cater for



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

Down 1pt

on last year

794m

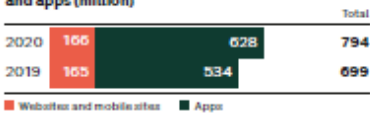
total visits to Channel 4's websites, mobile sites and apps

Total visits to Channel 4's websites and apps

In 2020, Channel 4's websites and apps attracted a record total of 794 million visits, after increasing by 14% year-on-year – the highest ever total for this metric. The dedicated All 4 app – available on a wide range of smartphones, tablets and connected TVs – accounted for 79% of total visits (up from 76% in 2019), with the remaining 21% being visits to Channel 4's websites (including mobile sites).

The growth this year was driven primarily by visits to All 4 apps, which increased by 18%. Visits to Channel 4's websites were also up, but only by 1%.

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



■ Website and mobile sites ■ Apps

Source: Channel 4.

Up 14%

on last year

Engaging the audience

73%

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

Equal

with 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). Network originations are important as Channel 4 delivers its public remit for the most part through its investment in original content: these are the programmes over which it has creative and editorial influence in partnership with the production companies that Channel 4 commissions to make them.

In 2020, network originations accounted for 73% of total viewing to the main channel, E4 and More4. Coming after six years of consecutive growth, the proportion of network originations held steady this year. Over the last two years network originations have represented a higher proportion of viewing to these channels than at any time since this metric was first reported in 2008, and network originations' share of viewing is ten percentage points more than in 2013.

Turning to the volume of programming in the schedules, network originations represented 62% of all hours across the schedules of the main channel, E4 and More4 in 2020, one percentage point more than last year.

A comparison of these viewing and output figures shows that network originations continue to be responsible for a disproportionately high share of overall viewing to the main channel, E4 and More4, outperforming acquired programmes: in 2020, they generated a higher share of viewing (73%) than their corresponding share of the volume of programming (62%).

Please note that:

1. The Film4 and 4Music/Box channels are excluded from this metric as their output is primarily made up of acquired feature films and content.
2. 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.

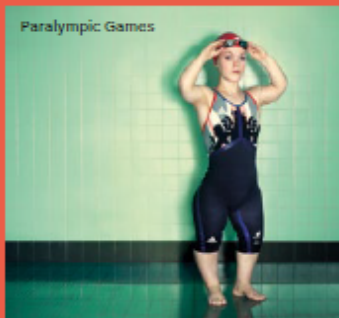
Innovation through content

When the Covid-19 pandemic hit the UK early in 2020, the impact on Channel 4 was substantial and affected plans across the whole year. The first lockdown imposed by the government forced an immediate hiatus in production across all genres in March. Shortly thereafter, the Tokyo 2020 Paralympic Games – of which Channel 4 has exclusive UK coverage – were postponed by the event organisers.

We initially had to cut total programming investment by up to £150 million to ensure we could manage the financial implications, should the advertising market not recover from the extreme nature of the revenue declines we saw in April and May 2020. From that point, we ring-fenced content spend in order to protect the independent production sector and reinvested in the content budget later in the year, once we had better visibility.

Over the following months, this enabled us to manage a prolonged interruption to our creative pipeline. The ingenuity and agility demonstrated by the sector in response to the situation was remarkable. However, the combination of reduced budget and enforced production restrictions resulted in fewer hours than planned of some regular programming (e.g. *Hollyoaks*), while some titles (e.g. *The Circle* and *It's A Sin*, along with our extensive coverage of the Paralympic Games) were pushed back to 2021.

Towards the end of the year, once the financial outlook began to improve and thanks in part to our own cost-saving initiatives, we were able to put money back in the content budget, allowing more new shows to air in the last quarter.



Paralympic Games



The End of the F***ing World

Innovation through content

Meeting Channel 4's licence obligations

Average hours per week		Compliance minimum	2020
News	In peak-time (6-10.30pm)	4	4
Current Affairs	Overall	4	6
	In peak-time (6-10.30pm)	2	4
Hours per year	Schools	1	24
Percentage			
Origination production	Overall	55	60
	In peak-time (6-10.30pm)	70	79
Independent production		25	50
European independent production		10	27
European origin		50	69
Subtitling for the deaf and hard of hearing		90	100
Audio description		10	44
Signing		5	6
Regional production		35	47
Regional hours		35	58
Production in the Nations		9	9
Nations hours		9	12

Innovation through content

£522m

spent on content
across all services

Down 21%

on last year

£510m

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

Down 22%

on last year

Investment in all content

Following the enforced budget reductions, Channel 4 spent £522 million on content across its services in 2020. This represented a reduction of £138 million year-on-year, a 21% drop.

The main channel – which attracts the biggest audiences in the portfolio – continued to account for the bulk of the investment: its budget was £420 million this year, 81% of the total. Spend was down by 21% year-on-year, a £110 million decline. Across the digital TV channels, spend totalled £90 million, a decline of £30 million relative to the 2019 level (a 26% drop). Reflecting the growing importance of digital media to Channel 4, content spend on these services actually rose in 2020, by £2 million to £12 million (a 27% increase). Overall, digital services (the digital TV channels and digital media) accounted for 19% of Channel 4's total content investment in 2020, marginally down from 20% in 2019.

Focusing on the TV portfolio, i.e. the main channel and digital TV channels, total spend was £510 million in 2020, £140 million less than in 2019 (a 22% decrease). At the genre level, spend was down in most cases, with two exceptions. To allow for the extended running times of some editions of Channel 4 News during lockdown, spend on News rose by 3% this year, to £29 million (a £1 million increase). And with some gaps in the schedule when production was halted by Covid-19, spend on Film also rose, by 4% to £84 million (a £3 million increase). In all other genres, investment fell by at least 20%. The individual declines do not, however, tell the main story of the year, which was how Channel 4 reacted in response to Covid-19 to provide relevant programming across a range of genres to a population that suddenly found itself in lockdown.

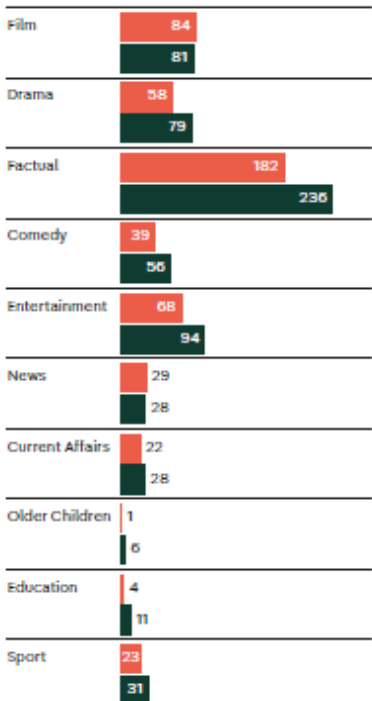
Spend across the Channel 4 network on all content (£m)

	Channel 4 (main channel)	Digital channels	Digital media (excluding main channel)	Total
2020	420	90	12	522
2019	530	120	10	660

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

Source: Channel 4.

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



■ 2020 (£510m) ■ 2019 (£650m)

Source: Channel 4.

Innovation through content

65%

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

Down 9pts

on last year

Output mix on Channel 4

Changes to the programme schedule following the Covid-19-related budget reductions led to a significant reduction in the volume of first-run originated content on the main channel in 2020, especially during peak-time hours (defined by Ofcom as 6-10.30pm). There were corresponding increases in the shares of acquisitions and repeats.

During peak-time hours – when Channel 4 typically premieres its originations, as they can reach the largest audiences – the share of first-run originated programming on the main channel was 65%, nine points below 2019's figure. Repeats of original programming accounted for another 14% of hours (up by four points year-on-year), meaning that total originations comprised 79% of peak-time output. This is well ahead of Ofcom's 70% licence requirement.

Daytime schedules offer a more balanced spread of originations and acquisitions, and originations represented 60% of output on the main channel across the day in 2020 – two percentage points less than in 2019 but still comfortably above the relevant Ofcom quota (of 56%).

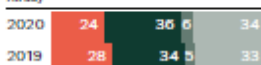
Overall, in peak-time, there was a shift from originations to acquisitions of five percentage points, and a seven-point rise in the share of repeats (with a corresponding drop in first-run programming).

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

Peak (6-10.30pm)



All day



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

Source: Channel 4.

£370m

spent on originated content across all services

Down 25%

on last year

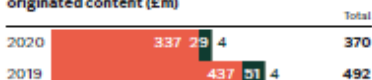
Investment in originated content

Channel 4 delivers its public remit primarily through the original content that it commissions and invests in. In 2020, the reduction in the overall content budget meant that total expenditure on originated content (first-run transmissions and repeats) across its TV channels and online services fell to £370 million. Year-on-year, this was a decline of £122 million, equivalent to a 25% drop.

On the main channel – which attracts the biggest audiences and correspondingly accounts for the large majority of Channel 4's content budget – investment in originations was £337 million (91% of the total). This was exactly £100 million less than 2019's level, a 23% drop.

Beyond the main channel, £29 million was spent on original content for the digital channels, £22 million less than in 2019 (a 44% drop). Spend on digital media content (including websites and cross-platform content) actually increased by 14% from £3.6 million to £4.1 million (the chart shows £4 million in both years in rounded terms).

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



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

Source: Channel 4.

Innovation through content

6.3hrs

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

Down 20%

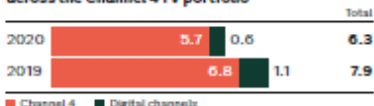
on last year

Originated output across Channel 4 TV portfolio

Channel 4 broadcast an average of 6.3 hours of new commissioned programmes (i.e. first-run originations) every day across the main channel, E4, More4 and Film4 in 2020. The main channel accounted for 5.7 of these daily hours (91% of the total). There were a further 0.6 hours on the digital channels.

Following the reduction in its content budget, the volume of first-run originations across the TV portfolio fell by 20% year-on-year to its lowest level since this metric was first reported in 2008. Hours on the main channel fell by 17% while those on the digital channels were down by 46%.

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



Source: Channel 4.

2,281

hours of first-run originations across the portfolio

Down 20%

on last year

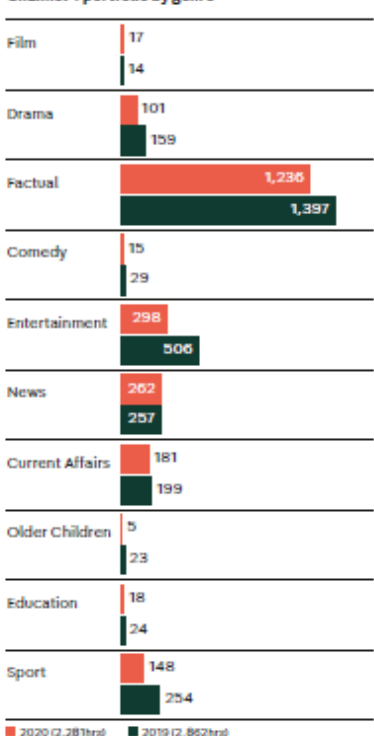
Volume of first-run originations by genre

Reflecting the decreases in originated and first-run content discussed in 'Output mix on Channel 4' on page 98, Channel 4 broadcast 2,281 hours of first-run originated programming across its TV portfolio (main channel and digital channels) in 2020, down by 581 hours (a 20% drop) year-on-year.

Mirroring the changes in spend shown in 'Investment in all content' on page 97, volumes were down for all genres except for News and Film. There were five more hours of News in 2020 (a 2% increase); while Film was up by three hours, a 17% rise.

Amongst the other genres, the two with the smallest percentage declines in volume, of 9% and 12% respectively, were Current Affairs and Factual – two key genres (alongside News) that Channel 4 prioritised in order to reflect the challenges the nation was facing on screen, with programmes that helped audiences to navigate the unprecedented times (see 'Challenge with purpose' chapter on page 46).

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



Source: Channel 4.

Innovation through diversity

£329m

investment in first-run external UK commissions on the main channel in 2020

Down 24%

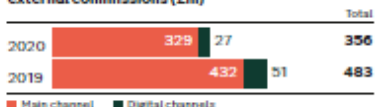
on last year

Broadcasters' investment in the production sector

Channel 4 sources all of its original programming from external suppliers. An intrinsic part of Channel 4's model, this maximises the benefits of its content investment to the UK's independent production sector.

In 2020, Channel 4's investment in first-run originations from external suppliers across its TV portfolio fell in line with the Covid-19-related reduction in its overall content budget (see introduction to 'Innovation through content' on page 95). On the main channel, spend on external suppliers was £329 million, 47% of which was spent on qualifying independent production companies. With a further £27 million spent on the digital TV channels, Channel 4's total investment in first-run originations from external suppliers across its TV portfolio was £356 million. This is 26% below the 2019 figure, a reduction of £127 million. Across the portfolio, spend fell by 24% on the main channel and by 46% on the digital channels.

Expenditure by Channel 4 on first-run external commissions (£m)



Source: Channel 4

Output from suppliers based outside London:

58%

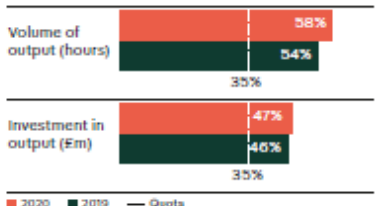
of first-run originated programme hours

Investment in the Nations and Regions (main channel)

Despite the significant disruptions to the schedules following the Covid-19-related cut to content budgets and the enforced production restrictions in lockdown (see introduction to 'Innovation through content' on page 95), Channel 4 increased the proportions of content sourced from the Nations and Regions in both volume and spend terms in 2020.

It sourced 58% of the hours of first-run originated programmes on the main channel from suppliers based in the Nations and Regions. This is four percentage points more than in 2019 and just one point below the record level achieved in 2018.

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



Source: Channel 4.

47%

of the value of first-run originations

As a proportion of spend, Channel 4 achieved its highest-ever level of investment outside London on the main channel, with 47% of its expenditure on first-run originated programming sourced from suppliers in the Nations and Regions, one percentage point up year-on-year.

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

Up 1pt

on last year

Innovation through diversity

274

companies working with Channel 4 portfolio across TV, film and digital media in 2020

Equal

with last year

161

Independent TV production companies supplied the Channel 4 portfolio in 2020

Down 3%

on last year

Diversity of supply base

Channel 4 punches above its weight in terms of the extent of its relationships with independent TV production companies ('indies'). In 2019, the most recent year that comparative TV industry data is available, Channel 4 worked with 166 indies across its TV channels. Amongst the PSBs, this was second only to the BBC (354 indies), whose TV portfolio content budget of £1.6 billion in 2019/20 (according to its Annual Plan) is more than double Channel 4's. While ITV's content budget is also much larger than Channel 4's, it only worked with 86 indies.

Turning to 2020 (for which data is available only for Channel 4), there was inevitably some impact following the Covid-19-related reduction in original content spend (see 'Investment in originated content' on page 98). Channel 4's efforts to support the independent production sector enabled us to maintain the overall number of suppliers that we worked with. Across the year, a total of 274 companies supplied the TV, film and digital media content that it commissioned, the same level as 2019. In TV, this included 161 indies – just five fewer than 2019's total of 166 (the figure used for the PSB comparisons above), a 3% decline. A further 34 non-independent producers gave a total TV supply base of 195 companies (4% below the 2019 figure of 204).

In other media, there were 20 online suppliers, just one fewer than in 2019 (a 5% fall). Channel 4 worked with 79 film companies in 2020, seven more than in the previous year. This increase, of 10%, is due in part to the commissioning of a series of short films in response to the Black Lives Matter movement that imagine a future through a black cultural lens.

Across all types of content, 37 companies were new suppliers to Channel 4. While this is six fewer than in 2019 (a 14% drop), it remains higher than the 2018 figure of 34. Note that some suppliers worked across TV, film and online; removing the double-counting that arises from suppliers who worked across more than one media gives a total figure of 274 companies that Channel 4 worked with in 2020.

Number of independent TV production companies supplying the PSBs

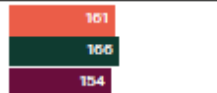
BBC portfolio n.a.



ITV portfolio n.a.



Channel 4 portfolio



Five n.a.



Note: 2020 data not available for other PSB channels.
Source: Channel 4, Broadcast (other channels).

Innovation through diversity

Output from suppliers based in the Nations:

12%

of first-run originated programme hours

Up 1pt

on last year

9%

of the value of first-run originations

Up 1pt

on last year

Investment in the Nations (main channel)

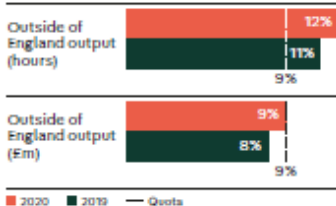
In recent years, the proportion of Channel 4's commissions made outside of England has been increasing steadily in anticipation of new Ofcom licence quotas of 9% for the proportions of volume and spend on the main channel that came into force in 2020 (up from 3% in earlier years).

This year, programmes commissioned in the Nations accounted for 12% of total hours of first-run originations on the main channel. This is one percentage point up on the 2019 figure, and level with the record for this metric previously set in 2017. It exceeds the new Ofcom quota by three points. Looking at the individual Nations, Scotland accounted for 5.7% of commissions this year, Wales 4.2% and Northern Ireland 1.7% (giving a total of 11.6% to one decimal point).

Turning to expenditure, the Nations represented 9% of the total budget for first-run originated programmes on the main channel. This is one percentage point up on the 2019 figure, again level with the record previously set in 2017. It comprised 6.1% spent in Scotland, 2.1% in Wales and 1.0% in Northern Ireland – totalling 9.2% to one decimal place, just above the new Ofcom quota.

Commissions from the Nations provided 210 hours of first-run programming on the main channel in 2020. Reflecting the Covid-19-related reduction in total first-run originated content this year, this is 38 fewer hours than in 2019, a 15% decline. Total spend in the Nations also fell by 15%, to £26.6 million (a £4.5 million fall). While this mostly translated into declines in volume and spend for each Nation, there were two exceptions: spend in Scotland rose by 1% year-on-year, to £17.7 million (with 102 hours of commissions). And the volume of programming from Northern Ireland more than doubled year-on-year to 31 hours (with spend at £2.8 million). In Wales, spend was £6.1 million for 76 hours of programmes.

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



Source: Channel 4.

Innovation through diversity

£141m

spent on production companies based outside London

Down 25%

on last year

£28m

spent on production companies in the Nations

Down 19%

on last year

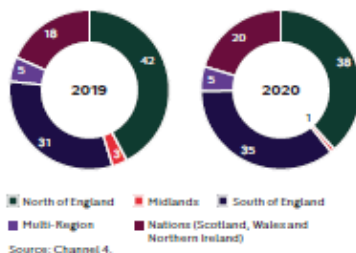
Spend by region across the Channel 4 TV portfolio

In 2020, Channel 4 spent £141 million across its TV portfolio on content commissioned from production companies based in the Nations and the English Regions. Reflecting the Covid-19-related reduction in the overall content budget, this was down 25% on last year's record level of £189 million (a £48 million drop).

Expenditure on content from production companies in the Nations was £28 million this year, a 19% reduction year-on-year (equivalent to £7 million). Scotland accounted for the largest share of this, with a spend of £19.0 million, followed by £6.1 million in Wales and £2.8 million in Northern Ireland. TV portfolio spend on commissions from the English Regions fell by 26% to £106 million (£38 million down), with a further £7.2 million spent on multi-region content (a decline of 27%, or £2.7 million). Given the overall reduction in the content budget in 2020, there were year-on-year declines in spend in all the individual Nations and English Regions, ranging from as little as 8% for Scotland up to 67% in the Midlands.

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

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



Making an impact: Different voices

The Covid-19 pandemic – and the resulting production hiatus and budget cuts – significantly affected Channel 4's plans for a broad swathe of programming that would have contributed to its promotion of diverse voices and perspectives. Production was delayed on some key commissions planned for 2020 that will now air in 2021, such as 1980s AIDS drama *It's A Sin*. Producing the daily soap *Hollyoaks* – which frequently highlights social issues in its storylines – was a huge challenge in the circumstances, and the programme went off air for several months (as did all the PSBs' soaps). And the Tokyo 2020 Paralympic Games, which were to be covered extensively by Channel 4, were also postponed until 2021. Shows that were commissioned in their place sometimes had less space to cover diverse voices as central themes given their subject matter (in many cases focusing on Covid-19-related issues). These changes are likely to have contributed to some negative trends in the metrics in this section.

Despite these changes, we maintained our average lead over the other main PSBs across 12 tracker statements linked to our public service remit (four are presented in this section and the other eight in the following sections). These benchmark the main channel's reputation against the other main PSB channels, with the results focusing on our leads over the other channels' average scores. Averaged across the 12 statements, Channel 4's lead over the average for the other main PSB channels was 23 percentage points: level with the 2019 figure and in the middle of the 20-27-point range achieved over the last decade.



Joe Lycett's Got Your Back

Take Your Knee Off My Neck



The School That Tried to End Racism



Different voices

76hrs

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

Up 17%

on last year

183hrs

of first-run foreign-language content across the portfolio

Down 20%

on last year

Range of international programming

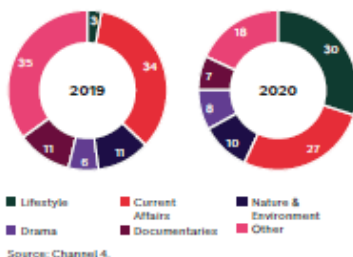
Channel 4's coverage of international themes extends across a range of genres in the schedule. Excluding Channel 4 News, there were 76 hours of first-run programmes with an international theme on the main channel and in the dedicated international documentary strand, *True Stories* (which in recent years has run across the main channel and Film4), in 2020. This figure is 17% above last year's total of 65 hours (11 additional hours). The *True Stories* strand accounted for six hours in 2019 and two hours in 2020.

This year, Lifestyle overtook Current Affairs as the biggest single genre, with 30% of total first-run hours of international programming (excluding news), up from 3% in 2019. This large year-on-year increase is due to *Work on the Wild Side*, a 20-part series following vets and volunteers who moved to South Africa to rescue, rehabilitate and release some of the world's most iconic animals. The second-biggest genre was Current Affairs, with 27% of the total (down from 34% in 2019). Alongside the long-running *Unreported World* and *Dispatches* strands this year were programmes offering a range of global perspectives on the coronavirus pandemic.

Channel 4's acquired TV programmes and films also include a diverse range of content from around the world. These include tie-ins with Walter Presents, Channel 4's innovative on-demand service curating the best foreign-language TV shows. This year, the main channel showed 13 series premieres, with the opening episode of Swedish thriller *Stockholm Requiem* attracting 386,000 viewers. A further seven series were launched on More4, with the first three episodes of Nordic Murders averaging 316,000 viewers. Taken together, the Walter Presents-branded foreign-language dramas shown on the main channel and More4 reached 7.0 million viewers in 2020 (11.6% of the TV population). While down by 1.9 million on last year's figure, this was compensated by a 36% increase in views to Walter Presents content on All 4, to 44 million.

Reflecting the overall reduction in content investment this year, there were 183 hours of first-run foreign-language TV shows and films across the TV portfolio, 20% less than in 2019 (46 fewer hours). Conversely, on the Film4 channel, the number of hours of films from outside the UK and US grew by 20% to 927 this year (156 additional hours). This total – which includes first-runs and repeats, and films shown both in the English language and in foreign languages – is at its highest level over the last decade, due primarily to a large increase in the number of hours of films qualifying as Mixed (both English and foreign-language), reflecting the increasingly global nature of filmmaking.

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



Different voices

96hrs

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

Down 34%

on last year

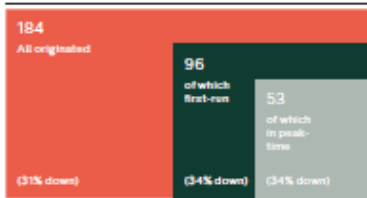
Diversity output on the main channel

While Channel 4 seeks to reflect the diversity of the UK across its entire output, it also commissions shows whose subject matter specifically covers diversity issues. In 2020, 184 hours of originated programmes on the main channel included subject matter covering issues relating to religion, multiculturalism, disability and sexuality. Of these originated hours, 96 were first-run programmes (the others being repeats), and 53 of the first-run hours were in peak-time (i.e. between 6pm and 10.30pm, following Ofcom's definition).

Our diversity output responded to the Covid-19 pandemic in a variety of ways. *Ramadan in Lockdown* followed the Muslim community as it adjusted to Ramadan under lockdown conditions (religion), *Is Covid Racist?* asked why so many black, Asian and minority ethnic NHS colleagues have died from the coronavirus (multiculturalism), while *The Last Leg: Locked Down Under* saw presenters Adam Hills, Josh Widdicombe and Alex Brooker host the show from their homes in Melbourne, London and Huddersfield (disability). Other diversity highlights included *Losing It: Our Mental Health Emergency* (disability), *The School That Tried To End Racism* (multiculturalism) and comedy series *Feel Good* (sexuality).

The Covid-19-related reduction in content budgets significantly impacted diversity output this year. In particular, some key series that were planned for 2020 were pushed back to 2021: these included Russell T Davies' major drama on the AIDS crisis, *It's A Sin*, and the return of *The Circle* (which contributed 26 first-run hours in 2019), as well as our extensive coverage of the Paralympic Games, which were themselves postponed by 12 months. As a result, the total volume of originations was down by 31%, while the volume of first-run originations and first-run originations in peak-time both dropped by 34%.

Total hours of programming covering diversity issues shown on the main channel (2020 with trends relative to 2019)



Source: Channel 4.

Film

40%

from outside the US

Up 8pts

on last year

21%

from the UK

Up 6pts

on last year

Diversity of Film4 channel schedule

The Film4 channel differentiates itself from other mainstream film channels by showcasing a diverse and alternative range of films from around the world. In 2020, the share of the schedule devoted to non-Hollywood-studio titles rose to its highest level in seven years.

British films – including projects that were co-funded by Film4 Productions – accounted for 20.5% of total programming hours in the schedule, a substantial jump of 5.1 percentage points year-on-year when looking at exact figures (2019: 15.4%). This substantial increase can be attributed to a greater number of British classics playing in weekday daytimes, and a marked rise in Film4 Productions playing throughout the schedule. With the share accounted for by other non-US films also increasing this year, by 3.2 points to 19.3%, a total of 39.8% of hours of output were devoted to films from countries other than the US, 8.3 points up year-on-year (2019: 31.5%). This total, of just under 40%, is the highest share of non-US programming on the Film4 channel since the same level was last achieved in 2013.

The Film4 channel reflected a number of important public events during the year. Celebrating VE Day was a selection of films to mark the 75th anniversary of VE Day. In recognition of Pride in London – and the cancelled march and other events that would have taken place on and around Saturday 27 June – the channel presented a varied and multi-faceted season of movies exploring issues, recognising achievements and celebrating relationships relevant to LGBT+ culture and lives, including the network premiere at 9pm of *Call Me By Your Name*. As part of Channel 4's *Black and Proud* season, Film4 aired a rich and powerful collection of films, beginning with *Fences*, starring and directed by Denzel Washington. The season also reflected on contemporary black lives with two titles backed by Film4 Productions: *Been So Long*, a big-screen musical starring Michaela Coel and Arinze Kene; and playwright Debbie Tucker Green's intimate drama *Second Coming*, starring Idris Elba and Nadine Marshall.

Film4 also extended its reach on digital services, reflecting the migration of young viewers in particular to new platforms. Film4 on BritBox launched in September, bringing some of the most iconic British films of the last 30 years to the platform. Meanwhile, Film4 on All 4 significantly increased its selection of editorially curated titles, coming closer to replicating the style and scope of the output on the channel itself. Its range was further expanded by a selection of shorts from Film4 Productions, as well as the 15 LGBT+ films shortlisted for the Iris Prize Best British Short – a new partnership with Iris Prize, which over its 15-year history has become a leading voice in championing LGBT+ short film and introducing vital new talent.

News and Current Affairs

389

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

Down 3%

on last year

Commitment to long-form journalism

This metric looks at 'long-form' journalism in the News and Current Affairs output on the main PSB channels, defining long-form programmes as those running for at least 45 minutes for News and 15 minutes for Current Affairs.

In 2020, Channel 4's main channel showed 389 'long-form' News and Current Affairs programmes in peak-time (between 6pm and 10.30pm, as defined by Ofcom). This is substantially more than the corresponding combined total for the other main PSB channels (245 programmes between them). With extended editions of *Channel 4 News* displacing some *Current Affairs* programmes that would have aired as separate programmes, the number of long-form programmes on Channel 4 was slightly down year-on-year, by 3%. This decline is relative to the record level achieved in 2019, and the 2020 total remains the second-highest-ever figure on this metric since 2012 (the oldest year using the current methodology).

These figures – based on the number of programmes – do not reflect the extended running times of some special editions of *Channel 4 News*, as they would have counted as long-form programmes anyway. Eight editions were extended a little beyond the usual hour, and a further nine were extended to between 70 and 105 minutes, with the longest occurring on 23 March, the day of the Prime Minister's televised address instructing the British public to stay at home. Overall across the whole year, looking at the volume of programming in terms of total hours, Channel 4 showed more news in peak-time than any other year in the broadcaster's history, at 289 hours.

Channel 4 maintained a commanding lead over other channels even when the late evening period is also taken into account, which includes News and Current Affairs programmes broadcast after peak-time (in particular, BBC Two's *Newsnight*, which usually begins after 10.30pm). Between 6.30pm and midnight, Channel 4 showed 428 long-form News and Current Affairs programmes on its main channel in 2020, 6% below the previous year's figure. Channel 4's total was considerably greater than that for any of the other main PSB channels, with a bigger gap than last year over second-placed BBC Two, which broadcast 277 long-form News and Current Affairs programmes (only 23 of which were shown in peak-time). That put BBC Two 151 titles behind Channel 4 this year, versus a 129-title difference in 2019.

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

		Peak-time	Off-peak	Total
BBC One	2020	84	82	166
	2019	114	90	204
BBC Two	2020	23	254	277
	2019	72	256	328
ITV1	2020	99	48	147
	2019	77	65	142
Channel 4	2020	389	39	428
	2019	403	54	457
Five	2020	39	5	44
	2019	2		2

■ Peak-time ■ Off-peak

Source: Channel 4, BAKB (other channels).

Different voices

20pt

lead over average for other channels for showing different cultures and opinions

Down 1pt

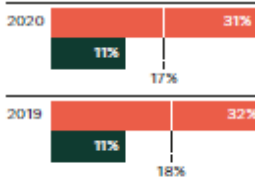
on last year

Channel reputations – shows different kinds of cultures and opinions

In 2020, Channel 4 maintained its reputation as being best for showing different kinds of cultures and opinions. 31% of respondents selected the main channel, giving it a lead of 20 percentage points over the average for the other main PSB channels, and a 14-point lead over the next-highest-scoring channel, BBC One.

Channel 4's scores fell marginally this year. The proportion of people selecting the main channel and its lead over the average for the other main PSB channels fell by one percentage point relative to 2019, while its lead over the next-highest-scoring channel was flat year-on-year. Despite some small declines over the last three years, Channel 4's average lead over other channels sits roughly in the middle of the 17-24-point range it has occupied over the last decade.

Shows different kinds of cultures and opinions



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

20pt

lead over average for other channels for challenging prejudice

Down 1pt

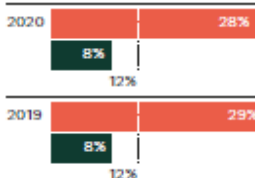
on last year

Channel reputations – challenges prejudice

Channel 4's main channel was chosen by 28% of respondents as the one they most associate with challenging prejudice in 2020, giving it a 20-percentage-point lead over the average score for the other main PSB channels, and a 16-point lead over the next-highest-scoring channel, BBC One.

All three scores – 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 – fell by one percentage point year-on-year. Perhaps reflecting the schedule changes referred to above, 2020's scores dipped below the range achieved over the previous five years. Nonetheless, Channel 4's average lead over other channels remains within the 18-27-point range it has occupied over the last decade (albeit at the lower end).

Challenges prejudice



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

Different voices

21pt

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

Down 1pt

on last year

Channel reputations – shows the viewpoints of minority groups in society

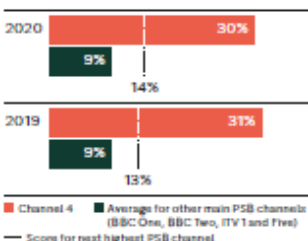
Channel 4 has a longstanding reputation for giving a voice to diverse groups, including some that are under-represented on TV. Channel 4 remained by a large margin the PSB channel regarded by viewers as being the best for showing the viewpoints of minority groups in society, and its scores fell by only small amounts year-on-year.

30% of viewers selected Channel 4's main channel as being the best for showing the viewpoints of minority groups in society. This translated to a significant lead, of 21 percentage points, over the average for the other channels, and a 16-point lead over the next-highest-scoring channel, BBC One. This year, the proportion of people selecting the main channel, and its lead over the average of the other PSB channels, both fell by one point, while its lead over the next-highest-scoring PSB channel was down by two points.

There still remains a considerable distance between Channel 4 and the other PSB channels, with Channel 4's 30% score this year more than double that of the next-highest-scoring channel (of 14%).

Moreover, Channel 4 continued to outperform the other PSBs by large margins as a platform for the viewpoints of individual minority groups. The main channel was selected by 28% of viewers as being best for showing the viewpoints of different ethnic groups in the UK (the same as in 2019), giving it a lead of 19 percentage points over the average for the other main PSB channels. 31% of viewers thought Channel 4 was best for showing the viewpoints of lesbian, gay, bisexual and transgender people (2019: 33%), a massive 24 points above the average of the other PSB channels. And 25% of viewers thought Channel 4 was best for showing the viewpoints of disabled people (2019: 26%), 17 points above the average of the other PSB channels.

Shows the viewpoints of minority groups in society



Source: Ipsos MORI commissioned by Channel 4.

26pt

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

Equal

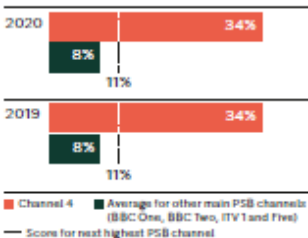
with last year

Channel reputations – home for alternative voices

Channel 4 continued to provide a mainstream platform for alternative voices in 2020. Its main channel was selected by 34% of respondents as being the home for alternative voices. Its lead over the average for the other main PSB channels was 26 percentage points, while its lead over the proportion selecting the next-highest-scoring channel, Channel 5, was 23 points.

Despite the revisions to the 2020 schedule, Channel 4's performance on this metric held steady this year. Its own score, its lead over the average for the other main PSB channels, and its lead over the next-highest-scoring channel, were all level with the corresponding 2019 figures.

Home for alternative voices



Source: Ipsos MORI commissioned by Channel 4.

Distinctive approaches

Revisions to the 2020 schedules – due to the Covid-19-related budget cuts, production delays and increased complexity for those productions that could continue – impacted the nature of Channel 4's distinctiveness this year. Some of the programmes that we are most proud of include fast-turnaround commissions such as *Jamie: Keep Cooking and Carry On* and *Grayson's Art Club*, which were filmed in the presenters' own homes, and subject to entirely new production protocols that were developed and implemented at speed. These programmes were highly distinctive in terms of the production processes that enabled them to be made safely, and were amongst the fastest lockdown shows to come to screen on any TV channel.

Nonetheless, some of the tracker statements in this section show small falls in Channel 4's leads over other channels in 2020, due to a number of factors. First, the innovations in fast-turnaround shows mostly occurred behind the scenes and will not always have been apparent to viewers. Second, some genres that appeared in greater numbers as a result of the pandemic – such as news and Covid-19-related documentaries – by their nature focused on elements of the remit other than distinctiveness. And third, a few of the most distinctive programmes that had been commissioned for 2020, such as *It's A Sin*, were pushed back to 2021.



It's A Sin

Grayson's Art Club



Distinctive approaches

13pt

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

Down 2pts

on last year

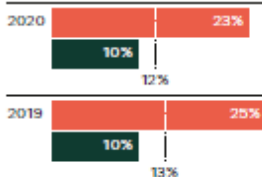
Channel reputations – makes me think about things in new and different ways

After achieving its joint-highest-ever score in 2019 for making people think about things in new and different ways, Channel 4's scores fell back a little this year. 23% of respondents selected the main channel on this metric, two percentage points below the 2019 peak.

This gave Channel 4 a lead of 13 percentage points over the average for the other main PSB channels, two points less than in 2019. Its lead over the next-highest-scoring channel, BBC One, was 11 points, one point down year-on-year.

Despite these small year-on-year declines, this metric remains stable. Channel 4's average lead over other channels remains within the tight 12-16-point range it has occupied over the last decade.

Makes me think about things in new and different ways



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

30pts

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

Equal

with last year

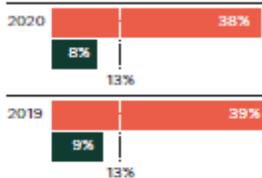
Channel reputations – tackles issues other channels wouldn't

Channel 4 maintained its strong reputation for being best for tackling issues that other channels wouldn't in 2020. A huge 38% of respondents selected the main channel on this metric – this is almost three times the figure achieved by the next-highest-scoring channel, Channel 5 (chosen by just 13% of respondents). This meant that Channel 4 had a 25-percentage-point lead over the next-highest-scoring channel.

The other main PSB channels were chosen by 8% of people on average, giving Channel 4's main channel a 30-point lead over them – level with the corresponding figure in 2019. This meant that this metric remains one of two reputational statements for which Channel 4 has maintained an average lead over the other PSB channels of at least 30% for the last five years.

The proportion of respondents selecting Channel 4 and its lead over the next-highest-scoring channel each fell slightly year-on-year, by one percentage point.

Tackles issues other channels wouldn't



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

Distinctive approaches

25pt

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

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

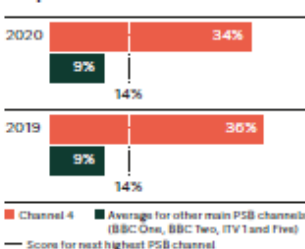
With one of the highest scores on the reputation statements, 34% of people selected Channel 4's main channel as the one they most associate with taking a different approach to subjects compared with other channels in 2020. This translated to substantial leads for Channel 4: of 25 percentage points over the average for the other main PSB channels, and of 20 points over the next-highest-scoring channel, Channel 5.

Down 2pts

on last year

There were small declines year-on-year. The proportion of people selecting the main channel, its lead over the average for the other main PSB channels, and its lead over the next-highest-scoring channel all fell by two percentage points. Despite these declines, Channel 4's average lead over other channels remains in the middle of the 19-29-point range it has occupied over the last decade.

Takes a different approach to subjects compared with other channels



Source: Ipsos MORI commissioned by Channel 4.

165

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

New and one-off programming

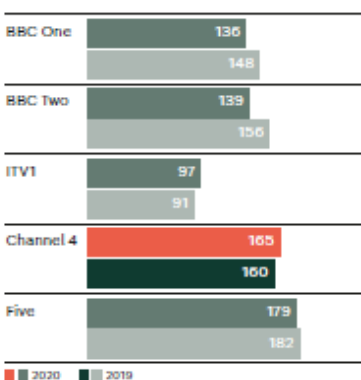
Channel 4's commitment to experimentation is demonstrated in part by the number of new and one-off programmes that it shows. This year, despite the reductions in content budgets due to Covid-19 (see introduction to 'Innovation through content' on page 95), Channel 4 increased the number of new and one-off programmes in the evening schedules (when audiences are highest) and maintained its leads over the BBC and ITV.

Up 3%

on last year

There were 165 new and one-off programmes on Channel 4's main channel between 6pm and midnight in 2020 – many of which were directly about, or in response to, the pandemic and the lockdowns that were introduced (see 'Reinvent entertainment' chapter on page 60). This is more than corresponding figures for BBC One (136 programmes), BBC Two (139 programmes) and ITV (97 programmes). Of the main PSB channels, only Channel 5 showed more new and one-off programmes (179 titles), as it continued its post-Big Brother revamp of its schedule. With a 3% increase, this was the second consecutive year-on-year rise in the number of new and one-off programmes in the evening schedules on Channel 4.

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

31pt

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

Down 1pt

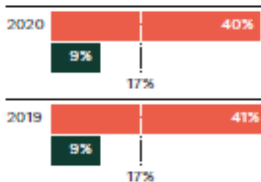
on last year

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

Risk-taking lies at the heart of Channel 4's public remit, and its success in delivering on this on the main channel is reflected in its scores when respondents are asked which of the main PSB channels is best for taking risks with programmes that others wouldn't. A massive 40% of respondents selected Channel 4 on this metric in 2020, its highest score on any of the reputational statements. Channel 4 maintained a substantial gap over the other main PSB channels: its score was 31 percentage points above the average of the other channels, while it led the next-highest-scoring channel, Channel 5, by 23 points.

There were small year-on-year declines in this metric: the proportion of people selecting the main channel, its lead over the average for the other main PSB channels, and its lead over the next-highest-scoring channel, all fell by one percentage point.

Takes risks with programmes that others wouldn't



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

24pt

lead over average for other channels for being experimental

Down 2pts

on last year

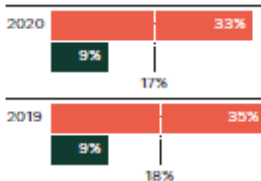
Channel reputations – is experimental

Channel 4's main channel was picked by 33% of respondents as the PSB channel that they most associate with being experimental in 2020. This gave Channel 4 significant leads over the other channels: the proportion of people choosing the main channel was 24 percentage points higher than the average for the other main PSB channels, while its lead over the next-highest-scoring channel, Channel 5, was 16 points.

The scheduling changes in 2020 resulted in less space for experimentation than planned at the start of the year, and this may account for small declines in the scores this year: the proportion of respondents selecting Channel 4 and its lead over the average for the other main PSB channels each fell by two percentage points year-on-year, while its lead over the next-highest-scoring channel fell by one point.

As a result, Channel 4's average lead fell to its lowest level over the last decade. Nonetheless, this metric has been fairly stable, with Channel 4's average leads sitting within a narrow range of 24 to 29 points over the whole period. And even despite this year's decline, Channel 4's performance remains well ahead of the other PSBs, with its 2020 score of 33% almost double the 17% achieved by the next-highest-scoring channel.

Is experimental



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

Film

26pt

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

Up 2pts

on last year

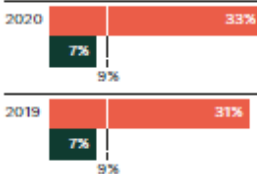
Channel reputations – is best for modern independent film

Channel 4 strengthened its reputation amongst the main PSB channels as being best for modern independent film in 2020, with scores at, or close to, their all-time peaks. 33% of respondents picked Channel 4's main channel for this metric, two percentage points more than in 2019, and just one point below the highest-ever score of 34% achieved in 2013.

Channel 4 also increased its lead over the average for the other main PSB channels by two percentage points, to 26 points, its joint-highest-ever score (last reached in 2018). And its lead over the next-highest-scoring channel, ITV, likewise rose by two points, just one point below the highest-ever lead, of 25 points, achieved in 2016.

Amongst the top-rated film premieres on Channel 4 this year, acclaimed Film4 production *Three Billboards Outside Ebbing, Missouri* attracted 2.1 million viewers (14.1% audience share) in July, while Asif Kapadia's *Diego Maradona* drew 873,000 viewers in March, an impressive figure for a feature documentary.

Is best for modern independent film



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

Factual

21pt

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

Up 3pts

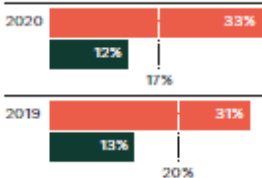
on last year

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. In 2020, after two years of declines, Channel 4's reputation improved as being best for documentaries that present alternative views. 33% of respondents selected the main channel for this metric, giving it a lead of 21 percentage points over the average for the other main PSB channels, and a 16-point lead over the next-highest-scoring channel, BBC One.

With no other PSB channel being selected by more than 17% of respondents, Channel 4's scores increased markedly this year: the proportion of respondents selecting the main channel rose by two percentage points, its lead over the average for the other main PSB channels was up by three points, and its lead over the next-highest-scoring channel rose by five points – a significant figure for a year-on-year change. Channel 4's average lead over other channels is at the upper end of the 10-24-point range it has occupied over the last decade.

Is best for documentaries that present alternative views



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

Factual

69%

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

Down 3pts

on last year

Inspiring change through Factual programming

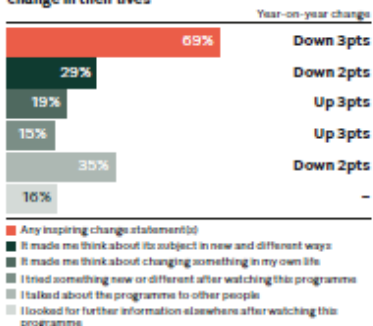
Channel 4's Factual programming seeks to inspire people to make changes in their lives and encourages them to think about things in new and different ways. Some programmes lead to active engagement, e.g. by encouraging people to talk to others about their subject matter, to seek out further information or – at their most engaging – to actually try something new or different.

Some of the programmes commissioned to air during the first lockdown in 2020 were specifically intended to inspire viewers who were stuck at home, and were amongst the best-performing titles covered by this metric; for example, *Grayson's Art Club* and *Jamie: Keep Cooking and Carry On* scored 84% and 69% respectively.

Across the whole Factual slate (comprising around 50 programmes and series), 69% of viewers said that Channel 4's programming inspired them in one or more ways this year. This figure fell by three points year-on-year, possibly reflecting the rebalancing of this year's Factual slate. While programmes such as those cited above were expressly inspirational in nature, some other Factual programming related to Covid-19 was inevitably less inspiring in its subject matter. Notwithstanding the drop in the overall score this year, it remained at the upper end of the 63% – 72% range it has occupied over the last decade.

The highest-scoring individual programme across all the statements this year was *100 Kilo Kids: Obesity SOS* – a documentary following young patients and the specialist NHS staff working in Britain's leading childhood obesity clinic in Bristol – with a score of 88%. Top-scoring programmes on individual statements included *Lose a Stone in 21 Days with Michael Mosley* (53% of viewers were inspired to think about changing something in their own life) and *Peter: The Human Cyborg* (49% of viewers talked about this programme to other people).

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



Source: Ipsos MORI commissioned by Channel 4.

News and Current Affairs

81%

of Channel 4 News viewers regard it to be independent from government

Down 1pt

on last year

Independence of TV news

In a year dominated by major news events – from the Covid-19 pandemic through the Black Lives Matter movement and on to the US elections – 2020 saw surges in conspiracy theories and the dissemination of inaccurate information, making the impartial and authoritative news services provided by the main UK broadcasters more important than ever. Channel 4 News continues to be the most highly regarded news provider in terms of its perceived independence from the government and from the influence of big businesses, leading the other broadcasters by clear margins.

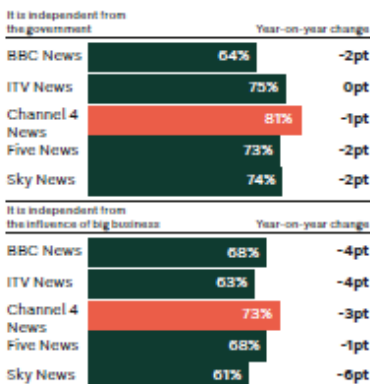
81% of regular viewers to Channel 4 News regarded it as being independent from the government in 2020. This is ten percentage points more than the average for the other main news programmes (those from the other public service broadcasters and Sky News) and six points above the corresponding figure for the next-highest-scoring news programme (ITV News).

73% of regular viewers to Channel 4 News agreed that it is independent from the influence of big businesses, eight percentage points more than the average for the other main news programmes and five points more than the next highest-scoring news programme (BBC News).

There were year-on-year declines in the absolute proportion of respondents selecting Channel 4 News in 2020. Its score fell by one percentage point (2019: 82%) for being independent from the government, perhaps reflecting the important role played by the broadcasters this year in reporting official press briefings on Covid-19. Meanwhile, Channel 4's score for being independent from the influence of big businesses fell by three points (2019: 76%), possibly because reporting on the pandemic displaced some investigations relating to big businesses that would have been undertaken in a normal year.

These factors affected all broadcasters, and Channel 4 maintained or extended its lead over the other main news programmes year-on-year. For both metrics – independence from the government and independence from the influence of big businesses – the trend was the same: Channel 4's lead over the average for the other main news programmes rose by one percentage point, while its lead over the next-highest-scoring news programme (2019: Sky News and BBC News respectively for the two metrics) held steady.

Percentage of regular viewers to TV news programmes in 2020 who agree with the following statements:



Source: Ipsos MORI commissioned by Channel 4.

News and Current Affairs

45%

average programme reputation statement for *Unreported World*

Up 3pts

on last year

45%

average programme reputation statement for *Dispatches*

Equal

with last year

Programme reputation statements – Current Affairs

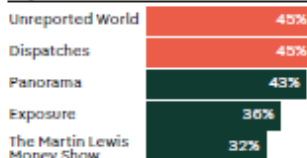
Channel 4's longstanding Current Affairs strands, *Dispatches* and *Unreported World*, differ from other public service broadcasters' Current Affairs programmes in terms of their approach and subject matter. Across a broad range of topical issues – which in 2020 included but was not limited to Covid-19 and the US elections – they continued to emphasise investigative journalism, challenging viewers to see things differently, giving a voice to those who might not otherwise be heard and (especially in *Unreported World*) providing a window on the wider world. One-hour Current Affairs specials delivered additional depth for important stories.

Channel 4 tracks five reputational statements in these areas looking at audience perceptions of the main Current Affairs shows – both regular strands and one-off programmes – on the main PSB channels. With an average score of 45% across the five statements, *Dispatches* and *Unreported World* were jointly the best-performing Current Affairs shows on the main PSB channels in 2020, ahead of BBC One's *Panorama* (in third place with a 43% score).

Dispatches was the most consistent show, ranking first or second for four of the five statements: it scored higher than any other Current Affairs show for "uncovers the truth" (for which it was selected by 58% of respondents) and "made me see something in a different light" (41% of respondents), and was in second place for "covers things in great depth" (50% of respondents) and "gives a voice to groups that aren't always heard in mainstream media" (39% of respondents). *Dispatches*' average score across the five reputational statements held steady year-on-year; it has only once scored higher over the last decade, with 48% in 2011.

Unreported World was the highest-scoring Current Affairs show for "shows stories about parts of the world you would rarely see on British TV" (53% of respondents) and "gives a voice to groups that aren't always heard in mainstream media" (51% of respondents). It ranked third for another two statements – "uncovers the truth" (46% of respondents) and "made me see something in a different light" (36% of respondents). After small declines over the previous two years, *Unreported World*'s average score across the five reputational statements rose by three percentage points in 2020, back to its 2017 level.

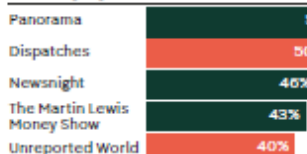
Programme reputation



Uncovers the truth



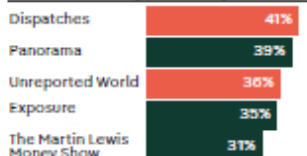
Covers things in great depth



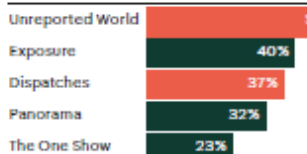
Gives a voice to groups that aren't always heard in mainstream media



Made me see something in a different light



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



■ Channel 4 show ■ Other broadcasters' shows

Source: Ipsos MORI commissioned by Channel 4.