

Too this, too that, too
Too true. We are Ch
We take risks*. We o
We create TV, film a
that challenges and
We champion diver
indies, new talent a
And to deliver this,
act commercially. It

o the other?
annel 4.
ffer alternatives.
nd digital content
provokes.
se perspectives,
nd young people.
we think and
's all in our remit.

*When there isn't someone complaining
about one of our shows, we should be worried.

2019 at a glance

Rick and Morty



The Lateish Show with Mo Gilligan



DELIVERING DIGITAL TRANSFORMATION

£163m record digital revenue (+18%)

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

995m programme views on-demand (+9%)

the highest-ever level, offsetting changes in our linear audience share

22.2m registered users on All 4 (+13%)

attracting more regular viewers to our streaming platform

54% of views on All 4 are from 16-34-year-olds

All 4 is the youngest-profiling public service broadcaster streaming service in the UK; with a 16-34 profile akin to Amazon Prime and Netflix

FINANCIAL INVESTMENT IN THE FUTURE

£985m corporation revenue (+£10m on 2018)

led by strong digital revenue growth and investment in Box, offsetting challenging linear ad market conditions

£26m pre-tax deficit (-£31m on 2018)

as Channel 4 invests in its strategic business transformation, we budgeted a deficit in 2019 to allow for significant spend in our 4 All the UK programme, while increasing investment in digital growth and maintaining content spend

£137m cash reserves* (-£43m on 2018)

reduced due to Channel 4's investment in digital growth, key strategic initiatives and our 4 All the UK programme

* Cash reserves reflect the sum of the Group's cash and cash equivalents and other financial assets at the balance sheet date.

This Way Up



MAKING AN ECONOMIC IMPACT

£660m total content spend (2018: £662m)

enabling us to maintain our creative momentum as we transform our business

£492m spend on originated content (2018: £489m)

the third-highest level in Channel 4's history

£189m spend on productions in Nations and Regions (2018: £186m)

a joint-record level in Channel 4's history

43 new suppliers worked with in 2019 (+26%)

274 producers worked with in total (equal with 2018), including 166 independent producers (+8%)

Hollyoaks



MUST-WATCH TELEVISION

9.9% viewing share across the TV channel portfolio (-3%)

a small decline as young people move to stream more content on-demand

7.5% main channel viewing share among 16-34-year-olds (flat)

the only commercial public service broadcaster to maintain share among young people across the day - and we grew 16-34-year-old share by +2% in peak-time, the highest level since 2015

7.9% main channel BAME profile (+9%)

our highest BAME profile ever

75.8% of all TV viewers reached every month across Channel 4's TV channels (-4%)

the third-biggest UK broadcaster in terms of audience reach, behind only the BBC and ITV

At Channel 4,
we're more
than a public
service
broadcaster,
we're a unique
and distinctive
part of life in
the UK.

Our remit is to be experimental and inclusive, and that's been set by Parliament and enshrined in law. Everything that we do is inspired by our public service remit. Along with a set of public service broadcasting licence obligations, the remit creates a framework that shapes the way we work as a whole: the types of content and programming that we invest in, the people and companies that we work with to create this content and the positive impacts that our content delivers.

We are

Creators

TV. Film. Digital.

Challengers

Voicing alternative views.
Experimenting and taking risks.
Provoking genuine debate and change.
Championing culture.
Telling today's full story.

Champions

Youth.
Diversity.
Social mobility.
Talent.
Creativity.

Commercial

Our commercial activity
fully funds our unique
creative output.

Before anything else, we're creators. Every day we invest in TV, film and digital content that's distinctive, imaginative, pioneering and provocative. When it comes to creativity, there's no such thing as too much. That's what makes us different from the rest.

No such thing as too creative

Creators

Investing and innovating in the British creative sectors

The Curry House Kid



Britain's edgiest terrestrial

INVESTMENT IN TV

Channel 4 has been at the heart of the national conversation for almost 40 years. Our unique model – commercially-funded but publicly-owned – means that we are able to offer independent and distinctive, universal content reflecting the interests of different communities across the UK. Every day, our commissions across high-quality television, film and digital content deliver to our remit.

To make this content, we work with the best creative talent drawn from all across the UK. This model allows us to fulfil a core part of our mission, to strengthen the independent production sector, by supporting a wide range of creative enterprises.

In 2019, we maintained our overall level of investment in content across our services. Our total spend was £660 million across our services – level in percentage terms with 2018 and higher than in any year prior to 2016. Content investment on the main channel was £530 million (2018: £548 million). This was down by 3% year-on-year, as £16 million was moved to our digital TV channels, increasing their budget by 15% to £120 million.

This steady level of investment enabled us to deliver on our content strategy, maintaining Channel 4's distinctiveness by commissioning shows that promote risk-taking and innovation, champion unheard voices and tackle challenging territories.

This was exemplified by a host of ground-breaking factual titles that delivered both in terms of viewing performance and critical acclaim during the year, particularly among young people. These included *Leaving Neverland* (4.2 million total viewers, including a share of 37.4% of 16-34-year-olds, which was 324% above the slot average – which is the average share in the slot over the past year), *Jade: The Reality Star Who Changed Britain* (2.0 million total viewers, including a share of 14.6% of young people, up 79% against the slot) and *The British Tribe: Next Door* (2.1 million viewers, including 16-34-year-old share of 17.8%, up 35% against the slot).

Our creative risk-taking in recent years was proven with a swathe of returning programmes that performed strongly throughout the year: as many as 29 shows saw year-on-year growth in 2019, including *The Circle* (1.2 million viewers, with its viewing share up by 43% on the previous series), *SAS: Who Dares Wins* (its biggest-ever audience of 3.2 million, with share up 36% on the last series), *Gogglebox* (3.7 million viewers, with share up 9% on the last series, reaching its highest level since 2015), and *Escape to the Chateau* (2.9 million viewers, with this series' share rising by 17%). Channel 4 News' award-winning journalism also saw notable growth in viewing share of 22% year-on-year during its weekday 7pm slot, and achieved some 1.4 billion minutes of online video views across all social platforms (see page 57).

TV channel.

The Times



The Accident

High-quality British drama

Offering a unique take on British storytelling, our high-profile dramas attract large audiences and received critical acclaim across the slate.

Our biggest drama success of 2019 was *The Accident*, the final instalment of award-winning writer Jack Thorne's trilogy of Channel 4 films that, in his words, "peeked behind the curtains of this country" (following *National Treasure* in 2016 and *Kiri* in 2018). *The Accident* told the story of a devastating catastrophe and its aftermath on a local Welsh village. Each episode was watched on average by 3.6 million people (a 16.5% viewing share), and the whole series (including repeats) reached a total of 8.1 million people, equivalent to 13.4% of the UK population. This was our third-biggest new programme of the year in the 9pm slot and our most-viewed drama since *Kiri* in January 2018.

Acclaimed filmmaker Shane Meadows – who has a long-standing relationship with Channel 4 and Film4 – returned to Channel 4 with *The Virtues*, a powerful, bold drama that tackled themes of repressed memory, revenge and the hope of redemption. Co-written by Jack Thorne and starring the BAFTA-nominated Stephen Graham, the four-part series attracted an average audience of 1.7 million viewers (7.8% share) and received widespread critical praise. Lucy Mangan, *The Guardian's* TV critic, labelled the drama "a harrowing triumph".

Amongst an eclectic slate, other dramas that stood out during the year included *Brexit: The Uncivil War*. Meanwhile, season two of *The End of the F***ing World* was a huge hit with its young target audience. It became Channel 4's biggest instantly-available box-set ever and our first title ever to attract more viewers on All 4 than on linear TV, with 55% of total viewing via streaming platforms. On TV, the series drew a 14.7% share of 16-34-year-olds (46% above slot average), with much of this growth driven by 16-24-year-olds (up 163% on slot average). With 37% of the drama's audience aged between 16 and 34, *The End of the F***ing World* became Channel 4's youngest-skewing drama in four years and the youngest-skewing drama across all terrestrial channels in 2019.

The End of the F***ing World



The British Tribe Next Door



2.1m

The British Tribe Next Door averaged 2.1 million viewers

Programme innovation

Channel 4's remit encourages us to push creative boundaries, take risks and experiment in our programming in ways that other broadcasters do not.

We are constantly experimenting with new programmes and formats, seeking break-out hits with broad appeal. On the main channel, in the evening period when most people are watching (between 6pm and midnight), Channel 4 showed 160 new and one-off programmes in 2019 – more than BBC One (148 programmes), BBC Two (156) and ITV (91).

Factual Entertainment formats were a key focus for developing new ideas this year. *Sink or Swim* followed the journey of a cast of celebrities who couldn't swim who – through training and support – sought to swim across the English Channel. In aid of *Stand Up To Cancer*, the four-part series attracted an average of 2.0 million viewers and a 9.9% share of all individuals, including a substantial 17.9% share of 16-34-year-olds.

The British Tribe Next Door was a four-part series that followed Gogglebox star Scarlett Moffatt and her family as they spent four weeks with the Himba tribe in a remote Namibian tribal village – while living in an exact replica of their County Durham home. The biggest new Factual Entertainment series of the year for Channel 4, the series averaged 2.1 million viewers (a 9.9% share), and performed strongly with 16-34-year-olds (35% uplift in share).

To celebrate the 50th anniversary of the Apollo 11 mission, we announced the innovative *Moon Landing Live*, a multi-platform commission incorporating two major documentaries, several short films and online content.

The aim of the project was to immerse viewers in the remarkable six days, bookended by the dramatic launch and the moon landing. It included a Twitter takeover during the corresponding six days this year, in which mission updates were tweeted out as live at the same time of day as the historic event. Additionally, five three-minute films were shown after Channel 4 News during the week with updates on the mission from that day. Few other media or technology companies have sufficient presence across linear and online platforms to be able to run such a project, and only Channel 4 had the foresight to mark these remarkable events in such an innovative manner. Across the week, *Moon Landing Live* reached 5.2 million viewers (8.6% of the TV population). In terms of impact, 78% of viewers claimed they learned something new from the season.

Feel-good TV at its –

A new generation of returning brands

We continue to invest in new programmes that are set to become the next generation of channel-defining brands.

In a world where audiences are flooded with choice, our strategy has been to 'dial up the difference' and seek new formats and programmes that no one else would make. We launched a host of innovative and distinctive programmes during the year, many of which have already been recommissioned for additional – and sometimes extended – seasons in 2020, and which we hope will become fixtures of the Channel 4 schedule in the years ahead.

New series *Snackmasters* saw maître d' Fred Sirieix challenge Michelin-starred chefs to work out the secret recipes behind Britain's best-loved snacks – such as the Kit Kat, the Burger King Whopper and Pickled Onion Monster Munch – and try to recreate them from scratch.

Snackmasters was one of Channel 4's top original series launches of 2019, debuting with an audience of 2.1 million and almost doubling the share of 25-34-year-olds from 12.7% to 21.9% (and a 22.1% share of 16-34-year-olds overall). It has already been recommissioned for a second series in 2020.

60 Days on the Streets was a three-part series in which ex-soldier and adventurer Ed Stafford spent 60 winter days and nights on the streets of London, Manchester and Glasgow, documenting his first-hand experience of Britain's growing homelessness crisis.

With no money, food or shelter, Stafford self-shot his time living alongside the homeless to capture the reality of their day-to-day existence. This challenging series attracted an audience of two million viewers (8.7% share). Following its success, the series was renewed for another three-part documentary, *60 Days with the Gypsies*, in which Stafford will immerse himself into Romani Gypsy and Irish Travelling culture for 60 days.

Acclaimed by *The Times*' Caitlin Moran as "the TV show of the decade" and by *The Guardian* as "feel-good TV at its fluffiest", *The Dog House* was a new eight-part documentary filmed at Wood Green, The Animals Charity, in Cambridgeshire, which takes in hundreds of discarded, disowned or neglected dogs every year. The staff are committed to matching their homeless dogs with hopeful owners and the series followed the team as it tries to find the perfect match for both human and dog.

The Dog House launched in September 2019 and attracted an average audience of 1.4 million viewers per episode (a 7.4% share). It was Channel 4's second-highest-rating new series launch at 8pm among 16-34-year-olds. It will return in 2020 with an extended 18-episode run.

Snackmasters



fluffiest





Hollyoaks



Catch-22

A

The Great British Bake Off



All 4

As audiences – young people in particular – increasingly turn to streaming services for content, All 4 has continued to evolve to meet this demand. Our goal is to provide content wherever and whenever our audiences want to watch it.

2019 was another ‘best of’ year for our digital streaming platform All 4, with our best-ever individual day, week, month, quarter and year for viewing of our content.

Overall, we achieved record levels of on-demand viewing on our apps and platforms, which increased by 9% to reach a record 995 million views by year-end. This growth was driven primarily by connected TVs and streaming devices that plug into TVs, which saw app viewing growth of more than 20%.

With regard to our content, catch-up programming was All 4’s strongest growth area, thanks both to strong single titles such as *Leaving Neverland*, which became All 4’s most-viewed catch-up episode ever, as well as popular returning brands such as *Celebs Go Dating*, *The Great British Bake Off*, *Gogglebox* and *Derry Girls*.

All 4’s catalogue also includes a wide range of archive titles as well as new programming. A raft of successful acquisitions including *Catch-22*, *90210*, *30 Rock* and *ER* contributed to our streaming growth in 2019. We also created a dedicated Film4 section on All 4 for the first time.

Hollyoaks was once again the biggest title of the year on All 4, followed by *Celebs Go Dating*, *The Inbetweeners*, *Made in Chelsea*, and *Friday Night Dinner*. Our reality format *The Circle* continued to draw significant viewing figures – over half of the total volume of viewing by 16-34-year-olds to the series was after the live transmission via All 4, +1 and recorded viewing.

Walter Presents, our curated channel dedicated to quality foreign-language programming, also continued to see steady growth, with video views up 4% to 32.5 million. The service now includes more than 100 titles from nearly 20 countries and its library features around 950 hours of curated content, including the hugely popular Dutch drama *The Adulterer*, and *Deutschland 86*, the much-anticipated sequel to *Deutschland 83*.

We also launched a beta test version of All 4+, an optional paid-for service offering the public the choice of viewing our commissioned content without ad breaks. We also made significant technical improvements to the product this year, including fully-rebuilt iOS and Android apps.



In a quiet, low-key, very British way, All 4 is becoming the best streaming service we have.

The Guardian

Reaching audiences on social media

Channel 4, E4 and All 4 delivered another substantial year of growth in social media.

We are consistently ranked amongst the top six worldwide content providers for reaching UK audiences on social media (for video views of 30 seconds or more on Facebook and YouTube), as measured by social monitoring platform Tubular Labs. This success is crucially important in showing that Channel 4 is able to engage audiences for longer and in other places than its competitors.

Developing new ways of reaching young people is a core part of our strategy, and social media's potential for reaching those audiences is clear. The Digital Creative Unit, based in our National HQ in Leeds, has started publishing made-for-digital commissions, including a new comedy talent strand (Sparks) and a revamped content strand (True Stories, produced for Channel 4 by Barcroft Studios) for Facebook, YouTube and Snapchat.

While the number of views amongst the UK media market (defined as all UK-based creators in the media and entertainment space) generally decreased by 20% year-on-year, the Channel 4 social media portfolio grew by 4% in 2019, making it our biggest-ever year across social platforms (excluding the Channel 4 News brand, which itself performed strongly, see page 57).

We grew on every platform (Facebook, YouTube, Instagram, Snapchat, Twitter) but were particularly strong on Twitter (up 51%) and Instagram (up 31%), and video views on our Hollyoaks Facebook page were up 58% in 2019.

Facebook users spent 11.3 billion minutes with Channel 4, with growth in the minutes-viewed metric across our three biggest pages (the Channel 4 page increased by 13.2%, E4 was up 0.5% and All 4 grew by 4.7%).

We are the only UK public service broadcaster to have launched shows on Snapchat, which has particularly strong reach with young people. 90% of Snapchat users are 13-24-years-old and 43% of UK 13-34-year-olds have an active Snapchat account. In 2019, our Snap shows attracted 35 million unique viewers worldwide.

Our youth-focused channel E4 also remained the largest UK broadcaster brand on social in terms of video views in 2019, delivering almost five billion views across all platforms – double the size of its next biggest competitor, BBC News. This helps us to reach young audiences, with 72% of its audience aged under 35.



IPC Swimming Championships

Youth outreach

Opening up opportunities to groups that are under-represented in the media industry and the wider jobs market plays a vital role in helping us deliver against our public remit.

Channel 4 runs a number of industry-leading schemes tailored to early outreach. In particular, for the fifth consecutive year, Channel 4 ran a national youth outreach programme of skills workshops and challenges in cities across the UK in 2019.

The programme, rebranded as New Material (formerly known as Channel 4 Pop Ups), enables us to deepen our links to a variety of communities across the UK. Its aim is to supercharge young talent who have taken their first steps within their communities, to encourage collaboration, share skills and promote opportunities and organisations looking for young talent within their local area, while also giving them access to the experience of Channel 4 staff.

2019's New Material events were held in Birmingham, Bristol, Londonderry, Glasgow, Leeds and Nottingham and we worked with partners that work specifically with young people from lower socio-economic backgrounds. The events were attended by more than 600 young people in total. Of these, 41% were BAME and 61% were female.

Our Work Experience Scheme provides training and hands-on experience of working in a team at Channel 4. This attracted 3,626 applications in 2019 and we offered 57 placements across the year. Of these, 36% were from socially-mobile backgrounds, 46% were BAME, 71% were female and 16% had disabilities.

Meanwhile, our Apprenticeship Scheme remains a cornerstone of our talent strategy. Channel 4 Apprentices spend between one and two years attached to a department in a Channel 4 office working on a range of challenging projects that count towards their Level 3 or 4 qualifications. In 2019, we welcomed 12 young Apprentices, out of a pool of 2,899 applicants.

We also funded 16 young people through our Paras Production Training Scheme, a 12-month salaried training programme to recruit and support disabled people who want to start a career in television. The 16 trainees have been placed into production companies across the UK (including Birmingham, Glasgow, Leeds, London and Manchester) in either Researcher, Production Coordinator, Social Media or Graphic Design roles.



3,626

applications received for our Work Experience Scheme



Since starting as an apprentice in Agency Sales, my knowledge has widened and my confidence has flourished. I've been able to build a strong rapport with people in the industry. There have been endless opportunities to network and get involved in further training development.

No two days are the same in the sales team. The best moment is when your work gets acknowledged by your managers. It's an amazing feeling when you see an email sent to the floor congratulating you on your hard work!

I'm super-excited about my future as I now have a clear vision of what I want to do. Thank you to Channel 4 for supporting people from all backgrounds to kick off their careers in a competitive industry. Channel 4 has made this possible for me and many others.

Sharon Chapendama
Agency Sales Apprentice, Manchester

4 All the UK

Channel 4 has always had a unique place in British broadcasting. Commercially-funded but with a public service remit, we were set up to disrupt and shake up the TV industry by giving a voice to the under-represented and grow the independent production sector across the UK.

In 2018, we decided to supercharge our ability to deliver against the remit through our 4 All the UK strategy. This major new and significant plan aims to change the geography of the UK's world-leading production sector, responding to broader political concerns about the excessive concentration of the UK's economic activity in the South-East of England. By increasing investment in content from the Nations and Regions, as well as directly creating 300 Channel 4 jobs outside of London, we are able to also indirectly act as the catalyst for many more production-related jobs around the country.

We have moved quickly to deliver on this ambitious plan. In 2019, we opened the doors to two new Creative Hubs in Bristol and Glasgow and established a new National HQ in Leeds.

Our new bases are home to production and corporate roles from right across the business, including key Commissioners in Drama, Comedy, Factual and Current Affairs, plus finance, product, marketing and many more. And they have already begun to make a tangible impact, with production companies and industry bodies setting up or opening local branches close to the new Channel 4 locations. In expenditure terms, we achieved our joint-highest-ever level of investment in the Nations and Regions, with 46% of investment in first-run originated programming on the main channel from out-of-London suppliers (2018: 45%), and a joint-record £189 million on programmes from production companies based outside of London (2018: £186 million).

These developments will quickly unlock opportunities in the media for new, diverse talent across the UK, and we are supporting them with skills and training through a new Channel 4 Academy, to be launched in 2020.

Alongside TV production, we have also invested significantly in digital, establishing a new Digital Creative Unit in Leeds that will create and commission short-form content, lead on social media marketing and act as a northern-based incubator for the digital skills of the future.

4 All the UK will translate on screen into brand new shows from the Nations and Regions with a regional flavour. For example, from late 2020, *Channel 4 News* will regularly co-anchor from Leeds and our new flagship daytime programme, *The Steph Show*, will broadcast every weekday live from Leeds.

These changes – the biggest restructure of Channel 4 since it was established – will ensure that we produce distinctive, original content that reflects Britain back at itself and help to spread opportunities in the creative industries across the whole of the UK.





Junior Bake Off



Kathy Burke's All Woman

Building skills across the UK

Identifying young and emerging talent across TV, film and digital media is a vital part of our role as creators.

Channel 4 is committed to ensuring that people from different backgrounds and walks of life can successfully pursue careers in the media industry, helping to foster the UK's vibrant and diverse television and film sectors. Diversity itself helps to foster innovation, by bringing together people with different perspectives and mindsets, and avoiding the 'groupthink' that can occur when everyone comes from the same background. This strengthens our appeal to younger audiences, and sets us apart from global streamers that invest mostly in established talent.

In 2019, Channel 4's schedules reflected our renewed focus on finding and developing fresh talent, with a range of popular new shows by up-and-coming presenters. These included on-screen diverse talent such as Tez Ilyas in the late-night satirical programme *The Tez O'Clock Show*, Livia Simoka in her three-part documentary *Extreme Tribe: The Last Pygmies*, the award-winning comedian Mo Gilligan in *The Lateish Show with Mo Gilligan*, Liam Charles as a judge on *Junior Bake Off* and Aisling Bea who wrote and stars in the comedy-drama *This Way Up*.

We run a number of industry-leading off-screen talent and skill development initiatives tailored to early outreach. Channel 4 works closely with production partners, such as our Production Trainee Scheme for entry-level talent (see page 30). We also collaborate with cultural and educational institutions, such as the Dispatches Investigative Journalism Training Scheme, our partnership with De Montfort University for its MA degree in Investigative Journalism, and the Channel 4 Playwright Scheme, which offers five bursaries to emerging writers. Supporting social mobility and encouraging new entrants into the wider media industries across the UK is crucial to our role as Britain's youngest public service broadcaster. In addition, we also support a range of genre-based schemes that help us to identify and provide a platform for future talent, such as Comedy Blaps (Comedy), First Cuts (Documentaries), Random Acts (Arts) and 4Screenwriting (Drama).

Through these talent initiatives, we develop a strong pipeline of talent, supporting Channel 4's success, as well as that of the wider UK creative sector.





I've taken a different route to get here, I've taken risks, and I've believed in my ability – and those have been the marks of my success.



It's a big deal. But nerves keep me sharp.

Mo Gilligan

Film4

Film4

Productions continues to back authored films from new and established directors across a range of budgets, with a mission to champion creative excellence and support British films and filmmakers.

The year began with the UK release of *The Favourite*. Film4's third collaboration with director Yorgos Lanthimos. This female-skewed drama set in the court of Queen Anne grossed £16 million at the UK box office and \$95 million worldwide. A healthy awards run in 2019 saw the film lead the BAFTAs, winning seven of its 12 nominations, and jointly lead the Oscar nominations with ten, equalling *Slumdog Millionaire* in 2008 as Film4's most nominated film ever. For her portrayal of Queen Anne, Olivia Colman was crowned Best Actress at the Golden Globes, BAFTAs and Oscars, marking the third time in the last four years that a Film4-backed film has produced the Best Actress Oscar and BAFTA winner – a remarkable achievement for the film arm of a British public service broadcaster.

2019 was the second consecutive year that Film4-backed titles have won both Outstanding British Film (*The Favourite*) and Outstanding Debut at the BAFTAs (for *Beast's* director Michael Pearce and producer Lauren Dark).

Cold War from Polish-British director Paweł Pawlikowski also enjoyed significant awards attention early in 2019, securing four BAFTA and three Oscar nominations, a rare instance of a non-English language film receiving recognition in the main awards categories.

Other Film4-backed titles released in cinemas in 2019 included *Fighting With My Family*, from writer-director Stephen Merchant (and inspired by a 2012 Channel 4 documentary), Jessie Buckley-starrer *Wild Rose* (directed by Tom Harper), the third in Asif Kapadia's trilogy of box office smash documentaries *Diego Maradona*, Chris Morris's *Four Lions* follow-up *The Day Shall Come* and Toby MacDonald's directorial debut *Old Boys*.

Eight Film4 titles were selected to premiere at the Toronto Film Festival in September, and most will release theatrically in the early months of 2020. These included slice-of-life teen drama *Rocks* from Sarah Gavron, fashion satire *Greed* from Michael Winterbottom, Coky Giedroyc's adaptation of Caitlin Moran's bestseller *How to Build a Girl*, two debut features – Rose Glass's *Saint Maud* and Nick Rowland's *Calm With Horses* – and Armando Iannucci's adaptation of Dickens' classic *The Personal History of David Copperfield* starring Dev Patel, which was also selected in the prestigious opening night gala slot of the BFI London Film Festival.

The Film4 productions that were greenlit in 2019 (for release in 2020 and beyond) encapsulate the commissioning range of Film4's strategy, encompassing Edgar Wright's *Last Night in Soho*, made as a co-production with Working Title and Focus Features; the Sheffield-set and -shot *Everybody's Talking About Jamie*, which marks the directorial debut of the creative team behind the hit stage show of the same name; true-life Welsh racehorse drama *Dream Horse*; acclaimed playwright Florian Zeller's debut film *The Father*; Louis Wain, the solo directorial debut of Will Sharpe, who previously created Channel 4's *Flowers*; and debut features *Passing*, from acclaimed actress Rebecca Hall, and Prano Bailey Bond's *Censor*.



Film4, the cinema production arm of Channel 4, is now a pint-sized Oscars powerhouse.

The Guardian

Productions



More than any other UK public service broadcaster, Channel 4 resonates powerfully with young and diverse audiences, reflecting their lives and interests, entertaining them and, in the process, helping them to navigate through the complexities of modern life.

Never too
young to
change the
world

Champions

Resonance with young and under-served audiences

YOUTH

The future of Britain and Channel 4

Young people are, more than ever, at the heart of everything Channel 4 does: our talent, our content and how we distribute it.



The Circle

The Great British School Swap



Celebrity Hunted



As young viewers move increasingly towards on-demand platforms as their primary means of finding content, we must work harder to ensure that we continue to engage with them – by building new brands, investing in content that appeals to them and making it available where they want to watch it. Successful implementation of this strategy allows us to strengthen our connection with young audiences and superserve their needs.

In 2019, this resulted in disproportionately strong viewing figures amongst this target group: we grew our share of 16-34-year-olds in peak-time hours by 2%, and maintained our share of young audiences across all hours – the only commercial public service broadcaster to do so. This year also saw the best single day for young viewers on Channel 4 since 2006, with a share of 23.8% of 16-34-year-olds, thanks to the launch of the latest season of *The Great British Bake Off* and the first episode of *Sink or Swim*.

Moreover, in peak-time hours, Channel 4 was responsible for 24 of the top 30 highest-profiling programmes on TV for 16-34-year-olds, and 20 of the top 30 highest-profiling titles amongst the even-harder-to-reach 16-24-year-old age group.

With a 42% profile of 16-34-year-olds, *The Inbetweeners: Friends Reunited* was Channel 4's youngest-skewing title of the year, followed closely by season two of *The Circle* (which had a 41% profile of 16-34-year-olds – 20 percentage points up on the slot average) and *The Great British School Swap*.

orthy

Throughout the year, as we made strong progress in the delivery of our youth strategy, a number of shows broke new records for young people watching Channel 4 on our TV channels and via streaming.

Top young programmes and new records

Two major Channel 4 commissions performed extraordinarily well. The second series of *The End of the F***ing World* became All 4's most binge-watched box-set ever, as well as the youngest-skewing drama since *This is England '90* in 2015.

And *Leaving Neverland*, the two-part documentary directed and produced by British filmmaker Dan Reed, about two men who recount their experiences of being sexually abused by Michael Jackson, achieved a 16-34-year-old share of 37.4%, making it the top youth documentary across all TV channels in the UK in two years. —————>



The End of the
F***ing World

binge — w



→ Meanwhile, *Rick and Morty* achieved a share of 20.7% amongst 16-34-year-olds, making it the biggest US animation for this group on any channel in 2019 and E4's biggest show of the year for young people.

In Entertainment, *The Great British Bake Off* was another showstopper this year, attracting a huge share of 60.1% of 16-34-year-olds, making it the second-biggest series of the year for young people across all TV channels.



Rick and Morty

The Great British Bake Off





Gogglesprogs

Older children in 2019

A key aspect of our remit is to appeal to older children (specifically 10-14-year-olds) and young adults.

This year, we continued to commission a stable of original, high-quality programmes with popular mainstream appeal that reflect their lives and interests and help them to better understand the world around them.

A good example of this was *Junior Bake Off*. The 15-episode series – hosted by Harry Hill with judges Prue Leith and baking ace Liam Charles – was tasked with finding Britain's best junior baker aged between nine and 15. It averaged a 27.1% share of 10-14-year-olds in its weekday 5pm slot. Across all dayparts, it ranked as Channel 4's third-biggest programme in 2019 for share of older children (after *The Great British Bake Off* and *The Tiger Who Came to Tea*). It was also Channel 4's biggest daytime series (pre-6pm) in terms of the volume of 10-14-year-olds for a decade (going back to 2010), while this year it ranked as the biggest daytime programme across all the main PSB channels for this group.

Also targeted at older children, *The Great British School Swap* was a radical experiment exploring racial segregation in Britain, in which pupils from schools in very different areas swap places. This three-part series attracted a share of 20.6% of 10-14-year-olds.

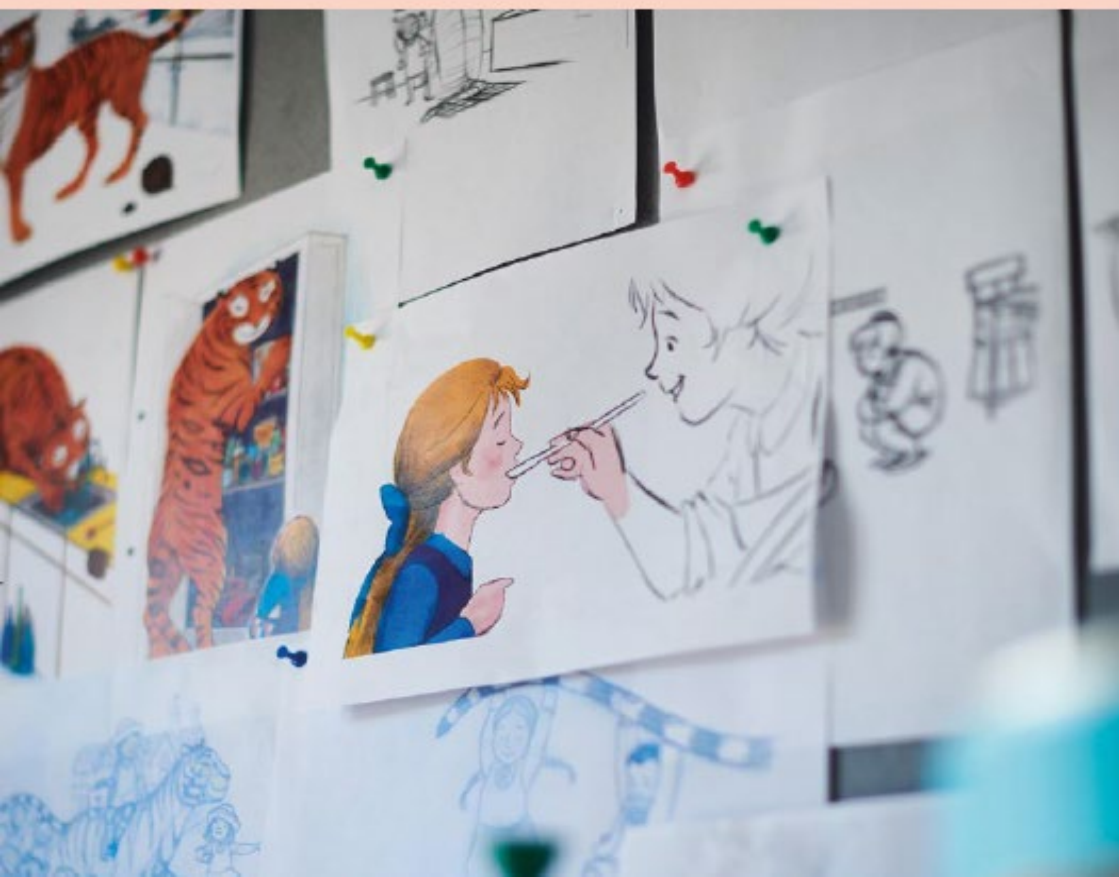
Other Channel 4 programmes made for all audiences but with strong appeal to children this year included *SAS: Who Dares Wins*, *Gogglebox* and *Hunted*.

Another successful show was the four-part series *Sink or Swim for Stand Up To Cancer*. A line-up of celebrities including Olympic gold medallist Linford Christie, *The Last Leg*'s Alex Brooker and *Hollyoaks* actress Rachel Adedeji were pushed to their limits – in the process, attempting to erase the stigma of being a non-swimmer. It achieved a 20.6% share of 10-14-year-olds.



Sink or Swim

The Tiger Who _____



Came To Tea

Ruth Fielding: Producer, Lupus Films, makers of The Tiger Who Came To Tea

Q: Your films are known for their distinct hand-drawn look that seamlessly brings a picture book to life – how do you remain both so true to a book and breathe new energy into it?

A: We pride ourselves on our relationships with illustrators and authors. We get to know why and how they created their successful book and try to recreate those techniques, and the essence of the book and their story, in the medium of animation. We have to feel passionate about the work that we do and hope that is then borne out on screen.

Q: Lupus Films is unique. Why did you want to create a hand-drawn animation studio, and what are the ingredients that go into a new Lupus film?

A: We feel that 2D hand-drawn animation can have a particular effect on television and cinema audiences if the stories you are telling are emotional. We believe the emotion from the animator drawing a character is translated directly onto screen and into the hearts and minds of the audience.

The films we like to make touch and affect our audiences and, that way, we hope they will stay with people, have a long shelf life and stand repeat viewing. The books we choose to adapt tend to be classics that have achieved book sales in the millions. They tend to be a sensible starting place from which to build a good business model.

Q: What was the biggest difficulty to bring *The Tiger Who Came To Tea* to screen?

A: For me, as the producer, the biggest challenge was keeping everyone happy without compromising creative ambition and bringing the film in on time and on budget.

The use of white space is also technically ambitious in this film. Trying not to overfill the frame – in order to keep the resemblance of the book illustrations; but creating a scene which is engaging enough for a young viewer – is quite a feat in itself.



The end of 2019 was capped with a special Christmas treat – a hand-drawn animated adaptation of the much-loved classic children's book *The Tiger Who Came To Tea* by Judith Kerr.

The story of Sophie and her extraordinary, stripy tea-timed guest has enchanted generations of children and has become a timeless classic. Channel 4 commissioned Lupus Films – makers of the acclaimed *We're Going on a Bear Hunt* and *The Snowman and The Snowdog* – to make the new 30-minute animation as a fitting celebration of the book's 50th anniversary in 2018. It features a stellar cast of voices including David Walliams, Tamsin Greig, David Oyelowo and Benedict Cumberbatch.

A rare example of hand-drawn British animation, the film took 18 months and a crew of 80 artists to produce the 36,000 hand-coloured frames of animation, armed only with a set of coloured pencils and an estimated 23,444 cups of tea.

A huge hit, it was Channel 4's highest-rating programme over the Christmas period, averaging 5.1 million viewers and 21% share of the total TV audience. The film particularly appealed to younger viewers, attracting a 34% share of 10-14-year-olds and becoming the biggest Channel 4 programme of the year for 4-9-year-olds, with almost one million viewers from this age group.



DIVERSITY

Focus on the under-served

Channel 4 has a long and proud history of inclusion and diversity. Our commitment to diversity stems from our remit as a public service broadcaster to focus on the under-served and appeal to a culturally-diverse society. We want Channel 4 to authentically reflect and represent the country.

By producing iconic moments that change the way that Britain thinks about diversity – from the first pre-watershed lesbian kiss on *Brookside* and the first black sitcom, *Desmond's*, in the 1980s and early 90s, through pioneering content in the late 90s and 2000s such as *Queer as Folk*, and on more recently to our ground-breaking coverage of the Paralympic Games over the last decade – we have brought previously neglected experiences and perspectives into the mainstream, doing things that no broadcaster in the world had done before.

2019 was a strong year for inclusion and diversity at Channel 4. Across all genres, we presented a modern, diverse Britain on screen. Highlights in each genre included positive and accurate representations of all facets of diversity, from disability to gender, sexuality to ethnicity and more. These include:

- **Documentaries:** *The Great British School Swap*, *First Dates*
- **Drama:** *The Accident*, *Ackley Bridge*, *Hollyoaks*, *I Am...*
- **News and Current Affairs:** *Unreported World*, *Dispatches*, *Supershoppers*
- **Specialist Factual:** *100 Vaginas*, *Random Acts*, *The Curry House Kid*, *The Secret Life of 5-Year-Olds*
- **Entertainment:** *Sink or Swim for Stand Up to Cancer*, *The Last Leg*, *The Big Narstie Show*, *The Lateish Show With Mo Gilligan*, *The Tez O'Clock Show*
- **Sport:** *World Para Swimming Championships 2019*
- **Factual Entertainment:** *The Circle*, *Gogglebox*, *The Undateables*
- **Comedy:** *Home*, *Derry Girls*, *This Way Up*
- **Features and Formats:** *The Great British Bake Off*, *The Restaurant That Makes Mistakes*

84% of our programmes met our Commissioning Diversity Guidelines, which set genre-specific diversity targets on- and off-screen.

We achieved 100% subtitles across all linear channels, 6% signing on Channel 4 and E4 and over 40% audio description across all linear programmes for the first time (with E4 at 75% of audio described programmes). We also introduced several signed box-sets on All 4, including for *The Inbetweeners* and *Derry Girls*, leading the way in our provision of access services.

Our programmes also appealed to diverse audiences. Across 2019, we increased our BAME profile on the main channel to 8% – our highest level ever. Our BAME share also grew by 3% on the main channel, to a total BAME viewing share of 5.1%, while our BAME portfolio viewing share was 9.2% (2018: 9.5%). Some of our top-rating programmes with BAME audiences included *The Great British Bake Off* (32% BAME share), *Leaving Neverland: Michael Jackson & Me* (22%), *The Great British School Swap* (16%) and *Three Identical Strangers* (17%).

We also championed diversity in between our programmes through our £1 million Diversity in Advertising Award. This year, we invited agencies to create campaigns that tackled the lack of representation and stereotyping of the LGBT+ community. Starbucks and Iris won the prize, with their ad airing in February 2020.

The Big Narstie Show





This Way Up



Warrior Women with Lupita Nyong'o

Black History Month

Channel 4 marked Black History Month in October with a dedicated season of docu-series and films on its linear TV channels and online.

The main channel showcased three recent Oscar-winning films: Jordan Peele's *Get Out*, which delivered the biggest audience of the season, coming-of-age drama *Moonlight*, and *Fences*, starring Denzel Washington and Viola Davis. Taken together, the titles shown on the linear channels reached 6.0 million viewers (10% of the TV population), delivering strong BAME representation on screen during the month.

Complementing this, All 4 gave prominence to a curated Black History Month collection that included most of the titles shown on linear TV, alongside some new content (such as *Warrior Women* with Lupita Nyong'o) and programmes from the Channel 4 archive that revolved around the black British experience (including *Chewing Gum*, which recorded a four-fold increase in viewing during the month, *Desmond's* and *The Black Lesbian Handbook*). A highlight of the collection was a series of six exclusive films from gal-dem, an online platform committed to telling the stories of women and non-binary people of colour.

Viewers of the season praised the range of programmes and films available in the All 4 collection and said they appreciated seeing new, emerging talent. They felt this type of content is exactly what they'd expect from Channel 4. Indeed, 92% of those who watched at least one programme within the season agreed that "Channel 4 makes distinctive and different programmes" and is seen to "tackle issues other channels wouldn't".

Channel 4's Black History Month season also attested to the broadcaster's reputation as a champion of diversity and a platform for unheard voices, with two-thirds of viewers agreeing that "Channel 4 reflects the diversity of the UK within its programming" and that Channel 4 is the leading broadcaster for "giving a voice to the under-represented".

IPC Swimming Championships





Michaela Coel

Faces of E4

A key focus of Channel 4's on-screen Inclusion and Diversity strategy is to shift focus to authentic portrayal and representation, in order to allow audiences to recognise themselves on screen.

As part of this, in July 2019, Channel 4's Creative Diversity team launched a new on-screen talent initiative, Faces of E4, to find candidates who would go on to become the new, young and diverse on-screen stars of E4 – whether presenters, actors or comedians. E4 has a well-established heritage as a launchpad for talent, kicking off the careers of well-known names including Russell Brand, Jameela Jamil, Jimmy Carr, Michaela Coel, Daniel Kaluuya and Kaya Scodelario.

This nationwide talent search is being led by production company Fully Focused, which has been charged to find new talent from a range of backgrounds across the country, who come without significant mainstream or terrestrial broadcast experience. It kicked off the process by organising a number of pop-up events in Liverpool, Birmingham and London in the autumn of 2019. The search remains ongoing and will then move into the next phase (in 2020 and beyond) in which selected new talent will be given training to help with their development, as well as exposure on E4, which could see them involved across digital content, social media, in-vision continuity or starring in new shows.

Faces of E4 complements a separate scheme, also funded through Channel 4's Creative Diversity team, called Faces of Factual, in which four companies were tasked to identify and develop new diverse regional talent and ideas in 2019. The results of this search are already providing dividends, with new talent already being used in programmes that have been commissioned for 2020.

New inclusion strategy

In October 2019, Chief Executive Alex Mahon launched a new Inclusion and Diversity strategy, with a vision to build on Channel 4's heritage as a trailblazer in diversity.

Four years after launching our ground-breaking 360° Diversity Charter, this new Inclusion and Diversity strategy is aligned to the organisation's corporate strategy and is fully focused on inclusion, social mobility and authentic portrayal. The strategy has three key components:

- **An inclusive workforce:** to instil a culture where the power of the diverse workforce is celebrated, and people recognise that diversity of thought generates richer ideas.
- **On-screen:** to shift focus to authentic portrayal and representation, allowing audiences to recognise themselves on screen.
- **Leading the industry:** to be a driving force and pioneer in the industry on inclusion and diversity.

Our ambition is to be a beacon for the UK industry of what an inclusive, diverse and creative culture can look like, and to give Channel 4 a creative and competitive edge.

Channel 4's commitment to diversity was recognised through a number of awards and accolades in 2019. At the 2019 Mind Media Awards, Shane Meadows' powerful four-part drama *The Virtues* won 'Best Drama' and, for its commitment to mental health reporting, *Channel 4 News* won 'Best News and Current Affairs'. Off-screen, Channel 4 was named as a 'Top 10 Outstanding Employer' at the Ethnicity Awards 2019, and ranked in 35th place on Stonewall's 2020 list of the top 100 inclusive employers for LGBT+ staff – the first time in its history that the organisation has been included in this list – while Stonewall also recognised Channel 4 as a top trans employer.

The Virtues



Too cool



Derry Girls

Voices from across the UK

Our investment in programming made in the Nations and Regions isn't just about the economic impact – it is also integral to ensuring that we reflect a wide range of voices, experiences and stories drawn from across the UK. We believe that, more than ever, viewers want to see their local areas portrayed on TV, and that doing so contrasts with the international settings of most programmes offered on the biggest streaming services. As such, this is not just the right thing to do, but it also makes commercial sense, delivering higher levels of viewing across the UK.

As evidence of this, *Derry Girls* returned for a second season in 2019 – with its vibrantly-portrayed local setting – and became Channel 4's second-most-watched series in Northern Ireland ever, only behind the comedy's first series.

Jack Thorne's drama *The Accident*, filmed in Wales and telling the story of how a catastrophe impacts a local Welsh community, was Channel 4's biggest drama launch in Wales since *Humans* in 2015. Emphasising the appetite for programming based in regions near to them, the series averaged a 13.9% share among viewers living in Wales – almost three times the slot average of 5.3%.

It is no coincidence that many of our most popular returning series also reflect British diversity; this is an important criterion for our commissioning teams and production partners. *The Great British Bake Off* showcased bakers from across the country, including from Chester, Durham, Halifax, Leeds, Leicester, Somerset and Tenby. And each episode of *Gogglebox* features families drawn from a range of locations across the UK, including Bristol, Caerphilly, Leeds and the Wirral.

These shows feel distinctively British and help Channel 4 to stand out and attract audiences. This is shown in our viewing figures, with shows like *Gogglebox* and *Celebrity Gogglebox* recording a higher share of viewing in every region of the UK (against its slot average).



for school

Too
challenging
to ignore

Challengers



With a range of uniquely Channel 4 programmes, we challenge and engage mass audiences to think differently. Through this, we create better social cohesion across the UK.



Fatima Manji



Channel 4 News

NEWS/ALTERNATIVE VIEWS

Channel 4 makes a vital contribution to the national debate by providing a platform for alternative voices.

In a rapidly changing world, Channel 4 stands out from other public service broadcasters and global streamers by saying something impactful about Britain, provoking debate and telling unheard stories from across the country in a common, trusted space.

At its most impactful, Channel 4 content exposes the truth and acts as a powerful catalyst for change. Our ambition is to reflect Britain back at itself, to challenge easy assumptions and to offer something unique and distinctive to the country.

Channel 4 News

At the heart of our news provision is our flagship **Channel 4 News**, the only hour-long news programme in peak-time on the main PSB channels.

This extended running time enables us to tell stories from multiple angles and in more depth. **Channel 4 News** stands out from other mainstream news broadcasters by combining rigorous, thorough analysis with a lively, accessible presenting style.

In a world of online disinformation, the provision of independent and authoritative news by public service broadcasters is more important than ever. In 2019, **Channel 4 News** continued to be seen as the most highly-regarded news provider in terms of its independence from the influence of big business and government, leading the other main UK broadcasters by clear margins (read more analysis on page 105).

As the United Kingdom moved closer to exiting the European Union, Brexit was the dominant topic throughout the year. The climate emergency attracted a significant amount of coverage – cited by David Attenborough as “leading the way” – as did the ongoing war in Syria, and US politics.

For many voters, the climate crisis was a key issue in December’s General Election, and **Channel 4 News** hosted the world’s first-ever party leaders’ climate debate, which took over the 7-8pm news hour on 28 November. The programme averaged 884,000 viewers (a 5% share), with a remarkable 7.9% share of 16-34-year-olds – the biggest viewing share amongst young audiences for **Channel 4**’s weekday evening news since 2011.

The debate became the fourth-most-talked-about event in the election (according to Lord Ashcroft Polls) and raised the debate about the climate emergency across the country. The hashtag #ClimateDebate trended worldwide and generated 243,000 tweets and was watched by over three million viewers in total (including clips, live video and the programme itself). It was also **Channel 4**’s second-highest talked-about programme of the year overall. It demonstrated that young audiences can be reached with in-depth and authoritative coverage of important issues if they are presented in an engaging manner.

On average, 7.8 million viewers watched **Channel 4 News** each month in 2019, an increase of 6% year-on-year. Moreover, our main weekday evening programme grew its viewing share significantly, rising by 22% year-on-year to 3.7% of viewing – its highest level since 2010. **Channel 4 News**’ increase in reach was all the more notable given that the other public service broadcasters all suffered declines in the monthly reach of their national news programmes.

BAME audiences also grew in 2019, by one percentage point, to 16% of **Channel 4 News**’ total viewing – the joint-highest figure achieved over the last decade. Amongst the main PSB channels’ news programmes, **Channel 4 News** is the only one whose viewing by BAME audiences exceeds this group’s representation in the UK population (estimated to be around 13-14%) – the other PSBs’ news programmes had shares of BAME viewing in the range of 6%-11%.

The news programme also appeals to young adults, with 16-34-year-olds making up 10% of viewers. This is level with **Channel 5** and higher than the other PSBs’ national news programmes. As **Channel 4 News** increased its digital and social media coverage (see next page), to reach young people where they want to consume news, 16-34-year-old viewing share decreased on the main channel by two percentage points year-on-year.

Channel 4 News reinforced its reputation as the leading flagship news programme, winning 33 prizes, including an International Emmy for News, a Peabody Award, a BAFTA, as well as a record seven RTS Journalism Awards.

In addition, the **Channel 4 News** co-produced documentary film *For Sama* (see page 60) won more than 60 awards, including the Prix Change to Prix L’Œil d’Or for Best Documentary at the 2019 Cannes Film Festival and Best Documentary at the 2020 BAFTAs.

7.8m

viewers watched **Channel 4 News** each month in 2019 (+6%)

+22%

viewing share growth in 2019 to **Channel 4 News**’ main weekday evening programme, to 3.7% of viewing, the highest level since 2010

7.9%

viewing share of 16-34-year-olds for **Channel 4 News**’ climate debate – **Channel 4**’s biggest weekday evening news share since 2011



Krishnan Guru-Murthy



We have worked hard to build a big digital audience, especially amongst younger people, while not compromising on any of *Channel 4 News*' core principles or values.



Cathy Newman

Leading digital news

As audiences – young ones in particular – spent ever more time using digital and social media, *Channel 4 News* continued to expand its digital presence in 2019, helping it to engage with these audiences.

In total, some 1.4 billion minutes of *Channel 4 News* videos were watched across all social platforms in 2019.

Channel 4 News video views grew by 65%, to 187 million, on YouTube; and by 64%, to 185 million, on Twitter. The total number of YouTube subscribers grew to more than one million.

There were even greater increases amongst 16-34-year-old viewers in the UK on YouTube. Video views increased by a huge 72% to more than 25 million. And the number of minutes of video viewed in 2019 was almost double the corresponding figure for 2018.

Of the most-watched *Channel 4 News* videos on YouTube, two-thirds were about politics or Brexit. This reflects the massive interest among young people for high-quality news on platforms where they access information. Dwell time was also substantial: UK audiences watched seven minutes of *Channel 4 News* content on average, a large figure for video in social media.

Channel 4 News also expanded its brand on other social platforms. At the end of 2019, *Channel 4 News* launched *Rated*, an Instagram Stories explainer series made in the mobile-friendly vertical video format. And it was commissioned to make *Uncovered*, a weekly news programme – also in vertical video – for Facebook Watch, making it one of the earliest suppliers of content to this platform.



Q&A with Ben De Pear, Editor, Channel 4 News

Q: Why does reporting news in depth still matter?

A: In an era of disinformation and disruption, our programme is a unique hybrid of serious in-depth daily news, revelatory investigations and quality short-form filmmaking – and has never been more in demand or more vital to public life.

The programme pushes hard to be really engaging as we try to get to the truth, but has the benefit of Ofcom-required impartiality and accuracy, which means we are trusted, as well as being a good watch.

Last year, our TV figures were up significantly, proving that in a time of crisis people still feel they need to come to us.

Q: How do you ensure that Channel 4 News resonates with younger and harder-to-reach viewers?

A: We have worked hard over the last few years to build a big digital audience, especially amongst younger people, whilst not compromising on any of the show's core principles or values. We have successfully maximised our content on key social media platforms where younger audiences consume news, initially on Facebook – where we established ourselves as the most-watched news show in Europe at the time – and now on YouTube.

Q: Which story has had the most impact this year?

A: Brexit was the major story of the year and we were very proud of our coverage, spearheaded by Political Editor Gary Gibbon and our Westminster team, but our undercover investigation into Cambridge Analytica garnered a remarkable number of awards and its impact continues to reverberate around the world today.

We are very proud of the critically-acclaimed *For Sama*, a film which started with a single news report by our newsroom and was produced by Channel 4 News and ITN Productions and broadcast on Channel 4, and which won over 60 awards, including the Film BAFTA and an Oscar nomination. We feel greatly privileged to have worked with Waad and so many other Syrians during this horrific period in their history, and believe that the films that we have made with them have at least spread awareness of the ongoing humanitarian crisis.

Winner of the Prix L'Œil d'Or for Best Documentary at the 2019 Cannes Film Festival, Grand Jury prize for Best Documentary and the Audience Award at SXSW, Best Documentary at the 2020 BAFTAs and nominated for an Academy Award, *For Sama* has been a huge and highly-acclaimed hit in Britain and internationally.

For



This is not just a film for me,
it's my life, my greatest loss,
my greatest happiness. It is
everything I struggled for and
dreamt of, my duty to the city
I belong to and a message to
my daughter Sama.





When the Syrian uprising began in Aleppo in 2011, Waad al-Kateab taught herself to film and captured some of the most memorable images of the conflict. She initially started documenting the horrors of Aleppo for a *Channel 4 News* series, *Inside Aleppo*, in January 2016, while living in a makeshift hospital run by her husband. Her short news films became a worldwide sensation, revealing the relentless horror of the events in Aleppo. The films won more than 20 awards, including the International Emmy for News in 2017.

In December 2016, al-Kateab and her family fled Aleppo with over 500 hours of footage. Together with Emmy-award winning director Edward Watts, they produced the remarkable film *For Sama*, an intimate and epic journey into the female experience of war.

A love letter from a young mother to her daughter, the film tells the story of al-Kateab's life through five years of the uprising in Aleppo, Syria, as she falls in love, gets married and gives birth to Sama – all while cataclysmic conflict rises around her.

Al-Kateab's camera captures incredible stories of loss, laughter and survival as she wrestles with an impossible choice: whether or not to flee the city to protect her daughter's life, when leaving means abandoning the struggle for freedom for which she has already sacrificed so much.

Since leaving Syria, funded by Channel 4, al-Kateab has started training as a producer for *Channel 4 News*. It is highly unusual for feature-length documentaries to emerge from the news divisions of any broadcaster, and *Channel 4 News* is incredibly proud to have supported both this film and al-Kateab herself over the last five years.

Sama

Taking Britain's pulse

During uncertain times, Channel 4 has the ability to engage mass audiences in the big issues that affect British people in ways that other broadcasters and global content providers cannot, or choose not, to do.

At a time when television is becoming ever more global and content is often designed to appeal to (and therefore not offend the sensibilities of) audiences around the world, we offer something different and distinctly British. Our distinctive editorial taste and innovative programming allows us to tackle big issues in new ways, helping to reflect the nation back at itself.

A prime example of this was *Brexit: The Uncivil War*, written by the acclaimed playwright James Graham. Starring Benedict Cumberbatch and Rory Kinnear, the drama provided a profoundly timely, witty and compelling behind-the-scenes exploration of one of the biggest political earthquakes of recent times: the campaign running up to the EU referendum in 2016. The programme attracted two million viewers and a 9.8% share.

Meanwhile, *The Great British School Swap* was a radical experiment that explored racial segregation in Britain. Across three episodes, the series followed a group of teenagers aged 13 and 14 from a predominantly white school as they entered an inner-city, multicultural Birmingham school, exploring the misconceptions held by both groups of children.

Covering issues ranging from offensive language to what it means to be British, the series reached 3.4 million viewers and performed particularly well among its key target audiences. It had a 20.2% share of 14-19-year-olds (a huge 122% above the slot average), and a 16.1% share of BAME viewers, more than tripling the slot average for this group.

The programme also had a tangible impact: seven in ten viewers claimed that it made them think about how society can do more to encourage cultural and racial integration and, importantly, one-quarter of parents said they had discussed the issues raised in the programme with their children.

It was also seen to be a distinctively Channel 4 programme, with close to half of viewers agreeing that "you wouldn't find programmes that tackle social issues in the UK like this on a platform such as Netflix or Amazon".

Another strong example of a programme reflecting Britain back at itself was *Crime and Punishment*, a six-part documentary series filmed over two years that set out to explore all aspects of the UK criminal justice system.

The filmmakers received unprecedented access, a first for any TV documentary, giving viewers a uniquely privileged viewpoint to explore how the criminal justice system grapples with crime and seeks to deliver justice for victims, the accused and society more generally. Attracting an average of 1.1 million viewers (a 4.7% share), the programme received widespread critical acclaim for its unvarnished approach.



Covering Current Affairs

In 2019, our long-running investigative strand, *Dispatches*, continued to air almost entirely in a peak-time 8pm slot, allowing the series to reach large audiences.

Across 27 episodes, this year's domestic and international investigations covered important topics including Brexit, poverty, the knife crisis and the healthcare system.

The most-watched episode, attracting 1.7 million viewers (an 8.0% viewing share), was *The Secrets of Amazon*. Presenter Sophie Morgan brought attention to the working conditions in Amazon's UK fulfilment centres and investigated products carried by the company, often sold by third parties, which may not meet safety standards.

Growing Up Poor – Britain's Breadline Kids – the second-most-watched programme in the series, with 1.3 million viewers (a 7.4% share) – shed light on the more than four million children growing up in poverty by telling the stories of three families that do not have enough money for life's essentials. On social media, two *Growing Up Poor* video posts on Facebook attracted 15 million views and the biggest *Channel 4 News* videos ever for engagement.

And, prior to BBC Two's *Newsnight* covering the story, Channel 4 investigated the extraordinary friendship between Prince Andrew and multimillionaire Jeffrey Epstein in *The Prince & The Paedophile*, asking why a member of the British royal family maintained ties with a convicted sex offender. 1.2 million viewers watched the programme, giving it an 8.1% share.

Alongside *Dispatches*, reporters from our multi-award-winning foreign affairs series *Unreported World* uncovered stories that are typically ignored by the world's media. Ten authored films explored wide-ranging international stories, including Krishnan Guru-Murthy's investigation of mafia drug-dealers in southern Italy, Seyi Rhodes' exploration of why Brazil is becoming one of the most dangerous places in the world to be LGBT, and Marcel Theroux's account of the children who have fallen foul of Pakistan's strict blasphemy laws.



Unreported World



Dispatches: Growing Up Poor
- Britain's Breadline Kids

Brexit: The Uncivil War



The Restaurant That Makes Mistakes



The Restaurant —



In a daring five-week social experiment, *The Restaurant That Makes Mistakes* observed whether a fully-functioning restaurant in Bristol could be staffed by 14 people living with various forms of dementia.

This ambitious project attempted to start a wider national conversation about how the public sees people who live and work with dementia.

After spending one month learning the tricks of the trade, the newly-trained staff were put to work in one of the toughest, most high-pressure working environments, serving a host of celebrity diners, members of the public and food critics.

Offering an underlying tone of optimism, the series resonated powerfully with audiences. Just over 80% of viewers claimed it helped them gain a better understanding of the challenges people with a mental disability can face, while three-quarters said it made them "think differently about dementia or mental disability". 78% of viewers agreed that the series "provided a view of disability they'd never seen before on TV".



57%

of viewers were inspired to see what volunteering schemes are available for those with dementia or another disability

That Makes Mistakes



It's not a radical thing,
to have a vagina, but
Channel 4's documentary
100 Vaginas does feel
quite revolutionary.

The Independent

Talked-about documentaries

At our best, our shows drive the national conversation, helping to make us the UK's most distinctive broadcaster.

A prime example of this in 2019 was *60 Days on the Streets*, a three-part series in which ex-soldier and adventurer Ed Stafford spent 60 winter days and nights on the streets of London, Manchester and Glasgow, documenting his first-hand experience of Britain's growing homeless crisis. With no money, food or shelter, Stafford self-shot his time living alongside the homeless to capture the reality of their day-to-day existence. This challenging series attracted an audience of two million viewers, equivalent to an 8.7% audience share, an impressive 32% above the slot average.

The taboo-breaking *100 Vaginas* saw documentary artist Laura Dodsworth photograph and interview women about how their vagina has shaped their lives. Viewers and critics appreciated the thoughtful approach taken to the subject, with *The Independent* praising it for its honesty and calling it a "powerful and essential documentary". With an audience of 1.4 million viewers and a 9.1% audience share, this was Channel 4's biggest documentary of the year in the 10pm slot.

Channel 4's cultural scope is not narrowly confined to the borders of our country, and we also support British filmmakers when they explore subjects with global appeal. The standout documentary of the year was *Leaving Neverland*, directed by award-winning director Dan Reed. This unflinching and meticulous two-part film, originally commissioned by Channel 4, showed how American singer Michael Jackson groomed and abused two young boys over a number of years.

60 Days on the Streets



powerful and —



100 Vaginas

essential

Leaving Neverland launched with 4.2 million viewers on the main channel, skewing strongly with young people (its 37% share of 16-34-year-olds was up a huge 324% on the slot average). It went on to become Channel 4's most-watched new documentary series of 2019 for all individuals, reaching 8.5 million people (including repeats), and becoming the best-performing documentary for 16-34-year-olds across all UK television channels since the BBC's *Blue Planet II* in 2017. It was also the second-most-watched programme of the year on Channel 4 for young people across all genres, behind only *The Great British Bake Off*.

Leaving Neverland made headlines around the world for weeks, forcing viewers and cultural commentators to re-evaluate Jackson's legacy - vividly illustrating the kind of bold risk-taking and impact that few other broadcasters can match. The programme also won a host of major international awards, including an Emmy for Outstanding Documentary.



Inspiring the nation through sport

It was a strong year for sport on Channel 4 across a range of competitions, with coverage spanning Para sport, rugby (International Rugby Union and the Heineken Champion's Cup rugby), cricket and Formula 1.

Our ground-breaking coverage of Para sport has been changing attitudes to disability in sport for almost a decade (ever since the London 2012 Paralympic Games), and this year – as part of our coverage – we continued to help discover a new generation of disabled talent in front of and behind the camera. In September, Channel 4 broadcast the World Para Swimming Championships from the London Aquatics Centre, as Ellie Simmonds and the ParalympicsGB team competed for places ahead of the 2020 Tokyo Paralympic Games. All 162 of the finals over the week were shown through our extensive live coverage on More4 and the Channel 4 Para Sport website.

In July, Channel 4 brought the ICC Cricket World Cup Final – England vs New Zealand – to free-to-air television for the first time in 14 years, thanks to a ground-breaking partnership with Sky to share live coverage. In an action-packed day for sports fans, the final aired on the same day as Channel 4's live coverage of the British Grand Prix – also the only live free-to-air Grand Prix to be shown on British television in 2019.

This combination of two major sporting events – which aired simultaneously on Channel 4 and More4 – resulted in Channel 4's best all-day TV audience since 2012, in terms of the number of viewers. Channel 4 attracted a peak audience of 5.3 million during the cricket, while overall 4.4 million viewers tuned in to watch Lewis Hamilton win a record-breaking sixth British Grand Prix on Channel 4. In total, 12.8 million people tuned in to watch either some of the cricket or the British Grand Prix coverage across Channel 4 or More4. Channel 4 also recorded its best-ever day for live online streaming on All 4.

My Grandparents' War



New takes on history

Throughout the year, Channel 4 offered a range of programmes focused on the overlooked and the misunderstood, re-examining British history through a modern lens. By taking fresh, alternative approaches to history, we can provide new insights and tell new stories from Britain's past.

In *My Grandparents' War*, some of Britain's most high-profile actors – including Kristin Scott Thomas and Helena Bonham Carter – retraced their grandparents' footsteps some 80 years after the start of World War II.

Through these journeys, the programmes explored unanswered questions about the scars that war left on their grandparents and looked at how those six years of conflict changed their families' lives and Britain forever. The programme averaged 1.4 million viewers and attracted a 5.6% share of all individuals.

The Massacre That Shook The Empire, meanwhile, examined one of the darkest days in British and Indian history. Coinciding with the centenary commemoration of the Amritsar Massacre in India, writer and journalist Sathnam Sanghera explored the events that took place on 13 April 1919, when a British army general ordered troops to gun down a crowd of men, women and children who were peacefully gathered in a park in Amritsar, and the implications of the massacre on the way Britain thinks about the Empire and Britishness.

This Specialist Factual commission, which attracted a 10.7% share of BAME viewers, more than double the slot average – was both a personal journey for Sanghera, as a British Sikh Punjabi, and the unearthing of a relatively poorly-known event that became a pivotal turning point in British colonial rule.

A rather more uplifting story emerged when Oscar-winning actress, writer and producer Lupita Nyong'o went in search of a remarkable but little-known female army. In an epic and revealing journey, the hour-long Specialist Factual commission *Warrior Women with Lupita Nyong'o* saw her travel across Benin in West Africa to uncover and tell the story of the remarkable 'Agoji'. Almost 400,000 viewers tuned in to find out about these warrior women who, in armies up to 4,000-strong, fought African and European powers from the 17th to the 19th centuries in the Kingdom of Dahomey (modern-day Benin).

Warrior Women with Lupita Nyong'o





Hollyoaks

Helping young people navigate complex issues

Channel 4 plays an important role in offering educational content within its programming for young people, challenging them and exploring issues that matter to them in entertaining and engaging ways.

Our flagship soap for young people, *Hollyoaks* – which has aired on Channel 4 since 1995 – continues to be the youngest-skewing soap on British television: 55% of its audience (across Channel 4 and E4) are aged 34 and under, more than double the other leading soaps' comparative figures of 22% for *Eastenders* (BBC), 15% for *Coronation Street* and 12% for *Emmerdale* (both ITV).

Hollyoaks performed strongly in 2019, particularly on E4, where audience share and volume both rose at a time when TV viewing amongst young audiences is in decline. *Hollyoaks*' E4 broadcasts attracted their highest-ever share of 16-34-year-olds, with a 21.5% share of this audience (20% up year-on-year), while the volume of 16-34-year-olds rose by 2%. Across all audiences, viewing share on E4 was up 6% year-on-year, and the volume of viewers was up by 1%.

Integrated within entertaining storylines that appeal to young viewers, *Hollyoaks* has a proud track record of delivering impactful, important public service messages to this core audience on challenging social issues. In 2019, powerful storylines included far right extremism and radicalism, substance abuse, mental health and sexual abuse.

Our successful drama series, *Ackley Bridge*, set in and around a school designed to unite the divided white and Asian communities of a small Yorkshire mill town, also returned for a second run of eight episodes.


The 2019 series, which explored issues such as poverty and teen sexuality, averaged 1.1 million viewers (5.8% share) and was Channel 4's biggest non-*Boke Off* show of the year at 8pm for both 16-24-year-olds and 14-19-year-olds in terms of viewing share. It was also praised by critics for its "frank, funny account of life in a multicultural society" (*The Guardian*).

Channel 4's commitment to this series was rewarded, as it grew in popularity among young viewers – its 14-19-year-old audience share was up by 5% versus the previous series.

The *Great British School Swap* was a radical experiment that explored racial segregation in Britain, designed to introduce secondary school pupils to different cultures and ways of life. The series saw students from two very different schools swap places in order to challenge the misconceptions they hold about other communities.

The series reached 3.4 million viewers, including a 20.2% share of 14-19-year-olds – an impressive 122% above the slot average – and had a tangible impact. Seven in ten viewers claimed that it made them think about how society can do more to encourage cultural and racial integration and, importantly, one-quarter of parents said they had discussed the issues raised in the programme with their children.

Outside of our programmes, we have also taken steps to educate and encourage children to eat healthily. In 2019, Channel 4 joined ITV's Vegpower initiative – the campaign to inspire children to eat more vegetables – offering significant airtime, alongside Sky to promote the campaign.



Channel 4 is the engine room of the UK's thriving creative industries. Uniquely amongst the public service broadcasters, Channel 4 is a publisher-broadcaster, meaning that we commission all of our programmes for our portfolio of TV channels externally.

Too good to miss

Commercial

Delivering public value through a commercial model

Our unique model sees us invest hundreds of millions of pounds into the UK creative landscape and work with hundreds of independent production companies across the country.

In this way, Channel 4 helps to build IP-rich businesses with global reach, and we're proud to play a disproportionately influential role in the UK's creative economies – not only by helping to bring creative ideas to life, but also by supporting small and medium-sized enterprises ('SMEs') across the country. Channel 4 is creating an economic and cultural legacy that will last long into the future.

£189m

invested in programmes from Nations and Regions, an increase of £3 million

SUPPORTING CREATIVE BUSINESSES

Since our launch in 1982, Channel 4 has consistently commissioned from a huge range of independent production companies across the UK. In the last year, we have started to put in place the most significant change we have ever made to our commissioning model, providing a new level of support to help build a sustainable production sector outside of London through our '4 All the UK' plan. This is described in more detail on page 31.

We worked with 274 companies across TV, film and digital in 2019, of which 43 were new suppliers – a significant increase from 34 new suppliers in 2018. This reflects our ambition to support a thriving, growing and more diverse UK independent production sector and to build a sustainable network of creative clusters across the UK. In total, we invested £492 million in originated content from British producers – an increase of £3 million year-on-year and the third-highest level in Channel 4's history.

We operate under a model whereby the independent producers that we work with retain the secondary rights to the programmes that they create (i.e. rights to own and distribute their programmes beyond Channel 4's first-run window). This gives our investment an important multiplier effect, whereby our production partners can go on to monetise content in secondary markets (in the UK and overseas), generating additional revenue streams and helping them to grow viable businesses.

We invested £189 million in programmes from the Nations and Regions in 2019. This is an increase of £3 million year-on-year and returns to Channel 4's peak level of spend set in 2017. Nations and Regions indies continued to deliver successful programmes throughout the year, including our biggest single commission,

Hollyoaks (made by Liverpool's Lime Pictures), plus *The Circle* (Manchester's Studio Lambert), *Kirstie and Phil's Love It or List It* (Glasgow's Raise the Roof Productions) and *A New Life in the Sun* (Leeds' True North Productions).

Some of our most popular and acclaimed new commissions this year came from indies in the Nations and Regions, including *The Virtues* (Sheffield's Warp Films) and *Year of the Rabbit* (Glasgow's Objective Fiction).

During the year, Channel 4 reached a new Terms of Trade deal with Pact, the trade association that represents the commercial interests of UK indies. The landmark agreement – which saw Channel 4 gain additional first-window rights for use on All 4 in return for allowing producers to retain all net receipts from international exploitation – was widely welcomed across the industry. In particular, it is an example of a broadcaster working constructively with the sector to find an innovative way of delivering the rights that are required to enable Channel 4 to drive forward its digital strategy, whilst also ensuring that indies retain an appropriate and valuable package of secondary rights for them to exploit.

We have an ambition for Channel 4 to be widely recognised as the best creative partner for suppliers. We launched a Commissioning induction training programme for new and existing Commissioning hires and will continue to deliver training to help improve the ways that we work with production partners to ensure the smoothest relationships between Commissioners and independent partners.

Year of the Rabbit





Growth funds

The £20 million 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. The Indie Growth Fund is now five years old and the existing portfolio continues to perform well.

To date, the Indie Growth Fund has invested in 17 companies, with six exits so far and 11 companies remaining in the fund by the end of 2019. Over the course of 2019, the fund invested in four new companies: Glasgow-based indie Two Rivers Media, Leeds-based factual indie True Vision Yorkshire, Bristol-based factual indie Five Mile Films and Eagle Eye Drama, an indie focused on producing English-language drama series inspired by hit foreign language shows. The fund also successfully exited of its share in Barcroft, which was sold to Future plc during the year.

Future investment by the Indie Growth Fund will continue to be geared towards fast-growing independent production companies in the Nations and Regions, as well as digital and diverse businesses across the whole of the UK. The Indie Growth Fund has now moved to Channel 4's National HQ in Leeds.

Alongside the Indie Growth Fund, the Commercial Growth Fund was launched in 2015 and invests in high-growth digital consumer businesses, offering media airtime in exchange for equity. To date, this fund has completed 19 equity investments and had a balance sheet value of £20 million at 31 December 2019 (2018: £16 million).

In 2019, Commercial Growth Fund investments included: Meatless Farm, a plant-based meat alternative producer; SportPursuit, a specialist flash sales site for sports and outdoor enthusiasts selling technical and athleisure products; TravellLocal, an online travel platform connecting holidaymakers with selected local tour operators across the globe; and Droveo, a car subscription marketplace. Three follow-on investments were completed with existing portfolio companies: Eve Sleep, Huzzle (formerly PayAsUGym) and GetAgent. The Commercial Growth Fund also divested its stake in Pinterest, a social media website. The increase in the fund's value was offset by its divestment of Pinterest and fair value losses that relate to some of the fund's investments.

Dynamic TV

Commercial innovation and partnerships are critical to Channel 4's long-term success. From ground-breaking advertising breaks to pioneering commercial collaborations, innovation runs through the entire Channel 4 business.

A strong example of this is Dynamic TV.

At the start of 2019, in a first for the UK and European advertising markets, Channel 4 launched Dynamic TV. This is a brand-new innovation in spot advertising that enables potentially thousands of data-driven creative variations of an advert to be served across big screen devices, such as smart TVs, for the first time, as well as on mobile and desktop video-on-demand platforms.

Developed alongside Channel 4's video technology partner Innovid, Dynamic TV allows advertising partners to leverage first-party data from Channel 4's more than 22 million registered viewers to deliver bespoke ads based on location, weather, time of day, date and demographics (without any data being shared by Channel 4 with others). For example, one of our launch partners, Boots, launched a targeted ad that showed users where their nearest Boots store was located.

By personalising TV adverts, we are able to bring more relevancy to viewers and create a better experience than traditional commercial breaks. Dynamic TV supports previous innovations launched by Channel 4, such as Contextual Moments, launched in 2018. This was the world's first AI-driven TV advertising technology, enabling Channel 4 to place a brand's adverts next to the relevant scenes in a linear TV show.





Cricket World Cup

Industry partnerships

Channel 4 collaborates with commercial partners to offer the best content and technology for the British public.

With UK broadcasters increasingly feeling the effects of competition from video-on-demand services offered by much bigger US-based media and tech companies, there is a growing rationale for companies who saw each other primarily as commercial rivals to find new ways to collaborate.

A prime example of a successful implementation of this is Channel 4's industry-leading partnership with Sky. In September, Channel 4 and Sky announced a new, broader, strategic partnership that spans content, technology and innovation – benefiting both British consumers and the broader industry.

As part of the partnership deal – and following a successful season in 2019 – Formula 1 highlights and live coverage of the British Grand Prix will continue to be broadcast on Channel 4 as part of the wider, multi-year content deal – ensuring that Formula 1 remains available on free-to-air television.

In addition, Sky and Now TV customers are also able to enjoy more upfront box-sets from Channel 4, which provides the ability to binge-watch all episodes of selected Channel 4 series before they are broadcast, along with extended access to our Walter Presents series of foreign-language dramas.

And as part of the commercial partnership, Channel 4 also signed up to use Sky's AdSmart technology for the first time, which will enable us to deliver fully-targeted, addressable spot adverts across our portfolio of linear channels to viewers in Sky and Virgin Media households.

This partnership is a fantastic example of how broadcasters can work together to extend the reach of their content and innovate for the benefit of both viewers and advertisers. It builds on the growing list of collaborations between Sky and Channel 4 which, earlier in the summer, saw the two broadcasters share the final of the ICC Cricket World Cup, enabling the entire nation to celebrate a once-in-a-generation moment of England winning the World Cup on home soil (see page 68).



The opportunity to collaborate as public service broadcasters on BritBox extends our track record of partnership and will ensure there is a compelling single destination for the very best high-quality, home-grown content.



The Inbetweeners

The End of the F***ing World



BritBox

During 2019, Channel 4 struck a multi-year deal with BritBox, the new streaming service created by the BBC and ITV.

Our partnership with BritBox will add around 1,000 hours of recent and archive Channel 4 box-sets across Comedy, Drama and non-scripted programmes, plus a selection of British films from Film4.

The opportunity to collaborate with other public service broadcasters on BritBox extends our track record of partnership with other broadcasters and ensures that there is a compelling single destination for the best high-quality, home-grown content from the PSBs on a service defined by their shared public service brand values.

BritBox brought All 4 to the service in spring 2020, with new series being available 31 days following transmission of the last episode on Channel 4. Film4 will follow later in 2020.

Investing

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.

Innovation through content

In 2019, Channel 4 maintained its overall content investment across its services, with total spend on originated and acquired content of £660 million, level with the 2018 figure in percentage terms. The total was marginally down, by £2 million, in absolute terms, but still higher than in any year prior to 2016. Expenditure on Channel 4's own commissions rose by £3 million to £492 million, the third-highest level in Channel 4's history. £437 million of this was spent on the main channel; this was down by 2% year-on-year as more budget was allocated to the digital channels, whose original content spend rose by 31% to £51 million.

Channel 4 broadcast 7.9 hours of first-run originations every day on average across the TV portfolio in 2019, 6.8 of which were on the main channel. The total was slightly down (by 1%) year-on-year. Hours on the main channel fell by 3% while those on the digital channels rose by 36%, reflecting the rebalancing of the original content budget described above. During peak viewing time (6-10.30pm), first-run originated programmes accounted for 74% of hours on the main channel – one percentage point up on 2018 and the joint-highest figure since this metric was first reported in 2008. Including repeats, 84% of peak-time hours were taken up with originations, the highest figure since 2008.

Across the TV portfolio, there were few significant year-on-year variations (of more than £10 million or 10%) in investment at the genre level. The biggest change was a reallocation from Sport (with less F1 coverage this year and no summer or winter Paralympic Games) to other areas, in particular youth-skewing originations on E4 and longer runs for successful series. As a result, spend on Sport was down by 33% to £31 million, while the volume of first-run originations dropped by 152 hours. The main beneficiary of this change was Factual programming, the sole genre to experience a significant increase in its budget, with spend up by 6%/£14 million to £236 million and volume up 57 hours. Other significant decreases in spend were in Education programming (down by 33% to £11 million) and Older Children (down by 20% to £6 million). In volume terms, the other notable change this year was a 43-hour increase in Entertainment, a 9% rise. More information on genres and programmes are included within the relevant narratives.

in innovation

Innovation through diversity

Channel 4 is the only PSB that outsources all of its productions, and in 2019 it increased its total investment in first-run originations from external suppliers across its TV portfolio. Spend on the TV portfolio was £483 million, up 1% year-on-year (a £5 million rise). Reflecting the rebalancing of budgets described above, the main channel's investment fell by 2% to £432 million, while spend on the digital channels was up by 31% to £51 million. Channel 4 worked with 274 creative partners across its commissions in TV, film and digital media this year, the same as in 2018. Of these suppliers, 43 were new to Channel 4, a 26% rise, reflecting our commitment to diversify the supply base this year after declines in 2018, along with the launch of the new Digital Creative Unit ("DCU").

Channel 4's commitment to regional diversity is reflected in its commissions from across the Nations (Northern Ireland, Scotland and Wales) and the English Regions. In 2019, 54% of hours of first-run originated programmes on the main channel came from suppliers based outside London. While this is five percentage points down on 2018's record level, this remains a strong performance well in excess of our target quota. In expenditure terms, Channel 4 achieved its joint-highest-ever level of investment outside London, with 46% of investment in first-run originated programming on the main channel from out-of-London suppliers (one point up year-on-year). Across the TV portfolio, Channel 4 spent a joint-record £189 million on programmes from production companies based outside London, 1.5% up on last year's figure. £35 million of this total came from companies based in the Nations, a 6% rise.

Turning to on-screen diversity, Channel 4 showed 266 hours of originated programmes on the main channel whose subject matter covered issues relating to religion, multiculturalism, disability and sexuality. This total rose slightly, by 2%, in 2019; excluding years boosted by coverage of Summer Paralympic Games (i.e. 2012 and 2016), it is the highest level reached on this metric since 2011. Following last year's live coverage of the PyeongChang 2018 Winter Paralympic Games – which comprised a large volume of first-run programming outside of peak-time – the volume of first-run originations fell back this year by 18% to 146 hours (still above 2017's level), while first-run originations in peak-time rose by 28% to 80 hours. Programme examples are provided on page 93.

Programming with an international theme adds another element of diversity to the schedules. There were 65 hours of first-run non-news programmes covering international topics on the main channel and in the cross-channel *True Stories* documentary strand in 2019, 10% up year-on-year. The TV portfolio continued to showcase foreign-language TV shows from Channel 4's Walter Presents service: the opening episodes of 13 foreign-language TV series were premiered on the main channel this year, and a further eight series shown in full on the main channel and More4. Taken together, these Walter Presents programmes reached 8.9 million people in 2019. While down by 1.5 million year-on-year, this was compensated by a 4% increase in views to Walter Presents content on All 4, to 32.5 million. Meanwhile, the Film4 channel continued to offer a diverse and international slate: 32% of its output came from outside the UK, with British films accounting for 15% of total output.

Innovation through content

£660m

spent on content across all services

Equal

with last year

£650m

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

Equal

with last year

Investment in all content

In 2019, Channel 4 maintained its overall level of investment in content across its services, with some redistribution of funds from the main channel to digital channels. Total spend across the network was £660 million, level with the 2018 figure in percentage terms. While this was marginally down, by £2 million, in absolute terms, the content budget remains higher than in any year prior to 2016.

The main channel – which attracts the biggest audiences in the portfolio – continued to account for the bulk of the investment: its budget was £530 million this year, 80% of the total. This was down by 3% year-on-year, as £16 million was reallocated to the digital TV channels, whose budget rose by 15% to £120 million. The remaining £10 million was spent on digital media (level with the 2018 amount), which comprises Channel 4's websites, cross-platform content and investment in All 4 content, including foreign-language TV service Walter Presents. Overall, digital services (the digital TV channels and digital media) accounted for 20% of Channel 4's total content investment in 2019, up from 17% in 2018.

Focusing on the TV portfolio – the main channel and digital TV channels – total spend of £650 million in 2019 was level year-on-year in percentage terms (and £2 million down in absolute terms on the 2018 figure). At the genre level, there were only a few significant year-on-year variations in investment, defined as being movements of more than £10 million or 10%. The biggest driver of change was a reallocation from Sport – whose F1 coverage this year mainly comprised highlights, with only one live race (10 live races in 2018) – to other areas, in particular youth-skewing original programmes on E4 (e.g. *Shipwrecked*) and longer runs for successful series such as *SAS: Who Dares Wins*.

Factual programming was the biggest beneficiary, and this was the sole genre to experience a significant increase in its budget, with spend on Factual up by £14 million (a 6% rise). The biggest reduction in spend was in Sport, down by £15 million (a 33% decline), for the reason given above, as well there being no summer or winter Paralympic Games this year.

Spend on Education programming also fell by 33%, equivalent to £6 million, while the budget for Older Children fell by 20% (a £2 million drop) as series such as *Kiss Me First* and *Old People's Home...* did not return this year.

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

	Channel 4 (main channel)	Digital channels	Digital media (excluding main channel)	Total
2019	530	120	10	660
2018	548	104	10	662

■ 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)

Film	81	82
Drama	79	80
Factual	236	222
Comedy	56	52
Entertainment	94	91
News	28	27
Current Affairs	28	27
Older Children	6	8
Education	11	17
Sport	31	46

■ 2019 (£650m) ■ 2018 (£652m)

Source: Channel 4.

Innovation through content

74%

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

Up 1pt

on last year

Output mix on Channel 4

Channel 4 typically premieres its original programmes on the main channel during peak-time hours (defined by Ofcom as 6-10.30pm), where they can reach the largest audiences. The share of originations in peak-time on the main channel reached record levels in 2019: 74% of peak-time hours were made up of first-run originated programming – one percentage point up on the 2018 figure and the joint-highest figure since this metric was first reported in 2008. With repeats of original programming accounting for another 10% of hours (also up one point year-on-year), total originations comprised 84% of peak-time output – their highest figure since 2008 and well ahead of Ofcom's 70% licence requirement.

Daytime schedules offer a more balanced spread of originations and acquisitions, and originations represented 62% of output on the main channel across the day in 2019 – one point down on the 2018 figure but again well above the relevant Ofcom quota (of 56%).

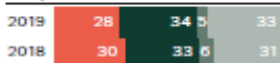
There were small year-on-year variations in this metric: in peak-time, there was a shift from acquisitions to originations of two percentage points, and a one-point rise in the share of repeats (with a corresponding drop in first-run programming). Across the whole day acquisitions were up by one point, while repeats rose by three points.

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.

£492m

spent on originated content across all services

Up 1%

on last year

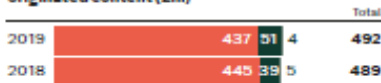
Investment in originated content

Channel 4 delivers its public remit primarily through the original content that it commissions and invests in. In 2019, total expenditure on originated content (first-run transmissions and repeats) across its TV channels and online services grew to £492 million. This is an increase of £3 million (1% up) year-on-year and the third-highest level in Channel 4's history.

The main channel attracts the biggest audiences and correspondingly accounts for the large majority of Channel 4's originated content budget: at £437 million, this was 89% of the total in 2019. £221 million of this total was spent on News, Current Affairs, Education programming, Comedy, Drama series and single dramas (including Film4 productions), Arts and Religion (this sum does not include the full range of programme genres e.g. Factual or Sport, where Channel 4 also delivers important public service content). Beyond the main channel, £51 million was spent on original content for the digital channels and £4 million on digital media content (including websites and cross-platform content), as part of our wider strategy to increase our appeal to young people.

Across the services, the digital TV channels received a boost in spend this year: original content investment was up by £12 million year-on-year, equivalent to a 31% rise. As part of this rebalancing of the overall budget, there were small declines in investment on the core channel, which fell by £8 million (a 2% drop) and in digital media (£1 million down).

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

7.9hrs

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

Down 1%

on last year

Originated output across Channel 4 TV portfolio

In 2019, Channel 4 broadcast an average of 7.9 hours of new commissioned programmes (i.e. first-run originations) every day across the main channel, E4, More4 and Film4. The main channel accounted for 6.8 of these daily hours (86% of the total). There were a further 1.1 hours on the digital channels, the joint-highest level since 2008.

The volume of first-run originations across the TV portfolio fell slightly, by 1% year-on-year. Hours on the main channel fell by 5% while those on the digital channels rose by 36%, reflecting the rebalancing of the original content budget from the main channel to the digital channels, in line with our wider strategy to supercharge our appeal to young people (see 'Investment in originated content' on page 85).

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

		Total
2019	6.8	7.9
2018	7.2	8.0

■ Channel 4 ■ Digital channels

Source: Channel 4.

2,862

hours of first-run originations across the portfolio

Down 1%

on last year

Volume of first-run originations by genre

Channel 4 broadcast 2,862 hours of first-run originated programming across its TV portfolio (main channel and digital channels) in 2019, marginally down (by 1%, or 38 hours) on the 2018 level. The two biggest genres – Factual and Entertainment – together accounted for 66% of total first-run originated hours. The volume of first-run originations in Factual rose by 57 hours this year (a 4% increase), as it was the main beneficiary of the hours freed up by Sport (see 'Investment in all content' on page 84). Entertainment was also up, by 43 hours (a 9% increase), thanks in part to a focus on Friday nights at 11pm as a space for innovation and new talent with shows such as *The Lateish Show With Mo'Gilligan*.

In the rest of the schedule, only three other genres experienced significant year-on-year changes in the volume of first-run originations, which we define as being in excess of 10% or 50 hours. Film (i.e. those with investment from Film4 Productions) was up by 14% to 14 hours, a two-hour increase; this year's titles included the network premiere of Film4 Production's *T2 Trainspotting*. The volume of Sport fell by 152 hours, a 37% decline, and there was a 12% decline in the volume of Education programmes (a drop of three hours), both for the reasons described in Investment in all content on page 84.

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

Film	14	12
Drama	159	159
Factual	1,397	1,340
Comedy	29	31
Entertainment	506	463
News	257	249
Current Affairs	199	189
Older Children	23	24
Education	24	27
Sport	254	406

■ 2019 (2,862hrs) ■ 2018 (2,900hrs)

Source: Channel 4.

Innovation through content

Meeting Channel 4's licence obligations

Average hours per week		Compliance Minimum	2019
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	33
Percentage			
Origination production	Overall	56	62
	In peak-time (6-10.30pm)	70	83
Independent production		25	44
European independent production		10	27
European origin		50	70
Subtitling for the deaf and hard of hearing		90	100
Audio description		10	42
Signing		5	6
Regional production		35	46
Regional hours		35	54
Production in the Nations		3	8
Nations hours		3	11

Innovation through diversity

£432m

investment in first-run external UK commissions on the main channel in 2019

Down 2%

on last year

Broadcasters' investment in the production sector

Uniquely amongst the main public service broadcasters, Channel 4 has no in-house production base of any kind and sources 100% of its original programming from external suppliers. This is an intrinsic part of Channel 4's model, ensuring that its investment in content provides maximum benefit to the UK's independent production sector.

In 2019, Channel 4 increased its total investment in first-run originations from external suppliers across its TV portfolio. On the main channel, its spend on external suppliers was £432 million, 46% of which was spent on qualifying independent production companies. A further £51 million was spent on the digital TV channels, taking Channel 4's total investment in first-run originations from external suppliers across its TV portfolio to £483 million – up 1% on the 2018 figure (a £5 million rise). The main channel's investment fell by 2% year-on-year, while spend on the digital channels was up by 31%, reflecting the rebalancing of the overall original content budget between the main channel and digital channels (see 'Investment in originated content' on page 85).

Note: Ofcom no longer publishes cross-industry data on the main public service broadcasters' spend on first-run external commissions. Up to the point when Ofcom last published this data, for 2016, comparative figures showed that Channel 4 consistently spent more on first-run external commissions than any of the other main public service broadcasters.

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

		Total
2019	432	51
2018	440	38

■ Main channel ■ Digital channels

Source: Channel 4
2018-19 data not available for other PSB channels.

Output from suppliers based outside London:

54%

of first-run originated programme hours

Down 5pts

on last year

Investment in the Nations and Regions (main channel)

In 2019, Channel 4 sourced 54% of the hours of first-run originated programmes on its main channel from suppliers based in the Nations and Regions. While this is five percentage points down on the record level achieved last year (2018: 59%), it remains well within our quota target. The decrease in hours can be attributed to a reduction in Sports programming (2019 did not have summer or winter Paralympic Games and our F1 programming also reduced significantly by hours).

In spend terms, Channel 4 achieved its joint-highest-ever level of investment outside London. 46% of Channel 4's expenditure on first-run originated programming on the main channel was on programmes from suppliers in the Nations and Regions, one percentage point up year-on-year and a record level for this metric (jointly with 2013). Both of these figures exceed by a significant margin the 35% licence quotas set by Ofcom.

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



■ 2019 ■ 2018 — Quota

Source: Channel 4.

46%

of the value of first-run originations

Up 1pt

on last year

Innovation through diversity

274

companies working with Channel 4 portfolio across TV, film and digital media in 2019 of which 166 were independent TV production companies

Equal

with last year

Diversity of supply base

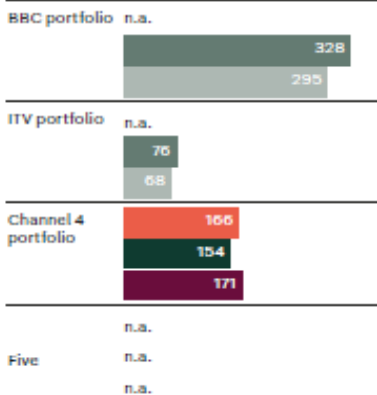
Channel 4 punches above its weight in terms of the extent of its relationships with independent TV production companies ('indies'). In 2018, the most recent year that comparative TV industry data is available, Channel 4 worked with 154 indies across its TV channels. Only the BBC – whose TV portfolio content budget (£1.7 billion in 2018-19, according to its Annual Plan) is more than double that of Channel 4 – worked with more (328 indies in total). Channel 4 worked with significantly more indies than ITV (76 companies), whose content budget is also much larger than Channel 4's.

Turning to Channel 4's most recent data, for 2019, a total of 274 companies supplied the TV, film and digital media content that it commissioned – the same number as in 2018. In TV, this included 166 indies (2018: 154 companies, the figure used for comparison with other broadcasters above). This is up 8% year-on-year, thanks in part to new commissions arising from E4's investment boost and a rise in the number of new and one-off programmes. A further 38 non-independent producers gave a total TV supply base of 204 companies (3% up on the 2018 figure of 198).

In other media, there were 21 online suppliers, down from 36 in 2018 – a 42% fall. This is the biggest year-on-year change across the various media in percentage terms, and is explained by the continuation of All 4's recent strategy from the 2018 report to focus on acquiring long-form third-party content, rather than commissioning original short-form content. Channel 4 also worked with 72 film companies, up from 68 the previous year (a 6% rise).

Across all types of content, 43 companies were new suppliers to Channel 4, 26% more than the 2018 figure of 34. This large increase reflects Channel 4's intensified commitment to create access for new suppliers to the industry this year after declines in 2018, along with the launch of the new Digital Creative Unit ('DCU'). 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 the total figure of 274 separate companies that Channel 4 worked with in 2019.

Number of independent TV production companies supplying the PSBs



Legend: 2019 (red), 2018 (green), 2017 (purple)
Note: 2019 data not available for other PSB channels.
Source: Channel 4, Broadcast (other channels).

Innovation through diversity

Output from suppliers based in the Nations:

11%

of first-run originated programme hours

Up 1pt

on last year

8%

of the value of first-run originations

Equal

with last year

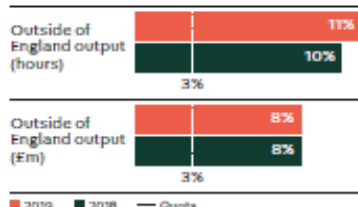
Investment in the Nations (main channel)

In 2019, Channel 4's commissions in the Nations accounted for 11% of total hours of first-run originated programming on the main channel. This figure is one percentage point up year-on-year, and just one point below 2017's record level of 12%. It also exceeds both the current 3% licence quota set by Ofcom and the increased 9% quota which comes into effect in 2020. Looking at the individual Nations, Scotland accounted for 6% of the total this year, Wales 4.5% and Northern Ireland 0.6%.

In terms of expenditure, the Nations represented 8% of the total budget for first-run originated programmes on the main channel (comprising 4.4% spent in Scotland, 2.4% in Wales and 1.1% in Northern Ireland). This is level with 2018's figure and again just one point below the 2017 record (of 9%). It exceeds Ofcom's current 3% licence quota and is just one percentage point short of 2020's increased 9% quota.

Commissions from the Nations provided 248 hours of first-run programming on the main channel in 2019, 4% up year-on-year. Within the individual Nations, the biggest change was an increase in investment from Scotland: the volume of programming was up by 19% to 134 hours (2018: 113 hours), while spend rose by 31% to £17.4 million in 2019 (2018: £13.3 million). New commissions included Kirstie's *Celebrity Craft Masters* and *Year of the Rabbit*. In Wales, the volume of commissions held steady year-on-year at 100 hours, but spend fell by 32% to £9.4 million (2018: £13.8 million). As last year, the slate included a major drama, *The Accident*. While some series (e.g. *One Born Every Minute*) did not return, there were more hours of the rugby Heineken Champions Cup as well as new series *Sun, Sea and Brides to Be*. In Northern Ireland, spend held steady at £4.3 million while the volume of commissions dropped by 44% to 14 hours (2018: 25 hours). *My Family Secrets Revealed* did not return this year, and was replaced by the ... *From Hell: Caught On Camera* strand as well as feature-length *Britain's Wildest Weather 2019*.

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



■ 2019 ■ 2018 — Quota

Source: Channel 4.

Innovation through diversity

£189m

spent on production companies based outside London

Up 1.5%

on last year

£35m

spent on production companies in the Nations

Up 6%

on last year

Spend by region across the Channel 4 TV portfolio

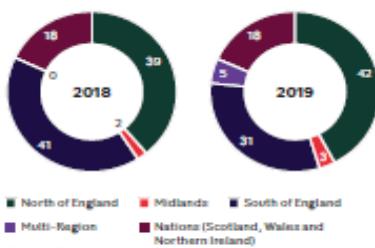
In 2019, Channel 4 spent a joint-record £189 million across its TV portfolio on content commissioned from production companies based in the Nations and the English Regions. This is an increase of 1.5% (equivalent to £3 million) on last year's figure and returns to the peak level set in 2017.

Expenditure on content from production companies in the Nations was £35 million this year, £2 million up year-on-year. In the individual Nations, the most marked year-on-year change was a 43% increase in investment in Scotland, equivalent to a rise of £6.2 million, to a total of £20.7 million. In Wales, investment fell by 30% (or £4.2 million) to £9.7 million. There was a marginal decline in investment in Northern Ireland of 3% (£0.1 million) to a total of £4.3 million. New programmes in the Nations this year included *Year of the Rabbit* (from Scotland), *The Accident* (Wales) and the second series of *Derry Girls* (Northern Ireland).

Turning to commissions from the English Regions, Channel 4's TV portfolio spend fell by 5% (an £8 million drop) to £144 million. Programmes made in the English Regions this year included *The Dog House* (South of England), *Snackmasters* (the Midlands), and *The Circle*, which relocated from London to Manchester to boost investment in the Regions (North of England). A further £10 million was spent on multi-region content in 2019. This is a significant increase, of £9 million, on 2018's figure of £1 million, due primarily to new drama *Traitors*.

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)



Different voices

65hrs

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

Up 10%

on last year

229hrs

of first-run foreign-language content across the portfolio

Up 13%

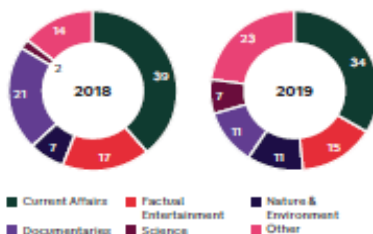
on last year

Range of international programming

Channel 4's coverage of international themes extends across the schedule, from weighty geopolitical issues to more light-hearted explorations of different countries. In 2019, excluding *Channel 4 News* there were 65 hours of first-run programmes with an international theme on the main channel and in the dedicated international documentary strand, *True Stories*, which runs across the main channel and Film4. This figure is 10% above last year's figure of 60 hours (five additional hours). The *True Stories* strand accounted for six hours both this year and in 2018. Current Affairs was the biggest single genre in 2019 (as was the case last year), accounting for 34% of total first-run hours of non-news international programming (2018: 39%). Alongside the long-running *Unreported World* and *Dispatches* strands, highlights this year included the award-winning film *For Sama* (see p58) and *Leaving Neverland: Michael Jackson and Me*. The second-biggest genre was Factual Entertainment, with 15% of the total (2018: 17%). New series this year included *Smuggled*, in which eight British citizens attempted to smuggle themselves back into Britain without their passports. In joint-third place, with 11% of total hours, were *Nature & Environment* (up from 7%) and Documentaries (down from 21% in 2018); while Science was the fifth-biggest genre, with 7% of the total (2018: 2%). International programmes in these genres included, respectively, *Extreme Tribe: The Last Pygmies*, *Sex on Trial* and *Moon Landing*.

Channel 4's acquired TV programmes and films also include a diverse range of content from around the world. These include tie-ins with Walter Presents, Channel 4's innovative on-demand service curating the best foreign-language TV shows. This year, the launch episodes of 13 series were premiered on the main channel, with viewers being pointed to All 4 to watch the rest of the series. The most popular was Norwegian thriller *The River*, attracting 382,000 TV viewers to its opening episode. A further eight series were shown in their entirety on the main channel and More4, of which the most popular, returning German thriller *Deutschland 86*, averaged 274,000 viewers across ten episodes. Taken together, the Walter Presents-branded foreign-language dramas shown on the main channel and More4 reached 8.9 million people in 2019, equating to 14.7% of the population. While down by 1.5 million on last year's figure, this was compensated by a 4% increase in views to Walter Presents content on All 4, to 32.5 million. Overall, there were 229 hours of first-run foreign-language TV shows and films across the TV portfolio, 13% more than last year's level (26 additional hours), and the highest figure for this metric over the last five years. On the Film4 channel, 771 hours of films from outside the UK and US were shown in 2019 (this figure includes first-runs and repeats, and films shown both in the English language and in foreign languages). This is 3% down (25 hours) on the 2018 figure.

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



Source: Channel 4.

Different voices

146hrs

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

Down 18%

on last year

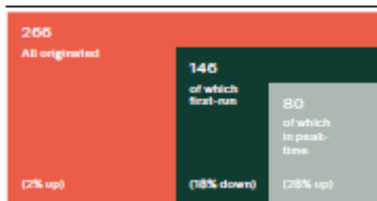
Diversity output on the main channel

As part of Channel 4's broad goal to reflect the diversity of the UK – which spans its entire output – it broadcasts programmes whose subject matter specifically covers diversity issues. In 2019, it showed 266 hours of originated programmes on the main channel whose subject matter covered issues relating to religion, multiculturalism, disability and sexuality. Of these originated hours, 146 were first-run programmes (the others being repeats), and 80 of the first-run hours related to programmes shown in peak-time (i.e. between 6pm and 10.30pm, following Ofcom's definition). Amongst this year's highlights, *Drag SOS* saw unlikely protégés embark upon a voyage of self-discovery as they transformed into bigger, better, drag-enhanced versions of themselves, while Rufus Jones' comedy *Home* looked at life through the eyes of a Syrian asylum-seeker. Other programmes included *The British Tribe Next Door* (multiculturalism), *Sink or Swim for Stand Up To Cancer* (disability) and *The Circle* (sexuality).

The total volume of originations rose slightly, by 2%, in 2019, excluding years boosted by coverage of Summer Paralympic Games (i.e. 2012 and 2016), this is the highest level reached on this metric since 2011. Following last year's live coverage of the PyeongChang 2018 Winter Paralympic Games – which comprised a large volume of first-run programming outside of peak-time – the volume of first-run originations fell back this year, by 18% (though still above the 2017 level), while first-run originations in peak-time rose by 28%.

Channel 4's impact on diversity includes far more than the programme commissions covered by these figures. The broadcaster continues to support a range of initiatives that promote diversity. This year, it developed further the new strategy that began to be rolled out in 2018, to centre around three areas: an inclusive workforce that celebrates diversity, shifting focus to on-screen portrayal and representation, and to be a driving force and pioneer in the industry on inclusion and diversity. Channel 4 also continues to improve access to opportunities to those with different backgrounds via its New Material events, Paras Production Training Scheme, Work Experience and Apprenticeship programmes. Read more about Channel 4's work on Diversity on page 48.

Total hours of programming covering diversity issues shown on the main channel (2019 with trends relative to 2018)



Source: Channel 4.

Film

32%

from outside the US

Up 1pt

on last year

15%

from the UK

Equal

with 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. This was reinforced in 2019, when the channel slightly increased its share of the schedule devoted to non-Hollywood-studio titles.

British films – including ones that were co-funded by Film4 Productions – accounted for 15.4% of total programming hours in the schedule, up from 14.6% in 2018. Other non-US films made up a further 16.1% of the schedule, down from 16.6% in 2018. Overall, a total of 31.5% of hours of output were devoted to films from countries other than the US, 0.3 points up year-on-year (2018: 31.2%). (Note that this figure includes films that were co-productions between the US and other countries; in 2019, 8.2% of output on the channel comprised US/non-US co-productions, 2.3 points more than in 2018.)

October saw the launch of a dedicated Film4 area on the All 4 platform, providing a clear and accessible showcase for films that have aired recently on the TV portfolio. It is carefully curated to highlight individual titles, including those from Film4 Productions, along with thematic sections – such as British films, World Cinema and FilmFear – which are supported by original interviews with key talent. This new space has increased our digital footprint and helped promote a diverse range of British and international films, in line with our remit.

The Film4 channel reflected the 50th anniversary of The Troubles in Northern Ireland with a line-up of films that complemented filmmaker Mark Cousins' documentary on the main channel. Each film was introduced by Cousins, who wrote and recorded special continuity intros for the occasion. The channel also marked Black History Month in October with a short season of films, including the network premiere of the powerful and previously unseen drama *Night Comes On* and the experimental documentary *Black Mother*, with further short films and additional programming on All 4.

News and Current Affairs

403

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

Up 7%

on last year

Commitment to long-form journalism

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

In 2019, Channel 4's main channel showed 403 'long-form' News and Current Affairs programmes in peak-time (between 6pm and 10.30pm, as defined by Ofcom). Not only is this substantially more than the corresponding combined total for the other main PSB channels (265 programmes between them), following a 7% increase year-on-year, it is also Channel 4's highest-ever figure on this metric since 2012 (the oldest year using the current methodology).

Channel 4 maintains a commanding lead over other channels even when the late evening period is also taken into account, thereby capturing News and Current Affairs programmes broadcast after peak-time (in particular, BBC Two's Newsnight, which usually begins at 10.30pm). Between 6.30pm and midnight, Channel 4 showed 457 long-form News and Current Affairs programmes on its main channel in 2019. This is 2% higher than the previous year's figure and the highest for Channel 4 since 2012. It was also considerably greater than that for any of the other main PSB channels. Second-placed BBC Two broadcast 328 long-form News and Current Affairs programmes (only 72 of which were shown in peak-time), 129 fewer than Channel 4.

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

				Total
BBC One	2019	114	90	204
	2018	94	105	199
BBC Two	2019	72	256	328
	2018	35	278	313
ITV1	2019	77	65	142
	2018	86	26	112
Channel 4	2019	403	54	457
	2018	376	70	446
Five	2019	2		2
	2018	5		5

■ Peak-time ■ Off-peak

Source: Channel 4, BARB (other channels)

Making

Channel 4 occupies a unique role as a mass-market TV channel that also appeals to under-served groups with its risk-taking, challenging content. To measure Channel 4's impact, we look at viewing across different audience groups as well as the public value achieved by delivering its remit.

Reputational impact

To assess its impact, Channel 4 tracks audience perceptions of 12 reputational statements linked to its public service remit, benchmarking the main channel against BBC One, BBC Two, ITV and Channel 5. As Channel 4 typically leads these other main PSB channels by a significant margin, we look at annual variations in the main channel's leads over the other channels' average scores to provide additional rigour.

Channel 4 continued to lead the other broadcasters on each statement in 2019, often by large margins. The biggest leads were for 'taking risks with programmes that others wouldn't' (32 percentage points), 'tackling issues other channels wouldn't' (30 points) and 'taking a different approach to subjects compared to other channels' (27 points). Averaged across the 12 statements, Channel 4's lead over the average for the other main PSB channels was 23 percentage points. This is down one point year-on-year, but still falls in the middle of the 20-27 point range achieved over the last decade.

Digital

As audiences increasingly consume TV programmes on-demand, Channel 4 is evolving to meet this demand and provide content wherever and whenever its audiences want to watch. Its dedicated All 4 app offers long-form programmes, live streaming and digital-first video content on PCs, smartphones, tablets, games consoles and connected TVs. In 2019, Channel 4 attracted record levels of on-demand viewing: 995 million programme views were initiated through All 4-branded platforms, 9% up year-on-year. The strongest area of growth (more than 20%) was on 'Big Screen' devices, i.e. connected TVs and streaming devices that plug into TVs. Catch-up programming was All 4's strongest growth area, thanks both to strong single titles and popular returning brands.

Channel 4's websites and apps attracted 699 million visits in 2019, level year-on-year in percentage terms (though marginally down, by three million, in absolute terms). Within this total, there were bigger changes at the platform level, as All 4 app visits migrated away from mobile platforms and towards 'Big Screen' platforms on which there is a higher propensity to view Channel 4's content (which is why on-demand video viewing rose despite the number of visits holding steady).

Television

Following five years in which the main channel's TV viewing share held steady – and in a year in which we increased our investment in developing All 4 as part of our wider digital strategy – our main channel's TV viewing share fell by 0.1 percentage points to 5.8% in 2019. This stability in recent years is impressive given the intensified competition in the linear TV space, and Channel 4's particular vulnerability to the migration of young viewers to video-on-demand (VoD) services. There were small changes in viewing to the digital channels: viewing to E4, More4 and Film4 fell by 0.1 percentage points each, partially offset by a 0.1 point increase in viewing to the Box/4Music channels following the addition of six Box music channels to the portfolio this year. Overall, the digital channels had a viewing share of 4.1%, 0.2 points down year-on-year.

Channel 4's TV portfolio was watched by 75.8% of all viewers every month on average in 2019, behind only the BBC and ITV. Viewer migration to other linear TV channels and VoD services meant that the main PSBs all suffered reductions in the reach of their traditional TV channels, ranging from 2.2 percentage points (for Channel 5) to as much as 3.1 points (ITV), with Channel 4's reach down by 2.9 points.

Channel 4's engagement with hard-to-reach audiences – in particular young adults and black and minority ethnic ('BAME') groups – continued to outperform other PSBs this year. TV portfolio viewing share amongst 16-34-year-olds was 15.7%, down slightly year-on-year (by 0.2 percentage points). Nonetheless, Channel 4 not only remained the only PSB to attract significantly greater viewing amongst this age group than across the general population, but also the differential – viewing amongst 16-to-34-year-olds was 59% higher than the corresponding all-audience share – was higher than at any time since this metric was first reported in 2012. Meanwhile, Channel 4's portfolio share amongst BAME audiences was 9.2% (0.3 points down year-on-year), meaning that this group represented a higher proportion of Channel 4's total audience than the corresponding proportion for the other PSBs.

Channel 4's News and Current Affairs output represents a vital part of its remit delivery. In 2019, *Channel 4 News* was watched by an average of 7.8 million people each month – 6% up year-on-year, making Channel 4 the only PSB to have grown its national news reach. *Channel 4 News* seeks new ways to promote its content on digital platforms, and this year video views rose by 65% to 187 million on YouTube, and by 64% to 185 million on Twitter. Across Facebook, YouTube, Twitter and Instagram, *Channel 4 News* had eight million followers/subscribers by the end of 2019.

Channel 4 outperforms the other PSBs in attracting young adults and BAME viewers to its news programmes. 16-to-34-year-olds accounted for 10% of the *Channel 4 News* audience in 2019, level with Channel 5 and above the corresponding viewing profiles for the national news programmes on the other main PSB channels, which ranged from 5% to 8%. Our weekday news also grew its share of 16-24-year-olds by a huge 29% year-on-year. *Channel 4 News*' appeal is even more marked for BAME audiences, representing 16% of total viewing this year, the joint-highest figure achieved over the last decade, and well ahead of the corresponding profiles, of 6%-11%, for the other PSB channels' news programmes. There were small year-on-year variations: the proportion of viewing to *Channel 4 News* accounted for by 16-to-34-year-olds fell by two percentage points, while the proportion of BAME viewers rose by one point.

Impartial and authoritative news is one of the most important elements of the UK's PSB system – more so now than ever in the era of 'fake news'. *Channel 4 News* continues to be the most highly regarded TV news provider in terms of regular viewers' perceptions of its independence from the government and from the influence of big businesses, by clear margins relative to the other broadcasters (the main PSBs and Sky). 82% of regular viewers to *Channel 4 News* regarded it as being independent from the government (nine percentage points more than the average for the other broadcasters' news programmes) and 76% agreed that it is independent from the influence of big businesses (seven points over the average for the other broadcasters).

To capture its distinctiveness in Current Affairs, Channel 4 tracks five reputational statements covering the subject matter and approach taken by the main PSB channels in this genre. In 2019, *Dispatches* had the highest average score across the five statements of all the PSBs' Current Affairs programmes and strands, while *Unreported World* was tied in second place (with BBC One's *Panorama*). *Dispatches* ranked first for "making me see something in a different light", and in second place for another three statements; while *Unreported World* was first for "showing stories about parts of the world you would rarely see on British TV" and "giving a voice to groups that aren't always heard in mainstream media". *Dispatches*' average score across the five statements rose by one percentage point year-on-year, while *Unreported World*'s score dropped by two points.

Audience feedback

Channel 4 draws on feedback from sources including its Viewer Enquiries Centre, social media traffic, bespoke audience research and registered online users. The 'Buzz' metric, derived from a daily sample of 3,000 people, indicates which programmes people have talked about the most, face-to-face or on social media. The average 'Buzz' score for the ten most talked-about programmes rose this year to 59%, the top three being the ICC Men's Cricket World Cup Final, the *Channel 4 News Climate Debate* and *Leaving Neverland: Michael Jackson and Me*.

an
impact

Different voices

21pt

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

Down 1pt

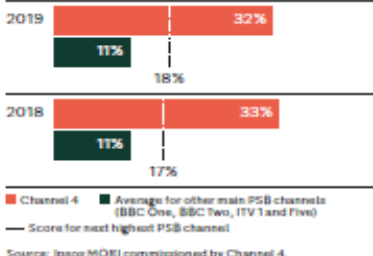
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Channel reputations – shows different kinds of cultures and opinions

In 2019, Channel 4 maintained its reputation as being best – by a significant margin – for showing different kinds of cultures and opinions. The main channel was selected by 32% of all respondents, giving it a lead of 21 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 slightly this year. The proportion of people selecting Channel 4, and its lead over the average for the other main PSB channels, were each down by one percentage point relative to 2018, while its lead over the next highest-scoring channel fell by two points. Notwithstanding some small declines over the last five years, these scores have remained within a narrow range over this period.

Shows different kinds of cultures and opinions



21pt

lead over average for other channels for challenging prejudice

Down 2pts

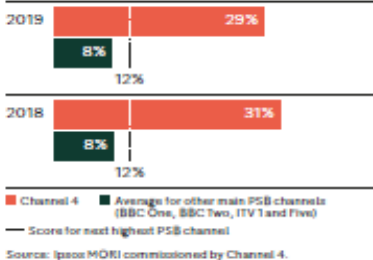
on last year

Channel reputations – challenges prejudice

29% of respondents chose Channel 4's main channel as the one they most associate with challenging prejudice in 2019. This translated to significant leads of 21 percentage points over the average score for the other main PSB channels, and of 17 points over the next-highest-scoring channel, BBC One.

All three of these 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 two percentage points year-on-year. Reflecting the challenge of sustaining such massive leads over other channels over time, 2019's scores fell slightly below the range achieved over the previous five years.

Challenges prejudice



Different voices

22pt

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

Down 2pts

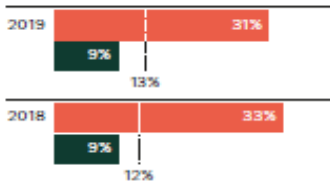
on last year

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. In 2019, 31% of viewers selected Channel 4's main channel as being the best for showing the viewpoints of minority groups in society. Channel 4 enjoyed a substantial lead, of 22 percentage points, over the average for the other channels, and an 18-point lead over the next-highest-scoring channel, BBC One. Channel 4's scores decreased a little in 2019: the proportion of people selecting the main channel, and its lead over the average of the other PSB channels, both fell by two points, while its lead over the next-highest-scoring PSB channel fell by three points.

Channel 4 also outperforms 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, giving it a lead of 19 percentage points over the average for the other main PSB channels. 33% of viewers thought Channel 4 was best for showing the viewpoints of lesbian, gay, bisexual and transgender people, a massive 26 points above the average of the other PSB channels. And 26% of viewers thought Channel 4 was best for showing the viewpoints of disabled people, 18 points above the average of the other PSB channels. There were small annual declines in the proportion of people selecting Channel 4 for all three groups in 2019 (by between one and three points).

Shows the viewpoints of minority groups in society



■ 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.

26pt

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

Equal

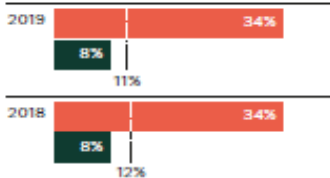
with last year

Channel reputations – home for alternative voices

Amidst growing concerns that digital and social media cause people to retreat into 'filter bubbles' that limit the range of viewpoints and perspectives that they encounter, Channel 4 maintained its vital contribution to plurality by providing a mainstream platform for alternative voices. In 2019, its main channel was selected by 34% of respondents as being the home for alternative voices. This gave Channel 4 substantial leads over both the average for the other main PSB channels (of 26 percentage points) and the proportion selecting the next-highest-scoring channel, Channel 5 (of 23 points).

Channel 4's performance on this metric held steady in 2019. Its own score, and its lead over the average for the other main PSB channels, were level with the corresponding 2018 figures, while its lead over the next-highest-scoring channel increased by one percentage point.

Home for alternative voices



■ 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

15pt

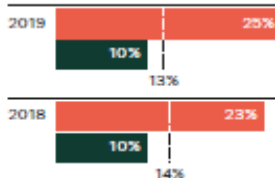
lead over average for other channels for making viewers think in new and different ways

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

Channel 4 achieved its joint-highest-ever score in 2019 for making people think about things in new and different ways. 25% of respondents selected Channel 4's main channel on this metric, two percentage points more than in 2018, returning to the high point reached in 2017.

This resulted in a lead of 15 percentage points over the average for the other main PSB channels, two points higher than in 2018 and just one point below this score's highest-ever level (reached in 2017). Its lead over the next-highest-scoring channel, BBC One, was 12 points, three points more than in 2018, and again just one point below its highest-ever level (reached in 2016 and 2017).

Makes me think about things in new and different ways



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV 1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

Up 2pts

on last year

30pts

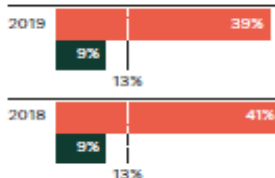
over average for other channels for tackling issues other channels wouldn't

Channel reputations – tackles issues other channels wouldn't

39% of respondents selected Channel 4's main channel as being best for tackling issues that other channels wouldn't in 2019. This huge score is three times that achieved by the next-highest-scoring channel, Channel 5 (chosen by 13% of respondents), resulting in a lead of 26 percentage points for Channel 4. 9% of people chose the other main PSB channels on average, giving the main channel a 30-point lead over this average.

Channel 4's performance fell back a little in 2019, with all three of the main 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 – dropping by two percentage points year-on-year. Nonetheless, this metric remains very strong: it is one of two reputational statements for which Channel 4's lead over the average for other channels is at least 30%.

Tackles issues other channels wouldn't



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV 1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

Down 2pts

on last year

Distinctive approaches

27pt

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

Equal

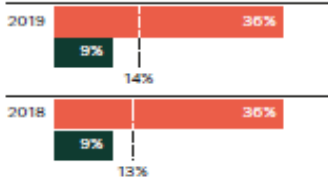
with last year

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

In 2019, 36% of people associated Channel 4's main channel, more than any of the other main PSB channels, with taking a different approach to subjects compared with other channels – one of the highest scores on the reputation statements. It gave Channel 4 a substantial lead, of 27 percentage points, over the average for the other main PSB channels, and a lead of 22 points over the next-highest-scoring channel, Channel 5.

There were minimal changes year-on-year. The proportion of people selecting the main channel, and its lead over the average for the other main PSB channels, were both the same as in 2018, while its lead over the next-highest-scoring channel fell by one percentage point.

Takes a different approach to subjects compared with other channels



■ 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.

160

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

Up 11%

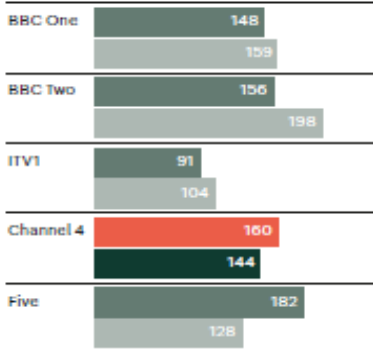
on last year

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 metric focuses on the number of such programmes in the evening schedules, when audiences are highest. In 2019, Channel 4 showed 160 new and one-off programmes on the main channel between 6pm and midnight, more than BBC One (148 programmes), BBC Two (156 programmes) and ITV (91 programmes). Of the main PSB channels, only Channel 5 showed more new and one-off programmes (182 programmes), becoming the highest-scoring PSB for the first time as it replaced *Big Brother* (which ended in 2018) with new titles.

After 2018's decline following the reduction in its overall content budget, the number of new and one-off programmes in the evening schedules on Channel 4 was back up this year, rising by 11% and overtaking the two BBC channels.

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



■ 2019 ■ 2018

Source: Attentional commissioned by Channel 4.

Distinctive approaches

32pt

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

Down 1pt

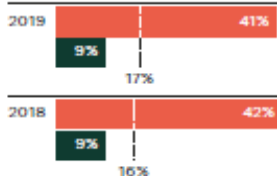
on last year

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 component of its remit is reflected in its scores when respondents are asked which channel is best for taking risks with programmes that others wouldn't. A massive 41% of respondents selected Channel 4's main channel on this metric in 2019 – as in previous years, its highest score on any of the reputational statements. The gap between Channel 4's score and those of the other channels was also substantial: its lead over the average of the other main PSB channels was 32 percentage points, while it led the next-highest-scoring channel, Channel 5, by 24 points.

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

Takes risks with programmes that others wouldn't



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV 1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

26pt

lead over average for other channels for being experimental

Equal

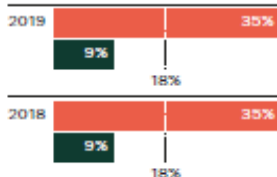
with last year

Channel reputations – is experimental

Channel 4's commitment to trying new things drives its role as Britain's creative greenhouse. 35% of respondents associated its main channel, more than any other channel, with being experimental in 2019 – making this one of the highest-scoring reputational statements. Its leads over the other channels were also substantial: the proportion of people choosing Channel 4 was 26 percentage points higher than the average for the other main PSB channels, while its lead over the next-highest-scoring channel, Channel 5, was 17 points.

There were no year-on-year changes in this metric: the proportion of respondents selecting Channel 4, its lead over the average for the other main PSB channels and its lead over the next-highest-scoring channel were all level with their 2018 figures.

Is experimental



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV 1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

24pt

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

Down 2pts

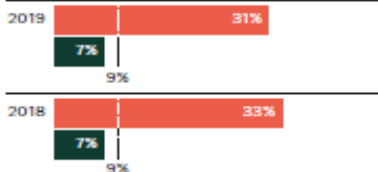
on last year

Channel reputations – is best for modern independent film

In 2019, 31% of respondents picked Channel 4's main channel over the other main PSB channels as being best for modern independent film. This gave it a substantial lead, of 24 percentage points, over the average for the other main PSB channels, and a 22-point lead over the next-highest-scoring channel, ITV. Amongst the top-rated films on Channel 4 this year, the premiere of Film4 production *12 Trainspotting* in July attracted 743,000 viewers and a 5.9% audience share, while the award-winning feature documentary *For Sama* drew 445,000 viewers in October.

There were small year-on-year declines in this metric, with 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 (Channel 5 in 2018) all falling by two percentage points.

Is best for modern independent film



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV 1 and Five)

— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

Factual

18pt

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

Down 2pts

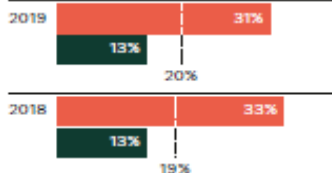
on last year

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 2019, 31% of respondents selected its main channel as being best for documentaries that present alternative views. Channel 4 enjoyed a significant lead over the average for the other main PSB channels, of 18 percentage points, while its lead over the next-highest-scoring channel, BBC One, was 11 points.

There were small year-on-year declines in this metric: the proportion of respondents selecting Channel 4 and its lead over the average for the other main PSB channels fell by two percentage points. Its lead over the next-highest-scoring channel fell by three percentage points.

Is best for documentaries that present alternative views



■ Channel 4 ■ Average for other main PSB channels (BBC One, BBC Two, ITV 1 and Five)
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

72%

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

Up 1pt

on last year

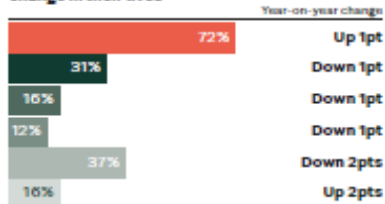
Inspiring change through Factual programming

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. These different ways of inspiring change are captured in five statements, responses to which allow us to assess how inspiring Channel 4's Factual programmes are each year.

In 2019, Channel 4's Factual slate (comprising around 50 programmes and series) registered its highest score on this metric in a decade, and its second-highest-ever score since this metric was first reported in 2009. 72% of viewers said that Channel 4's Factual programmes inspired them in one or more ways, just one percentage point below its 2009 peak of 73%. This represented a rise, of one percentage point, over 2018's figure.

The highest-scoring individual programme across the statements this year, with a score of 84% was *The Restaurant That Makes Mistakes*, which followed the UK's first ever restaurant staffed by people living with dementia. Top-scoring programmes on individual statements included *Leaving Neverland: Michael Jackson & Me* (56% of viewers talked about the programme to other people) and *Steph & Dom: Can Cannabis Save Our Son?* (49% of viewers thought about its subject in new and different ways).

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



■ Any inspiring change statement(s)
■ It made me think about its subject in new and different ways
■ It made me think about changing something in my own life
■ I tried something new or different after watching this programme
■ I talked about the programme to other people
■ I looked for further information elsewhere after watching this programme

Source: Ipsos MORI commissioned by Channel 4.

News and Current Affairs

82%

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

Down 2pts

on last year

Independence of TV News

With growing concerns about 'fake news' and the veracity of some news sources in digital and social media, the impartial and authoritative news services provided by the main UK broadcasters are 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, by clear margins relative to the other broadcasters.

In 2019, 82% of regular viewers to Channel 4 News regarded it as being independent from the government. This is nine 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 (Sky News).

Meanwhile, 76% of regular viewers to Channel 4 News agreed that it is independent from the influence of big businesses, seven percentage points more than the average for the other main news programmes and four points more than the next highest-scoring news programme (BBC News).

Relative to 2018 figures (which have been restated, see note below), there was a two-percentage-point drop in Channel 4's score for being independent from the government (2018: 84%). With some other broadcasters also experiencing small declines year-on-year, Channel 4's lead over the average for the other main news programmes and the next-highest-scoring news programme (also Sky News in 2018) both fell by one percentage point in 2019. Turning to independence from the influence of big businesses, Channel 4's score fell by one percentage point (2018: 77%). Its lead over the average for the other main news programmes held steady year-on-year, while its lead over the next-highest-scoring news programme (5 News in 2018) rose by three points.

Note: In the 2018 Annual Report, the source data provided to Channel 4 by Ipsos MORI for this metric overstated the figures for all news programmes. In this year's report, the year-on-year movements presented in the narrative and accompanying charts on this page are based on the accurate restated 2018 figures. Please refer to the online methodology document for further details, including the restated figures for 2018.

Percentage of regular viewers to TV news programmes in 2019 who agree with the following statements:

It is independent from the government		Year-on-year change
BBC News	66%	0pt
ITV News	75%	-1pt
Channel 4 News	82%	-2pt
Five News	75%	-1pt
Sky News	76%	-1pt
It is independent from the influence of big business		Year-on-year change
BBC News	72%	-1pt
ITV News	67%	0pt
Channel 4 News	76%	-1pt
Five News	69%	-6pt
Sky News	67%	0pt

Source: Ipsos MORI commissioned by Channel 4.

News and Current Affairs

45%

average programme reputation statement for *Dispatches*

Up 1pt

on last year

42%

average programme reputation statement for *Unreported World*

Down 2pts

on 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: in particular, their emphasis on investigative journalism, on challenging viewers to see things differently, on giving a voice to those who might not otherwise be heard and (especially in *Unreported World*) on providing a window on the wider world. One-hour Current Affairs specials allow Channel 4 to deliver in-depth coverage of important stories.

Dispatches and *Unreported World*'s strengths in these areas are captured in five reputational statements that assess audience perceptions of Current Affairs programming on the main PSB channels, covering regular strands on these channels as well as one-offs. In 2019, *Dispatches* had a higher average score, of 45% across the five statements, than any other Current Affairs programme or strand shown by any of the PSBs, while *Unreported World* was tied in second place with BBC One's *Panorama*, both with average scores of 42%.

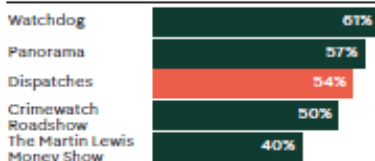
Dispatches was the most consistent programme overall. It scored higher than any other Current Affairs programme or strand for "making me see something in a different light" (for which it was selected by 41% of respondents). It ranked in second place for another three statements – "covering things in great depth" (51% of respondents), "giving a voice to groups that aren't always heard in mainstream media" (39% of respondents) and "showing stories about parts of the world you would rarely see on British TV" (38% of respondents) – and in third place for "uncovering the truth" (34% of respondents). *Dispatches*' average score across the five reputational statements rose by one percentage point year-on-year, giving it its highest score since 2012.

Unreported World scored higher than any other Current Affairs programme or strand on two of the five statements, for: "showing stories about parts of the world you would rarely see on British TV" (selected by 52% of respondents) and "giving a voice to groups that aren't always heard in mainstream media" (44% of respondents). It ranked in second place for "making me see something in a different light" (37% of respondents). Its average score across the five reputational statements was two percentage points lower than in 2018.

Programme reputation



Uncovering the truth



Covers things in great depth



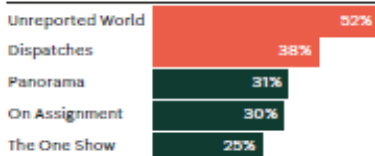
Gives a voice to groups that aren't always heard in mainstream media



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.

Engaging the audience

75.8%

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

Down 2.9pts

on last year

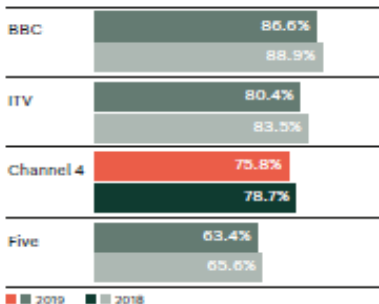
Audience reach

Channel 4 is the third-biggest UK broadcaster in terms of audience reach, behind only the BBC and ITV. In 2019, just over three-quarters (75.8%) of individuals in homes with a TV watched Channel 4's TV channels for at least 15 consecutive minutes each month on average. With TV viewing continuing to migrate to other linear TV channels and video-on-demand (VoD) services (including the broadcasters' own VoD services, which are not reported in this metric), the main PSBs all suffered reductions in the reach of their traditional TV channels in 2019 – as they did in 2017 and 2018 – with declines ranging from 2.2 percentage points (for Channel 5) up to 3.1 points (ITV). Channel 4's reach fell by 2.9 percentage points year-on-year.

Turning to the individual channels in Channel 4's TV portfolio, reach for the main channel was 68.3%, while the digital TV channels together reached 51.9% of viewers (2018: 55.8%). The main channel's reach fell by 2.8 percentage points year-on-year (slightly more than 2018's 2.7 point drop). In the previous two years (2017 and 2018), E4, More4 and Film4 each experienced annual declines in reach within the range of 1.5–3.0 percentage points. This was also the case in 2019 for E4 and Film4 (2.6 and 1.9 points down, respectively). However, More4's reach fell by 4.5 points this year – due in part to declining audiences for some US series such as *Outlander*, and the repositioning of More4's time-shifted (+1) channel on Sky's electronic programme guide to a less favourable position. Offsetting these changes, Box/4Music increased its reach by 1.3 percentage points, following the addition of six Box music channels in 2019.

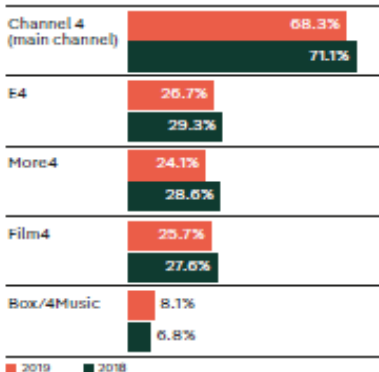
Note: After the acquisition by Channel 4 of The Box Plus Network on 31 December 2018, all six Box music channels are included as part of the Channel 4 digital TV portfolio in 2019. In 2018 and earlier years, the 'Box/4Music' segment included only the 4Music channel.

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

9.9%

viewing share across the TV channel portfolio

Down 3%

on last year

TV viewing share

Channel 4's total viewing share was 9.9% across its TV channel portfolio in 2019. There was a small year-on-year decline in viewing, of 0.3 percentage points (equivalent to a 3% fall).

Following five years in which it held steady, at 5.9%, the main channel's share fell by 0.1 percentage points to 5.8% of total TV viewing in 2019 (a 1% reduction). This performance – a decline of just 0.1 points over a five-year period – is impressive given the intensified competition in the linear TV space, and Channel 4's particular vulnerability to the migration of young viewers to video-on-demand services, including Channel 4's own service, All 4, whose viewer profile is much younger than that of Channel 4's TV channels. In 2019, the main channel held its share year-on-year amongst 16-to-34-year-olds (at 7.5%) and amongst ABC1 adults (at 6.2%), and its viewing share in the evenings (7-11pm) rose by 2% for all individuals. In addition, changes to Sky's EPG in 2018 also continued to negatively impact our +1 channels' share through to 1 May 2019.

Competition for audiences also accounted for small changes in viewing to the digital channels in 2019. E4, More4 and Film4 experienced small declines, of 0.1 percentage points each, in their viewing. This was partially offset by a 0.1 point increase in viewing to the Box/4Music channels following the addition of six Box music channels to the portfolio in 2019 (see 'Audience reach' on page 107). Overall, the digital channels had a viewing share of 4.1% in 2019, 0.2 points down year-on-year.

Channel 4 portfolio share as a percentage of total TV viewing

	Channel 4 (main channel)	Digital channels	Total
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
2015	5.9	4.7	10.6

Source: BARB.

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

	E4	More4	Film4	Box/4Music	Total
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
2015	1.9	1.1	1.4	0.3	4.7

Source: BARB.

995m

programme views initiated on demand

Up 9%

on last year

On-demand viewing

With audiences – especially younger demographics – consuming TV programmes ever more via on-demand services, it is vital that Channel 4's own services continue to evolve to meet this demand. In 2019, Channel 4 achieved record levels of on-demand viewing of its content: the number of programme views initiated through All 4-branded platforms – which include PCs, smartphones, tablets, games consoles and connected TVs – rose by 9% to reach 995 million.

As was the case in 2018, the strongest area of growth this year was on 'Big Screen' devices, i.e. connected TVs and streaming devices that plug into TVs, with viewing up by more than 20%. Within this group, individual platforms on which growth was especially high included Freeview Play and Samsung TVs.

On-demand viewing (million)

2019	995
2018	915

Source: Channel 4.

Engaging the audience

9.2%

portfolio viewing share amongst BAME audiences

Down 2%

on last year

5.1%

main channel viewing share amongst BAME audiences

Up 2%

on last year

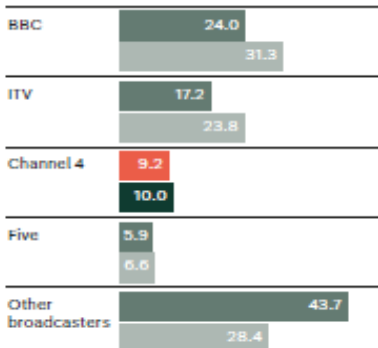
Share among hard-to-reach audiences – BAME

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

In 2019, Channel 4's TV portfolio enjoyed a 9.2% viewing share amongst BAME audiences. With a corresponding portfolio viewing share amongst white audiences of 10%, the resulting viewing share differential – between BAME and white audiences – was 8%. The BBC and ITV had much higher viewing share differentials between BAME and white viewers, of 23% and 28% respectively. At 11%, Channel 5's viewing share differential was closer to, but still higher than, Channel 4's. All this means that BAME audiences represent a higher proportion of Channel 4's total audience than they do the total audience of the other PSBs.

Channel 4's TV portfolio viewing share amongst BAME audiences fell by 0.3 percentage points year-on-year. In percentage terms, this was a 2% decline; smaller than the 3% decline amongst white audiences. Its 8% differential in 2019 was equal with last year's figure (actually falling slightly, when measured to one decimal place), and remains within the 4%–11% range achieved over the last decade. On the main channel, viewing share amongst BAME audiences was 5.1%, a year-on-year increase of 2%.

Public service broadcasters' portfolio viewing shares amongst white and BAME audiences as a percentage of total TV viewing by those audiences (2019)



Source: BARB.

15.7%

portfolio viewing share amongst 16-34-year-olds

Down 1%

on last year

8.0%

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

Equal

with last year

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

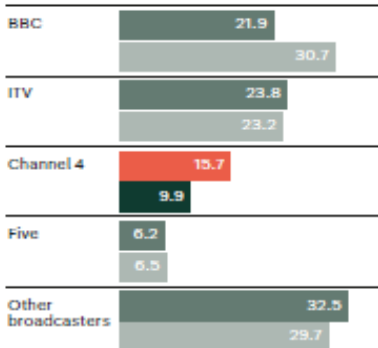
Channel 4's TV channels attract a disproportionately large share of viewing amongst hard-to-reach 16-34-year-olds.

Across its TV channel portfolio, Channel 4's viewing share amongst 16-34-year-olds was 15.7% in 2019. While this represented a small decrease, of 0.2 percentage points, relative to the 2018 share (a 1% fall), this is a smaller decline than that for all audiences to the Channel 4 portfolio (3% down).

Channel 4's viewing share amongst 16-34-year-olds was 59% higher than its corresponding all-audience share in 2019. This is three percentage points more than the corresponding differential in 2018 (which was 56%), and higher than at any time since this metric was first reported, in 2012 (in previous years, the differential has ranged from 46% to 56%).

Channel 4 is the only PSB to attract significantly greater viewing amongst this age group than across the general population: the BBC's 16-34 share was as much as 29% below its all-audience portfolio share, reflecting its relative appeal to older audiences. For ITV and Channel 5, the viewing share differentials between all audiences and those aged 16-34 were within the range $\pm 5\%$. On the main channel, viewing share amongst 16-34-year-olds was 8%, equal with last year. However, during peak hours our share of 16-34-year-olds grew by 2%.

Public service broadcasters' portfolio viewing shares amongst 16-34-year-olds and all audiences as a percentage of total TV viewing by those audiences (2019)



Source: BARB.

Engaging the audience

4.7%

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

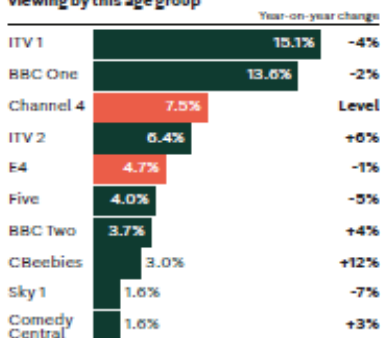
Down 1%

on last year

Most popular channel for young viewers

In 2019, E4 remained the second-most-watched digital TV channel in the UK for 16-34-year-olds (behind only ITV2), with a viewing share of 4.7%. This figure was slightly down, by 1%, on the corresponding 2018 share (which was 4.8%). E4 was also the fifth most popular TV channel overall for this audience, ahead of two of the main PSB channels, BBC Two and Channel 5. Key successes on E4 this year included originated programmes such as *Hollyoaks* – which enjoyed its best-ever year in terms of share amongst 16-34-year-olds (of 21.6%) – and *Celebs Go Dating* as well as the final season of US comedy *The Big Bang Theory*. Channel 4's main channel enjoyed another disproportionately strong performance amongst 16-34-year-olds in 2019. Its viewing share amongst this age group held steady at 7.5% for the third consecutive year, making it the third most popular TV channel, behind only ITV and BBC One.

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



Source: BARB

10%

of viewing to *Channel 4 News*
programmes on the main
channel in 2019 accounted
for by viewers aged 16-34

Down 2pts

on last year

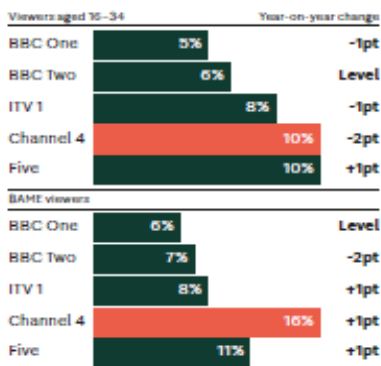
Viewing to national news

Channel 4 News has a particularly strong appeal to young and BAME audiences. 16-34-year-olds accounted for 10% of its audience in 2019, level with Channel 5 and above the corresponding profiles of viewing to the national news programmes on the other main PSB channels, which ranged from 8% (ITV) down to as little as 5% (BBC One).

While it continued to match or lead the other PSBs on this metric, *Channel 4 News*' profile of 16-34-year-olds fell by two percentage points year-on-year and is now at the lowest level over the last decade – reflecting the fact that young audiences are the fastest to migrate to digital and social media for their news consumption (see 'Reach of *Channel 4 News*' opposite, on page 111, for its growth on other platforms). That said, share of viewing to all *Channel 4 News* among 16-34-year-olds is up by 10% year on year (up 12% for the 7pm weekday news).

Channel 4 News' appeal is even more marked, and growing, for BAME audiences. They represented 16% of its total viewing in 2019. This is one percentage point up on 2018, and the joint-highest figure achieved over the last decade (level with 2016). *Channel 4* is the only PSB whose news viewing by BAME audiences matches or even exceeds this group's representation in the UK population (estimated to be around 13%-14%); the other main PSB channels' news programmes had profiles of BAME viewing in the range 6%-11%.

Percentage of viewing to national news programmes on the main PSB channels in 2019 accounted for by 16-34-year-olds and BAME viewers



Source: BARB

16%

of viewing to *Channel 4 News*
programmes on the main
channel in 2019 accounted
for by BAME viewers

Up 1pt

on last year

Engaging the audience

7.8m

people watched *Channel 4 News* each month

Up 6%

on last year

Reach of *Channel 4 News*

In 2019, an average of 7.8 million watched *Channel 4 News* for at least 15 consecutive minutes each month – a 6% increase year-on-year. Amongst BAME audiences, viewing was up by a substantial 22%. These figures cover the main weekday evening programme as well as daytime and weekend news bulletins on the main channel but exclude the programme's growing presence on digital and social media. These increases contrast with the other PSBs, whose corresponding levels of average monthly reach for national news all fell, by amounts ranging from 4% (BBC One and ITV) to 11% (Channel 5).

The main weekday evening programme also experienced significant increases in its viewing share in 2019, which rose by 22% year-on-year to 3.7% of viewing – its highest level since 2010.

These increases in *Channel 4 News*' reach and viewing share on the main channel are especially impressive given the high level of competition between 7pm and 8pm from the other PSBs (in particular, the soaps on BBC One and ITV and some sports programming on Channel 5 in 2019) and the increased reliance by many audiences on digital and social media as sources of news.

Channel 4 News constantly seeks to find new ways to promote its content on digital platforms. Its video views on YouTube rose by 65% in 2019 to 187 million, while video views on Twitter were up by 64% to 185 million. Across the main social platforms (Facebook, YouTube, Twitter and Instagram), *Channel 4 News* had eight million followers/subscribers by the end of 2019.

Engaging the audience

19pt

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

Up 2pts

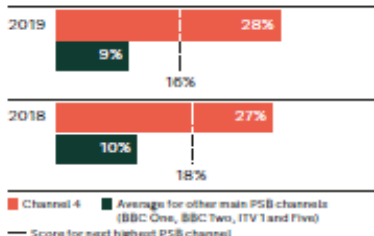
on last year

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

In 2019, Channel 4 reinforced its reputation for catering for audiences other channels don't cater for. 28% of respondents selected Channel 4's main channel over the other main PSB channels on this metric. This gave Channel 4 a 19-percentage-point lead over the average of the other main PSB channels, and a 12-point lead over the next-highest-scoring channel (Channel 5).

Channel 4's performance improved across all three of these scores year-on-year. The proportion of people selecting the main channel increased by one percentage point; its lead over the average of the other main PSB channels was up by two points, and its lead over the next-highest-scoring channel rose by three points.

Caters for audiences other channels don't cater for



Source: Ipsos MORI commissioned by Channel 4.

Engaging the audience

699m

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

Equal

with last year

Total visits to Channel 4's websites and apps

In 2019, Channel 4's websites and apps attracted a total of 699 million visits, level in percentage terms with the 2018 figure (though marginally down, by three million, in absolute terms). As was the case last year, the dedicated All 4 app – available on a wide range of smartphones, tablets and connected TVs – accounted for 76% of total visits, the remaining 24% being visits to Channel 4's websites (including mobile sites). In percentage terms, the numbers of app visits and website visits were also flat year-on-year.

While there were only marginal annual variations in these 2019 totals, at the platform level there were material changes, the most notable being a migration in All 4 app visits away from mobile platforms (6% decline in visits year-on-year) and towards 'Big Screen' platforms such as connected TVs (visits up 5%), on which there is a higher propensity to view Channel 4's content. This explains why, although visits were flat this year, video views were still up (see 'On-demand viewing' on page 108).

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

			Total
2019	165	534	699
2018	166	536	702

■ Websites and mobile sites ■ Apps

Source: Channel 4.

Engaging the audience

59%

average Buzz score for Channel 4's ten most talked-about programmes

Up 3pts

on last year

Producing talked-about TV

Channel 4's programmes can make an impact by engaging viewers, inspiring conversations and stimulating debate – both in the 'real' world and on social media. 'Buzz' scores are a research tool that assess audience reactions to Channel 4's programmes through a daily survey that tracks the proportion of its viewers who said they talked about programmes that they watched, or commented on them on social media platforms such as Facebook and Twitter. In 2019, the average 'Buzz' score for the ten most talked-about programmes across Channel 4's TV portfolio was 59%, three percentage points above the corresponding 2018 figure (of 56%).

England's dramatic victory against New Zealand in the ICC Men's Cricket World Cup Final inspired Channel 4's most talked-about programme of the year. This was one of two Sports events in the top ten, the other being the *Best In Show* finale of Crufts, the largest dog event in the world.

Channel 4 made important contributions in the run-up to December's General Election. The much-discussed *Channel 4 News Climate Debate* – the first-ever leaders' debate on the climate crisis – had the second-highest 'Buzz' score of the year, while *Britain's Next PM: The Channel 4 Debate* was in fourth place. Also in *Current Affairs* but away from politics, *Battle of the Super Eaters: 3000 Calories a Minute* explored the recent phenomenon of competitive eating.

The highest-rating non-live programme of the year, in third place, was *Leaving Neverland*. This gripping two-part documentary told the stories of two young boys who suffered abuse by singer Michael Jackson, going on to make headlines and trigger debates around the world. By contrast, two other Documentaries in the top ten told uplifting stories: In *My Grandparents' War*, actor Kristin Scott Thomas discovered how her grandfather saved thousands of lives at Dunkirk while serving in the Royal Navy in World War II, while Oscar-winning film *Free Solo* followed climber Alex Honnold as he became the first person in the world to scale El Capitan without harness and ropes. Two Factual Entertainment programmes completed the top ten: this year's final of *The Great British Bake Off* and the second season of Channel 4's innovative reality show *The Circle*.

Top 10 most talked-about programmes across the Channel 4 portfolio (2019)

Programme	2019 Buzz (%)
ICC Cricket World Cup: The Final	74%
Channel 4 News Climate Debate	67%
Leaving Neverland: Michael Jackson and Me	64%
Live: Britain's Next PM – The C4 Debate	58%
The Great British Bake Off: The Final	56%
My Grandparents' War: Kristin Scott Thomas	56%
Free Solo	55%
Crufts 2019: Best in Show	55%
The Circle	54%
Battle of the Super Eaters: 3000 Calories a Minute	54%
Average Buzz Score for 2019 top 10 programmes	59%

Note: 2019 data not available for other PSB channels.

Source: Channel 4, Broadcast (other channels).

Engaging the audience

73%

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

Up 1pt

up on last year

Viewing to network originations

Channel 4's output can be divided between 'network originations' – i.e. programmes commissioned by Channel 4 and transmitted on any of the channels in its TV portfolio – and programmes that were acquired by Channel 4 (primarily US content). The former category is important as Channel 4 delivers its public remit 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 2019, network originations accounted for 73% of total viewing to the main channel, E4 and More4, one percentage point higher than 2018. This figure has now grown for each of the last six years and is ten percentage points higher than in 2013. This year's figure also sets a new record, with network originations representing a higher proportion of Channel 4's viewing than at any time since 2008, when this metric was first reported – showing the value to viewers of the programmes that Channel 4 commissions.

Turning to the volume of programming in the schedules, network originations represented 61% of all hours across the schedules of the main channel, E4 and More4 in 2019. This figure is three percentage points less than in 2018 (when they accounted for 64% of output).

A comparison of viewing and output figures shows that network originations are responsible for a disproportionately high share of Channel 4's overall viewing, outperforming acquired programmes: in 2019, they generated a higher share of viewing (73%) than their corresponding share of the volume of programming (61%). Network originations' impact grew this year, with their share of viewing up despite a reduction in the volume of programming.

Please note that:

1. The Film4 channel is excluded from this metric as, by its nature, its output is primarily made up of acquired feature films.
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.