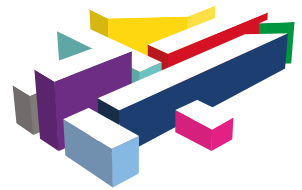




BRITAIN'S CREATIVE GREENHOUSE

CHANNEL 4
ANNUAL REPORT SUMMARY
2016 & KEY FACTS





How do you drive growth, create jobs and support small businesses throughout the UK?

And sustain a pipeline of innovation to a world-class sector?

And inspire a nation?

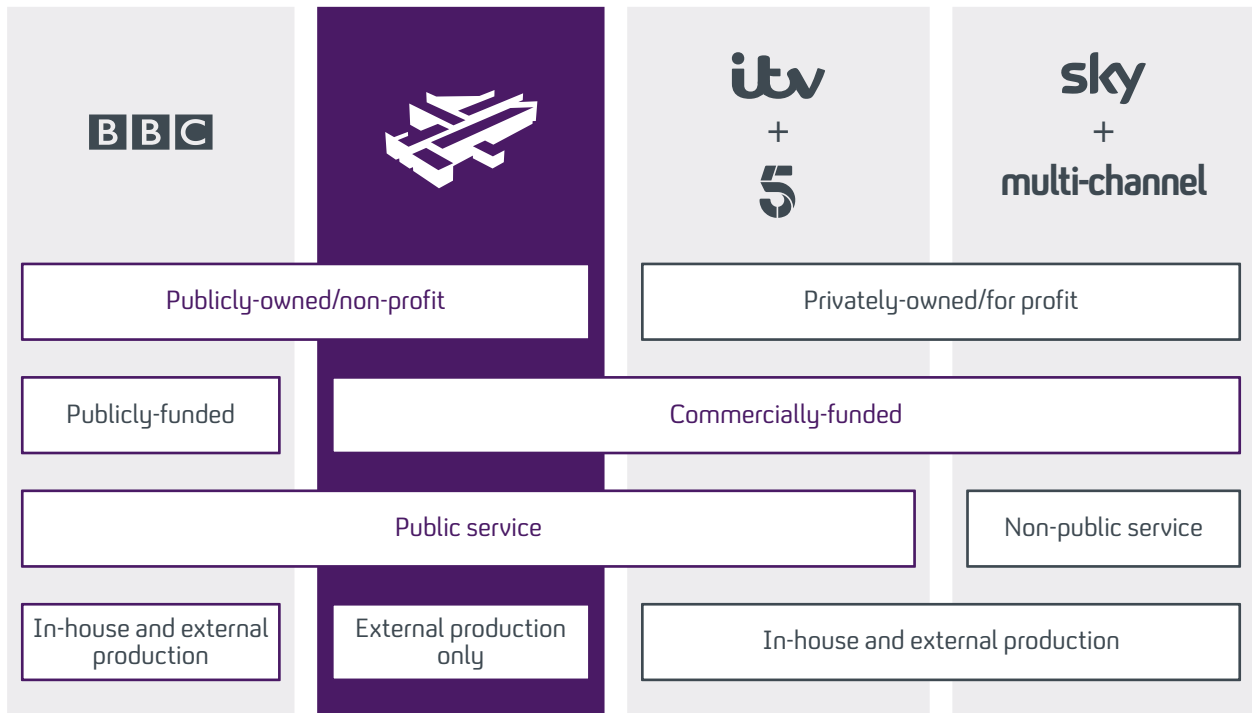
**AT NO COST
TO THE BRITISH
TAXPAYER?**



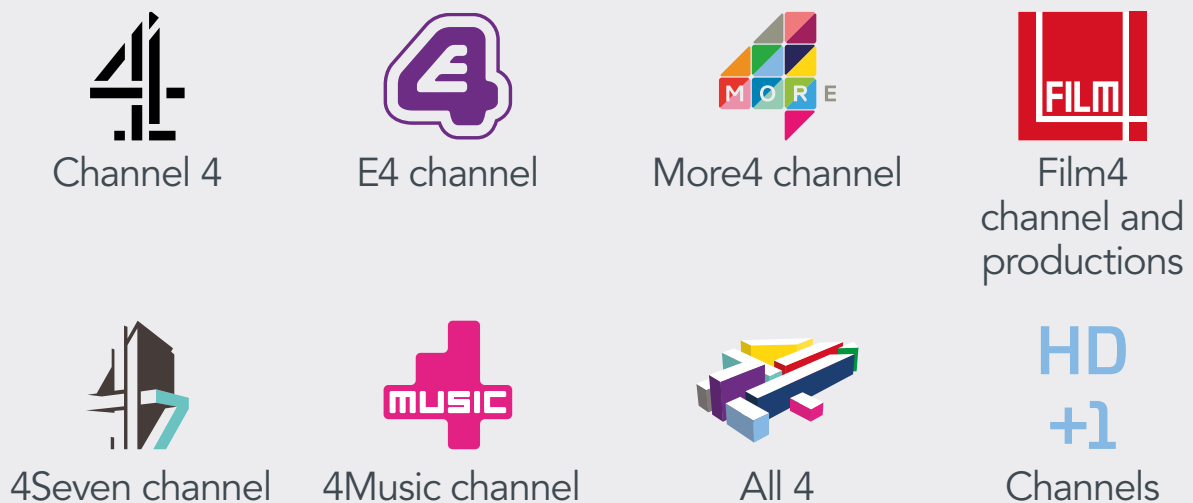


Britain's Public Service Broadcasting Ecology

The UK broadcasting ecology is the result of enlightened intervention by politicians and regulators. It's a carefully balanced mix of different organisations, with different missions, business models and governance structures that has made UK broadcasting a worldwide success.










Channel 4's portfolio of channels and services






Channel 4 in a nutshell

Our twin goals are to fulfil our remit and to be commercially self-sufficient


Statutory public service remit - 15 elements, including

-  Be innovative and distinctive
-  Stimulate public debate on contemporary issues
-  Reflect cultural diversity of the UK
-  Champion alternative points of view
-  Inspire change in people's lives
-  Nurture new and existing creative talent
-  Appeal to the tastes and interests of younger audiences





Social enterprise model

-  Commercially-funded by advertising
-  Profits into programmes: all surplus goes back into making content
-  'Robin Hood' system of profit-making genres such as Factual Entertainment cross-funding loss-making ones like News and Current Affairs

Publisher-broadcaster

-  No in-house production – unlike the BBC, ITV or Sky
-  100% of UK programmes commissioned from UK production companies
-  Supports wide range of companies across the Nations and Regions
-  Works with large number of SMEs

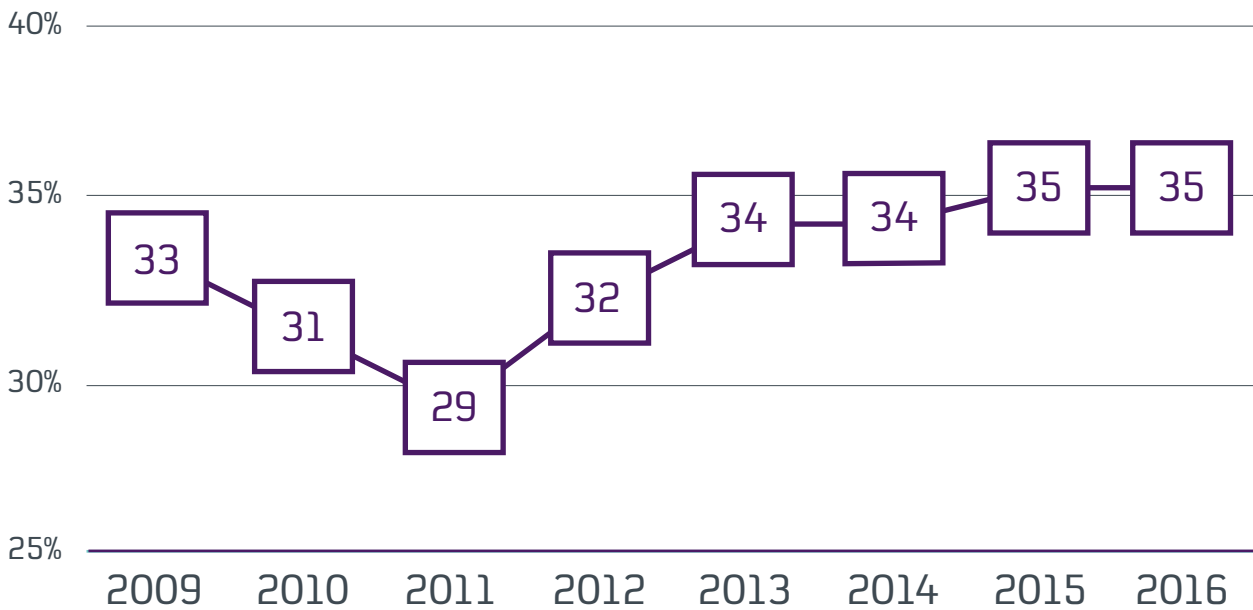
State-owned public service broadcaster

-  Established as a statutory corporation
-  Unitary Board, majority of Non-Executives (appointed by Ofcom)
-  Regulated by Ofcom
-  Subject to 16 licence quotas and other requirements, including:
 - News and Current Affairs
 - UK-commissioned programmes
 - Nations and Regions commissioning
 - Access services, e.g. subtitling

Headlines from 2016 Annual Report

Public Service remit delivery is at an all-time high

In 2016, audience perceptions of Channel 4's remit delivery remained at an all-time high – the average across the 12 statements that track our remit was the joint highest since we started reporting in 2008.



Winner

- Channel of the year – Broadcast Awards
- Edinburgh TV Festival Brand of the year
- Marketing Society

327
awards in 2016

8
Oscar wins since
2012

Creative success

With over 300 awards won and record investment in content, we continued to feel the benefits of creative renewal in 2016.

£695m

Total content spend,
biggest in Channel 4's history

£501m

UK-originated content spend,
biggest in Channel 4's history

Financial success

Record revenue

Record content spend

Record UK content spend

£995m

Corporation revenue, up £16m year-on-year

+24%

year-on-year
growth in total
digital revenues

8.3m

Channel 4 News viewers
each month, the second
consecutive year of growth

2016 saw significant strategic innovations

620m

programme views
on All 4, up 21%
year-on-year

14.9m

people have now registered
their details with All 4 –
including more than 50% of
all 16–34-year-olds in the UK

360°

Diversity
Charter

Our Year of Disability
provided opportunities
for disabled people
on-screen, off-screen
and at Channel 4

We nurture and bring to fruition new creative and digital ideas, and in the process we drive economic growth, create jobs and support hundreds of SMEs across the UK

£1bn

Over £1bn spent on content from the Nations and Regions in the last ten years

£169m

spent on TV production in the Nations and Regions (2016)

£36m

spent on TV production in the Nations in (2016)

BARB has

14

UK viewing regions – 2016. 16–34-year-olds viewing to our portfolio was higher in nine of these regions than in London

Channel 4 supports approx.

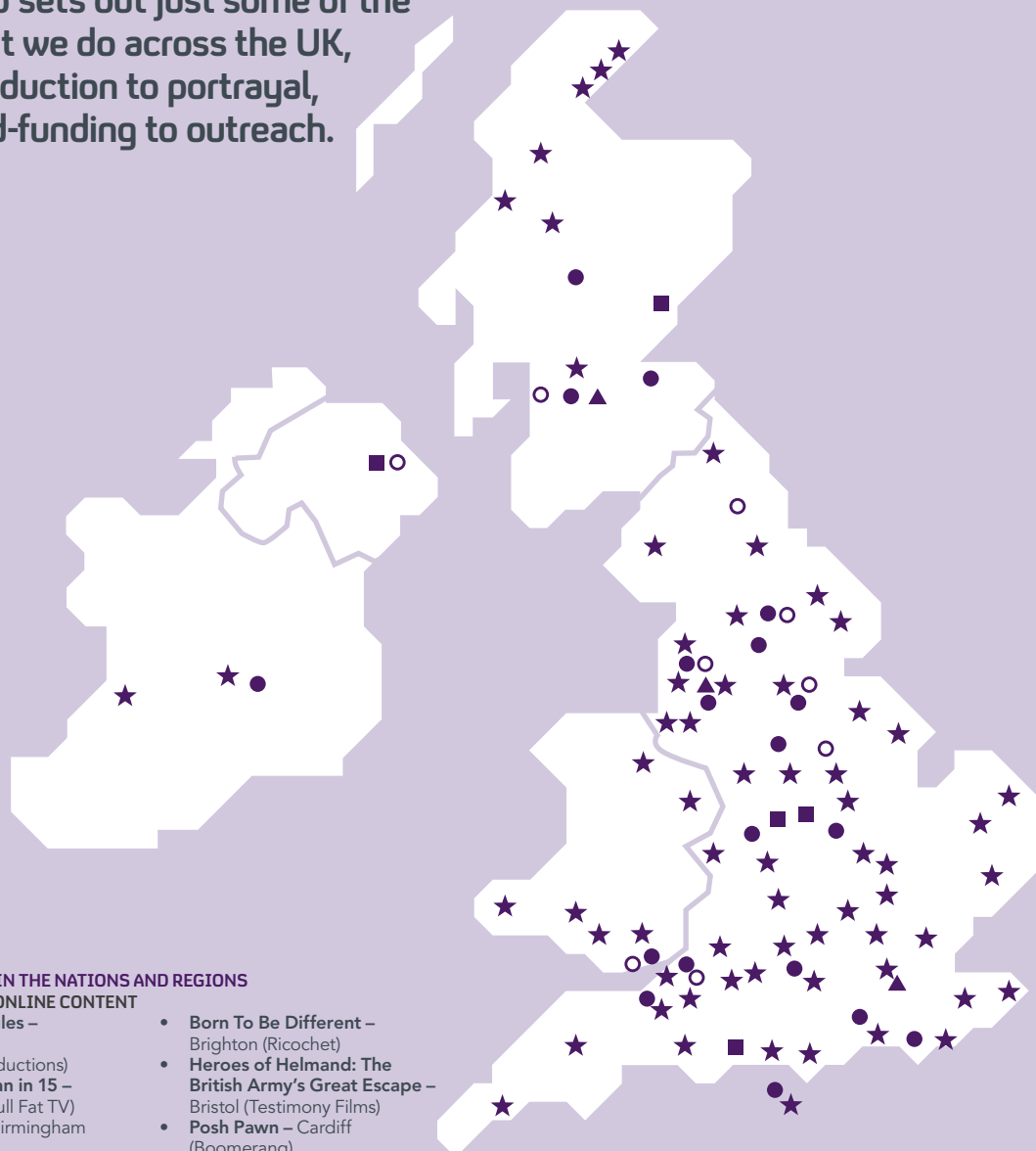
3,000

jobs in the Nations and Regions

55%

of first-run originated programme hours on Channel 4 were Nations and Regions productions

This map sets out just some of the work that we do across the UK, from production to portrayal, and seed-funding to outreach.



● PRODUCTION IN THE NATIONS AND REGIONS
TELEVISION AND ONLINE CONTENT

- **My Kitchen Rules** – Birmingham (7 Wonder Productions)
- **Joe Wicks: Lean in 15** – Birmingham (Full Fat TV)
- **Travel Man** – Birmingham (North One)
- **Patricia Routledge's Beatrix Potter** – Leeds (Daisybeck Studios)
- **Hollyoaks** – Liverpool (Lime Pictures)
- **Dispatches** – Manchester (Nine Lives Media)
- **Breaking the Silence** – Leeds (True North)
- **Britain's Ancient Tracks with Tony Robinson** – Belfast (DoubleBand Films)
- **Extreme Makeovers: On Fleek** – Belfast (Big Mountain)
- **Winnie-The-Pooh: The World's Most Famous Bear** – Glasgow (Finestripe Productions)
- **Location Location Location** – Glasgow (IWC Media)
- **Fill Your House for Free with Gok** – Glasgow (Raise the Roof)
- **Unreported World** – Oxford (Quicksilver Media)
- **Born To Be Different** – Brighton (Ricochet)
- **Heroes of Helmand: The British Army's Great Escape** – Bristol (Testimony Films)
- **Posh Pawn** – Cardiff (Boomerang)
- **IPC Athletics European Championships: Grosseto 2016** – Cardiff (Boomerang)

FILM4 SHOOTING LOCATIONS

- **The Lobster** – Republic of Ireland
- **Macbeth** – Scotland
- **Free Fire** – Brighton
- **Dark River** – Yorkshire
- **Journeyman** – Sheffield, Leicester, Doncaster and surrounding areas
- **T2: Trainspotting** – Edinburgh
- **Old Boys** – Sussex
- **Beast** – Isle of Wight

ALL 4 GAMES COMMISSIONS

- **Trusted Developments** – Oxfordshire
- **BigBit** – Brighton
- **Strawdog Studios** – Derby
- **PaperSeven** – Brighton
- **Lucid Games** – Liverpool

■ HIGHER EDUCATION PARTNERSHIPS AND PTS LOCATIONS

- **Big Mountain** – Belfast
- **Waddell Media** – Belfast
- **Full Fat TV** – Birmingham
- **De Montford University** – Leicester
- **Bournemouth University** – Bournemouth
- **University of Abertay** – Dundee

▲ OFFICES
MANCHESTER, GLASGOW,
LONDON (HEADQUARTERS)

- OUTREACH ACROSS THE UK
C4 POP UPS
- Cardiff
- Belfast
- Doncaster
- Corby

INDEPENDENT PRODUCTION COMPANY BRIEFINGS

- Glasgow
- Belfast
- Cardiff
- Newcastle
- Manchester
- Bristol
- Leeds

★ PORTRAYAL EXAMPLES*

This list highlights just some of the examples of regional portrayal across the schedule, with some series showcasing life across many different parts of the UK.

- **The Secret Life of the Zoo**
- **Ireland with Ardal O'Hanlon**
- **Amazing Spaces**
- **Come Dine With Me**
- **Gogglebox**
- **Four in a Bed**
- **Paul Merton's Secret Stations**
- **No Offence**
- **Grayson Perry: All Man**
- **Hollyoaks**

* Some programmes feature more than one location

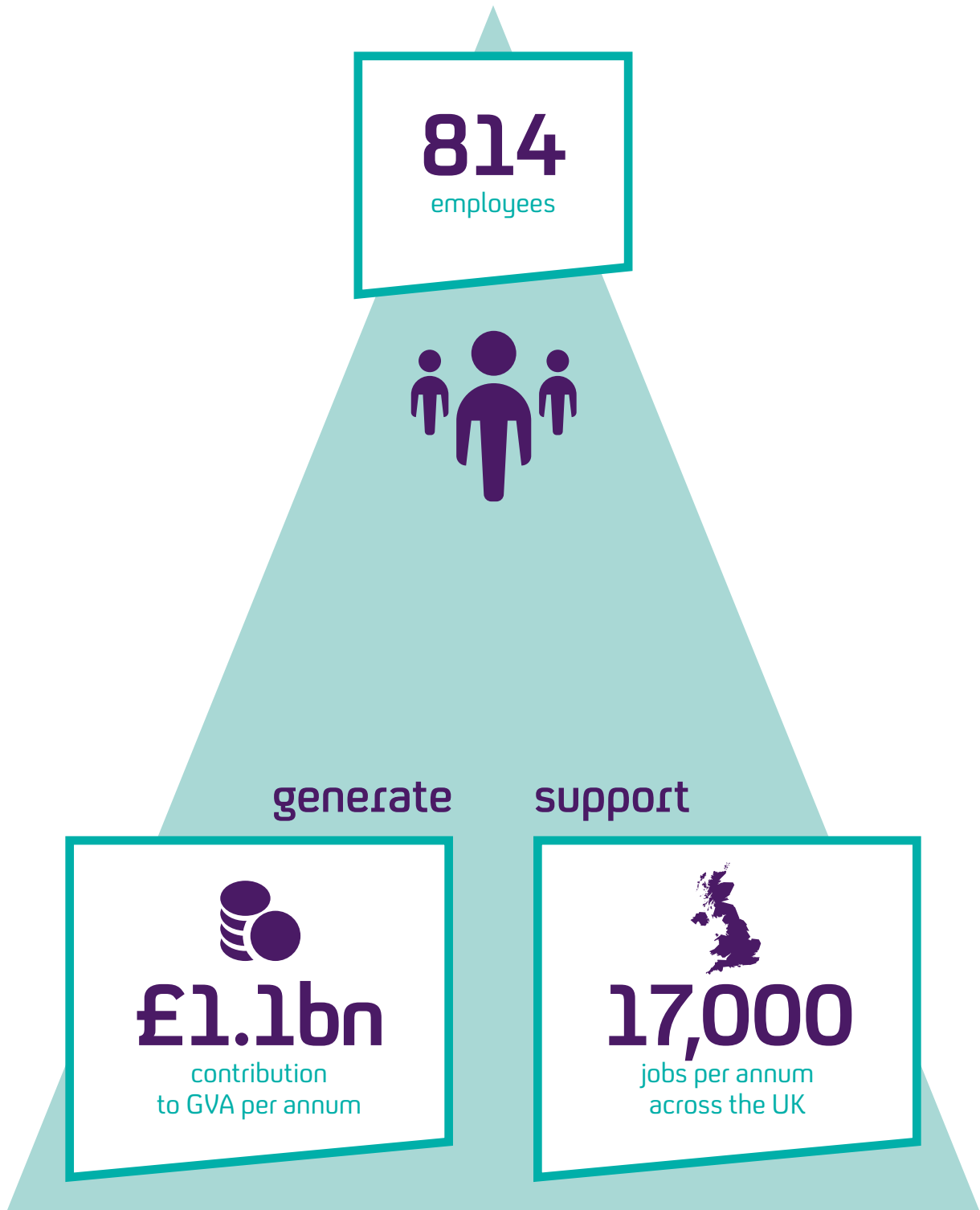
WE'RE A GREENHOUSE FOR NEW CREATIVE AND DIGITAL IDEAS AND TALENT OF SIGNIFICANT ECONOMIC IMPORTANCE

Our overall contribution to the UK's creative economy is disproportionate to our size.

We grow small businesses across the whole of the UK and our programme formats are successful around the world.

And we invest in grassroots talent to support a thriving UK creative sector.

We make a huge contribution to the UK's economy



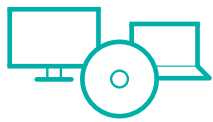
We provide significant business for UK producers

£13bn

Total portfolio spend on content since launch in 1982

£9.7bn

Total portfolio spend on UK originally commissioned content since launch in 1982



We worked with

317

production companies across TV, digital and film in 2016

70 companies were new to Channel 4 in 2016

32% more than last year

The number of independent TV production companies we commission from

Channel 4 (main channel)	127
BBC TWO	93
BBC one	68
itv	61
5	55

We support the independent production sector more than our competitors

Spend on UK independent production companies
by PSB channels



10

deals have been completed since the launch of our Commercial Growth Fund. The Commercial Growth Fund exists to offer high growth potential companies the chance to advertise on Channel 4, in exchange for equity stakes or revenue share agreements.

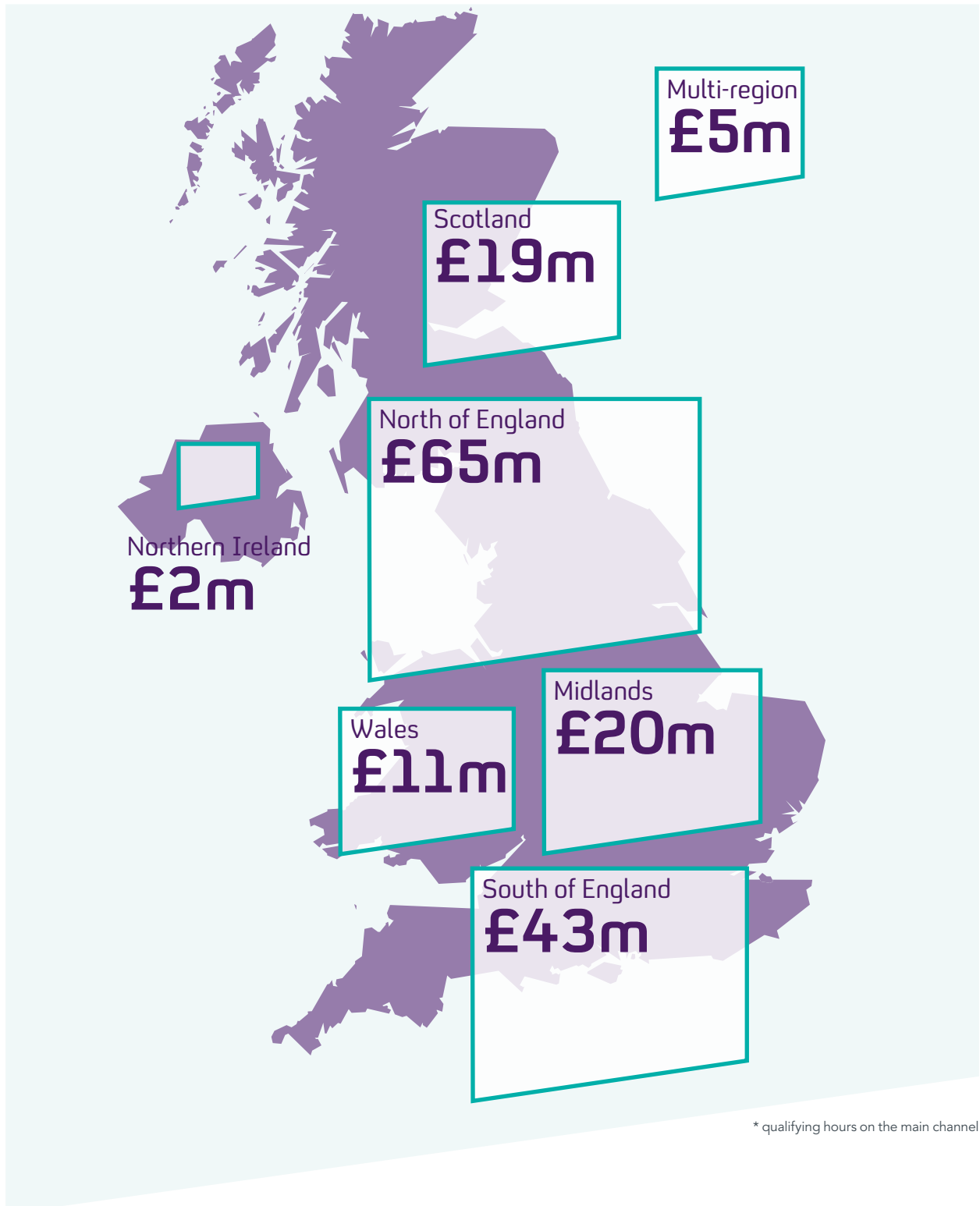


Launched in 2014, the Indie Growth Fund was set up to nurture the independent sector, by providing access to funding for small and mid-size production companies. Turnover across our Indie Growth Fund investees more than doubled in 2016. In 2017 The Fund sold Leeds-based True North Productions to Sky, delivering a profit on sale.

Across the UK

Channel 4 portfolio spend on Nations and Regions productions

On our main channel, over 50% of first-run commissioned programme hours* were produced in the Nations and Regions and we are significantly growing our spend in the Nations (Northern Ireland, Scotland and Wales).

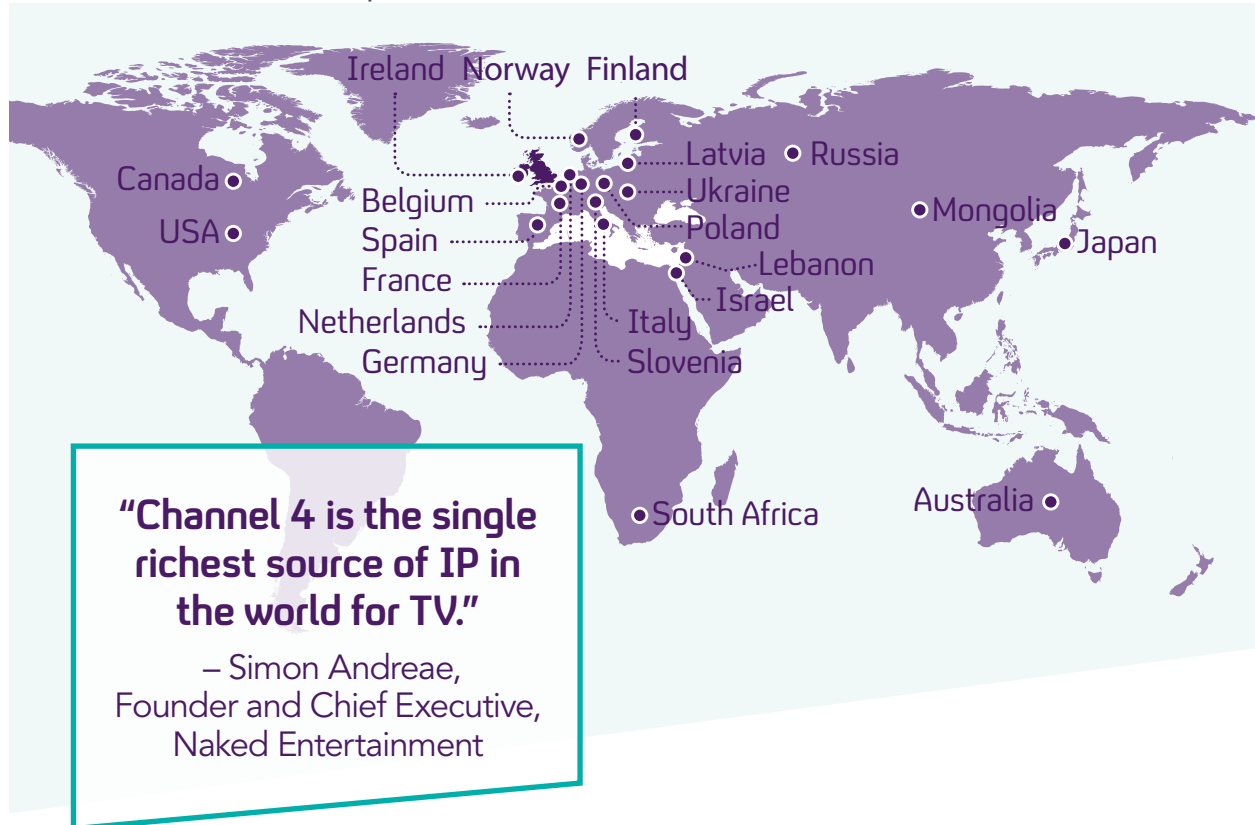


* qualifying hours on the main channel

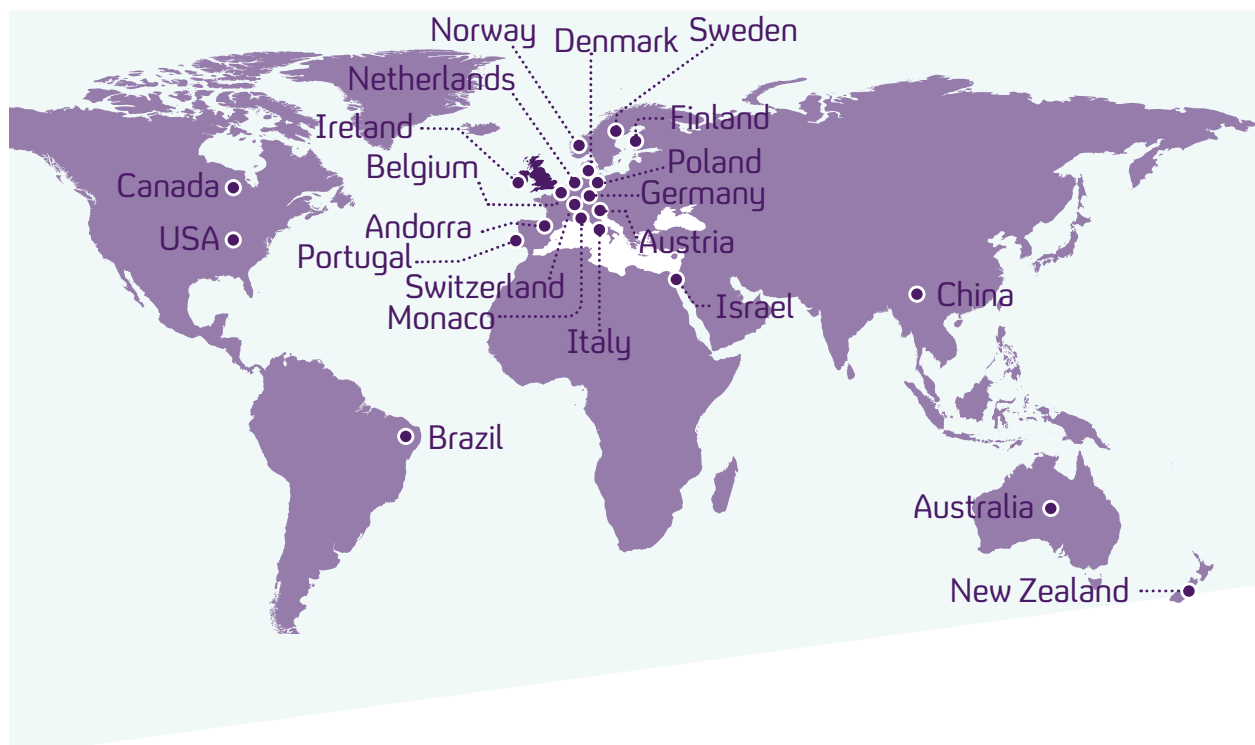
And around the world

Channel 4 contributed to the UK independent television sector's **£3.0 billion revenue in 2015**

Gogglebox is now exported to over 38 territories from Canada to Russia.



First Dates is now licensed in over 30 countries.



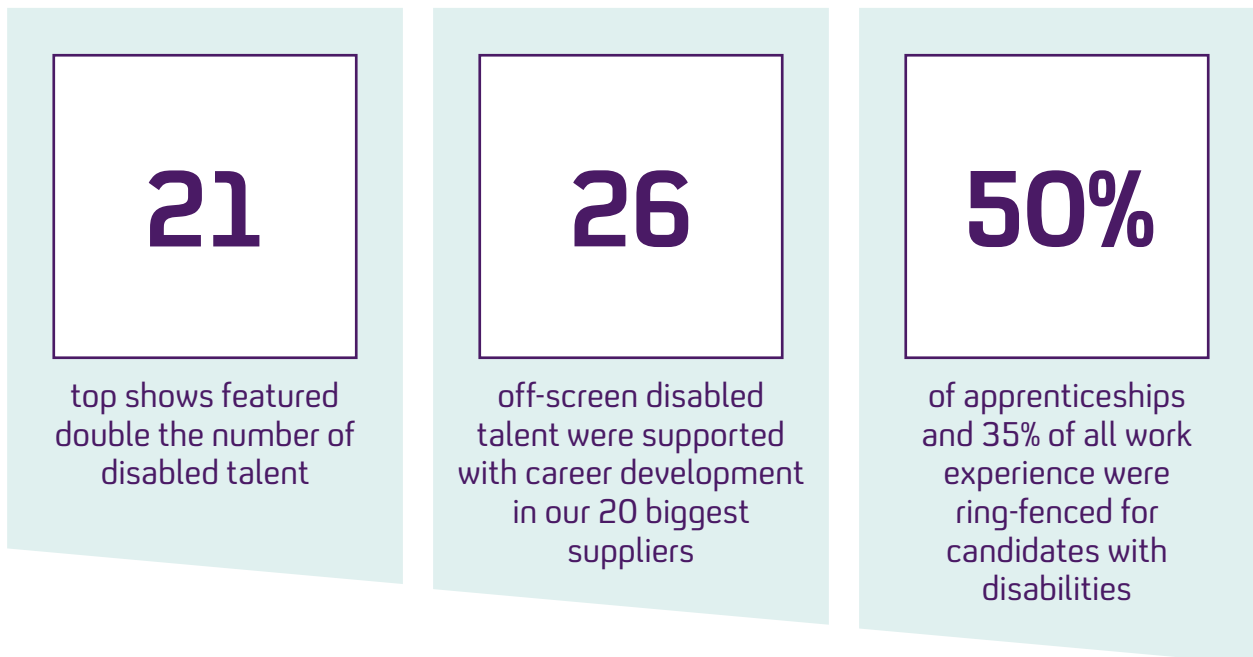
We invest in grassroots talent

Our commitment to apprenticeships is growing each year



(Number of apprentices recruited each year to Channel 4)

In 2016, we launched our Year of Disability: a set of initiatives with big, simple measurable goals to improve representation of disabled people on-screen, off-screen and at Channel 4.



We partner with organisations to support the UK's creative economy skills base

We financially support key creative talent development organisations, including Creative Skillset, Creative Diversity Network and the National Film and Television School

We support talent across the UK



In 2016, 650 people attended our C4 Pop Up programme of skills workshops, held throughout the UK



15 Production Trainee Scheme participants in 2017 – 75% of whom live outside London



36 people have been trained through our Dispatches Investigative Journalism scheme



4Stories launched in 2016, a new initiative for writers and directors aimed at talent currently under-represented in TV Drama – including women, disabled talent, BAME talent and those from disadvantaged backgrounds



Channel 4 is the largest corporate funder of the National Film and Television School ('NFTS')



In 2016 we launched the Investigative Journalism MA at De Montfort University in Leicester, developed in partnership with C4's News and Current Affairs team

“Channel 4 is the grit in the oyster – it’s the antidote to the BBC and you wouldn’t find anyone else doing what they do in the UK.”


– Sir Peter Bazalgette, Chair, Arts Council England



“Channel 4 is a fantastic embodiment of what’s great about the UK creative sector, bringing together and engaging people from across the creative industries.”

– Nicola Mendelsohn, VP EMEA, Facebook and co-Chair, The Creative Industries Council





**“Channel 4 and Film4
have played a great role in
creativity in the UK. Film4
has had a huge hand in making
films that otherwise wouldn’t
have happened.”**

– Andrea Wong, President of International
Production, Sony Pictures Television



**“Channel 4 is a starting
block for big talent,
they build people who
become huge and are
constantly launching
new people.”**

– Roy Ackerman, Managing Director,
Pulse Films TV (unscripted)

PSB'S CHALLENGER BRAND

Channel 4 creates innovative and alternative content which is distributed for free and admired globally.



WE'RE AN INNOVATIVE CHALLENGER BRAND IN BROADCASTING, KEEPING THE REST OF THE INDUSTRY ON THEIR TOES

Our investment in UK-originated content is rising, set against declining investments in PSB elsewhere.

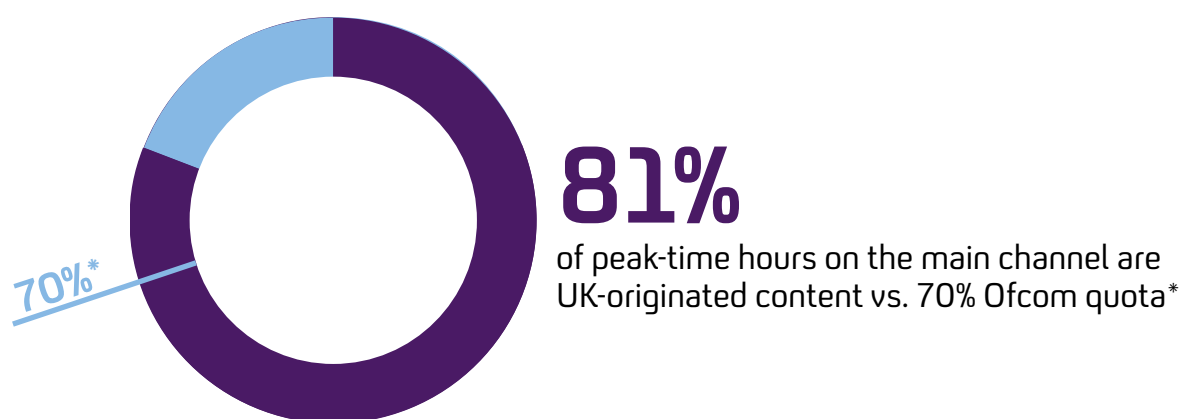
Our existence is critical to providing plurality in genres that deliver public good, such as News and Current Affairs.

We're at the forefront of innovation and harnessing new technologies.

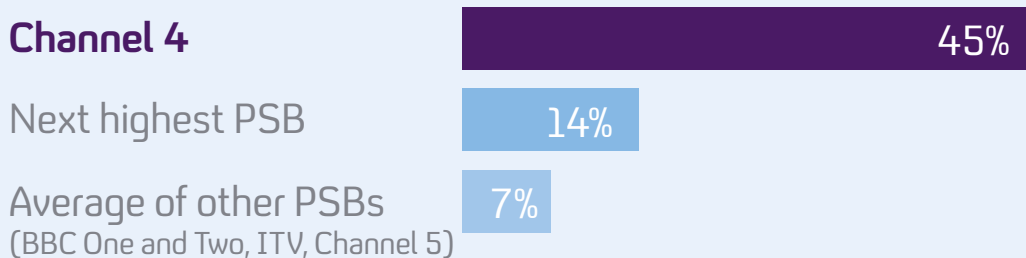
And we're in the premier league of international creativity.

We prioritise investment in innovative British programmes

Almost two-thirds of income spent on content



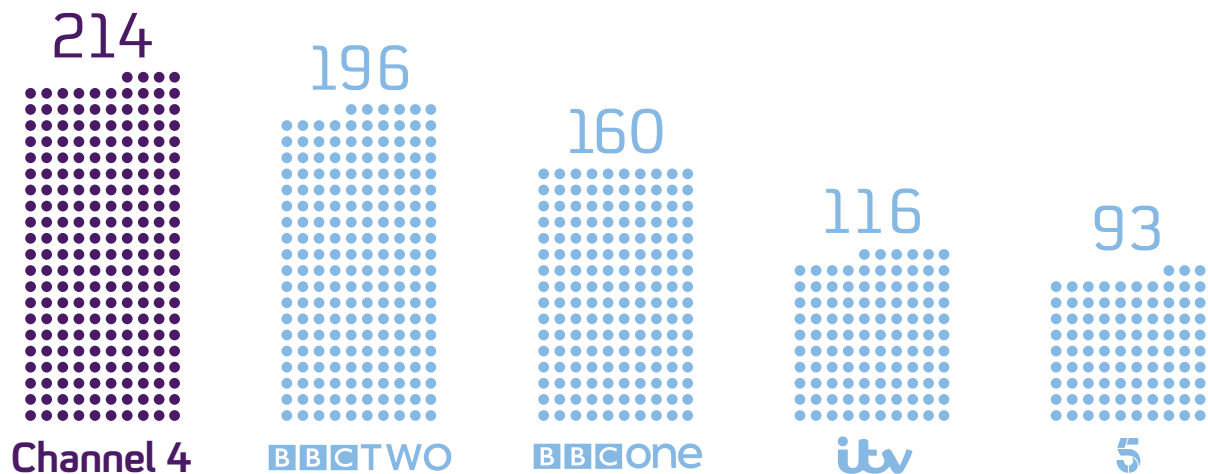
38pt lead over the average of other PSBs for taking risks



We survey our viewers regularly to understand how effectively we are delivering against our public service remit. The results are published in the Annual Report.

We're critical to providing plurality in genres that deliver public good

More new titles than any other broadcaster (2016)



More long-form News and Current Affairs programmes in peak-time on Channel 4 than on the other main PSBs combined (2016)



Covers News programmes running for at least 45 minutes and single-story Current Affairs programmes running for at least 15 minutes.

Ofcom-defined peak-time: 6pm–10.30pm.



65%

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

"Channel 4 is prepared to approach News with attitude in a way no other public service broadcaster could do. I'm not entirely sure how they get away with it, but it enriches British broadcast journalism."

– Richard Sambrook, Professor of Journalism and Director of the Centre for Journalism at Cardiff University

Viewers felt that Current Affairs programmes also:

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

Unreported World 48%

Real Stories With Ranvir Singh 37%

Dispatches 34%

Question Time 34%

This World 30%

Made me see something in a different light

Unreported World 45%

Panorama 38%

Dispatches 38%

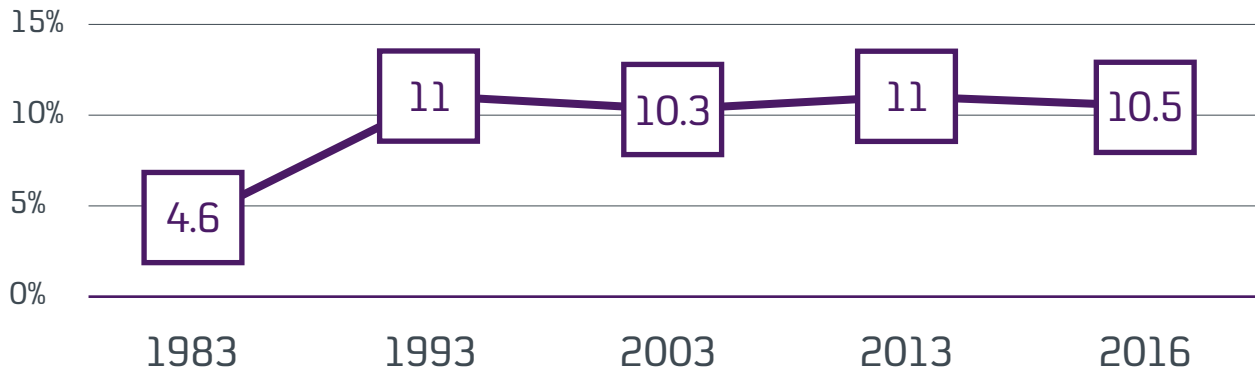
The Martin Lewis Money Show 34%

Real Stories With Ranvir Singh 32%

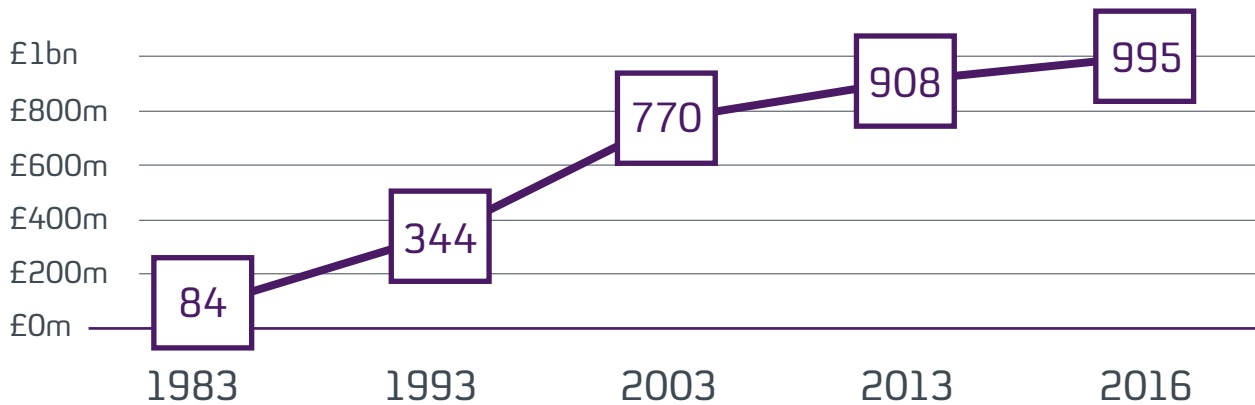
Unreported World and *Dispatches* achieved higher average viewer scores across five key reputational statements (including the two shown here) than Current Affairs programmes on the other main PSB channels.

Our viewing has remained stable in the multi-channel world and we punch above our weight in digital

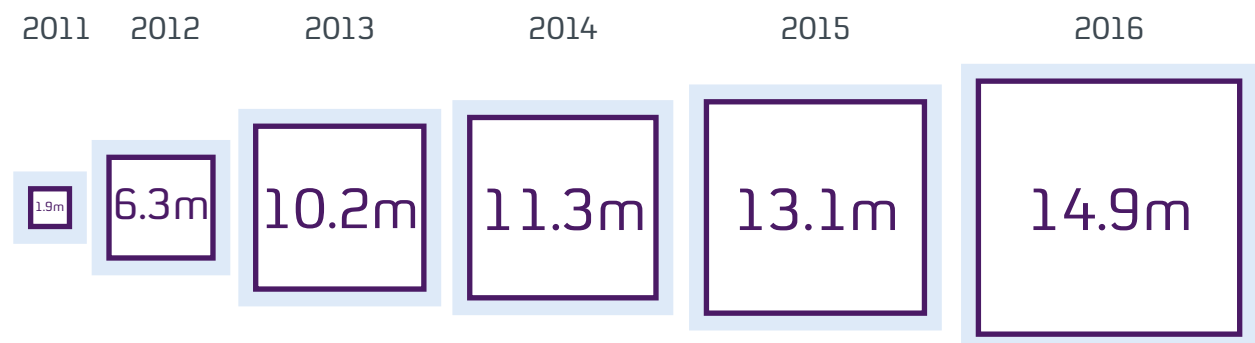
Our portfolio market share has been stable over three decades



Meanwhile, revenues have increased steadily and significantly



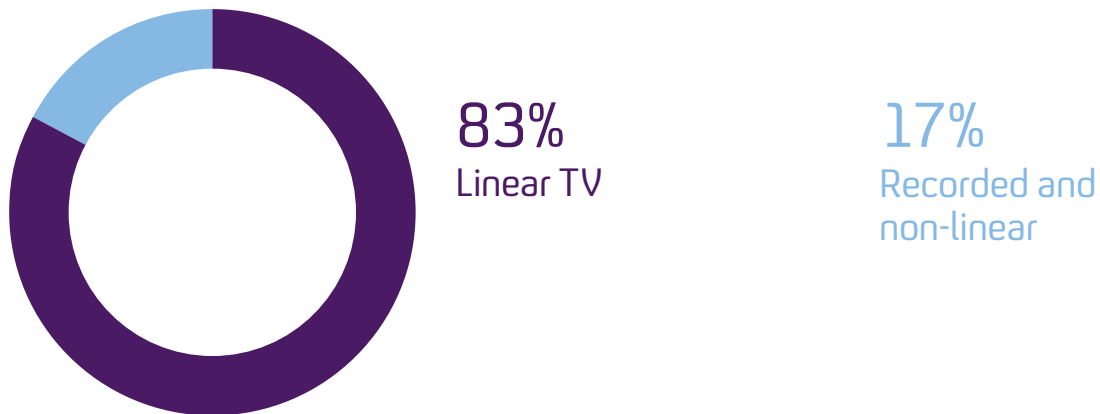
We are further innovating our commercial model through data collected from almost 15 million registered All 4 viewers*



Our award-winning Viewer Promise gives viewers confidence in the way their data will be used.

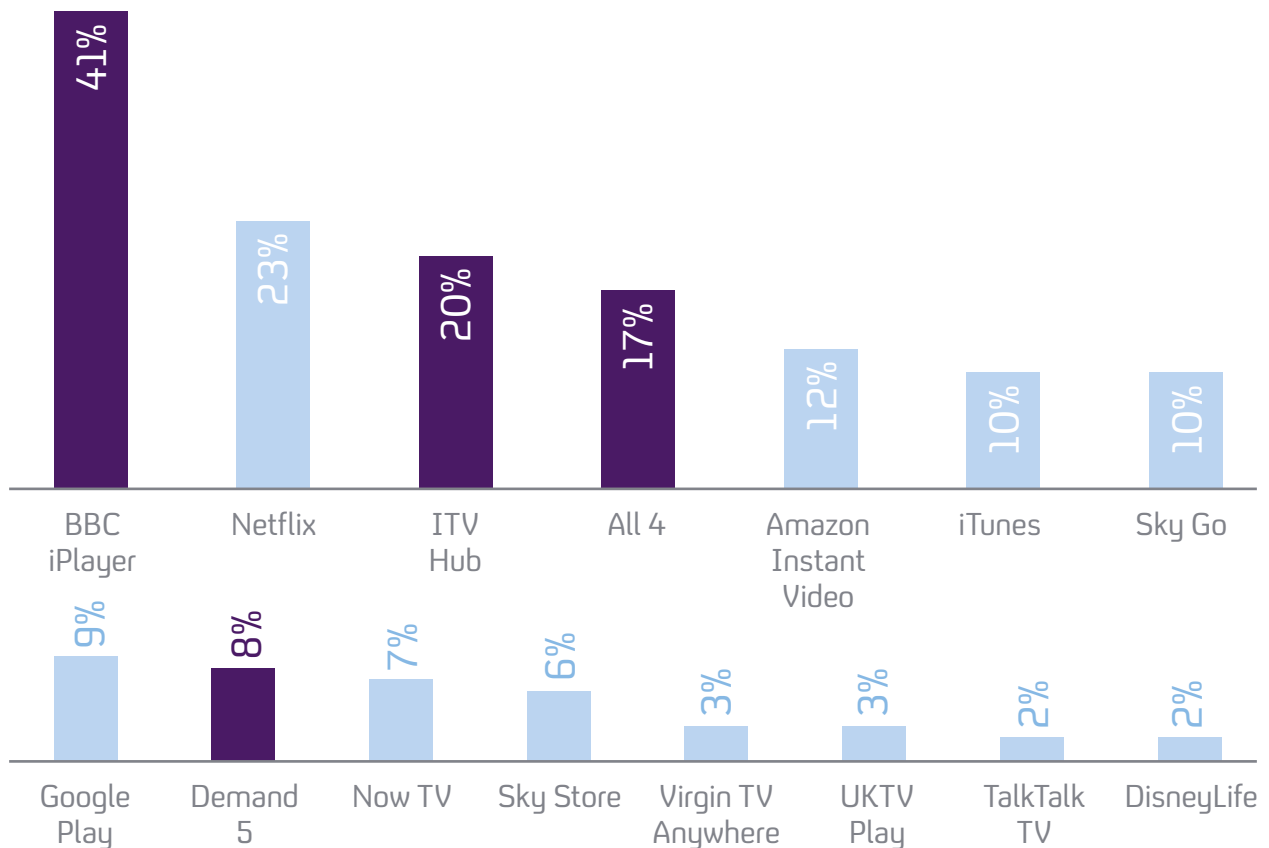
* Viewers registering their personal data means that we can serve them more effective and relevant advertising and content

The vast majority of viewing is still via linear TV

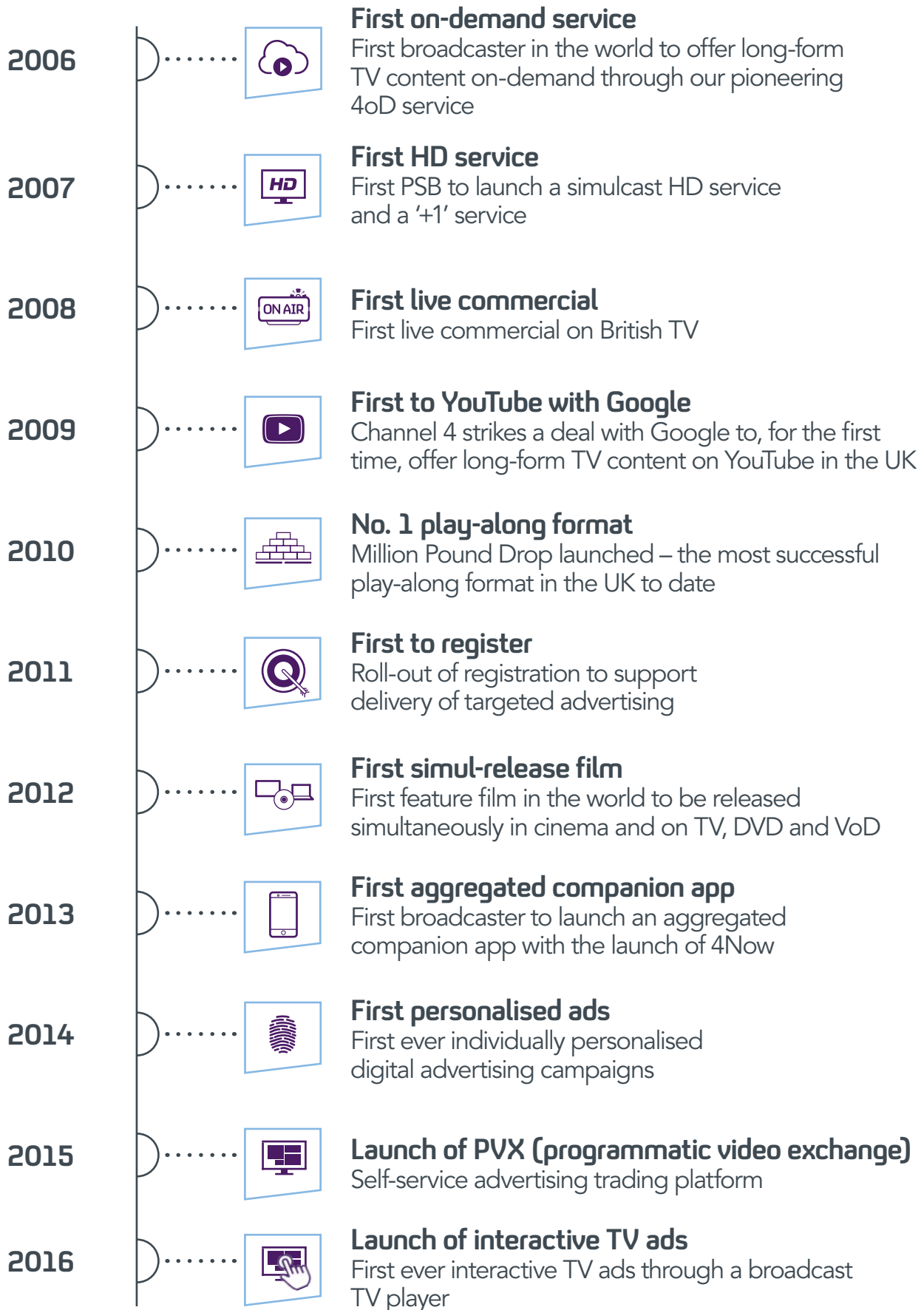


Base: All devices, long-form professional AV content. Live includes simulcast. Excludes physical consumption (e.g. DVDs) and short-form.

And non-linear viewing is dominated by the main PSBs

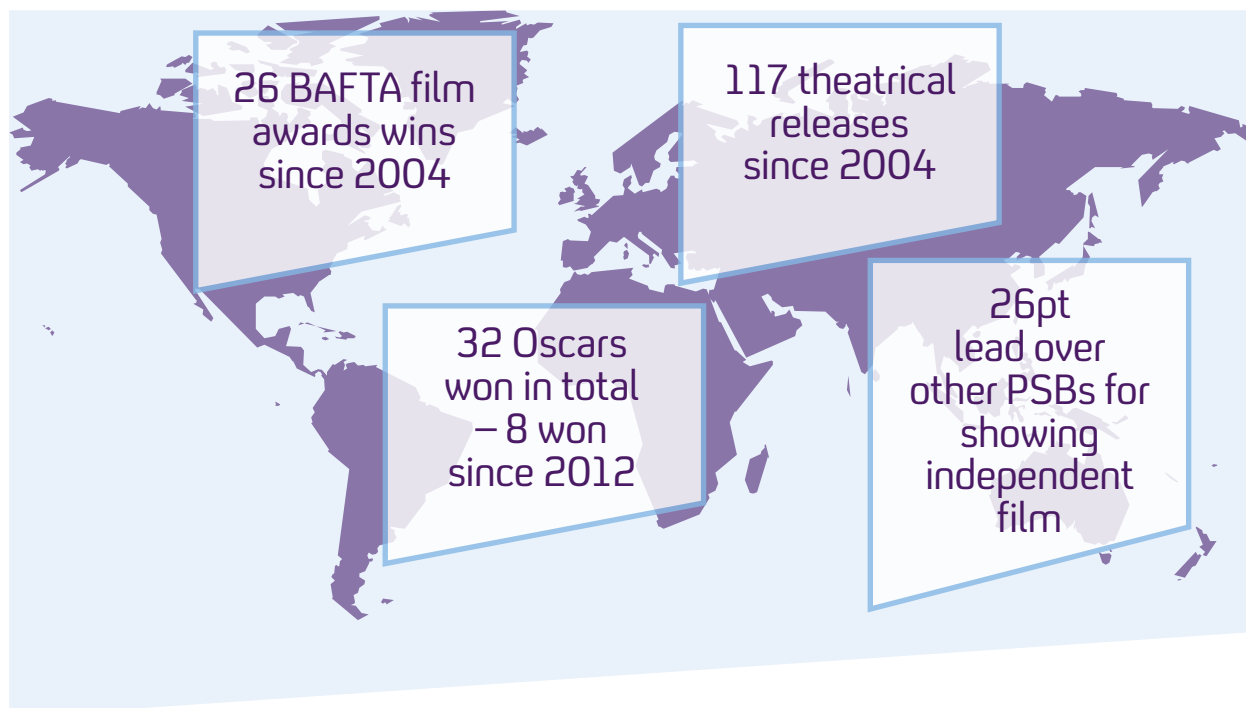


We're at the forefront of innovation and technology



We help put the UK in the premier league of international creativity

Our recent Film4 success includes:



Steve McQueen is one of the leading British directors in Hollywood

Talent grown by Channel 4 goes on to huge international success

“One of the reasons I won the Best Picture Oscar for that film is because of Channel 4’s investment and belief in my work.”

– Steve McQueen

- 2008 ... First major feature film, *Hunger*, premieres at Cannes and receives the Camera d’Or for first-time director
- 2011 ... Second major release, Bafta-nominated *Shame*
- 2014 ... *12 Years a Slave* wins three Oscars, including Best Picture
- 2017 ... McQueen goes into production with his next title, *Widows*, starring Viola Davis.



A CATALYST FOR SOCIAL CHANGE

Channel 4 inspires citizenship,
especially among hard-to-reach
audiences.



WE INSPIRE CITIZENSHIP, ESPECIALLY AMONG HARD-TO-REACH AUDIENCES

We have a greater impact than any other UK broadcaster in challenging prejudices, giving diverse viewpoints and inspiring change in people's lives.

Our unrivalled connection with young people makes us uniquely placed to deliver public service content to them.

And we're a world-leader in bringing diversity into the mainstream.



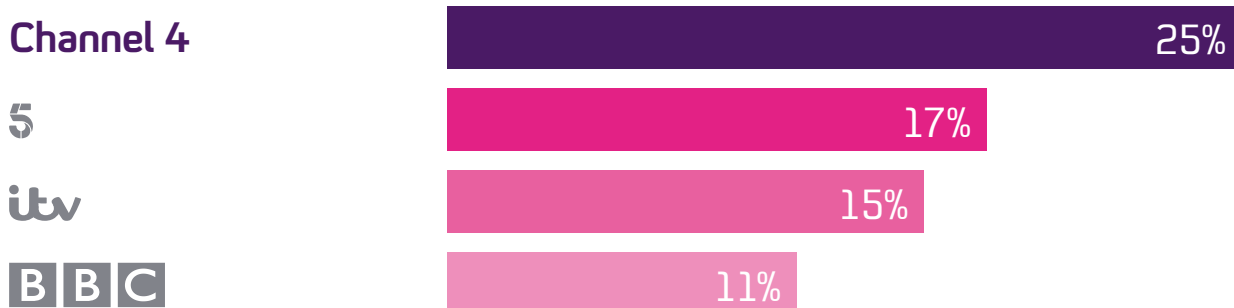
52%

of all 16–34-year-olds in the UK have registered their details online with Channel 4

We have a stronger relationship with young people than any other PSB



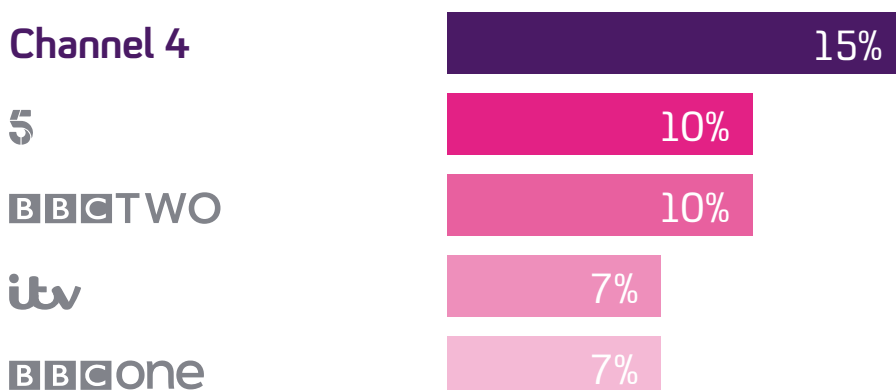
A significantly higher proportion of our total audience is aged 16–34 compared to any other PSB channel in the world, including the BBC and ITV



Total 16–34-year-olds' viewer minutes as a percentage of all individuals' viewer minutes (broadcaster portfolios).



Our News audience is made up of a significantly higher proportion of 16–34-year-olds compared to any another PSB channel in the world, including the BBC and ITV



Percentage of viewers of national news programmes on main PSB channels accounted for by viewers aged 16–34.

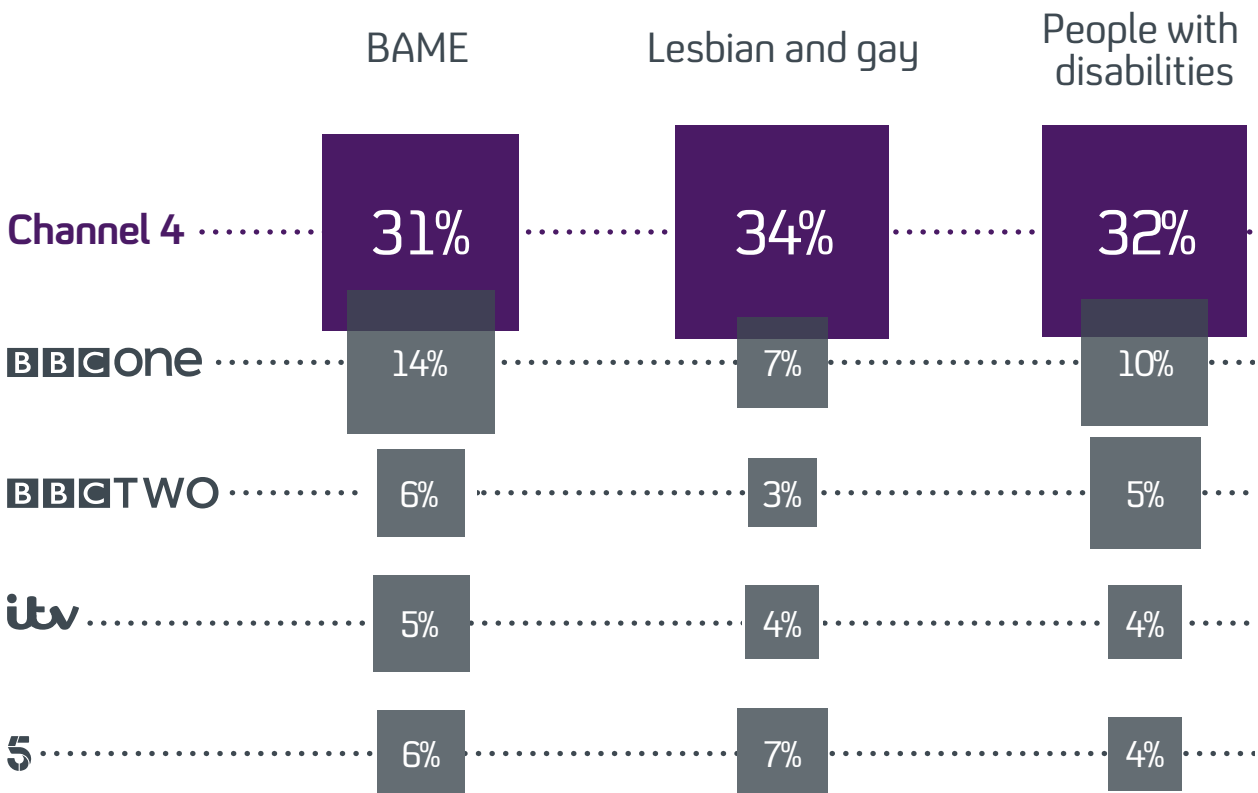
E4 has a larger share of viewing among 16–34-year-olds than both BBC Two and Channel 5, despite being a digital channel.

We provide diverse viewpoints, challenge prejudice and inspire change

Lead over PSB average



Best main PSB channel for showing the viewpoints of different minority groups



We were the first company to be placed at the top level – ‘institutionalised inclusion’ of EY’s National Equality Standard, the most forensic independent diversity audit in the UK.

We bring diversity to the mainstream

"As shown with its outstanding coverage of Rio 2016, Channel 4 continues to set the international benchmark for how Paralympic sport should be covered by a broadcaster. They lead the way both on-screen and off-screen."

– Sir Philip Craven, IPC President



In 2016, our Paralympic year, Channel 4's 360° Diversity Charter launched our Year of Disability, which more than doubled the number of disabled talent in 20 of our biggest shows, and advanced the careers of more than 50 disabled people in the TV industry.

Our Paralympics coverage will be studied as part of the new Media Studies curriculum from exam board AQA, the largest exam board in the UK.

52%

Our coverage of the Rio Paralympic Games 2016 was watched by nearly half the population

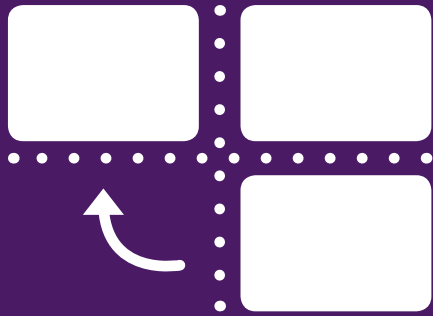
2/3

We assembled the largest ever team of disabled presenters on UK television – 2/3 of our presenting team

79%

of those surveyed said that our coverage of the Paralympics Games improved society's perception of disabled people

CHANNEL 4'S
UNIQUE
MODEL
UNDERPINS IT ALL



We operate a 'Robin Hood' model, whereby profits from more commercially successful programmes are reinvested in valued PSB programming

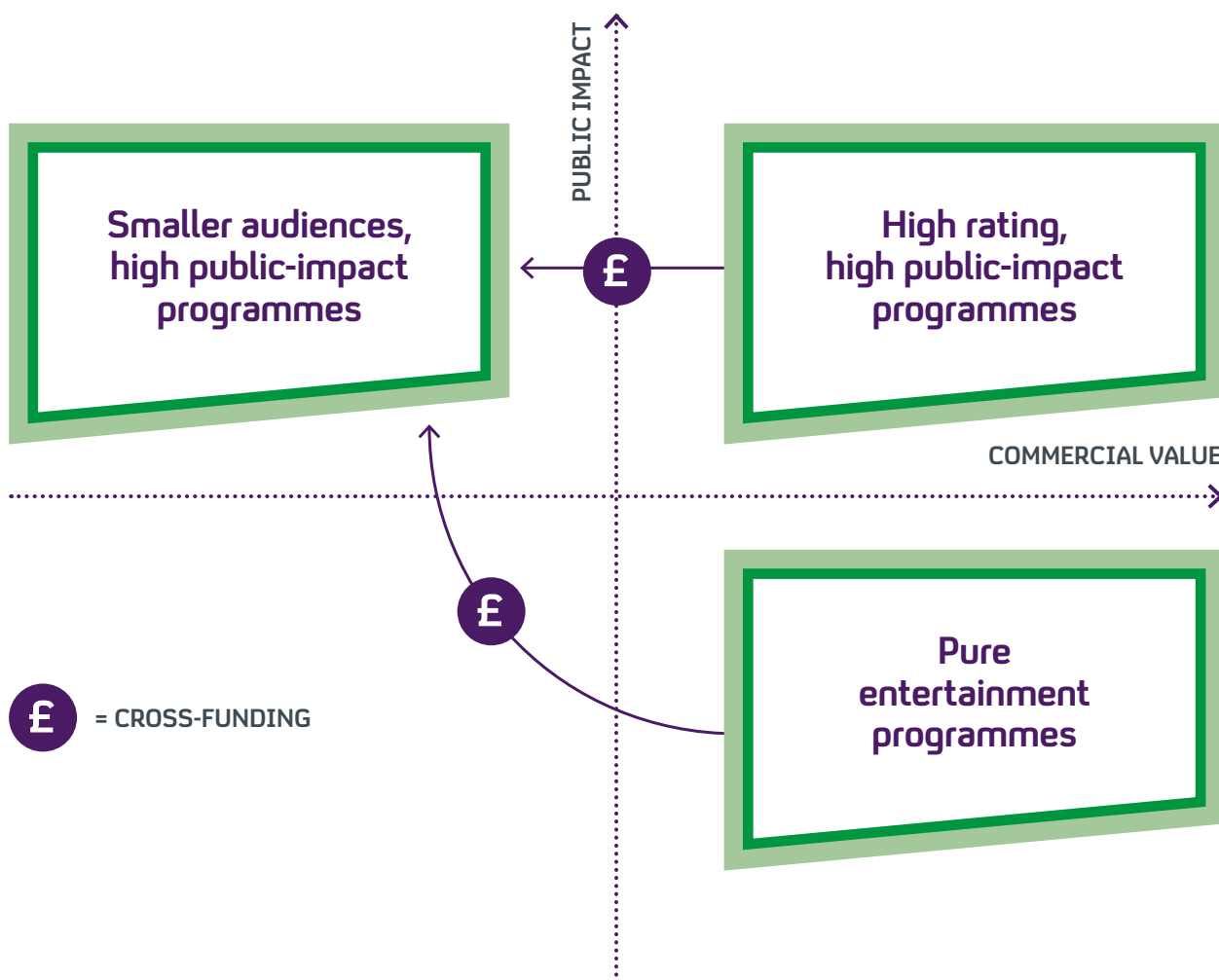
For over 30 years, Channel 4 has successfully balanced the twin challenges of delivering to an extensive public service remit whilst being commercially self-sufficient.

In a world in which consumers increasingly demand that businesses deliver social good, and organisations in the charitable and public sectors are raising more and more money from commercial activities, this has become a powerful business model. Today that business model is known as 'social enterprise'.

Channel 4 is a self-sustaining social enterprise, raising commercial revenues from the market and reinvesting surpluses back into British public-service content from UK independent producers.



We do this through cross-funding genres such as News, Current Affairs, British Film and Education (which are typically loss-making), with revenues from commercially valuable programming, like Factual Entertainment.



In contrast, ITV and Channel 5 are required to maximise returns to shareholders.

They are incentivised to invest in new programmes only to the degree required for them to effectively compete for market share in higher-audience, commercially-attractive content.

And Channel 4 isn't just about broadcasting

We create training and development opportunities

As part of Channel 4's 2016 Year of Disability commitments, 35% of work experience placements and 50% of apprenticeships in 2016 were ring-fenced for people with disabilities. In addition to work experience and apprenticeships at Channel 4's offices in London, Manchester and Glasgow, our Production Training Scheme offers 12-month salaried placements that provide on-the-job TV production training with independent production companies across the UK – including Northern Ireland and the West Midlands. Following the Rio 2016 Paralympics, 24 disabled trainees also completed our Rio Production Training Scheme – over half of whom are now employed in the industry.

Our pan-UK Channel 4 Pop Ups programme, Apprenticeship Scheme, our one-year Production Training Scheme, which provides on-the-job experience with independent production companies across the UK, our freelance 4Crew Scheme, the Northern Writers Award and our Investigative Journalism Scheme also all exist to support skills development in our industry.

We inform the British public about Current Affairs

In 2016, our long-running investigative strand *Dispatches* took the strategic decision to focus its domestic investigations on five core issues – inequality, the changing world of work, welfare reform, housing and the pressure on public services. We examined the lack of homes built, despite promises to increase housing, in *The Great Housing Scandal* and *Britain's Homebuilding Scandal*.

The film *Britain's Pensioner Care Scandal* had significant national impact after revealing concerns about home care provided to older people, particularly in the London Borough of Haringey. Following this programme, Haringey Council terminated its contract with one of the care providers investigated in the film and 17 home care workers brought a case against this provider over non-payment of the minimum wage.

Our impactful Current Affairs also featured in other factual genres too, evidenced in *The Secret Life of Prisons*, as it depicted the brutal reality of life inside these British institutions. It featured numerous videos shot illegally by prisoners on smuggled-in mobile phones and revealed the prevalence of violence, drugs and anarchy.

We reach young people on difficult subjects

Several documentaries explored teenagers growing up in unconventional families – *House of Teen Mums* tackled the growing crisis of homelessness among young Brits at the sharp end of the housing crisis, with access to one of the YMCA's hostels for young mothers. The documentary was accompanied by an online short on *Am I Normal?*

Obsessed with My Body looked at the growth in vanity amongst teenage boys, in an era where social media has meant their bodies are constantly under peer review. Our online series *Stripped Bare* won an RTS Award for its portrayal of how different people, including a transgender person and a girl with alopecia, use make-up to empower themselves.

Other original series for All 4 included *The Dark Side of Being Young*, in which six young adults confide their darkest moments as a warning to others, including technology addiction, bullying and eating disorders. We also commissioned a new scripted comedy, *Me and My Teen Self*, written by and starring new transgender talent, Lewis Hancox, based on his own experience of growing up transgender.

We find innovative ways to engage young audiences in News and Current Affairs

In 2016 we expanded our digital-first strategy based on publishing impactful, fact-checked short-form news video on social media channels – particularly Facebook and YouTube. This year, we also successfully launched two spin-off Facebook strands to accompany the main Channel 4 page: *Channel 4 News Democracy*, and *Channel 4 News Identity*.

This strategy has proved highly successful, with *Channel 4 News* now one of the UK's leading video news brands on Facebook. In 2016 videos across the Channel 4 News portfolio received almost 2 billion views, an increase of over 200% from 2015. Commissioned research amongst 16–34-year-olds shows that Channel 4 News Facebook videos deliver strongly to our remit.

We also delivered Current Affairs content to young people via other mainstream/popular formats on screen – most notably *The Last Leg*. The most powerful episodes have been those with a political spin: the US election special, held the night after the results were announced, achieved the programme's highest ever live viewing figures, consolidating at 2.6 million viewers at 9pm and a 16.8% share of 16–24-year-olds.

Our News has impact on a global scale

We continued its commitment to report on the conflict in Syria and its impact, with poignant documentaries such as *Children on the Frontline: The Escape* from filmmaker Marcel Mettelsiefen, which documented the journey of a family fleeing Syria and starting a new life in Europe as refugees, as well as cutting-edge reports such as those from young Syrian filmmaker Waad al-Kateab on conditions on the frontline in Aleppo – whose videos were viewed almost 200 million times on Facebook.

We identified and explored the drivers behind the appeal of Donald Trump from early on in his presidential candidacy, with a series of prime-time documentaries from *Channel 4 News'* Matt Frei charting his campaign. During the campaign period, Channel 4 broadcast all three presidential debates, and explored social issues defining modern America through documentaries such as *The Gun Shop* and *My Trans American Road Trip*.

In 2016, the *Unreported World* team's vivid and agenda-setting reports gave a voice to those who wouldn't normally be heard, combining accessible human stories with rigorous journalism and analysis, including Fazeelat Aslam's report from Karachi on the city's water crisis, which was recognised with the Foreign Press Association Environment Award.

We engage British citizens in democracy

As with our coverage of all major political events, we approached our coverage of the EU Referendum with a particular focus on our remit. We aired *Boris v Dave: The Battle for Europe*, a Michael Crick-fronted documentary that explored the personal battle between David Cameron and Boris Johnson on the election outcome.

In Comedy, we launched *Power Monkeys*, building on the success of *Ballot Monkeys* in 2015, a weekly topical comedy show on all things EU. And, we brought back 90s hit *Eurotrash* which showcased the best, worst and weirdest that the EU has offered the UK. On the night before polling day, we also aired *Europe: the Final Debate*, led by Jeremy Paxman.

Additionally, in 2016 our long-running soap *Hollyoaks* teamed up with the Electoral Commission to encourage 18–24-year-olds to register to vote, ahead of the local elections in May. Channel 4 sought to address the fact that this demographic was the least likely to be registered and launched a series of adverts featuring stars from the soap in a campaign to remind viewers of the voter registration deadline and its importance.

CHANNEL 4 HELPS FULFIL THE UK'S INNOVATION STRATEGY AT NO COST TO THE TAXPAYER

We drive innovation and growth by exploiting a publicly-owned asset (the terrestrial broadcasting spectrum) to reach audiences and generate revenues.

Those revenues go back into funding independent production companies, who retain the rights to the programmes they create.

These rights are then exploited on a global scale, delivering revenues direct to the production companies, who return tax receipts to the UK Government.

And on top of all of this, we provide invaluable knowledge and promotional support to help grow the UK's broadcasting sector and foster its entrepreneurialism.

The UK's innovation strategy focuses on support for small businesses to bring ideas to market, increase knowledge-sharing and grow global businesses.

This is what we do.





**IF CHANNEL 4
DIDN'T EXIST,
YOU'D HAVE
TO INVENT IT**

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