

# 2021 at a glance

A selection of highlights from 2021 – please see p146 for year-on-year progress on our key performance indicators, aligned with Channel 4's Future4 strategy.

## Digital acceleration

**19% of total corporation revenue comes from digital advertising**

(2020: 17%)

the £224m record digital advertising revenue (+40% year-on-year) puts Channel 4 well on target to reach its 30% digital revenue Future4 target by 2025

**+21% growth in programme streaming views**

we grew our programme streaming views to over 1.5 billion in 2021, the biggest ever increase in absolute terms and a second consecutive year of double-digit growth

**Biggest free streaming service in the UK**

with >14,500 hours of content available to stream on All 4

**13% of total Channel 4 viewing from streaming**

an increase from a proportion of 9.2% from streaming in 2020, demonstrating Channel 4's digital acceleration

The Electrical Life of Louis Wain



The Circle



## Financial success

**£1.2bn corporation revenue** (+25%\*)

a new record and exceeding £1 billion for the first time ever

\* +25% on 2020, +18% on 2019

**£101m pre-tax surplus** (+£27m)

a record, highest ever, result for the second year running in 2021 and recognising a three-figure surplus for the first time ever

**£272m net cash reserves\*** (+£71m)

our record surplus has driven a £71 million increase in our cash reserves versus 2020, to reach our second highest-ever closing cash position and net assets of £566 million

\* Net cash reserves reflect the sum of the Group's cash and cash equivalents and other financial assets net of cash borrowings at the balance sheet date, defined on p205.

## Must-watch content

**Highest main channel viewing share growth since 2013**

+3% growth in main channel viewing share to 6.1%, during a year in which audiences' viewing habits started to return to normal after pandemic lockdowns in 2020

**+3% growth in main channel viewing share amongst ethnically diverse audiences to 5.4%**

our highest ethnically diverse annual share since 2012

**+1% growth in viewing share to our TV channel portfolio to 10.3%**

we increased our TV portfolio viewing share year-on-year for the second consecutive year

**15% portfolio viewing share among 16-34-year-olds** (-5%)

linear share among young people fell slightly in 2021 as viewers migrated to streaming and social for content and competition increased

**Nine of the 10 youngest-profiling shows on the UK PSB channels were on Channel 4**

as the public service broadcaster for young people, Channel 4 works hard to engage with its audience however and wherever they watch TV

## Supporting the creative industries

### 66% of content sourced from SMEs based in the Nations and Regions (+8pts)

the highest ever volume of originated content on the main channel in Channel 4's history, as we work to represent the whole of the UK. By spend, 55% of our expenditure was sourced from companies outside of London

### £671m total content spend (2020: £522m)

a significant year-on-year increase following 2020's Covid-related reductions, as we reinvested our strong surplus from 2020 into the UK's creative industries

### £492m spend on originated content (2020: £370m)

reflecting our impressive remit delivery and investment in the independent production sector

### 164 independent producers worked with in 2021 (2020: 161)

294 companies worked with in total, with growth particularly strong amongst digital media companies as our new Future4 strategy was rolled out



Unapologetic



# Represent unheard voices

Throughout the year – from 2021's piercing drama *It's A Sin* to the groundbreaking *Black to Front Project*, from the incredible *Tokyo 2020 Paralympic Games* to our Leeds-based daytime show *Steph's Packed Lunch* or the smash hit *We Are Lady Parts* – Channel 4 has represented the whole of the UK in all of its glorious difference. It's about levelling up. Being uniquely British. Uniquely Channel 4.

## Four areas of focus:



British creativity



Digital excellence



Nations and Regions



Young and diverse



# ALTOGETHER DIFFERENT

**"You're different. We're different. Altogether Different."**  
In 2021, Channel 4 launched a new brand platform that celebrates what makes the channel distinct by showcasing some of our best-loved shows. Through all of our content and activities, we represent unheard voices, giving a voice to those who are not often heard on TV.



Altogether Different campaign



As part of our Future4 strategy, last year we set out a clear intention to relaunch the Channel 4 brand. Altogether Different is what Channel 4 stands for, and is used across all of our linear, digital and social media channels. It illustrates how Channel 4 celebrates difference in an entertaining, inclusive way, reflecting the whole of the UK through a broad range of impactful public service content.

We launched the campaign in July 2021, and had a second burst in November featuring more than 30 of Channel 4's famous faces and rising stars. Opening with a twist on the film classification system by rating viewers 'W for Weird' – as signed by Channel 4's Chief Executive Alex Mahon – Davina McCall went on to tell viewers: "There's nothing normal about this place or anyone who lives here."

Four in ten UK adults said they felt more positively towards Channel 4 after seeing the latest trail, and this figure was even higher for 16-24-year-olds (65%), 25-34-year-olds (50%) and ethnically diverse adults (59%).





Never before in my lifetime has a TV show had such a profound effect on people from all walks of life.

Ian Green, CEO of Terrence Higgins Trust



It's A Sin

## It's A Sin

**Crystallising Channel 4's remit to represent unheard voices, *It's A Sin* exploded onto British television at the start of 2021 and became one of the most defining and impactful shows in a generation.**

The five-part series from BAFTA-winning writer Russell T Davies followed a group of friends living in London through the 1980s – a decade that began, for them, with sex, love and freedom but was soon darkened by the looming AIDS crisis.

Described by critics as a “masterpiece” (*The Guardian*) and a show that “exists in a place beyond television entertainment” (*Evening Standard*), *It's A Sin* was an immediate smash hit, becoming All 4's most popular drama launch and biggest instant box-set, with all episodes released on demand immediately. With more than 26 million views (and counting), it remains All 4's biggest series ever.

*It's A Sin* wasn't just a success with viewers. As the first mainstream series to address the British experience of the AIDS crisis, the drama was credited by audiences for tackling difficult issues and giving a voice to those often marginalised in society (95% of viewers agreed); helping to remove stigma surrounding HIV/AIDS (87%); and showing LGBTQ+ relationships in a true light (71%).

After watching *It's A Sin*, Norman Fowler – who was the minister responsible for the public health campaign ‘Don't Die Of Ignorance’ in 1987 – brought forward his decision to end his role as Lord Speaker in the House of Lords so that he can devote his Parliamentary activity to campaigning on HIV/AIDS.

The Terrence Higgins Trust reported that the programme sparked a 3,100% jump in searches for ‘Why was AIDS so deadly in the 80s?’ and prompted a huge surge in HIV testing. “Never before in my lifetime has a TV show had such a profound effect on people from all walks of life,” said the charity's CEO Ian Green.

# Interview with Russell T Davies

**Q** *It's A Sin* is a story told through the experiences of a group of young gay men, but the themes of family, friendship, community and identity transcend demographics – is it important to you that this drama resonates with audiences from a whole range of backgrounds?

**A** Oh, absolutely! At its heart, *It's A Sin* is about a bunch of people leaving home and doing what we all do, which is find our own family. A family constructed of friends, and friends of friends, even friends' mothers. You build that for yourself. And I've written that many times. So I love writing about it. In writing a series about death, death is just the full stop, you've got to write the great big sentence that comes before.

**Q** There hasn't really been a drama of this scale exploring the British experience of the AIDS crisis until now. Why?

**A** I wanted to see the British perspective. It does exist, it's there in films like *Pride*, very beautifully stated, and there's this whole body of work that I've seen, such as *The Inheritance* and *Angels in America* – among the finest things that have been written – or *The Normal Heart*. I was very aware of those pieces of work. But I very much wanted to find my own place alongside them, not repeating what they've done.

In some ways, the urge to be new is the least important thing. Because it's stories like this that need restating again and again. I'm very aware that younger generations are growing up not knowing anything about this period. And actually, let's be honest, people who were there at the time don't know anything about it either. And there are those who have happily forgotten such a bad time, and I don't blame them for that. So it was a matter of me finding my place in there. It's an awful subject, it's a delicate subject, but it's an honour to write about it.

**What's been your experience of the impact *It's A Sin* has had on viewers?**

Since *It's A Sin* aired on Channel 4, I've received emails, texts and DMs every day, telling me how lives have changed as a result of the show. Families now able to tell the truth about how their uncle died; men and women freely stating their HIV status out loud, for the first time, without shame; charities telling me that HIV testing numbers have gone through the roof. More than £500,000 for charity has been raised from the sale of a single t-shirt design, based on the show's catchphrase.

That, to me, is public service broadcasting. Far more than a service. It's a joy.





I wanted to  
see the British  
perspective.

**Russell T Davies**

“

I've never been so happy watching UK telly. Literally ALL DAY.  
Adverts included #BlackToFront.

Celebrity Gogglebox





Big Age



## The Black to Front Project

**On 10 September, we disrupted our entire programming schedule to showcase Black talent, both on and off screen.**

The Black to Front Project was a takeover on an epic scale. It took a year to plan and involved every slot, every genre and every corner of Channel 4. No other broadcaster had attempted this before.

From *Celebrity Gogglebox* and *Hollyoaks* to *Countdown* and *Love It or List It*, we put Black voices front and centre of a swathe of our most popular programmes. Channel 4 News featured an all-Black reporting team, and *The Big Breakfast* was resurrected for the first time since 2002, with comedian Mo Gilligan and presenter AJ Odudu hosting alongside original newsreader Phil Gayle.

We also commissioned a raft of brand-new shows, including *Big Age* from up-and-coming writer Bolu Babalola; late-night talk show *Unapologetic* hosted by Yinka Bokinni and Zeze Millz; and Britain's first Black reality show *Highlife*.

We transformed our entire commercial schedule, too. In a world first, every single commercial break across the day featured ads with a Black lead or a majority Black cast. A huge logistical feat, more than 60 brands took part, with 70 campaigns across Channel 4 and More4. No other mainstream broadcaster in the world has ever done something like this.

And we worked hard with our indie partners to recruit from outside their usual networks and bring in more Black talent behind the cameras.

The Black to Front Project reached 11.6% of the TV population and opened an important conversation around Black representation. 60% of viewers agreed that it highlighted the breadth and depth of Black British talent and 51% acknowledged that it made them think about the challenges faced by Black people in a different way.

The takeover was just the start. The project has galvanised us to look at the programmes we make and how we make them, and to take further steps to make our industry more representative. In November, we gathered the British TV industry at our Inclusion Festival to share insights, ideas and lessons learned. Working closely with The Sir Lenny Henry Centre for Media Diversity, we will continue to amplify Black voices in front of and behind the cameras. We want to make sure the Black to Front Project leaves a lasting legacy, and are publishing our long-term plans in the first half of 2022.



## Authentic views from across the UK

**Channel 4 is proud of its long history of inclusion and diversity. Ensuring that diverse voices are portrayed on screen in an authentic manner, across all of our genres, is a key element of our public service remit. Highlights on All 4 and Channel 4 this year included moving towards more balanced and accurate representations of all types of lived experience – whether disability, gender, sexuality, ethnicity, diversity of thought and diverse voices from all over the UK.**

The *Dispatches* strand explored the reality of employment and the future of work through *Low Pay Britain*, shining a light on the gig economy and how workers across the country have felt the impact of Covid-19, lockdowns and Brexit.

Nida Manzoor's anarchic, joyful and irreverent music comedy *We Are Lady Parts* – named by *The New York Times* as one of the year's best pieces of TV – told the laugh-out-loud story of a female Muslim punk band, as never before seen on British TV, and performed strongly as a box-set on All 4.

The award-winning *Trip Hazard: My Great British Adventure*, saw comedian Rosie Jones travel across the UK. 84% of viewers of the show agreed that having disabled presenters on TV helps people understand disability better, while 83% agreed that the series helped to challenge perceptions of what it means to be disabled – rising to a significant 92% among disabled viewers.



Hollyoaks

# Tokyo 2020 Paralympic Games



## As the official UK broadcaster of the Paralympic Games, Channel 4 continues to transform attitudes towards disability across the UK.

Held in the midst of a global pandemic, we knew that Tokyo 2020 would be the most challenging Paralympic Games to cover in the decade since our ground-breaking coverage began for London 2012 – yet we vowed to raise the bar even higher.

We revved up the nation with our 'Super. Human.' marketing campaign – made by Oscar-nominated cinematographer Bradford Young – and build-up programming included *Billy Monger: Changing Gear*; *Jonnie's Blade Camp*; *Michael Johnson Meets...* and *Come Dine With Me: Paralympics Special*.

For the Paralympic Games themselves, we brought together the largest team of disabled talent in UK television history and provided more coverage than ever before: over 300 hours on Channel 4 and More4, plus more than 1,000 hours on 16 live streams on our Paralympics website.

The most captivating moments were highlighted across social media and through our five daily social media shows. Our bespoke TikTok Paralympics Hub clocked up 4.1 million views, helping us to reach new and younger audiences.

While Covid-19 restrictions meant that we were not able to send as large a team to Tokyo as was originally planned, our production teams and presenters still succeeded in conveying the atmosphere and excitement of the Games. Whether it was Ade Adepitan helming a daily highlights show from a Tokyo taxi, or Clare Balding anchoring live Paralympics action in Leeds, we pulled together top-level sporting action and entertainment for all our viewers. And we made sure everyone could enjoy it. We offered subtitles on all Channel 4/More4 Paralympics coverage, making Tokyo 2020 the most accessible Paralympic Games ever.

Our coverage was watched by more than 20 million people – a third of the UK population. Viewers credited it with bringing important but difficult issues to a mainstream audience (80% agreed) and making them think about the challenges facing disabled people in a different way (77%). "Channel 4 has done so much to elevate the way Paralympic sport is seen in this country," says Mike Sharrock, CEO of the British Paralympic Association.



Tokyo 2020 Paralympic Games

# 20 million people

watched our coverage of the Paralympic Games live and on All 4. Viewers credited the coverage for bringing important but difficult issues to a mainstream audience.





This is a show about a  
diverse group of women  
and for it to be about  
joy feels radical.

**@Anjana Vasan**  
Amina in We Are Lady Parts

# Girls to the front

We Are Lady Parts

#WeAreLadyParts



#WeAreLadyParts

# labels to the back



Our school drama *Ackley Bridge* shows that if you offer young viewers a good emotional story that reflects their lives without soft-soaping them, then they will become immersed.



## Ackley Bridge

**Hit series *Ackley Bridge* has amassed a devoted young audience that continues to grow with each season.**

The RTS award-winning drama is set in a newly formed academy in a Yorkshire mill town. Here, the lives and cultures of the Asian and White communities collide, giving an honest and humorous insight into modern, multicultural Britain. “The show doesn’t shy away from the difficulties that a diverse, multi-cultural school can face. It celebrates differences, challenges stereotypes and embraces the fundamental themes that bring us all together,” says actress Jo Joyner, who plays headteacher Mandy Carter.

After a two-year hiatus, the long-awaited fourth season of *Ackley Bridge* hit screens in April 2021, with a brand-new format and a cast of both familiar favourites and fresh characters, who watched settling down (and playing up) at school. Instead of the usual hour-long episodes at 8pm, the series moved to a 6pm teatime slot, best suited to reaching a young audience, with ten 30-minute programmes played out across two weeks. The whole series was released as an instant box-set on All 4.

Season 4 racked up 5.8 million views. Watched by 2 million 16-34-year-olds, it is our highest youth-skewing drama since 2015’s *This Is England* ‘90.

*Ackley Bridge* shows that if you offer young viewers a good emotional story that reflects their lives without soft-soaping them, then they will become immersed.



# Being the young people's public service broadcaster



Ackley Bridge

Channel 4 was responsible for

## nine of the ten

youngest-profiling shows on the UK PSBs





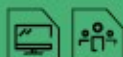
Gogglebox

7.8%

viewing share for  
16-34-year-olds

12%

share growth recorded  
among 16-34-year-olds  
by E4 in prime time



**As the public service broadcaster for young people, Channel 4 works hard to engage with its audience however and wherever they watch TV. It's about representing young people's voices through our stories and content, making programmes they enjoy and can't find anywhere else. We're able to offer something unique, valuable and sought after by younger viewers.**

We aim to offer young audiences popular mainstream programming that reflects their lives and interests – and helps them to better understand the world around them. Through programmes that can be watched together as a family and spark conversations, younger viewers are more engaged in modern Britain and develop the skills and knowledge they need. The most popular shows among 14-19-year-olds included *Hollyoaks* and *Ackley Bridge* (see page 40). A highlight for older children was festive treat Terry Pratchett's *The Abominable Snow Baby*, a charming animated adaptation starring Dame Julia Walters, Hugh Dancy and David Harewood.

Over the course of the year, Channel 4 'won' Friday nights (i.e. it was the broadcaster with the highest viewing share) 27 times for 16-34-year-olds. In addition, Channel 4 was responsible for nine of the ten youngest-profiling shows on the UK PSBs, including *The Great British Bake Off*, *Gogglebox* and *Taskmaster*.

Channel 4 remained the third most popular TV channel for 16-34-year-olds, behind only ITV and BBC One, with a 7.8% viewing share. After enjoying a boost to its viewing in 2020 – after young audiences turned to it for news and mainstream entertainment programming when the UK went into lockdown – 16-34-year-old viewing fell back in 2021, by 4%. However, the 7.8% viewing share (excluding 4Seven) remained higher than at any point between 2015 and 2019.

Driven by a challenging lockdown period at the start of the year and fatigue with some acquisitions, which affected our daytime share, E4's 16-34-year-old overall share was down 2% year-on-year, at 3.85%. However, it is notable that E4 recorded share growth of 12% among 16-34-year-olds in prime time, fuelled by the success of the *Married at First Sight* franchise.



Hollyoaks

The Abominable Snow Baby

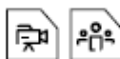




The Forgiven



The Father



**One of Channel 4's key channels for giving a voice to the unheard is through film. This allows us to not only tell uniquely British stories that appeal to audiences in the UK, but to play a vital role in promoting British culture and values internationally.**

In 2021, despite the challenging environment – with Covid-19 restrictions hampering production and keeping cinemas shut for long periods – Film4 enjoyed one of its busiest and most successful years. Over the course of the year, Film4 shot 12 films, launched 11 more at film festivals around the world, and premiered 13 Film4 productions in cinemas or via streamers.

In a bespoke initiative to support the beleaguered UK exhibition sector, Film4 partnered with Park Circus in June to offer a programme of classic Film4 productions in cinemas, as they attempted to woo back post-lockdown audiences. The six films – *Trainspotting*, *Brassed Off*, *My Beautiful Laundrette*, *Bhaji on the Beach*, *Local Hero* and *Sexy Beast* – illustrated Film4's legacy of bold, iconic, distinctively British cinema, but also our historic commitment to diversity and inclusion.

In 2021, Film4 worked with a number of new filmmakers, including Mark Jenkin, whose 1970s 'ecosophical' horror film *Enys Men* is his follow-up to the acclaimed *Bait*; Oliver Hermanus shot his first film outside his native South Africa, *Living*, a reimagining of Kurosawa's beloved classic *Ikiru* transplanted to 1950s England, scripted by Sir Kazuo Ishiguro and starring Bill Nighy and Aimee Lou Wood. Babak Anvari shot thriller *I Came By*, starring George Mackay, Hugh Bonneville, Percelle Ascott and Kelly Macdonald; and *The Beautiful Game*, starring Michael Ward and Bill Nighy, comes from director Thea Sharrock.

Soudade Kaadan shot Syria-set drama *Nezouh*, while Basil Khalil was able to complete production of his debut feature *A Gaza Weekend*, begun in 2020.

Film4 titles enjoyed considerable awards successes. *The Father* triumphed at the Oscars in April, with Sir Anthony Hopkins winning Best Performance by an Actor in a Leading Role, and Sir Christopher Hampton and Florian Zeller winning Best Adapted Screenplay. It won in the same two categories at the BAFTAs, where Rocks also saw twin success with Lucy Pardee winning Best Casting and Bukky Bakray beating out stiff competition to win the EE Rising Star Award for her debut role.

Last Night in Soho





Dream Horse



To look at a list of Film4 productions is to essentially look at the best of British film over the past 40 years.

Empire



Everybody's Talking About Jamie

At the Cannes Film Festival in July, Julia Ducournau became only the second female filmmaker in the festival's 75-year history to win the Palme d'Or for the explosive Film4-backed *Titane*.

When cinemas reopened, Euros Lyn's Welsh horse-racing drama *Dream Horse* was one of the first out of the gate, followed by *The Father* and three debut features: Prano Bailey-Bond's *Censor*, Cathy Brady's *Wildfire* and Ben Sharrock's English language debut *Limbo*.

The autumn saw three productions launch on streaming platforms: Film4's adaptation of smash hit stage show *Everybody's Talking About Jamie* rolled out in September to 240 countries on Amazon Prime Video, which also released *Encounter*, starring Riz Ahmed and Octavia Spencer, Michael Pearce's follow-up to his Film4-backed debut *Beast*. And Netflix gave a global release to Rebecca Hall's critically acclaimed directorial debut *Passing* starring Tessa Thompson and Ruth Negga.

Rounding off the year's cinema releases were Edgar Wright's love letter to Soho past and present *Last Night in Soho*; Eva Husson's adaptation of Graham Swift's *Mothering Sunday*, starring Colin Firth, Olivia Colman, Josh O'Connor and Odessa Young; the first Black British festive romcom *Boxing Day*, the directorial debut of writer, director and star Aml Ameen; *Flowers* director Will Sharpe's *The Electrical Life of Louis Wain* starring Benedict Cumberbatch and Claire Foy; and Palme d'Or winner *Titane*.

*Foresight*, an anthology of five Sci-Fi short films from Black British filmmakers commissioned by Film4, also screened at select UK cinemas ahead of broadcast on the Film4 channel and All 4.

Three Film4 titles launched at film festivals in 2021 and are due to be released in 2022: *The Real Charlie Chaplin*, from BAFTA-winning directors Peter Middleton and James Spinney, secured a prestigious slot at the Telluride Film Festival; while John Michael McDonagh's *The Forgiven*, starring Jessica Chastain and Ralph Fiennes, and Lucile Hadzihalilovic's haunting, hallucinogenic *Farwig* both wowed at the Toronto International Film Festival.

Film4 reunited with a number of acclaimed filmmakers for new projects: Martin McDonagh brought back his *In Bruges* cast of Colin Farrell and Brendan Gleeson for the darkly comic *The Banshees of Inisherin*; Emma Stone, Willem Dafoe and Mark Ruffalo headlined the cast of *Poor Things* from Yorgos Lanthimos (*The Favourite*, *The Lobster*); Jonathan Glazer (*Under the Skin*, *Sexy Beast*) began shooting Auschwitz-set drama *The Zone of Interest*; while Steve McQueen (*Twelve Years a Slave*, *Widows*) also tackles an aspect of World War Two in his first non-fiction feature film *Occupied City*. Finally, hot on the heels of his Oscar success with *The Father*, Florian Zeller shot his next film *The Son*, starring Hugh Jackman, Laura Dern and Vanessa Kirby.

# Developing skills and opportunities across the UK

In addition to representing unheard voices on screen, Channel 4 works hard off screen to help the creative industries be more representative of the whole of the UK.

4Skills



Content Creatives



Offering young regional talent specialist training, real-life paid experience and skills can open an entirely new career to people in the Nations and Regions. It is the perfect example of what we want to achieve with our 4 All the UK strategy.

**Sinead Rocks,**  
Managing Director, Nations and Regions



## Our training and development initiative, 4Skills, is turbocharging our efforts to find, nurture and develop talent. We're opening up opportunities in broadcasting – both in front of and behind the camera.

Launching 4Skills was a key part of 4 All the UK, as it helps address the skills gaps that are barriers to growing out of London production. We want to ensure that off-screen talent in the Nations and Regions can have long, productive, creative and profitable careers in television without having to move to London.

Despite the challenges of lockdowns and other Covid-19-related social restrictions, we rapidly expanded the 4Skills offer in 2021.

For the first time ever, our Production Trainee Scheme was entirely based in the Nations and Regions. After encouraging applications from diverse candidates, we had around 5,000 applications for 18 researcher roles across the UK. 4Skills pays for 50% of the trainees' 12-month salary (with independent producers paying the remaining 50%) and we provide training, mentoring and networking.

In-house, we relaunched and extended our Apprenticeship Programme after 2020's hiatus, welcoming 28 new apprentices across the business – from finance and operations to marketing and commissioning, with half of the roles based in Leeds. Both the Production Trainee Scheme and our Apprenticeship Programme have continued to build and expand in 2022.

A new grassroots talent programme, Content Creatives, was a collaboration between 4Studio, Channel 4's Leeds-based digital content studio, and SharpFutures, a social enterprise focused on young people from lower socioeconomic backgrounds with a passion for content. Participants in the fully paid programme benefited from six weeks learning creative, digital and soft skills, followed by six weeks embedded in 4Studio.

We also worked with other partners to support entry-level opportunities such as the eight-month 'rad' traineeship scheme in Scotland or the De Montfort University Investigative Journalism MA. Across the board, we reduced barriers to access by providing bursaries for travel and relocation expenses.

4Skills also supports the progression of those already in the industry. We worked closely on tackling skills gaps with major partners such as ScreenSkills, as well as individual training providers and indies. Our partnership with the National Film and Television School delivered training opportunities for close to 1,000 young people throughout the year, including bespoke editing, producing and self-shooting training as part of the Black to Front Project, and several weeks of free online short courses and masterclasses that attracted hundreds of applicants.

We extended our successful Fast Track Wales scheme to support talent in Bristol, and rolled out equivalent programmes in Scotland and Northern Ireland in partnership with Screen Scotland, Northern Ireland Screen and the BBC.

We ran 'hub' days in Leeds, Bristol, Glasgow, Belfast and Cardiff that gave people working in the Nations and Regions further opportunities to engage with the channel, and to take part in workshops on areas such as legal and business affairs.

From 2022, we will supercharge 4Skills so that its training and development initiatives help over 15,000 young people every year – an investment worth £5 million annually. Growing in scale and working with our external partners, this will include a new digital academy with paid three-month training and work placements for young people from lower socioeconomic backgrounds, a new pan-UK schools engagement programme, and a new on and off-screen training programme for people with disabilities in advance of the Paris 2024 Paralympic Games.



Channel 4's new National HQ in Leeds sends a hugely important message of inspiration, aspiration and ambition. It says: 'You can be part of this industry. You don't have to move 200 miles away. You can make a career from here.' For the whole region, and particularly for the more economically deprived parts of Yorkshire, that is game changing.

Sally Joynton, CEO (former), Screen Yorkshire

# 15,000

training, development and learning opportunities for young people across the UK from 2022

# 6,158

took part in 4Skills training, engagement and events in 2021

# 43%

of participants at NFTS training week identified as from lower socioeconomic background



Critical thought

# Challenge with purpose

At its most impactful, Channel 4's content exposes the truth and acts as a powerful catalyst for change. Through our best-in-class news and current affairs, our challenging documentaries and searing dramas, we're unafraid to say something about modern Britain.

critical thought

## Four areas of focus:

-  British creativity
-  Digital excellence
-  Nations and Regions
-  Young and diverse



Jon Snow

Fatima Manji



**10.1m**

followers on social media



Channel 4 News



## Channel 4 News

**Renowned for its high-quality journalism, hard-hitting stories and global impact, Channel 4 News provides news and analysis for people who want to know 'why?'. It's a key element of Channel 4's remit to deliver high-quality innovative, alternative content that challenges the status quo.**

Key editorial highlights for 2021 included Lindsey Hilsum's on-the-ground reporting from Afghanistan; Jamal Osman's coverage of the Tigray conflict in Ethiopia; and Ayshah Tull's reports on the St Vincent volcanic eruption. Krishnan Guru-Murthy also hosted the first UK-wide televised debate of Scotland's main party leaders. The year also saw the end of an era as acclaimed broadcaster and journalist Jon Snow stepped down after 32 years at Channel 4 News.

Channel 4 News has continued to achieve huge success with reaching audiences digitally. On Twitter, a video on Professor Chris Whitty responding to concerns that the NHS was prioritising Covid over other serious health issues drew 3.3 million views, while our fond farewell to presenter Jon Snow received 1.2 million views.

It was a strong year for Channel 4 News on Snap as well, with our two strands, *Divided America* and *Divided World*, becoming mainstays of our digital output, attracting a loyal audience of nearly 400,000 subscribers. Our podcasts, *The Fourcast* and the award-winning *Ways to Change the World*, continued to build their audiences, each with around 1 million downloads across the year.

TikTok was a new focus in 2021, with pieces on subjects such as upskirting, needle spiking and the increased visibility of disability on reality TV together drawing over 1 million likes. Across the main social media platforms (Facebook, YouTube, Twitter, Instagram, Snapchat and TikTok), Channel 4 News had 10.1 million followers/subscribers by the end of 2021.

Having reached a record 9.8 million people on linear in 2020, as viewers tuned in for the latest updates on the pandemic, viewing figures in 2021 returned to pre-pandemic levels. Over the year, an average of 7.7 million people watched Channel 4 News for at least 15 consecutive minutes each month on the main channel, across the main weekday evening programmes and the daytime and weekend bulletins.

Channel 4 News continues to appeal to ethnically diverse audiences. This group represented 17% of the programme's total viewing in 2021, an increase of two percentage points year-on-year, taking this figure to its highest-ever level since it was first reported in 2009. Channel 4 remains the only main PSB channel whose news-viewing by ethnically diverse audiences exceeds this group's representation in the UK population (estimated to be around 13%-14%).

The programme continues to appeal to young people, with 16-34-year-olds accounting for 8% of the Channel 4 News audience across the year. While this is higher than the corresponding viewer profiles of the other main PSB channels' national news programmes (which ranged from 5% to 7%), it's three percentage points down year-on-year, as young audiences migrate faster than other age groups to social media to access Channel 4 News.



You don't have to be a mother for this to affect you. On a human level, it's not okay.

**Rochelle Humes**  
Dispatches: The Black Maternity Scandal

# Shining a light

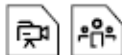
#BlackMaternityScandal



#BlackMaternityScandal

Dispatches: The Black Maternity Scandal

# on what matters



## Talked-about documentaries

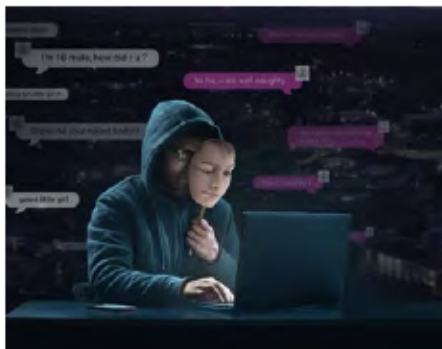
**At their best, our shows drive the national conversation, helping to cement Channel 4's position as the UK's most distinctive broadcaster.**

Across three episodes, *Undercover Police: Hunting Paedophiles*, reached 5.1 million viewers. Three years in the making, this hard-hitting documentary series gained exclusive access to some of the most secretive covert units working in modern day policing, and witnessed the work of undercover detectives as they went about their search for paedophiles operating online.

The series was impactful, with a huge 94% of viewers agreeing that programmes like these are important as they shed light on key issues in society. Importantly, it also prompted 42% of viewers with children aged under 16 to talk to them about the issues raised in the programme.

Also this year, *Caroline Flack: Her Life and Death* told the story of the actor/presenter's life and the impact that fame, mental health issues, press and social media had on her. In this powerful and revealing film, her friends and family spoke candidly about her rise to fame and examined the role that the media played in her death.

Described by *The Guardian* as "a compassionate eulogy suffused with pain" and by *The Telegraph* as "a sensitive study of suicide and mental health", it generated many conversations on social media, with many users adopting the hashtag #BeKind. The film struck a chord with audiences, attracting an audience of over 3 million viewers, equivalent to a 13.9% audience share – an impressive 91% above the slot average.

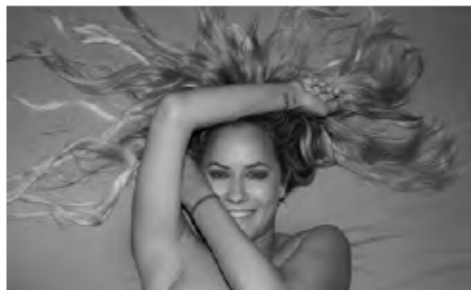


*Undercover Police: Hunting Paedophiles*

*Dispatches: The Black Maternity Scandal*

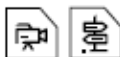


*Caroline Flack: Her Life and Death*





Dispatches: India's Rape Scandal



## Dispatches

Dispatches: Rape: Who's On Trial?



**Dispatches is Channel 4's award-winning current affairs strand. Its topical documentaries are often investigative. They're sometimes opinionated. They're always original.**

Last year, across 23 episodes, the series tackled hard-hitting subjects ranging from India's rape scandal to the performance of our much-loved NHS.

The most-watched episode in 2021, attracting 1.2 million viewers (a 6.2% viewing share), was *The Truth About Electric Cars*. With the country fretting over climate change and fuel shortages, journalist Morland Sanders looked into whether hybrid electric cars are as clean and green as we think.

*Rape: Who's On Trial* was filmed over two years by an all-female team. It followed four separate investigations by the Avon and Somerset Constabulary and shed light on the challenges faced by the police force and victims in securing convictions. This hard-hitting documentary was followed by a debate hosted by Jackie Long, which looked at the issues raised and asked what can be done. And *The Black Maternity Scandal* investigated why Black women were five times more likely than White women to die during pregnancy and childbirth. Hosted by Rochelle Humes, the award-winning documentary sparked a national conversation and helped to create a change in government policy.

Alongside Dispatches, our foreign affairs series *Unreported World* revealed some of the world's biggest untold stories. Channel 4 reporters were on the front line in Myanmar as protesters defied the military junta's coup, and they travelled to Serbia to interview migrants who had been beaten back from the EU border. In the most popular documentary of the series, Krishnan Guru-Murthy headed to New York to explore the Big Apple's epidemic of homelessness, made worse by Covid-19, race inequality and alleged profiteering.

Close to

1m

viewers watched  
Joe Lycett vs  
the Oil Giant



## Tackling the climate emergency

**In autumn 2021, the UK hosted COP26 – a pivotal moment in the fight against climate change. Channel 4 offered a unique, entertaining and sometimes irreverent look at how the climate emergency is affecting us all.**

Channel 4's creative response to the climate emergency highlighted a distinctive range of climate change programming, from hard-hitting investigations such as *How Green Is the Government?* *Dispatches* and Kieran Hodgson's irreverent documentary *How We Forgot to Save the Planet*, to *Celebrity Trash Monsters: What's Your Waste Size?*, in which celebrities wore suits containing their own rubbish to educate themselves on the impact of household waste.



*Celebrity Trash Monsters: What's Your Waste Size?*

# Celebrity Trash Monsters



Celebrity Trash Monsters: What's Your Waste Size?

## What's Your Waste Size?



Thought-provoking and eye-opening...



## A distinctive look at policing in the UK

**Channel 4's landmark documentary series *24 Hours in Police Custody* returned in 2021. The fly-on-the-wall series followed Bedfordshire Police as they attempted to catch criminals and get answers for victims and their families.**

With more than 80 cameras following Bedfordshire Police – from Luton Police Station's holding cells to the heart of major crime investigation teams – viewers learned first-hand the challenges faced by officers and detectives. Each episode looked into real-life dramas at their most intense, bringing viewers unique access into major crimes.

At times a tough watch, this year's run covered sexual violence, murder, assault, child abuse and neglect. Viewers praised *24 Hours in Police Custody* for being "eye-opening" and "thought-provoking". Some nine in ten viewers agreed that the series has made them realise what police officers have to deal with on a day-to-day basis, and six in ten viewers felt the series had increased both their trust and confidence in the UK police force.

The show, which launched in 2014, continues to perform strongly for Channel 4. Over its eight-year run, it has reached 29.6 million viewers on linear TV alone, including almost half of all 16-34-year-olds.



24 Hours in Police Custody

# Help



**BAFTA-winning screenwriter Jack Thorne wrote *Help* to shine an unflinching light on the care sector during the pandemic. “I wanted viewers to feel anger. Real anger,” he says. “We have to tell these stories because people are being ignored.”**

The one-off, feature-length drama was set in a fictional Liverpool care home called Sunshine Homes in 2020, and explored the relationship between newly qualified carer Sarah (played by Jodie Comer) and Tony (Stephen Graham), a patient with young-onset Alzheimer's.

When Covid-19 strikes, Sarah and her colleagues fight tooth and nail to protect the residents but are ill-equipped, poorly prepared and left helpless by the powers that be – despite the government's promise that it has thrown a “protective ring” around care homes. In an unbroken, 25-minute single take – reminiscent of a horror movie – the camera follows Sarah as the nightmare unfolds around her.

*Help* highlighted the panic, fear and desperation experienced by those working or resident in care homes during the pandemic. It pointed an accusing finger at government policy decisions that saw a shocking 40% of all Covid-19 deaths between mid-March and mid-June 2020 being of care home residents. “I hope that this film goes some way in telling the unseen and unheard stories of our country's carers and the horrendous position they found themselves in,” says Jodie Comer.

Within a week of airing, the programme had attracted a record-breaking 1.4 million views online, making it the best drama launch on All 4. And with a consolidated average TV audience of 3 million, it is Channel 4's second-best one-off drama after *Mo* (4.2 million) in 2010. Viewers described *Help* as “heart wrenching”, “an incredibly moving, powerful bit of telly” and “a voice for the voiceless”.

Help



## 1.4m

views online, making it the best drama launch on All 4



An incredibly moving, powerful bit of telly.



## Grenfell: The Untold Story



## The Diana Interview: Truth Behind the Scandal



## Hunting the Football Trolls – Jermaine Jenas



## Challenging preconceptions and shaping culture

Channel 4's most powerful shows test boundaries and inspire critical thought. Highlights in 2021 included *Davina McCall: Sex, Myths and the Menopause*, which initiated conversations about the menopause; *Cops on Trial: Dispatches*, which revealed the scale of sexual misconduct by serving police officers; *Grenfell: The Untold Story*; *The Truth About Police Stop & Search* and *Hunting the Football Trolls – Jermaine Jenas*.

Meanwhile, *The Diana Interview: Truth Behind the Scandal* led to the exposure of dirty tricks used by journalist Martin Bashir to obtain the famous Diana interview and the BBC's subsequent cover-up. And our *Rape: Who's on Trial?* night of programming, which comprised a major 90-minute documentary followed by a debate, was one of the most revealing and thoughtful explorations of the criminal justice system's failures over rape seen on British TV.



For far too long, there's been a shroud of embarrassment, shame and fear around this topic, and this is where it stops!

Davina McCall



Davina McCall: Sex, Myths and the Menopause



## Davina McCall: Sex, Myths and the Menopause

With nine in ten women saying that the menopause affects their work, and around half that their sex lives are adversely affected, *Davina McCall: Sex, Myths and the Menopause* fearlessly tackled the midlife taboos that can destroy women's jobs and relationships, exposing the lack of specialist education for GPs and the confusion that still exists around hormone replacement therapy.

With startling honesty, Davina described her own menopause journey in a bid to get women talking about theirs, and discovered that help is out there.

The one-off documentary reached 2.5 million viewers, equivalent to 4.1% of the TV population, including 5.8% of women, and a notable 14% of women aged 45-54.

Its impact on viewers was strong, with 83% agreeing that the programme made them think differently about the challenges menopausal women face, and three-quarters claiming to feel better informed about the help or support available to women going through the menopause. Significantly, 56% of viewers reported that they felt more comfortable asking questions about the menopause since watching it.

More than 21,000 health professionals have signed up for training about the menopause since the documentary aired. It kickstarted a national conversation that continues today.

# 2.5m

viewers were reached  
(4.1% of TV population)

# 83%

of viewers agreed that  
the programme made  
them think differently  
about the challenges  
menopausal women face

Joe Lycett's Got Your Back



innovation

creating change

creating change

## Reinvent entertainment

Channel 4's remit encourages us to push boundaries, take risks and experiment through our programming and across our business in ways that other broadcasters do not. In 2021, we worked on continuously refreshing what we did creatively, finding new ways to engage audiences, new ways of delivering our content, and new ways of supporting the creative industries.

innovation!

## Four areas of focus:



British creativity



Digital excellence



Nations and Regions



Young and diverse

Grayson's Art Club



As Covid-19 has transformed how and where people spend their working and leisure hours, changes relating to the consumption of media have greatly accelerated – in particular, trends such as viewers spending less time with linear TV channels and more with streaming services and social media on a multitude of personal devices. In this context, Channel 4's strategic initiatives around All 4, 4Studio and scaling via partnerships are critical to our future success.



**In the first full year of our Future4 strategy (see page 20), Channel 4 has devoted considerable efforts to encouraging everyone in the organisation to adopt a truly digital-first approach.**

This is a big challenge in an organisation that for decades has been laser-focused on the intricacies of linear TV schedules; it has required changes both in organisational structures and in personal mindsets. To this end, we have set ourselves ambitious targets for All 4 and are redoubling our efforts to find new ways to reinvent entertainment across all of our genres.



The Dog House



## Engaging viewers with innovative content

**In a world of abundant choice, Channel 4 continued to offer something unique, valuable and sought after in 2021.**

**We created and invested in new British-produced formats and shows that offered a distinctive flavour to viewers, finding new ways to tell stories and to reach audiences through highly distinctive commissions.**

Innovative new shows, such as the genre-bending immersive competition format *Murder Island* (see page 68), the irreverent quiz show *I Literally Just Told You*, woodwork competition *Good With Wood*, or daytime restoration show *Mend It for Money* delighted audiences with their new approaches and formats. Through the Global Format Fund, we invested in innovative new British-created and produced content formats with UK audience appeal and global potential, such as *Moneybags* and *The Love Trap* (see page 71).

We also continued to delight viewers with returning hits such as *Grayson's Art Club* and *The Circle*, expanded franchises such as *First Dates* with *Teen First Dates*, and continued to drive digital growth with instant box-sets for key titles – including *It's A Sin*, new comedy *Frank of Ireland*, and returning shows such as *The Dog House*, *Black and Dead Pixels* among others.

2021 saw us continue to invest in All 4's platforms and technology in order to enhance functionality and usability, acquire wider video-on-demand ('VoD') content rights and ensured that our content could be played across all of our platforms (see All 4 case study, page 76). We also expanded our reach on social media platforms through key partnerships with Snap and TikTok, giving audiences what they want, where they want (see 4Studio case study, page 74) – this is what reinventing entertainment looks like.

The Love Trap

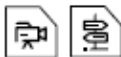




One thing is for sure – original concepts are rare in TV right now. For that reason alone, it is worth tuning in again.

The Sun

Murder Island



## Murder Island

**Innovation has been at the heart of Channel 4 since its creation. It is a core part of our remit and our vision to reinvent entertainment. In 2021, we continued to explore new formats and ways of engaging our audience. *Murder Island* encapsulated this perfectly.**

Filmed on the island of Hirta, off the west coast of Scotland, *Murder Island* was a six-part murder mystery series written by Ian Rankin, one of Britain's most successful crime writers. Eight ordinary members of the public, who believed they had what it takes to be a murder detective, worked in teams of two to try and unpick Rankin's plot and solve the crime.

Overseen by some of the country's finest real detectives, the teams had eight days to catch the killer, sifting through evidence, examining pathology and forensic reports and interviewing witnesses and subjects. With a £50,000 reward on the table for the winning team, they had to look beyond their own prejudices, learn new skills and gather evidence.

*Murder Island* had the authenticity of a real murder case, combined with the twists, turns and intrigue of the best detective fiction.





“

*Moneybags is a really innovative format that will be injecting quick-fire quizzing and edge-of-your-seat tension into the afternoon schedule.*

Moneybags



## Global Format Fund

**As part of our Future4 strategy, we launched a new Global Format Fund in 2020. The fund, which will invest a total of £30 million over the coming years, comprises ringfenced spend designed to stimulate the creation of original new formats from UK-based indies for domestic and international audiences.**

The fund, which invested £8 million in 2021, is focused on those genres with the greatest potential for global format success, including Daytime, Factual Entertainment, Features, Entertainment, Documentaries and Specialist Factual.

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

The first two series that were commissioned from the fund were *The Love Trap*, a reality-gameshow hybrid which subverts familiar dating show tropes, and *Moneybags*, produced by Youngest North, Youngest Media's recently launched Leeds-based hub. Hosted by Craig Charles, this big-money afternoon quiz show was devised by the team who created *The Million Pound Drop* and *Pointless*. *Moneybags* has been recommissioned for a second series. Jo Street, Channel 4's Head of Daytime and Features, said that: "*Moneybags* is a really innovative format that will be injecting quick-fire quizzing and edge-of-your-seat tension into the afternoon schedule."

**£30m**  
will be invested  
through the Global  
Format Fund

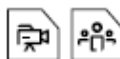


Channel 4 has pulled off a hat-trick of master strokes by securing the rights to the 2019 Cricket World Cup final, Emma Raducanu's US Open triumph and the climax of last season's Formula One world championship.

The Daily Telegraph

Formula 1 Abu Dhabi Grand Prix





## Bringing major sporting moments to free-to-air

**Reinventing entertainment also means finding new ways of engaging our viewers. In 2021, Channel 4 secured innovative commercial partnerships in order to bring major sporting events to free-to-air audiences. These created significant moments of shared national joy, which enthralled and entertained audiences across the UK.**

In February, our ball-by-ball coverage of the India vs England Test Series on Channel 4 and All 4 was watched by over 9 million viewers, reaching 15% of the TV population and an impressive 40% of Indian viewers in the UK. It was the first time live Test cricket had been on free-to-air television since Channel 4 showed England's momentous Ashes win in 2005.

Over the summer, Lions fans were able to roar on their team on TV for the first time in almost 30 years with Channel 4's broadcast of the Vodafone Lions 1888 Cup against Japan, which was especially popular with young people, attracting a share of 20% for 16-34-year-olds.

And then came our live coverage of Emma Raducanu's amazing victory against Leylah Annie Fernandez in the US Open Women's Final, secured through an innovative and widely praised deal with Amazon Prime Video. An incredible peak of 9.6 million people watched as Emma became first British woman to win a grand slam title since Virginia Wade's Wimbledon victory in 1977, and the youngest grand slam champion since Maria Sharapova in 2004. The final delivered Channel 4's best daily share since the 2012 Paralympic Games Opening Ceremony, making it the most-watched single broadcast of the Year on Channel 4.

Our collaborations with other broadcasters bring benefits to all parties – to the broadcasters themselves, to sports rights holders and to viewers – and help create a win-win balance in the availability of coverage of live events on free-to-air vs subscription services. Thanks to a partnership with Sky, we ended 2021 with another huge sporting moment: the Abu Dhabi Grand Prix. We brought the nail-biting, controversial finale, which saw Max Verstappen overtaking Lewis Hamilton on the final lap after a dramatic late safety car intervention, to 7.5 million people in total – with the highest one-minute peak audience on Channel 4 to date for live F1. This was a fittingly dramatic end to an extraordinary year of sport on Channel 4.

India vs England Test Series



# 4Studio: Innovating to reach new audiences

## 11.3bn

views of 4Studio social media content in 2021



Celebrity Gogglebox



The Circle



## 2021 saw our Leeds-based 4Studio business innovate its approaches to reaching audiences on social media platforms, reinventing how we use our content to appeal to young people and strengthening the Channel 4 brand as a digital PSB.

4Studio creates and publishes thousands of pieces of content across over 100 channels each month, reaching millions of people every day on the major digital and social media platforms – from Snapchat to YouTube, Facebook, Instagram, TikTok and Twitter.

Success is driven by smart use of data and creative excellence. 4Studio boasted over 11.3 billion global views in 2021, and scooped a number of awards – including Loves, a Drum Online Media Award, multiple Broadcast Digital Awards and a Prolific North Marketing Award – across its three key business areas of social media marketing, branded entertainment and digital original series.

4Studio also became the biggest social media brand on YouTube and Facebook for UK 18-34-year-olds, reaching more of this group than any other global brand, and saw continued success with its social media branded content, regularly topping the leaderboard as the UK's most viewed social media branded content partner.

Creatively, the team continued to innovate ways to drive noise around our linear shows and to find new forms of branded content, as well as launching social-first content series to audiences.

4Studio developed and executive produced its first digital extension, with star-studded *It's A Sin* spin-off *After Hours*, featuring creator Russell T Davies and stars including Neil Patrick Harris and Olly Alexander taking fans behind the scenes of the award-winning 80s AIDS drama. This was one of a raft of spin-off commissions.

*Hollyoaks IRL* told the emotional stories of fans whose lives have been personally affected by the issues raised in the daily soap, including depression and suicide, gay conversion therapy, and eating disorders. *The Circle* podcast *Dishonest Fun* saw guest stars chat with series 1 winner Alex Hobern to talk all things catfishing. And *True Crime: Unravelling* partnered Yinka Bokinni with criminologist Honor Doro Townsend to explore the real-life cases behind All 4's gripping season of true crime documentaries.

Meanwhile, the team ensured that our biggest programming moments – the Black to Front Project, *Married at First Sight Australia*, *Tokyo 2020 Paralympic Games*, *The Great British Bake Off* – drove conversation online and engaged viewers on every platform, before, during and well after transmission.

A key area of innovation this year was 4Studio's sales team's collaborations with world-leading companies to commission brand-funded content projects. They partnered with Balmain on *Fracture*, the first-ever branded social media drama; with Instagram on *You Do You*, the world's first-ever real-time social media reality series told through social media; with VisitBritain on a second series of the award-winning Rosie Jones-fronted disability travelogue *Mission: Accessible*; and with Meta Quest for the iconic return of *GamesMaster*.

It continued to evolve the way it worked with social media platforms, partnering with TikTok to launch Channel 4 and E4-branded accounts, create a dedicated Paralympics content hub, and to create and publish content which is now engaging young audiences in their millions on the platform.

2021 saw 4Studio's team grow to over 80 employees, almost all based in Leeds – reflecting its *modus operandi* to invest in diverse talent from the Nations and Regions. The team partnered with SharpFutures to launch a scheme as part of 4Skills, targeting young people in Leeds from disadvantaged backgrounds via virtual workshops, outreach and engagement. The department was delighted to introduce one of the trainees to the team in a full-time capacity once the scheme had finished.

# All 4: The UK's digital PSB



**2021 was another transformative year for All 4. With over 14,500 hours of content, the UK's biggest free streaming service saw viewing grow by 21% across the year, exceeding our annual target and achieving in excess of 1.5 billion views for the first time.**

Channel 4 has a long history of being a channel for young people, and in 2021 we leaned into this further, leveraging our progress in technology and exploiting our platforms further to bind young British viewers to strong, valuable and trustworthy public service media. We have seen our position with young people solidify and grow, with All 4 demonstrating our digital viewing success.

In November 2020, as part of our Future4 strategy, we announced our ambition to be the young people's PSB streamer, giving them the content they want, where they want it – and we are well on our way. And in 2021, we announced that we were further prioritising streaming in all of our commissioning and scheduling decisions: every piece of our scripted content will now be primarily commissioned for All 4, with linear a secondary consideration.

All 4 made up 13% of total Channel 4 viewing in 2021, up from 9.2% in 2020.

Help



It's A Sin

Married at First Sight UK

## Doubled

the number of subscribers  
to All 4+ in 2021



## Doubling down on digital growth

A central goal of the Future4 strategy is to double All 4 viewing by 2025 to 2 billion views. To achieve this, we are dialling up our ambitions for All 4 and doubling down on the types of programmes that we know people love to binge on demand. At the end of 2021, we achieved over 1.5 billion views on All 4 – well ahead of our annual target.

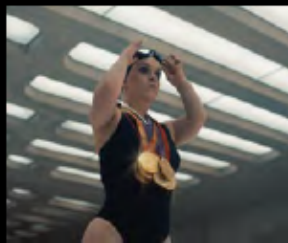
We have continued to invest in our ever-expanding All 4 content library – the largest of the UK PSBs. This year, we supercharged our box-set strategy whereby new series on the linear channels were made available in full on All 4, with over five times more titles than in 2020, including *It's A Sin*, *First Dates* and *24 Hours in Police Custody*.

During the year, we also started to experiment with scheduling, such as the pre-transmission release of *Help*, which contributed to it becoming the best single episode drama launch to date on All 4, based on viewing in the first week.

Content that performed strongly on linear performed strongly on All 4, particularly among young people, and we have adapted our strategy throughout the year to capitalise on this. Most notably, at the start of the year, Russell T Davies' impactful drama *It's A Sin* became Channel 4's biggest-ever commissioned new series, with over 26 million views on All 4 (see full case study, page 31), of which 22% of viewing was before the programme was transmitted on linear.

The *Married at First Sight* franchise, a major success on E4 in 2021, was equally successful on All 4: the sixth season of the Australian format became the biggest individual series of the year, achieving 79 million views across all platforms. Responding to this success, we reformatted and relaunched our own UK version of the format after the summer. *Married at First Sight UK* quickly became the highest-rating unscripted show in E4's history – making the channel the number one destination for 16-34-year-olds during its run – and has become our third-biggest individual title of the year on All 4. This example shows the positive feedback loop between performance on All 4, smart use of audience data and our core content commissioning strategies.

Tokyo 2020 Paralympic Games



>1.5bn

views on All 4 in 2021 (+21%)

13%

of total Channel 4 viewing in 2021 was made up by All 4

## Focusing on the All 4 experience

Viewers' expectations are changing in a digital world. They expect Channel 4 to know how they watch, where they watch and why they watch. This is not just about demographics; they expect more content, communications and experiences based on their motivations for watching.

Our focus has therefore continued to be on All 4 being the UK's biggest free streaming service, positioning it as 'more than catch-up'. This has been effective, with 62% of 16-34-year-olds agreeing that All 4 is 'more than a catch-up service' across the year, putting the service ahead of iPlayer and ITV Hub.

Continually enhancing the viewer experience – through All 4's functionality and usability – is key to our success among young viewers and the All 4 product benefited from significant investment in 2021.

We rebuilt our 'Big Screen' All 4 application (for smart TVs), making it more effective to showcase Channel 4's programmes. We made progress in making All 4 a more personalised and smarter service, better meeting consumers' expectations.

Meanwhile, our paid-for service, All 4+, which allows viewers to watch TV shows without ads, nearly doubled the number of subscribers across the year, and we are continuing to build this product into 2022 and the future.

Driven by our continued innovations and unrivalled content library, All 4 was recognised by the industry in 2021, winning 'Best On Demand TV Service' at the Edinburgh TV Festival Awards for the second consecutive year, and 'Best Streaming Platform' at the Broadcast Tech Awards.

## Best On Demand TV Service

at Edinburgh TV Festival Awards  
for the second consecutive year



The Secret Life of Emily Brontë



We would not be here, making programmes in this part of Wales, without Channel 4.

**Sioned Wyn**, award-winning director and producer, Chwarel



## Investing in innovative partners

**Beyond content, Channel 4 also works with and invests in innovative creative partners. These funds – the Indie Growth Fund, Emerging Indie Fund and Channel 4 Ventures – help to grow early-stage production companies across the UK and are helping to change the production landscape of the UK. Another way that Channel 4 is reinventing entertainment.**

The Indie Growth Fund (‘IGF’) has a remit to generate commercial returns for Channel 4 by investing in, and helping to grow, early-stage production companies, focusing on the Nations and Regions and diverse entrepreneurs. Profits from the fund’s ventures are invested back into the delivery of Channel 4’s public service remit.

Now seven years old, the IGF has invested in 25 companies to date, with nine exits so far and 16 companies remaining in the fund at the end of 2021.

This was a record year for the fund, which invested in six new companies: Uplands, Big Deal Films, Duck Soup, Paper Entertainment, Salamanda and Spirit Studios – all of which satisfy at least one of the IGF investment criteria of being Nations and Regions, diverse or digital. Of the 16 companies currently in the IGF portfolio, nine are based out of London, six are led by ethnically diverse founders, five have female founders and one is a digital-first company. There was one successful sale in 2021, of Lightbox, via a share buyback to its founders.

The Emerging Indie Fund, designed to help small, new or emerging indies outside of London break through with support at key stages of early growth, was launched in 2020. Feedback from the participating indies in the first round of the fund was extremely positive, with awardees hailing it as ‘game-changing’, and eight companies going on to receive commissions.

Building on this success, the second Emerging Indie Fund round launched in autumn 2021, and a diverse cohort of 20 companies was awarded, spanning the whole of the UK, including all four Nations. The awarded companies received development awards, and opportunities to work directly with the commissioning teams, as well as receiving expert business development support to help them to grow.

Channel 4 Ventures invests in high-growth digital consumer businesses, offering media airtime in exchange for equity. This fund has 22 active equity investments that had a balance sheet value of £30 million at 31 December 2021 (2020: £16 million).

Channel 4 Ventures made seven new investments this year. They included Boomin, a challenger property portal; Strike, an estate agent that sells houses for free; Clim8, an ethical investment app; and Maxwellia, a drug switching company that spearheaded the campaign to switch the progesterone-only contraceptive pill from prescription-only to available over the counter.

# 25

companies have been invested in by the Indie Growth Fund to date

Before We Die



The Battle for Britain's Heroes

# Future metrics



Highlife

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.



## Future metrics

Following the launch of Channel 4's Future4 strategy in 2020, now is the right time for us to update our measurement framework, in order to keep ahead of changes occurring in the industry and to reflect our corporate objectives and the priorities that underpin our new strategy. Over the last year, we have developed a new framework and have started to capture data for the new metrics, which we will present in full in next year's Annual Report. We have grouped the metrics under three headings: our impact on audiences, our impact on the creative industries, and Channel 4's vision.

The Anti-Vax Conspiracy



The Big Breakfast





Billy Monger: Changing Gear

As we develop the new framework, it is critical that we maintain the same degree of rigour that the existing Statement of Media Content Policy ('SMCP') metrics have provided to date – e.g. by reporting in a consistent manner each year, regardless of whether individual metrics rise or fall; and ensuring that, taken together, the set of metrics demonstrate our remit delivery to stakeholders.

However, as measurement capability evolves over time, we will refine these metrics whilst retaining transparent comparability.

In this Annual Report, we also continue to report on our existing metrics, which form a formal part of the SMCP – these begin on page 91. These metrics are part of a framework that was originally developed almost 15 years ago and, while there have been modifications to the set of metrics used over the years, the overall framework is still rooted in the world of traditional TV channels and does not reflect the huge changes in viewing over the next decade.



It's A Sin

Note: the metrics presented on the following pages include some data points that are the same as, or similar to, those presented in the current SMCP.

## Future metrics (continued)

**1.5bn**

All 4 views

**10.3%**

linear viewing share

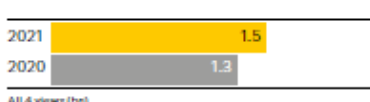
### Viewing: Channel 4's impact on audiences

2021 was a year of growth for Channel 4, both in traditional viewing and on digital platforms.

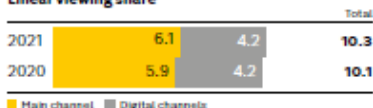
On-demand viewing of All 4 content grew by 21%, with 1.5 billion programme views initiated through All 4-branded platforms – which include PCs, smartphones, tablets, games consoles and connected TVs. This is the second consecutive year in which growth exceeded 20%, and over the last two years the number of views has risen by more than 50%. The strongest area of growth in 2021 was on 'big screen' devices, i.e. connected TVs and streaming devices that plug into TVs, with viewing up by 32%. However, growth was fairly evenly spread across platforms, with viewing also up by 29% on Channel 4's owned and operated services, and up by 22% on mobile and tablet platforms.

While overall TV viewing continues to migrate from linear TV to digital platforms, Channel 4 continued to maintain – and indeed grow – its share of the linear TV pie. It increased its viewing share year-on-year, to 10.3% across the TV channel portfolio. This is an increase of 0.2 percentage points (equivalent to a 1% rise). This growth was accounted for by the main channel, whose share also rose by 0.2 percentage points to 6.1% (a rise of 3%), its highest level since 2013. This is a very impressive performance, in a year in which audiences' viewing habits started to return to normal after the huge changes in 2020 that saw Channel 4 and other PSBs enjoy increased viewing as people turned to them for news of the Covid-19 pandemic and for mainstream entertainment. There were only marginal changes in viewing to the digital channels, total viewing to which was flat (4.2% in both years). E4's share rose by 0.1 percentage point, More4's share dropped by the same amount, while Film4 and the Box music channels both held steady.

### All 4 views



### Linear viewing share



■ Main channel ■ Digital channels

## Future metrics (continued)

**£671m**

total content spend

**£492m**

originated content spend

**£222m**

investment in originated content outside of London

### Output: Channel 4's impact on the creative industries

This was a year of growth and recovery for Channel 4 after the enforced cuts in investment in 2020 following the onset of the Covid-19 pandemic, which triggered a hiatus in TV production and large declines in the advertising market. The nature of the pandemic and the immediate impact of lockdown on production and advertising revenues meant that we had to take swift and prudent action in 2020 – this was not something we wanted to do, and we fully recognise and lament the adverse impact that postponing shows and reducing content investment had on our partners in the production community. In 2021, by contrast, advertising revenues were back up and new production protocols developed by the industry – along with the government's insurance scheme for the sector – allowed Channel 4's commissions to get off the ground in a period when Covid-19-related restrictions remained in force and were subject to frequent changes. This bounce-back is reflected in the three investment metrics reported in this section, all of which increased year-on-year by large amounts to levels that either match or exceed their 2019 levels prior to the pandemic.

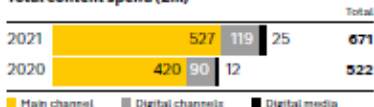
Channel 4 delivers its public remit primarily through the original content that it commissions and invests in. Its investment in original content returned to pre-Covid-19 levels in 2021, with a total expenditure (first-run transmissions and repeats) across its TV channels and online services of £492 million (up by £122 million year-on-year, a 33% increase), exactly matching the 2019 level. Investment in originations on the main channel was £438 million (89% of the total); after rising by £101 million year-on-year (a 30% jump), it now exceeds 2019's level by £1 million. A further £42 million was spent on original content for the digital channels, £13 million more than in 2020 (a 48% rise). Spend on digital media content (including websites and cross-platform content) trebled year-on-year from £4 million to £12 million in 2021, its joint-highest-ever level (previously achieved in 2010).

Reflecting its growing commitment to producing outside of London, Channel 4 spent a record £222 million across its TV portfolio on content commissioned from production companies based in the Nations and the English Regions. Up year-on-year by 57% (an £81 million rise), this is £33 million more than the previous highest out-of-London spend of £189 million in 2017. Within this total, expenditure in the Nations was £38 million, a 36% increase year-on-year (a £10 million rise). Scotland accounted for the largest share of this, with a spend of £23.5 million, followed by £10.8 million in Wales and £3.5 million in Northern Ireland. TV portfolio spend on commissions from the English Regions jumped by a substantial 67% to £178 million (a £72 million rise), and a further £6.9 million was spent on multi-region content (a small decline of 4%, or £0.3 million). Setting aside multi-region, spend rose year-on-year

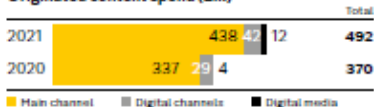
in all the individual Nations and English Regions. The largest changes were in the Midlands (up 149%), North of England (up 88%) and Wales (up 76%).

Looking at the totality of Channel 4's content (originations and acquisitions), expenditure across its services in 2021 was £671 million – a rise of £149 million (29% up year-on-year). This is a higher level of spend than in the previous three years (2018-2020). The main channel continued to account for the bulk of the investment (79% of the total); its budget was £527 million this year, with spend rising by £107 million, a 25% rise. Across the digital TV channels, spend totalled £119 million, a £29 million rise (33% up). And content spend in digital media more than doubled to £25 million (up by £13 million, equivalent to 108%).

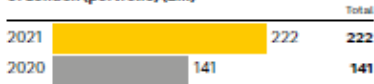
### Total content spend (£m)



### Originated content spend (£m)



### Investment in originated content outside of London (portfolio) (£m)



## Future metrics (continued)

**55%**

Channel 4 shows  
different kinds of  
cultures and opinions

**51%**

Channel 4 pushes  
boundaries

**47%**

Channel 4 always tries  
something new

### Vision: Channel 4's distinctiveness

As part of its SMCP, Channel 4 has historically reported its leads over the other main PSBs across a series of tracker statements linked to its public service remit. Tracker statements such as these are a valuable way of assessing Channel 4 against its remit, but the existing approach has become increasingly outdated. The new framework includes tracker statements that are updated compared to the earlier ones in several ways: first, the language of the statements has been refreshed so they remain both relevant to the remit and easily understood by respondents. Second, whereas previously we sought perceptions just of Channel 4's main channel, now we ask about views of Channel 4's full portfolio of TV channels and services. And third, we have broadened the competitor set so that it includes not only the other PSBs (as before) but also Sky and the leading streaming services.

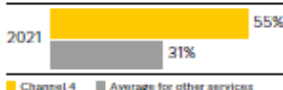
In 2021, Channel 4 was the highest-scoring brand for two of the tracker statements presented here, and the second-highest-scoring brand for the other one.

55% of respondents believe that Channel 4 performed strongly (scoring at least 7 on a 10-point scale) for "showing different kinds of cultures and opinions of the UK". This compares to other brands' scores ranging from as low as 13% up to 49%. The competitor brands had an average score of 31%, giving Channel 4 a 24-percentage-points lead over this average. It was also 16 points ahead of the 39% average for the other PSBs, and 6 points ahead of the next-highest-scoring brand (the BBC).

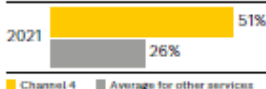
51% of respondents believe that Channel 4 performed strongly for "pushing boundaries". This compares to other brands' scores ranging from 11% up to 41%. Channel 4's lead over the average score of the other brands was 25 percentage points (with only a slightly smaller lead over the other PSBs, of 24 points). It scored 10 points more than the next-highest-scoring brand (Netflix's 41%).

Finally, 47% of respondents believe that Channel 4 performed strongly for "always trying something new", ranking in second place behind Netflix (52%, five percentage points higher). The other brands' scores ranged from 20% up to 36%. Channel 4's lead over the average score of the competitor brands was 15 points (it had a higher lead over the other PSBs, of 18 points). The third-highest-scoring brand was Amazon Prime (with 36%, 11 points behind Channel 4), meaning that Channel 4 was the only PSB brand to appear in the top 3 for this statement.

### Channel 4 shows different kinds of cultures and opinions



### Channel 4 pushes boundaries



### Channel 4 always tries something new



# Current metrics



Tom Allen's Quizness

As we continue to refine our future metrics, we will continue to publish our existing set, which form a formal part of the Statement of Media Content Policy ('SMCP'). These cover the key areas for our remit delivery, including how we: engage the audience, innovate through our content, make an impact and our distinctive approaches.

# Engaging the audience

In 2021, television viewing patterns returned towards their pre-Covid-19 levels after a year of unprecedented change, and some longer-term trends reasserted themselves. The impact on Channel 4 was mixed. The most significant overarching trend over the last decade has been for viewing to migrate from traditional TV channels to video-on-demand ('VoD') services. This benefited our streaming service All 4 – especially with our new Future4 strategy – while putting further pressure on the linear TV channels. Exacerbating this, the one-off surge in viewing towards the main PSB channels when the UK went into lockdown in early 2020 had disappeared this year. And younger viewers in particular – a key audience for Channel 4 – continued to move away from traditional TV faster than other groups, impacting the metrics that report viewing by 16-34-year-olds.

Offsetting these trends, Channel 4 was able to restore pre-Covid-19 levels of programme investment in 2021, resulting in a richer and more diverse schedule. This was reflected in strengthened scores for Channel 4 when audiences were asked which of the main PSB channels is best for catering for audiences other channels don't cater for. And it enabled Channel 4 to buck longer-term trends and grow overall portfolio viewing share, as well as share amongst ethnically diverse audiences.

These patterns were also reflected in viewing to news: whilst the overall reach of *Channel 4 News* fell back to pre-Covid-19 levels this year, and there were viewing declines amongst young audiences, the share of viewing accounted for by ethnically diverse audiences increased year-on-year.

We Are Lady Parts



Extraordinary Extensions

Kathy Burke: Money Talks



## Engaging the audience (continued)

# 10.3%

viewing share across  
the TV channel  
portfolio

# Up 1%

on last year

### TV viewing share

Channel 4 increased its TV portfolio viewing share year-on-year for the second consecutive year in 2021. Total viewing was 10.3% across the TV channel portfolio, an increase of 0.2 percentage points (equivalent to a 1% rise).

This growth in portfolio share was accounted for by the main channel, whose share also rose by 0.2 percentage points to 6.1% (a rise of 3%), its highest level since 2013. This is a very impressive performance, in a year in which audiences' viewing habits started to return to normal after the huge changes in 2020 that saw Channel 4 and other PSBs enjoy increased viewing as people turned to them for news of the Covid-19 pandemic and for mainstream entertainment. This year's rises saw Channel 4 partially reversing longer-term declines caused by increased competition in the linear TV space and the migration of younger viewers to video-on-demand services.

Amongst notable areas of growth this year, the main channel's share in the peak hours of 8pm-11pm was 8.11%, its highest since 2010. And its share in daytime (6am-6pm) was 4.89%, an increase of 5% year-on-year – resulting in the best weekday daytime share since 2014 and the best weekend daytime share since 2018.

Turning to the digital channels, there were only marginal changes this year. E4's share rose by 0.1 percentage point, More4's share dropped by the same amount, while Film4 and the Box music channels both held steady. Total viewing to the digital channels was flat (4.2% in both 2020 and 2021).

### Channel 4 portfolio share as a percentage of total TV viewing

	Channel 4 (main channel)	Digital channels	Total
2021	6.1	4.2	10.3
2020	5.9	4.2	10.1
2019	5.8	4.1	9.9
2018	5.9	4.3	10.2
2017	5.9	4.6	10.5

Source: BARB.

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

	E4	More4	Film4	Box/4Music	Total
2021	1.6	1.0	1.3	0.3	4.2
2020	1.5	1.1	1.3	0.3	4.2
2019	1.5	1.0	1.3	0.3	4.1
2018	1.6	1.1	1.4	0.2	4.3
2017	1.8	1.1	1.4	0.3	4.6

Source: BARB.

## Engaging the audience (continued)

# 70.5%

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

# Down 2.5pts

on last year

### Audience reach

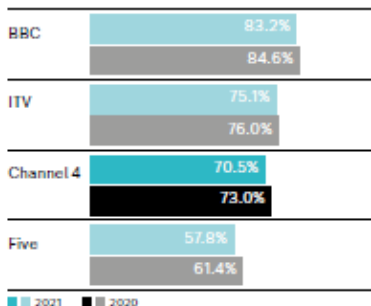
Channel 4 is the third-biggest UK broadcaster in terms of audience reach, behind only the BBC and ITV. In 2021, 70.5% of individuals in homes with a TV watched Channel 4's TV channels for at least 15 consecutive minutes each month on average (live or catching up within a week of transmission). With viewing continuing to migrate to streaming services (including the broadcasters' own services, which are not reported in this metric), overall TV reach fell by 2.5 percentage points year-on-year, continuing the declines experienced over the last decade, albeit at a marginally smaller rate than in the previous three years (when annual reach fell by between 2.7 and 2.9 points).

The main PSBs have all suffered reductions in the reach of their traditional TV channels in each of the last five years. In 2021, the scale of their annual declines ranged from 0.9 percentage points (for ITV) up to 3.6 points (Channel 5), with Channel 4's 2.5-point decline sitting just below the mid-point of this range.

Turning to the individual channels in Channel 4's TV portfolio, the main channel's reach fell by 2.5 percentage points year-on-year, while the digital channels experienced annual declines ranging from 0.9 points (Box music channels) up to 3.2 points (Film4).

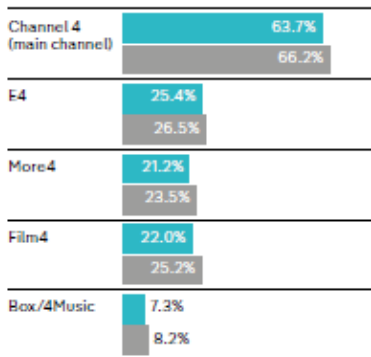
Note that the declines in reach presented here only cover traditional viewing and are partially offset by the continued strong growth in video-on-demand viewing to Channel 4's programmes, as viewers continue to rebalance their overall TV viewing away from linear channels and towards viewing on streaming services (see 'On demand viewing' opposite, on page 95).

### 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 (continued)

**1,518m**

programme views  
initiated on demand

**Up 21%**

on last year

### On-demand viewing

In another year punctuated in part by lockdowns, consumption of TV programmes via on-demand services continued to rise, with growth in 2021 spreading in particular amongst older audiences. Channel 4's All 4 streaming service lies at the heart of its Future4 strategy (see page 20), which seeks to accelerate the organisation's pivot to digital, prioritising digital growth over linear ratings. In content terms, this means investing more in the types of programmes audiences love to binge on demand. An example of this in 2021 was the launch of 'True Crime on Channel 4', a new multiplatform content offering for True Crime fans pulling together new commissions, archive and acquisitions in a new dedicated space.

As a result of these developments, on-demand viewing of All 4 content grew by more than 20% for the second consecutive year. There were 1.52 billion programme views initiated through All 4-branded platforms – which include PCs, smartphones, tablets, games consoles and connected TVs – in 2021, an increase of 21% on the year before. In absolute terms, the number of views rose by 265 million, the biggest ever increase in absolute terms for this metric (exceeding last year's rise, which itself was a new record). Over the last two years, the number of views has risen by more than 50%, an impressive rate of growth.

The strongest area of growth in 2021 continued to be on 'big screen' devices, i.e. connected TVs and streaming devices that plug into TVs, with viewing up by 32%. However, growth was more evenly spread across platforms this year compared to recent years, with viewing also up by 29% on Channel 4's owned and operated services, and up by 22% on mobile and tablet platforms.

### On-demand viewing (million)

2021	1,518
2020	1,253

Source: Channel 4.

## Engaging the audience (continued)

### 9.2%

portfolio viewing share  
amongst ethnically  
diverse audiences

### Up 3%

on last year

### 5.4%

main channel viewing  
share amongst  
ethnically diverse  
audiences

### Up 3%

on last year

#### Share amongst hard-to-reach audiences – ethnically diverse

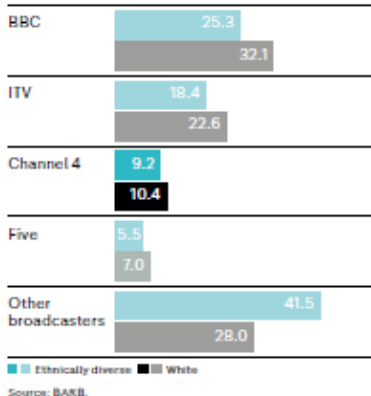
As part of Channel 4's remit to make programmes that appeal to people from different cultural backgrounds, it is especially important for the broadcaster to attract audiences from ethnically diverse groups. While the PSBs all have lower overall viewing shares amongst ethnically diverse audiences than White audiences across their portfolios, Channel 4 strives to make this differential as small as possible and strengthened its performance on this metric in 2021.

This year, Channel 4's TV portfolio attracted a 9.2% viewing share amongst ethnically diverse audiences. The corresponding share amongst White audiences was 10.4%, giving a viewing share differential between ethnically diverse and White audiences of 12%. This is the best performance (i.e. the lowest viewing share differential) of all the PSB portfolios: the BBC, ITV and Channel 5 all had significantly higher differentials in the range of 19% to 21%.

After losing ground in 2020 due to the unusual viewing patterns when the Covid-19 pandemic hit, Channel 4's viewing share amongst ethnically diverse audiences returned to its 2019 level this year, growing by 0.3 percentage points year-on-year, equivalent to a 3% rise in percentage terms. This is a higher rate of growth than that amongst White audiences, which was up by 1% year-on-year. As a result, the 12% differential is one percentage point better than (i.e. below) last year's figure of 13%.

Focusing on the main channel, Channel 4's viewing share amongst ethnically diverse audiences was 5.4% in 2021. This was up by 3% year-on-year and is at its highest level since 2012.

#### Public service broadcasters' portfolio viewing shares amongst White and ethnically diverse audiences as a percentage of total TV viewing by those audiences (2021)



Note: Viewing by ethnically diverse audiences compared to viewing by White audiences.

## Engaging the audience (continued)

### 15.0%

portfolio viewing  
share amongst  
16-34-year-olds

### Down 5%

on last year

### 8.2%

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

### Down 5%

on last year

#### Share amongst hard-to-reach audiences – 16-34-year-olds

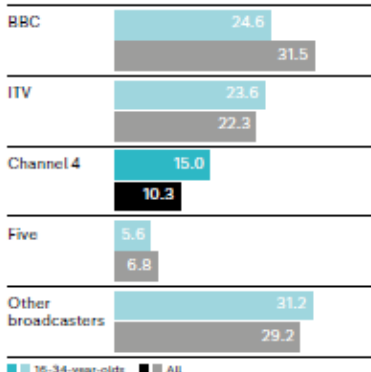
Channel 4 is unique amongst the PSBs in that its TV channels attract a significantly larger share of viewing amongst hard-to-reach 16-34-year-olds than across the overall population. Across its TV channel portfolio, Channel 4's viewing share amongst 16-34-year-olds was 15.0% in 2021, a figure that is 46% higher than the corresponding all-audience share of 10.3%. Conversely, the other PSBs' 16-34 viewing shares were either below their all-audience shares across their portfolios – by as much as 18% for Channel 5 and 22% for the BBC – or only slightly higher (by 6% for ITV).

Channel 4's 46% viewing differential was nine percentage points lower than the corresponding 2020 figure of 55%. While overall viewing was up by 1% in 2021 (from 10.1% in 2020 to 10.3% this year), viewing amongst 16-34-year-olds decreased by 5%, from 15.7% in 2020 to 15.0% this year. This decline in portfolio viewing share was disappointing and Channel 4 has started a programme of work to look at how to better engage with young people on linear TV.

In 2021, this decline may be partly attributed to the return of the summer edition of *Love Island* to ITV2, and to coverage of the major sporting tournaments on the BBC and ITV (football Euros and Tokyo Olympics, both postponed from 2020).

On the main channel, Channel 4's viewing share amongst 16-34-year-olds was 8.2% in 2021. While this was down by 5% year-on-year, it remained 2% above the 2019 level.

#### Public service broadcasters' portfolio viewing shares amongst 16-34-year-olds and all audiences as a percentage of total TV viewing by those audiences (2021)



Source: BARB.

Note: Viewing by 16-34-year-olds compared to all audiences.

## Engaging the audience (continued)

### 3.9%

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

### Down 2%

on last year

#### Most popular channels for young viewers

In 2021, viewing to E4 by 16-34-year-olds held steady year-on-year with a share of 3.9% (in percentage terms it fell slightly, by 2%). After dropping to its lowest viewing share in the last decade in 2020, Covid-19-related factors meant that it was challenging for E4 to regain ground this year.

A major contributor to the channel's performance is its nightly youth-focused soap *Hollyoaks*. The number of episodes of *Hollyoaks* was cut back significantly in 2020 when the first lockdown came into effect, with 162 episodes transmitted that year. While this year's episode count was back up to 256 (the same as in 2019), filming restrictions had a substantial impact on production: social distancing rules limited the number of cast and crew on set and on screen at any one time, and interactions between characters had to be restricted (more so than on other soaps, which have custom-built sets). Storylines were also affected by last-minute cast absences and illnesses. These factors all impacted on the quality of the programme and viewing declined (per-episode viewing was 25% down year-on-year).

Nonetheless, E4 remained the second-most-watched digital TV channel in the UK amongst 16-34-year-olds. Of the digital channels, only ITV2 had a higher share (this year, it recovered – up 18% – after the return of the summer edition of *Love Island*, which was cancelled in 2020 due to the pandemic). Across all TV channels, E4 was level with Channel 5, but fell behind BBC Two, whose share rose by 6% to 4.0%. Overall, E4 was the joint-sixth most popular TV channel for 16-34-year-olds in 2021.

Channel 4 remained the third most popular TV channel for 16-34-year-olds, behind only ITV and BBC One, with a 7.8% viewing share. After enjoying a big boost to its viewing in 2020 after young audiences turned to it for news and mainstream entertainment programming when the UK went into lockdown, 16-34 viewing fell back in 2021, by 4%, but its share was still higher than at any point between 2015 and 2019.

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

		Year-on-year change
ITV1	16.1%	+12%
BBC1	15.9%	+13%
Channel 4	7.8%	-4%
ITV2	5.5%	+18%
BBC2	4.0%	+6%
Five	3.9%	-4%
E4	3.9%	-2%
Cbeebies	2.9%	-6%
Sky 1	1.0%	-37%
Dave	1.9%	+14%

Source: BARB.

## Engaging the audience (continued)

### 8%

of viewing to *Channel 4 News* programmes on the main channel in 2021 accounted for by viewers aged 16-34

### Down 3pts

on last year

### 17%

of viewing to *Channel 4 News* programmes on the main channel in 2021 accounted for by ethnically diverse viewers

### Up 2pts

on last year

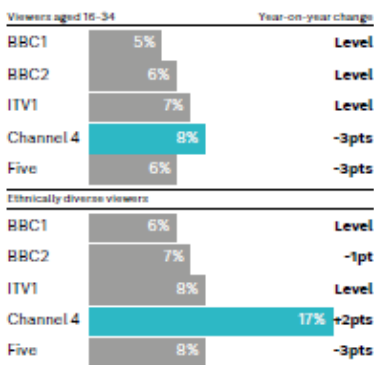
#### Viewing to national news

*Channel 4 News* has traditionally enjoyed a uniquely strong appeal to young and ethnically diverse audiences. In 2021, it enjoyed mixed fortunes: its appeal to ethnically diverse audiences reached record levels, while its appeal to 16-34-year-olds dropped off but remained stronger than for any of the other main PSB channels.

Starting with young audiences, 16-34-year-olds accounted for 8% of *Channel 4 News*' audience this year, higher than the corresponding viewer profiles of the other main PSB channels' national news programmes, which ranged from 5% to 7%. *Channel 4 News*' figure was three percentage points down year-on-year, continuing the steady declines over most of the last decade as young audiences migrate faster than other age groups to digital and social media for their news consumption (see 'Reach of *Channel 4 News*' on page 100, for its growth on other platforms). As a result, this group's share of news viewing fell to its lowest-ever level on this metric. This is in line with the performance of the other PSBs, whose 16-34 shares of news viewing were also all at their lowest, or joint-lowest, levels.

Conversely, *Channel 4 News*' appeal is stronger than ever and growing for ethnically diverse audiences. This group represented 17% of its total viewing in 2021, an increase of two percentage points year-on-year, taking this figure to its highest-ever level since it was first reported in 2009. *Channel 4* remains the only main PSB channel whose news viewing by ethnically diverse audiences exceeds this group's representation in the UK population (estimated to be around 13% to 14%); the other channels' news programmes had ethnically diverse viewing profiles in the range of just 6% to 8%.

#### Percentage of viewing to national news programmes on the main PSB channels in 2021 accounted for by 16-34-year-olds and ethnically diverse viewers



Source: BARB.

## Engaging the audience (continued)

### 7.7m

people watched  
Channel 4 News  
each month

### Down 21%

on last year

#### Reach of Channel 4 News

In 2021, an average of 7.7 million people watched Channel 4 News for at least 15 consecutive minutes each month on the main channel, across the main weekday evening programmes and the daytime and weekend bulletins. After jumping in 2020 to its highest level in almost a decade (9.8 million people), as Channel 4 expanded its news output following the outbreak of the Covid-19 pandemic and the imposition of lockdowns, reach fell back to its pre-Covid-19 trend in 2021. It dropped by 21% year-on-year, to just below the 2019 level of 7.8 million people. Comparing the latest figure with 2019 to sidestep the specific circumstances in 2020, the 2021 reach was 2% below the corresponding level of two years ago. Given the context over the last few years of audiences migrating to digital and social media for their news, it is an achievement for Channel 4 News' reach to have remained so close to its pre-Covid-19 level two years on.

The story is similar for the main weekday evening programme specifically (which usually airs at 7pm): its overall viewing share was 3.6% of individuals in 2021, a year-on-year decline of 15% that takes the share to slightly below 2019's level (just 3% less than the 2019 viewing share of 3.7%). Despite the decline in 2021, the main weekday evening news programme's share remained higher than at any point between 2011 and 2018.

The figures above exclude the programme's growing presence on digital and social media. On Twitter, a video on Professor Chris Whitty responding to concerns that the NHS was prioritising Covid over other serious health issues drew 3.3 million views, while our fond farewell to presenter Jon Snow received 1.2 million views. Snap had a strong year, with our two strands *Divided America* and *Divided World* becoming mainstays of our digital output, with a loyal audience of nearly 400,000 subscribers. Our podcasts *The Fourcast* and *Ways to Change the World* continued to build their audiences, each with around 1 million downloads across the year. TikTok was a new focus in 2021, with pieces on subjects such as upskirting, needle spiking and the increased visibility of disability on reality TV together drawing over 1 million likes. Across the main social platforms (Facebook, YouTube, Twitter, Instagram, Snapchat and TikTok), Channel 4 News had 10.1 million followers/subscribers by the end of 2021.

## Engaging the audience (continued)

### 19pts

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

### Up 1pt

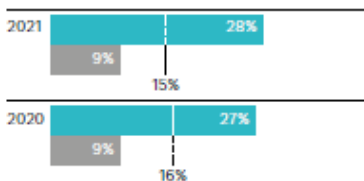
on last year

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

In 2021, 28% of respondents selected Channel 4's main channel over the other main PSB channels as catering for audiences other channels don't cater for. This gave Channel 4 a lead of 19 percentage points over the average of the other main PSB channels, and a 13-point lead over the next-highest-scoring channel (Channel 5).

All three of these figures were up year-on-year. The proportion of people selecting the main channel and its lead over the average of the other main PSB channels both rose by one percentage point, and its lead over the next-highest-scoring channel was up by two points. Taking a longer-term view, Channel 4's average lead over other channels this year is at the top end of the 10-22-point range it has occupied over the last decade.

#### Caters for audiences other channels don't cater for



■ Channel 4 ■ Average for other main PSB channels (BBC1, BBC2, ITV1 and Five)  
— Score for next highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

### 986m

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

### Up 24%

on last year

#### Total visits to Channel 4's websites and apps

In 2021, Channel 4's websites and apps achieved record rates of growth, reaching a new high of almost 1 billion visits. The exact total of 986 million visits was 24% higher than the corresponding figure for 2020 and is the highest percentage growth rate for nine years. Moreover, in absolute terms, the year-on-year increase of almost 200 million visits is by some distance the largest ever rise for this metric.

The dedicated All 4 app – which is available on a wide range of smartphones, tablets and connected TVs – continued to represent a growing share of the total: it accounted for 82% of all visits in 2021 (up from 79% in 2020), with the remaining 18% being visits to Channel 4's websites (including mobile sites).

As in recent years, growth was driven primarily by visits to All 4 apps, which were up by 28% in 2021. But visits to Channel 4's websites also rose this year, by 8%, the first time there has been a material (more than 1%) year-on-year rise in this figure since the metric was first reported in 2010. This may be because, as the market for video-on-demand (VoD) apps becomes more mature, the platform shift observed in earlier years – whereby people who used to consume VoD on websites switch to viewing on apps – is coming to an end. So now VoD viewing is growing on all platforms, with website VoD viewing on laptops, for example, reinforcing its place in the overall mix.

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



■ Websites and mobile sites ■ Apps

Source: Channel 4.

## Engaging the audience (continued)

# 76%

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

# Up 4%

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

In 2021, network originations accounted for a record 76% of total viewing to the main channel, E4 and More4, the highest level since this metric was first reported in 2008. This figure has been on an upward trajectory now for eight years (rising in seven of those years and holding steady in 2020) and is 13 percentage points above its level in 2013, from which point it started growing. Year-on-year, network originations' 76% share of total viewing is up by three percentage points (a 4% rise).

There are similar increases when we look at the volume of programming in the schedules. Network originations represented 67% of all hours across the schedules of the main channel, E4 and More4 in 2021, also the highest level since this metric was first reported in 2008. Year-on-year, this figure also rose by five percentage points (an 8% increase).

Comparing these viewing and output figures, network originations continue to be responsible for a disproportionately high share of overall viewing to the main channel, E4 and More4, outperforming acquired programmes: in 2021, they generated a higher share of viewing (76%) than their corresponding share of the volume of programming (67%).

Please note that:

1. The Film4 and 4Music/Box channels are excluded from this metric as their output is primarily made up of acquired feature films and content.
2. Network originations differ from the narrower Ofcom definition of 'originations', which only count programmes on the individual channel that commissioned them. Network originations better reflect the multichannel world by taking into account the multiple opportunities broadcasters can provide viewers to catch up on programmes across their digital TV portfolios.

# Innovation through content

This was a year of growth and recovery for Channel 4 after the enforced cuts in investment in 2020 following the onset of the Covid-19 pandemic, which triggered a hiatus in TV production and large declines in the advertising market. In 2021, by contrast, our advertising revenues were back up by 25% year-on-year, and new production protocols developed by the industry – along with the government's insurance scheme for the sector – allowed Channel 4's commissions to get off the ground in a period when Covid-19-related restrictions remained in force and were subject to frequent changes.

This bounce-back is reflected in the investment metrics reported in this section, all but one of which increased year-on-year – many by large amounts, and some to amounts that exceeded their 2019 levels prior to the pandemic. Thus, our overall investment in content rose to its highest amount since 2017 and investment in originations was back up to its 2019 level. The amount of money spent outside London was higher than in any previous year, after rising by more than 50% in 2021; and the proportions of total hours and spend invested in the Nations and Regions also reached their highest ever levels. The number of external suppliers Channel 4 worked with was at its highest level in four years, with growth particularly strong amongst digital media companies as our new Future4 strategy was rolled out.

Stand Up & Deliver



Are Women the Fitter Sex?

## Innovation through content (continued)

Meeting Channel 4's licence obligations			
Average hours per week		Compliance minimum	2021
<b>News</b>	In peak-time (6-10.30pm)	4	4
<b>Current Affairs</b>	Overall	4	6
	In peak-time (6-10.30pm)	2	3
<b>Hours per year</b>	Schools	1	15
<b>Percentage</b>			
Origination production	Overall	56	64
	In peak-time (6-10.30pm)	70	81
Independent production		25	59
European independent production		10	31
European origin		50	65
Subtitling for the deaf and hard of hearing		90	91
Audio description		10	36
Signing		5	5
Regional production		35	55
Regional hours		35	66
Production in the Nations		9	9
Nations hours		9	10

## Innovation through content (continued)

### £671m

spent on content  
across all services

### Up 29%

on last year

### £646m

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

### Up 27%

on last year

#### Investment in all content

Channel 4 was back to full strength in 2021 following the enforced budget reductions the year before. It spent £671 million on content across its services, equivalent to £149 million more than in 2020, a substantial increase of 29%. This is a higher level of investment than in the previous three years (2018-2020) and is the third-highest investment in Channel 4's history (behind only the amounts achieved in 2017 and 2016, when it peaked at £695 million).

The main channel – which attracts the biggest audiences in the portfolio – continued to account for the bulk of the investment: its budget was £527 million this year, 79% of the total. Investment on the main channel rose by £107 million, a 25% rise. Spend was also up on the digital services (i.e. the digital TV channels and digital media), which accounted for the other 21% of content investment. Across the digital TV channels, spend totalled £119 million, a £29 million rise (33% up). And content spend in digital media more than doubled to £25 million (up by £13 million, equivalent to 108%).

Focusing on the TV portfolio, i.e. the main channel and digital TV channels, total spend was £646 million in 2021, £136 million more than in 2020 (a 27% rise). Spend was up year-on-year in every single genre. In terms of absolute levels of investment, the biggest rises (of more than £10 million) were in Factual (up by £47 million), Entertainment (£29 million), Sport (£19 million) and Drama (£18 million). In percentage terms, there were also large increases (of more than 100%) in programmes for older children (up by 369%) and Education (up by 129%) – while the absolute values of these increases were relatively small, these are genres where Channel 4 was committed to increase investment and the percentage increases reflect the greater ambition in these areas.

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

				Total
2021	527	119	25	671
2020	420	90	12	522

■ 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	89	84
Drama	76	58
Factual	229	182
Comedy	42	39
Entertainment	97	68
News	30	29
Current Affairs	27	22
Older Children	5	1
Education	9	4
Sport	42	23

■ 2021 (£646m) ■ 2020 (£510m)

Source: Channel 4.

## Innovation through content (continued)

### 72%

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

### Up 7pts

on last year

#### Output mix on Channel 4

After a year that saw significant reductions in the volumes of first-run and originated content on the main channel in 2020, the balance in the schedule between originations and acquisitions, and between first-run programmes and repeats, returned to pre-Covid-19 levels in 2021.

During peak-time hours (defined by Ofcom as 6-10.30pm) – when Channel 4 premieres the bulk of its originations, as they can reach the largest audiences – the share of first-run originated programming on the main channel was 72%, seven percentage points up year-on-year. This figure lies within the narrow 72%-74% range that was achieved in the five years prior to Covid-19 (2015-2019). Repeats of original programming accounted for another 9% of hours (down by five points year-on-year), meaning that total originations comprised 81% of peak-time output – two points up year-on-year and well ahead of Ofcom's 70% licence requirement.

There is a more balanced spread of originations and acquisitions in the daytime schedules. Originations represented 64% of output on the main channel across the day in 2021 – four percentage points more than in 2020 and the highest level for this figure since 2016 (as well as being comfortably above the 56% Ofcom quota).

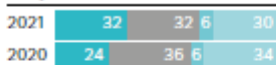
Overall, in peak-time, there was a rebalancing back to originations from acquisitions of two percentage points, and an eight-point rise in the share of first-run programming (with a corresponding drop in repeats). Across the whole day, there were similar shifts towards originated and first-run programmes, the shares of which were up by four points and eight points, respectively.

#### 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.

## Innovation through content (continued)

### £492m

spent on originated  
content across all  
services

### Up 33%

on last year

#### Investment in originated content

Channel 4 delivers its public remit primarily through the original content that it commissions and invests in. Its investment in original content returned to pre-Covid-19 levels in 2021, with spend on the main channel and across the whole portfolio closely mirroring 2019 levels.

Total expenditure on originated content (first-run transmissions and repeats) across its TV channels and online services was £492 million in 2021, after rising by £122 million year-on-year, a 33% increase. This figure exactly matches the 2019 level.

Investment in originations on the main channel – which attracts the biggest audiences and correspondingly accounts for the large majority of Channel 4's content budget – was £438 million (89% of the total). After rising by £101 million year-on-year (a 30% jump), it now exceeds 2019's level by £1 million.

Beyond the main channel, £42 million was spent on original content for the digital channels, £13 million more than in 2020 (a 48% rise). Spend on digital media content (including websites and cross-platform content) trebled year-on-year from £4 million to £12 million in 2021, its joint-highest-ever level (previously achieved in 2010). Comparing investment in 2019 and 2021, the key difference is a rebalancing of funds from the digital TV channels to digital media, reflecting the new Future4 strategy (see page 20).

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

			Total
2021	438	42	492
2020	337	29	370

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

Source: Channel 4.

## Innovation through content (continued)

# 8.7hrs

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

## Up 38%

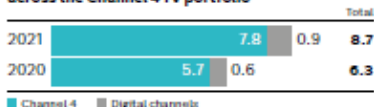
on last year

### Originated output across Channel 4 TV portfolio

This year, Channel 4's output recovered from the previous year's enforced fall in the volume of new commissioned programmes following the reduction in its 2020 content budget. In 2021, Channel 4 broadcast an average of 8.7 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 7.8 of these daily hours (89% of the total). There were a further 0.9 hours on the digital channels.

The volume of first-run originations across the TV portfolio rose by a substantial 38% year-on-year, by far the largest annual increase since this metric was first reported in 2008. Hours on the main channel were up by 37% and those on the digital channels rose by 65%. Overall, the volume of first-run originations not only offset the declines in 2020 but also the previous three years' reductions, taking the total to the highest since 2016.

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



Source: Channel 4.

# 3,171hrs

of first-run originations across the portfolio

## Up 39%

on last year

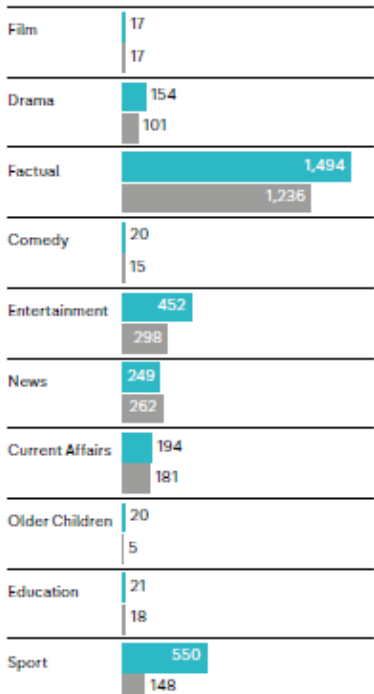
### Volume of first-run originations by genre

Channel 4 broadcast 3,171 hours of first-run originated programming across its TV portfolio (main channel and digital channels) in 2021, more than overturning the enforced reductions in 2020 with the highest level since 2016. After dropping by almost 600 hours in 2020, the 2021 total rose by 890 hours year-on-year, a jump of 39%.

Volumes were up for most genres, the exceptions being Film (which was level year-on-year) and News (down by 5%, as the 2020 total was boosted by extended editions of *Channel 4 News* when there were major developments relating to Covid-19).

With Channel 4 able to invest broadly across the whole schedule in 2021, there were big increases in many genres. The volume of programming rose by more than 100 hours in three genres: Entertainment was up by 154 hours (a 52% rise), Factual increased by 258 hours (a 21% rise) and Sport was up by 402 hours (a 271% jump), the latter in large part due to coverage of the delayed Tokyo 2020 Paralympic Games. Other notable rises – of more than 50% – were Drama (52% up) and programmes for older children (this rose by 328%, though in absolute terms the numbers are small: an increase from 5 to 20 hours).

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



Source: Channel 4.

## Innovation through content (continued)

### £427m

investment in first-run external UK commissions on the main channel in 2021

### Up 30%

on last year

#### Broadcasters' investment in the production sector

Channel 4 sources 100% of its original programming from external suppliers. An intrinsic part of its operating model, this maximises the benefits of its content investment to the UK's independent production sector.

Channel 4's investment in first-run originations from external suppliers across its TV portfolio bounced back in 2021. On the main channel, spend on external suppliers was £427 million, £98 million more than in 2020, equivalent to an increase of 30%. 48% of this was spent on qualifying independent production companies. A further £40 million was spent on the digital TV channels, 45% more than in 2020 (an increase of £13 million). Channel 4's total investment in first-run originations from external suppliers across its TV portfolio was £467 million, a year-on-year increase of £111 million (up 31%).

Following this year's increases, investment on the main channel in 2021 was just £5 million below 2019's pre-Covid-19 level (£427 million vs £432 million). Across the portfolio, spend was £16 million below the 2019 level.

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

			Total
2021	427	40	467
2020	329	27	356

Main channel Digital channels

Source: Channel 4.

Output from suppliers based outside London:

### 66%

of first-run originated programme hours

### Up 8pts

on last year

#### Investment in the Nations and Regions (main channel)

In 2021, Channel 4 delivered its highest ever figures for the proportion of content sourced from the Nations and Regions in both volume and spend terms, with substantial year-on-year increases.

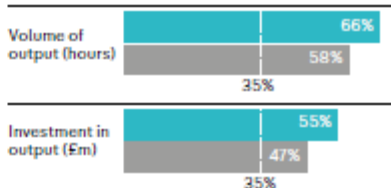
It sourced 66% of the hours of first-run originated programmes on the main channel from suppliers based in the Nations and Regions. This is eight percentage points more than in 2020 and beats by seven points the previous peak level of 59% in 2018.

As a proportion of spend, 55% of its expenditure on first-run originated programming was sourced from suppliers in the Nations and Regions. This is also eight percentage points more than the corresponding figure in 2020, which itself was a then-record proportion of investment.

The big increases in 2021 are due in part to the inclusion this year of some content that was originally planned for transmission in 2020, including coverage of the delayed Tokyo Paralympic Games (the production of which was based in the South of England) and drama *It's A Sin* (North of England).

Both of the figures for 2021 exceed by significant margins the 35% licence quotas set by Ofcom.

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



2021 2020 Quota

Source: Channel 4.

## Innovation through content (continued)

# 294

companies working with Channel 4 portfolio across TV, film and digital media in 2021, of which 164 were independent TV

### Up 7%

on last year

#### Diversity of supply base

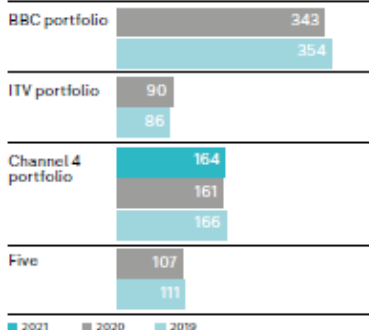
Channel 4 continues to punch above its weight in terms of the extent of its relationships with independent TV production companies ('indies'). In 2020, the most recent year that comparative TV industry data is available, Channel 4 worked with 161 indies across its TV channels. Amongst the PSBs, this was second only to the BBC (343 indies), whose TV portfolio content budget of £1.5 billion in 2020/21 (according to its Annual Plan) is more than double Channel 4's. While ITV's content budget is also much larger than Channel 4's, it only worked with 90 indies.

As Channel 4's content investment levels recovered this year, it was able to expand its supplier base further in 2021 (data is not available for other broadcasters). Across the year, a total of 294 companies supplied the TV, film and digital media content that it commissioned, 20 more than in 2020 (a 7% increase) and the largest number since 2017. In TV, this included 164 indies, three more than 2020's figure (of 161, as used for the PSB comparisons above), a 2% rise. A further 33 non-independent producers gave a total TV supply base of 197 companies (two more than in 2020, a 1% rise).

Looking beyond TV, the biggest year-on-year change was in digital media, reflecting the rollout of the new Future4 strategy and in particular the growth in commissions from 4Studio, our new in-house digital content studio. Channel 4 worked with 55 online suppliers, the highest number since 2017, following a 175% jump compared to 2020 (when the total was just 20). Channel 4 worked with 77 film companies in 2021, two fewer than in 2020 (a 3% decline).

Across all types of content, 38 companies were new suppliers to Channel 4, one more than in 2020. 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 294 companies cited above.

#### Number of independent TV production companies supplying the PSBs



Note: 2021 data not available for other PSB channels.  
Source: Channel 4, Broadcast (other channels).

## Innovation through content (continued)

Output from suppliers  
based in the Nations:

**10%**

of first-run originated  
programme hours

**Down 2pts**

on last year

**9%**

of the value of  
first-run originations

**Equal**

with last year

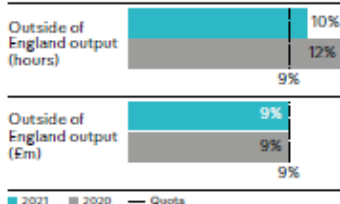
### Investment in the Nations (main channel)

In 2021, programmes commissioned in the Nations accounted for 10% of total hours of first-run originations on the main channel. This is one percentage point above the new Ofcom quota (which rose from its level of 3% up to 2019 to 9% from 2020 onwards). After hitting a record level of 12% in 2020, the proportion of Nations commissions fell back, by two points, this year. Looking at the individual Nations, Scotland accounted for 5.4% of commissions this year, Wales 4.2% and Northern Ireland 0.2% (giving a total of 9.8% to one decimal point).

Turning to expenditure, the Nations represented 9% of the total budget for first-run originated programmes on the main channel. This is level with the 2020 figure and is the joint-highest figure achieved on this metric. It comprised 5.8% spent in Scotland, 2.8% in Wales and 0.8% in Northern Ireland – totalling 9.4% to one decimal place, just above the new Ofcom quota.

Commissions from the Nations provided 253 hours of first-run programming on the main channel in 2020, 21% more than in 2020. The reason why the percentage of Nations commissions fell year-on-year, despite the large rise in volume, is due to the large increase in overall commissions in 2021, with a slightly disproportionate share of the increase accounted for by commissions from England. Total spend in the Nations rose even faster than the increase in volume, by 38%, to £36.6 million (up by £10.0 million). This mostly translated into increases in volume and spend for each individual Nation. In Scotland, the volume of commissions rose by 36% to 139 hours, with investment rising by 29% to £22.7 million. In Wales, commissions were up 41% to 108 hours, while investment rose by 75% to £10.7 million. In Northern Ireland, there were only six hours of commissions this year (80% down), but this still represented a 14% increase in investment to £3.1 million, due primarily to the high production values of Brian and Domhnall Gleeson's new peak comedy *Frank of Ireland*.

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



■ 2021 ■ 2020 — Quota

Source: Channel 4.

## Innovation through content (continued)

### £222m

spent on production  
companies based  
outside London

### Up 57%

on last year

### £38m

spent on production  
companies in  
the Nations

### Up 36%

on last year

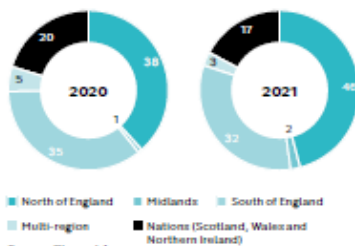
#### Spend by region across the Channel 4 TV portfolio

In 2021, Channel 4 spent a record £222 million across its TV portfolio on content commissioned from production companies based in the Nations and the English Regions. This represents a year-on-year increase of 57% (an £81 million rise) and is £33 million more than the previous highest out-of-London spend of £189 million in 2017.

Expenditure on content from production companies in the Nations was £38 million this year, a 36% increase year-on-year (a £10 million rise). Scotland accounted for the largest share of this, with a spend of £23.5 million, followed by £10.8 million in Wales and £3.5 million in Northern Ireland. TV portfolio spend on commissions from the English Regions jumped by a substantial 67% to £178 million (a £72 million rise), and a further £6.9 million was spent on multi-region content (a small decline of 4%, or £0.3 million). Setting aside multi-region, spend rose year-on-year in all the individual Nations and English Regions. The largest changes were in the Midlands (up 149%), North of England (up 88%) and Wales (up 76%).

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

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



# Making an impact

With Channel 4's 2021 schedule recovering from last year's curtailments in investment and production, we increased our overall average lead over the other main PSBs across 12 tracker statements linked to our public service remit this year (four are presented in this section and eight in the other sections). These benchmark our main channel's reputation against the other main PSB channels, with the results focusing on Channel 4's leads over the other PSBs' average scores. Averaged across the 12 statements, Channel 4's lead over the average for the other main PSB channels was 24 percentage points – one point more than in 2020 and in the middle of the 21-27-point range achieved over the last decade.

There were large increases in the amount of specifically diverse content on the main channel, volumes of which rose to amongst their highest ever levels, in part due to coverage of the Tokyo Paralympic Games. Conversely, the amount of international-themed programming this year remained affected by Covid-19-related travel restrictions and conditions in other countries that limited our ability to commission new shows. Still, the Film4 channel was able to strengthen its contribution to diverse voices, showing more films from around the world (outside the US) than at any point in the last decade.



The Money Maker

Football's Gambling Addiction



Murder Island



## Making an impact (continued)

### 43hrs

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

### Down 44%

on last year

### 162hrs

of first-run foreign-language content across the portfolio

### Down 11%

on last year

#### Range of international programming

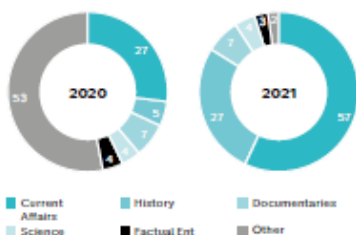
Channel 4's coverage of international themes extends across a range of genres in the schedule. In 2021, excluding *Channel 4 News*, there were 43 hours of first-run programmes with an international theme on the main channel and in the dedicated cross-platform international documentary strand, *True Stories*. There were two hours of *True Stories on Film* in 2021 (the same as in 2020). The total international volume is 44% below last year's figure of 76 hours (33 fewer hours) and is the lowest figure for this metric in the last decade. The decline was due in part to the presence in 2020 of a 20-part lifestyle series, *Work on the Wild Side*, which did not return this year. In addition, some international-themed programming that would have been commissioned in 2020 for transmission in 2021, such as *Travel Man*, was postponed due to travel restrictions relating to Covid-19.

This year, *Current Affairs* was the biggest single genre, with 57% of total first-run hours of international programming (excluding news), up from 27% in 2020. The percentage jump was mostly due to the genre representing a bigger share of a smaller total: in volume terms, international *Current Affairs* output rose by three hours year-on-year. Alongside the long-running *Unreported World* and *Dispatches* strands, major series this year included *The Man Putin Couldn't Kill* and the harrowing *Taken: Hunting the Sex Traffickers*. The second-biggest genre was *History*, with 27% of the total (up from 5% in 2020). Highlights this year included *Bin Laden: The Road to 9/11* and *Empire State of Mind*.

Channel 4's acquired TV programmes and films also include diverse content from around the world, including the Walter Presents service's curated foreign-language TV shows. This year, the main channel showed 12 series premieres, with the launch of *Monster* attracting 360,000 viewers. A further five series were launched on *More4*, with the second series of *Arctic Murders* averaging 331,000 viewers – the highest figure for any Walter Presents series on the channel since 2018. Taken together, the Walter Presents-branded foreign-language dramas shown on the main channel and *More4* reached 6.5 million viewers in 2021 (10.7% of the TV population). This was 7% down year-on-year, in part due to fewer programme launches, but was offset by a 7% increase in views of Walter Presents content on *All 4*, which rose to 47 million.

There were 162 hours of first-run foreign-language TV shows and films across the TV portfolio, 11% less than in 2020 (21 fewer hours). The *Film4* channel showed 945 hours of films from outside the UK and US (this includes first-runs and repeats, and films shown both in the English language and in foreign languages). This total grew slightly year-on-year, by 2% (equivalent to 18 additional hours), to its highest level over the last decade.

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



Source: Channel 4.

## Making an impact (continued)

### 341hrs

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

### Up 257%

on last year

#### Diversity output on the main channel

While Channel 4 seeks to reflect the diversity of the UK across its entire output it also commissions programmes whose subject matter specifically covers diversity issues. The volume of specifically diverse content on the main channel bounced back in 2021 to amongst its highest ever levels. There were 403 hours of originated programmes on the main channel that included subject matter covering issues relating to religion, multiculturalism, disability and sexuality. Of these originated hours, 341 were first-run programmes (the others being repeats), and 74 of the first-run hours were in peak-time (i.e. between 6pm and 10.30pm, following Ofcom's definition).

These three numbers are all up year-on-year by significant margins, due in large part to Channel 4's extensive coverage of the Paralympic Games (postponed from 2020), which included live coverage from Tokyo through the day (and night) along with daily evening editions of *The Last Leg* and the Paralympics: *Gold Rush* highlights show in peak-time. The 403 hours of originated programmes covering diversity issues in 2021 was more than double the figure for 2020 (up 119%) and is the second-highest figure since this metric was first reported in 2008, behind only the 424 hours in 2012, when Channel 4 broadcast the London Paralympic Games. The volume of first-run programming rose even more in 2021: the 341 hours is more than treble the 2020 figure (a 257% rise) and is the highest level since this metric was first reported. With most of the coverage of the Paralympic Games outside peak hours, the peak-time figure of 74 hours rose the least but was still up by 41%.

Away from the Paralympic Games, highlights in 2021 included Russell T Davies' award-winning 80s-set drama about the AIDS crisis, *It's a Sin*, and Olympic champion Tom Daley's heartfelt message of inclusion and acceptance in this year's *Alternative Christmas Message* (sexuality); the return of the social media-themed reality show *The Circle* and school drama *Ackley Bridge* (multiculturalism); and comedian Rosie Jones' *Trip Hazard: My Great British Adventure* (disability).

#### Total hours of programming covering diversity issues shown on the main channel (2021 with trends relative to 2020)



Source: Channel 4.

# Film

---

**40%**

from outside the US

**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. In 2021, the share of the schedule devoted to non-Hollywood-studio titles rose slightly to 40.1%, its highest figure for more than a decade (the rounded figure of 40% was the same as the corresponding 2020 figure).

---

**21%**

from the UK

**Equal**

with last year

British films – including projects that were co-funded by Film4 Productions – accounted for 20.5% of total programming hours in the schedule in 2021, the same as the 2020 figure, which itself had risen by 5.1 percentage points year-on-year due to an increase in British classics playing in weekday daytimes and more Film4 Productions playing throughout the schedule. With the share accounted for by other non-US films increasing slightly, by 0.3 points to 19.6%, a total of 40.1% of hours of output were devoted to films from countries other than the US. This total is 0.3 points up year-on-year (2020: 39.8%) and is the highest share of non-US programming on the Film4 channel since 2009 (when it was 40.3%). (Note that this figure includes films that were co-productions between the US and other countries; in 2021, 12.5% of output on the channel comprised US/non-US co-productions, 2.5 points more than in 2020.)

Film4 continued to offer strong and complementary programming around significant historical and social landmarks throughout the year, scheduling across both the linear channel and the film pages on All 4. The channel played a role in the Black and Proud day on Channel 4 in September by scheduling relevant films that were then available to support the themed offering on All 4. This programming continued into October to recognise Black History Month. Film4 also marked International Women's Day with a line-up of inspiring and empowering films, including *Belle* and *Hidden Figures*.

The channel joined in with the BFI's celebration of director Mike Leigh's career by curating a selection of films and shorts, old and new – this was also represented on All 4, providing a wider audience the opportunity to enjoy Leigh's work.

# News and Current Affairs

## 359

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

## Down 8%

on last year

### Commitment to long-form journalism

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

In 2021, Channel 4's main channel showed 359 long-form News and Current Affairs programmes in peak-time (between 6pm and 10.30pm, as defined by Ofcom). This is substantially more than the corresponding combined total for the other main PSB channels (173 programmes between them).

Compared with 2020, there were reductions in the number of long-form News and Current Affairs programmes on all the main PSB channels this year, but Channel 4's peak-time lead over the combined totals of the other broadcasters still rose, from 144 in 2020 to 186 in 2021.

While its decline was lower than for the other PSBs, Channel 4's own total fell by 8% year-on-year, for two reasons. First, there were more extended editions of *Channel 4 News* in 2020 on days when shorter news bulletins are usually shown (such as Fridays and weekends), taking their length beyond the 45-minute threshold used for this metric. And second, more Current Affairs programmes covering Covid-19 were shown in 2020 (there were 25 that year, compared with nine in 2021).

When the late evening period (through to midnight) is also taken into account, the number of 'long-form' News and Current Affairs programmes on Channel 4 rose to 425. This was just three short of the 2020 total (a year-on-year decline of less than 1%), with the decline in peak-time titles in 2021 offset by a large increase in the number of Current Affairs programmes shown in the post-peak period. Channel 4 maintained a commanding lead over other channels over this longer period, which covers the times when BBC Two's *Newsnight* is usually shown. Channel 4's total was considerably greater than that for any of the other main PSB channels, with a bigger gap than last year over second-placed BBC Two, which broadcast 263 'long-form' News and Current Affairs programmes (only 14 of which were shown in peak-time). That put BBC Two 162 titles behind Channel 4 this year, versus a 151-title difference in 2020.

### 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
BBC1	2021	73	81	154
	2020	84	82	166
BBC2	2021	14	249	263
	2020	23	254	277
ITV1	2021	66	47	113
	2020	99	48	147
Channel 4	2021	359	66	425
	2020	389	39	428
Five	2021	20	0	20
	2020	39	5	44

■ Peak-time ■ Off-peak

Source: Channel 4, BARB (other channels).

# Different voices

## 21pts

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

### Up 1pt

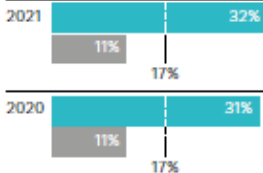
on last year

#### Channel reputations – shows different kinds of cultures and opinions

In 2021, Channel 4 reinforced its reputation as being best for showing different kinds of cultures and opinions. 32% of respondents selected the main channel, giving it a lead of 21 percentage points over the average for the other main PSB channels, while its lead over the next-highest-scoring channel, BBC One, was 15 points.

These three scores all increased year-on-year. The proportion of people selecting the main channel, its lead over the average for the other main PSB channels, and its lead over the next-highest-scoring channel were all up by one percentage point. This metric has also been stable over the longer term, with Channel 4's average lead over other channels consistently remaining within a narrow 20-24-point range over the last decade.

#### Shows different kinds of cultures and opinions



■ Channel 4 ■ Average for other main PSB channels (BBC1, BBC2, ITV1 and Five)  
— Score for next-highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

## 22pts

lead over average for other channels for challenging prejudice

### Up 2pts

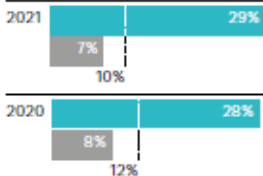
on last year

#### Channel reputations – challenges prejudice

In a year when divisions between different groups in society were increasingly exposed, Channel 4 strengthened its reputation for challenging prejudice. Its main channel was chosen by 29% of respondents as the one they most associate with challenging prejudice in 2021, giving it a 22-percentage-point lead over the average score for the other main PSB channels, and a 19-point lead over the next-highest-scoring channel, BBC One.

These three scores were all up year-on-year. The proportion of respondents selecting Channel 4 rose by one percentage point, its lead over the average for the other main PSB channels rose by two points, and its lead over the next-highest-scoring channel increased by three points. This metric has been stable over the longer term, with Channel 4's average lead over other channels remaining within a 20-27-point range over the last decade (and within a narrower 20-23-point range for seven of the last ten years).

#### Challenges prejudice



■ Channel 4 ■ Average for other main PSB channels (BBC1, BBC2, ITV1 and Five)  
— Score for next-highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

## Different voices (continued)

### 20pts

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

### Down 1pt

on last year

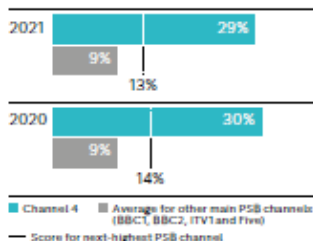
#### Channel reputations – shows the viewpoints of minority groups in society

Channel 4 has a longstanding reputation for giving a voice to diverse groups, including some that are under-represented on TV. In 2021, it remained by a substantial margin the PSB channel regarded by viewers as being the best for showing the viewpoints of minority groups in society. 29% of viewers selected Channel 4's main channel as being the best for showing the viewpoints of minority groups in society. This translated to a lead of 20 percentage points over the average for the other channels, and a 16-point lead over the next-highest-scoring channel, BBC One.

There were some marginal year-on-year declines in these scores: the proportion of people selecting the main channel and its lead over the average of the other PSB channels both fell by one percentage point, while its lead over the next-highest-scoring PSB channel held steady. Still, Channel 4's 29% score remained more than double that of the next-highest-scoring channel (of 13%). And this score has been stable over the longer term, sitting in a narrow 29%-34% range over the last decade, while its average lead over other channels has remained in a 20-27-point range over this period.

Channel 4 also outperformed the other PSBs by large margins as a platform for the viewpoints of individual minority groups in 2021, in all cases matching or improving on its scores from the previous year. The main channel was selected by 28% of viewers as being best for showing the viewpoints of different ethnic groups in the UK (the same as in 2020), 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 (2020: 31%), 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 (2020: 25%), 19 points above the average of the other PSB channels.

#### Shows the viewpoints of minority groups in society



Source: Ipsos MORI commissioned by Channel 4.

### 27pts

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

### Up 1pt

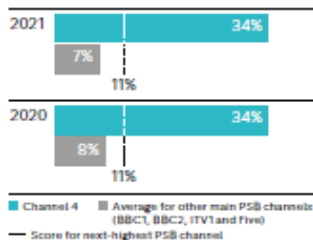
on last year

#### Channel reputations – home for alternative voices

Channel 4 maintained its position as a mainstream platform for alternative voices in 2021. For the fourth consecutive year, the main channel was selected by 34% of respondents as being the home for alternative voices. Its lead over the average for the other main PSB channels was a substantial 27 percentage points, while it had a 23-point lead over the proportion selecting the next-highest-scoring channel (Channel 5).

There was little year-on-year variation in this metric, which remains stable. Channel 4's own score and its lead over the next-highest-scoring channel were level with the corresponding 2020 figures, while its lead over the average for the other main PSB channels rose by one percentage point. Over the nine years for which this metric has been reported, Channel 4's average lead over other channels has remained in the narrow range of 26-31 points.

#### Home for alternative voices

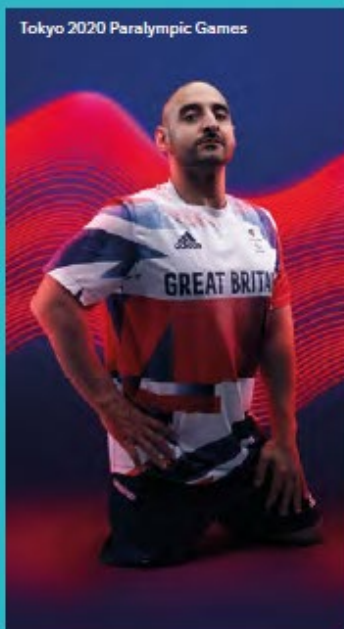


Source: Ipsos MORI commissioned by Channel 4.

# Distinctive approaches

With the volume and range of programming returning to normal levels in 2021, viewers appreciated the higher level of distinctiveness in Channel 4's schedules. Our performance on six of the seven tracker statements reported in this section either improved or held steady year-on-year, and there was also an increase in the proportion of viewers who said that Channel 4's Factual (and other) programming inspired change in their lives.

Our News and Current Affairs programmes – which came to the fore in 2020, when viewers turned to Channel 4 in increased numbers for information – broadly maintained their distinctiveness in 2021. Across five reputational trackers looking at audience perceptions of their distinctive approach, the *Dispatches* and *Unreported World* strands were jointly the best-performing Current Affairs shows on the main PSB channels for the second year running. When TV audiences were asked about the independence of the news programmes that they watch, Channel 4's score for independence from the influence of big businesses increased but there was a slight decline in its score for independence from the government; both scores remained higher than those for other broadcasters.



Empire State of Mind

## Distinctive approaches (continued)

### 15pts

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

### Up 2pts

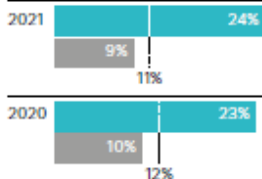
on last year

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

Channel 4 achieved amongst its highest-ever scores for making people think about things in new and different ways in 2021. 24% of respondents selected the main channel on this metric, one percentage point up year-on-year and just one point short of Channel 4's peak score of 25% (achieved in 2017 and 2019).

Channel 4's lead over the average for the other main PSB channels was 15 percentage points. This is two points above the 2020 figure and just one point below the highest-ever lead of 16 points (achieved in 2017). Finally, Channel 4's lead over the next-highest-scoring channel, BBC One, was 13 points. This is again two points above the 2020 figure and is the joint-highest-ever lead on this metric (also achieved in 2016 and 2017).

#### Makes me think about things in new and different ways



■ Channel 4 ■ Average for other main PSB channels (BBC1, BBC2, ITV1 and Five)  
— Score for next-highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

### 30pts

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

### Equal

with last year

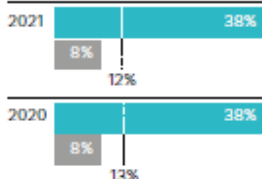
#### Channel reputations – tackles issues other channels wouldn't

Channel 4 maintained its strong reputation for being best for tackling issues that other channels wouldn't in 2021. 38% of respondents selected the main channel on this metric – remarkably, this is more than three times the figure achieved by the next-highest-scoring channel, Channel 5 (chosen by just 12% of respondents). This meant that Channel 4 had a 26-percentage-point lead over the next-highest-scoring channel.

The other main PSB channels were chosen by 8% of people on average, giving Channel 4's main channel a 30-point lead over them. This metric remains one of two reputational statements for which Channel 4 has maintained an average lead over the other PSB channels of at least 30% for the last five years (the other being "Takes risks with programmes that others wouldn't" on page 123).

There was little year-on-year variation in this metric. The proportion of respondents selecting Channel 4 and its average lead over other PSB channels both held steady, while its lead over the next-highest-scoring channel increased by one percentage point.

#### Tackles issues other channels wouldn't



■ Channel 4 ■ Average for other main PSB channels (BBC1, BBC2, ITV1 and Five)  
— Score for next-highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

## Distinctive approaches (continued)

### 27pts

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

### Up 2pts

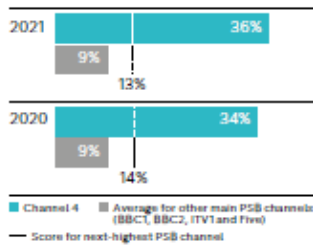
on last year

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

In what was already one of the highest-scoring statements, Channel 4 strengthened its reputation in 2021 for taking a different approach to subjects. 36% of people selected Channel 4's main channel as the one they most associate with taking a different approach to subjects compared with other channels, giving it substantial leads of 27 percentage points over the average for the other main PSB channels, and of 23 points over the next-highest-scoring channel, Channel 5.

All three of these figures increased 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 up by two percentage points. And its lead over the next-highest-scoring channel rose by three points. Looking over the longer term, Channel 4's average lead over other channels is at the upper end of the 19-29-point range it has occupied over the last decade.

#### Takes a different approach to subjects compared with other channels



### 149

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

### Down 10%

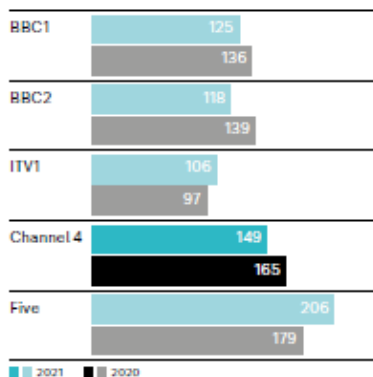
on last year

#### 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 each year. This year, while there was a decline in the number of new and one-off programmes in the evening schedules on Channel 4 (when audiences are highest), it still had clear leads over the BBC and ITV.

There were 149 new and one-off programmes on Channel 4's main channel between 6pm and midnight in 2021. This is more than corresponding figures for BBC One (125 programmes), BBC Two (118 programmes) and ITV (106 programmes). Of the main PSB channels, only Channel 5 showed more new and one-off programmes (206 titles), as it continued to refresh its schedule post-Big Brother. The number of new and one-off programmes in the evening schedules on Channel 4 fell by 10% year-on-year (16 fewer titles). This is due to the large number of one-off programmes related to Covid-19 shown in 2020 (more than 25 were shown that year, compared to fewer than ten in 2021).

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



## Distinctive approaches (continued)

### 32pts

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

#### Up 1pt

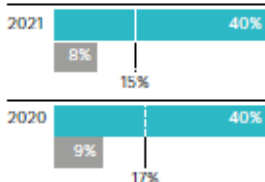
on last year

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

Channel 4's public remit requires it to take risks, and its success in delivering on this is reflected in its scores when respondents are asked which of the main PSB channels is best for taking risks with programmes that others wouldn't. The highest-scoring of any of the reputational statements, 40% of respondents selected Channel 4's main channel on this metric in 2021, level with its 2020 score.

Channel 4 improved its leads over the other PSB channels this year. It had a substantial 32-percentage-point lead over the average of the other channels, one point up year-on-year. Its lead over the next-highest-scoring channel, Channel 5, was 25 points, an increase of two points relative to the 2020 lead.

#### Takes risks with programmes that others wouldn't



■ Channel 4 ■ Average for other main PSB channels (BBC1, BBC2, ITV1 and Five)  
— Score for next-highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

### 26pts

lead over average for other channels for being experimental

#### Up 2pts

on last year

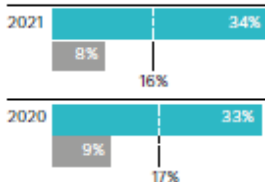
#### Channel reputations – is experimental

In 2021, 34% of respondents selected Channel 4's main channel as the PSB channel that they most associate with being experimental, giving it significant leads over the other channels. The proportion of people choosing the main channel was 26 percentage points above the average for the other main PSB channels. And Channel 4's score was more than double that of the next-highest-scoring channel, Channel 5 (chosen by 16% of people), corresponding to a lead over Channel 5 of 18 points.

Channel 4's scores on this metric recovered ground lost in 2020. The proportion of respondents selecting Channel 4 in 2021 rose by one percentage point year-on-year, to just one point short of the level reached in 2018 and 2019 (35% of respondents). Moreover, its lead over the average for the other main PSB channels was up by two points in 2021, matching the level achieved in 2018 and 2019. And its lead over the next-highest-scoring channel also rose by two points, to its highest level since 2017 (when the lead was 20 points).

This metric has been stable over the longer term, with Channel 4's average leads over other channels sitting within a narrow range of 24 to 29 percentage points over the last decade.

#### Is experimental



■ Channel 4 ■ Average for other main PSB channels (BBC1, BBC2, ITV1 and Five)  
— Score for next-highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

## 26pts

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

## Equal

with last year

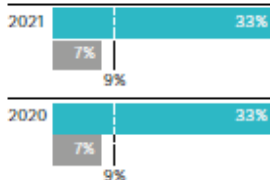
### Channel reputations – is best for modern independent film

In 2021, 33% of respondents picked Channel 4's main channel as being best for modern independent film, level with the 2020 score and just one percentage point below the highest-ever score of 34% achieved in 2013.

Channel 4's leads over the other PSB channels also held steady this year, at levels at, or close to, their all-time peaks. Its lead over the average for the other main PSB channels was 26 percentage points, the same as in 2020 and its joint-highest-ever score. And its lead over the next-highest-scoring channel, ITV, was 24 points, again the same as in 2020, and just one point below the 25-point peak achieved in 2016.

Amongst the top-rated premieres on Channel 4 this year, Film4-produced *The Little Stranger* captured 1.2 million viewers in February. Meanwhile, Steve McQueen's thriller *Widows* pulled in 784,000 viewers; its 6.4% share amongst ethnically diverse audiences was up an impressive 54% compared to the slot average for this group.

### Is best for modern independent film



■ Channel 4 ■ Average for other main PSB channels (BBC1, BBC2, ITV1 and Five)

— Score for next-highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

# Factual

## 19pts

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

## Down 2pts

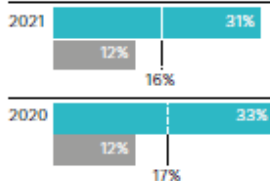
on last year

### Channel reputations – is best for documentaries that present alternative views

Channel 4 takes a different approach than other broadcasters with its documentary programming, differentiating it through its subject matter and approach, with a particular focus on offering alternative viewpoints less frequently seen on television. In 2021, 31% of respondents selected the main channel for being best for documentaries that present alternative views, giving it a lead of 19 percentage points over the average for the other main PSB channels, and a 15-point lead over the next-highest-scoring channel, BBC One.

This was one of just two audience tracker statements for which Channel 4's own score fell back slightly year-on-year: the proportion of respondents selecting the main channel decreased by two percentage points. Its lead over the average for the other main PSB channels was also down by two points, while its lead over the next-highest-scoring channel dropped by one point. Nonetheless, the proportion of people selecting Channel 4 was still almost double the 16% of respondents that chose the next-highest-scoring channel. And looking over the longer term, Channel 4's average lead over other channels remains at the upper end of the 10-24-point range it has occupied over the last decade.

### Is best for documentaries that present alternative views



■ Channel 4 ■ Average for other main PSB channels (BBC1, BBC2, ITV1 and Five)  
— Score for next-highest PSB channel

Source: Ipsos MORI commissioned by Channel 4.

## Factual (continued)

# 70%

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

## Up 1pt

on last year

### Inspiring change through Factual programming

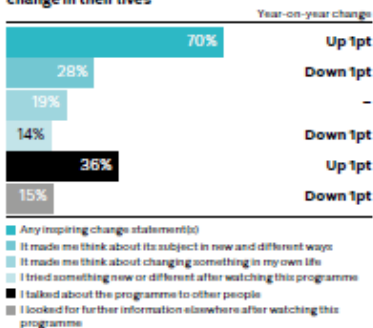
Channel 4's programming, especially in Factual, seeks to inspire people to make changes in their lives and encourages them to think about things in new and different ways. Some programmes lead to active engagement, e.g. by encouraging people to talk to others about their subject matter, to seek out further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

Whereas in 2020 many of the Factual programmes responded to the first year of Covid-19 and lockdowns, the 2021 slate was more varied in nature. The list also includes programmes in other genres that had particular potential to be inspiring, such as dramas *It's A Sin* and *Help*, both of which were based on actual recent or historical events.

Across the whole slate of Factual and other inspiring titles (comprising over 40 programmes and series), 70% of viewers said that Channel 4's programming inspired them in one or more ways this year. This score is one percentage point more than in 2020 and is at the upper end of the 63% to 72% range it has occupied over the last decade.

The best-performing individual programme across all the statements this year was *It's A Sin* – Russell T Davies' powerful drama about a group of friends confronting the AIDS crisis in the 1980s – with a score of 88%. This programme also scored highest for people who talked about the programme to other people (69% of viewers). Other top-scoring programmes on individual statements included *Davina McCall: Sex, Myths and the Menopause* (it made 51% of viewers think about the subject in new and different ways) and *21 Day Body Turnaround with Michael Mosley* (46% of viewers thought about changing something in their own lives).

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



Source: Ipsos MORI commissioned by Channel 4.

# News and Current Affairs

## 80%

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

## Down 1pt

on last year

### Independence of TV news

At a time when growing numbers of people get much of their news from unreliable sources on social media, while declines in political trust risk undermining democracy in the UK, the impartial and authoritative news services provided by mainstream broadcasters are more important than ever. It is of great pride to us that Channel 4 News continues to be the most highly regarded news provider of the main UK broadcasters, in terms of its perceived independence from the government and from the influence of big businesses.

80% of regular viewers to Channel 4 News regarded it as being independent from the government in 2021. This is eight percentage points more than the average for the other main news programmes (those from the other public service broadcasters and Sky News) and four points above the corresponding figure for the next-highest-scoring news programme.

75% of regular viewers to Channel 4 News agreed that it is independent from the influence of big businesses, eight percentage points more than the average for the other main news programmes and three points more than the next-highest-scoring news programme (5 News).

Year-on-year variations in these scores were small, within the range of  $\pm 2$  percentage points; there was a slight decline in Channel 4's own score for independence from the government and an increase in its score for independence from the influence of big businesses. For independence from the government, the absolute proportion of respondents selecting Channel 4 News in 2021 fell by one percentage point (2020: 81%), while its lead over the average for the other main news programmes and over the next-highest-scoring news programme (ITV News in 2020; Sky News in 2021) both fell by two points. Turning to independence from the influence of big businesses, the absolute proportion of respondents selecting Channel 4 News in 2021 rose by two points (2020: 73%). Its lead over the average for the other main news programmes held steady, while its lead over the next-highest-scoring news programme (BBC News in 2020; 5 News in 2021) fell by two points.

### Percentage of regular viewers to TV news programmes in 2021 who agree with the following statements:

It is independent from the government		Year-on-year change
BBC News	64%	0pt
ITV News	74%	-1pt
Channel 4 News	80%	-1pt
5 News	75%	2pt
Sky News	76%	2pt
It is independent from the influence of big business		Year-on-year change
BBC News	70%	2pt
ITV News	63%	0pt
Channel 4 News	75%	2pt
5 News	72%	4pt
Sky News	64%	3pt

Source: Ipsos MORI commissioned by Channel 4.

## News and Current Affairs (continued)

# 45%

average programme reputation statement for *Unreported World*

# Equal

with last year

# 45%

average programme reputation statement for *Dispatches*

# Equal

with last year

### Programme reputation statements – Current Affairs

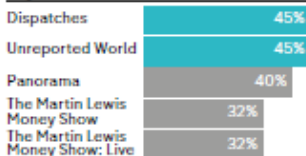
Channel 4's Current Affairs strands, *Dispatches* and *Unreported World*, differ from other public service broadcasters' Current Affairs programmes in terms of their approach and subject matter – in particular, their emphasis on investigative journalism, challenging viewers to see things differently, giving a voice to those who might not otherwise be heard and (especially in *Unreported World*) providing a window on the wider world. One-hour Current Affairs specials deliver additional depth for important stories.

Channel 4 tracks five reputational statements in these areas looking at audience perceptions of the main Current Affairs shows – both regular strands and one-off programmes – on the main PSB channels. With average scores of 45% across the five statements, *Dispatches* and *Unreported World* were jointly the best-performing Current Affairs shows on the main PSB channels in 2021, for the second year running (both strands achieved the same score in 2020). Their nearest competitor was BBC One's *Panorama*, in third place with a 40% score. One or other of *Dispatches* and *Unreported World* was the best-performing Current Affairs show for all five of the reputational statements.

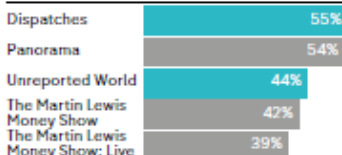
*Dispatches* was the most consistent show, ranking first or second for all five statements: it scored higher than any other Current Affairs show for "uncovering the truth" (for which it was selected by 55% of respondents) and "covering things in great depth" (51% of respondents). It came in second place for "giving a voice to groups that aren't always heard in mainstream media", "making me see something in a different light" and "showing stories about parts of the world you would rarely see on British TV" (with 40% of respondents for all three statements). With *Dispatches*' average score across the five reputational statements holding steady this year, it remained at what is its joint-highest level over the last decade.

*Unreported World* was the highest-scoring Current Affairs show for three statements: "showing stories about parts of the world you would rarely see on British TV" (51% of respondents), "giving a voice to groups that aren't always heard in mainstream media" (44% of respondents) and "making me see something in a different light" (41% of respondents). It was ranked third (behind *Dispatches* and *Panorama*) for "covering things in great depth" (45% of respondents) and "uncovering the truth" (44% of respondents). Its average score across the five reputational statements in 2021 was its joint-highest since 2016 (when it was 47%).

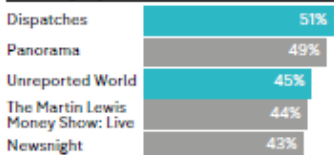
### Programme reputation



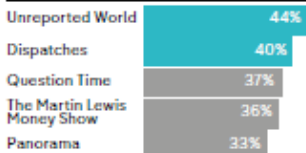
### Uncovers the truth



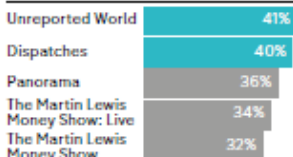
### Covers things in great depth



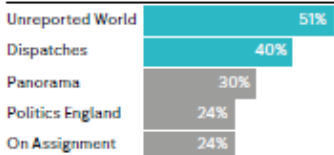
### Gives a voice to groups that aren't always heard in mainstream media



### Made me see something in a different light



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



■ Channel 4 show ■ Other broadcasters' shows

Source: Ipsos MORI commissioned by Channel 4.