



Channel 4 Corporation Remit

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1. Executive Summary

This research study was commissioned by Ofcom to explore the extent to which audiences in the UK feel the Channel 4 Corporation (C4C) is meeting the remit requirements of the Corporation as a whole¹. Additionally, the research explored the extent to which UK audiences feel Channel 4, as a licensed public service channel, is meeting its specific remit. The findings from the study have been used to inform Ofcom's assessment² of the Channel 4 Corporation's Statement.

The research included qualitative and quantitative stages. The deliberative, qualitative component focused on Channel 4's core target audience of 16-34 year olds who had watched Channel 4 in the last six months. The quantitative survey was conducted face-to-face among a nationally representative sample of all adults aged 16+ in the UK.

There was an additional children's online survey among 10-14 year olds who watch any Channel 4 Corporation service. The main purpose of the online survey among 10-14 year olds was specifically to assess the delivery of Channel 4 Corporation's duty to appeal to older children.

Overall, audiences feel that the Channel 4 Corporation is performing well against its remit

The consumer research provides evidence that the Channel 4 Corporation is considered to be performing well overall. Quantitatively, Channel 4 Corporation is performing in line with audience expectations throughout its media content duties with the majority of viewers (around seven in ten) rating its performance to be in line with perceived importance³. This represents a key measure of success across all of its duties. This is supported by the qualitative research which also found that the Channel 4 Corporation is considered to be performing well overall, and particularly well in virtually all those areas that are considered more important, particularly to wider society, such as diversity and news.

There were nuances within the findings that identify some potential areas for improvement. Overall, the Channel 4 Corporation was considered to be doing well delivering content for young adults, but the main area of perceived under-delivery among adults was C4C providing programmes of appeal to older children. The qualitative research revealed that some participants, parents in particular, felt that this area was an important duty, but provision in this area was weak and there was a lack of bespoke content for children aged 10-14. This applied not only to C4C, but across the public service broadcasters (PSBs) more broadly.

These views contrasted with the opinions of regular C4C viewers aged 10-14 themselves, the majority of whom found C4C programming of strong appeal, offering programmes they like, for people their age.

One other area to note is a slight sense of Channel 4 Corporation being urban/London focused, particularly among younger viewers in lower socio-economic grades in the devolved nations of the

¹ Note: a sub-set of duties relevant to audiences was included in the research programme as not all of the duties were suitable for discussion (e.g. matters relating to supporting creative talent and issues of distribution were not discussed).

² Ofcom letter to Channel 4 Corporation on its Statement of Media Content Policy 2016 / 2017:
https://www.ofcom.org.uk/data/assets/pdf_file/0019/104095/Ofcom-letter-to-Channel-4-Corporation-on-its-Statement-of-Media-Content-Policy-2016-2017.pdf

³ Respondents were asked to rate both importance of and Channel 4 Corporation's performance on each of its duties using a ten-point scale for each. For comparison, scores were then grouped 1-4, 5-6, 7-10.

UK who felt there was a lack of positive representation of people and life in their own part of the UK.

General impressions of the Channel 4 Corporation are favourable

Most of the Channel 4 Corporation service brands have a clear image in viewers' minds. Channel 4 is recognised as the original brand, with an edgier, more risk-taking image than other PSBs, broadcasting content that can at times be challenging and controversial, but still enjoying fairly broad appeal.

E4 and 4Music appeal to younger viewers, while More4 is perceived as targeting a more mature audience. Film4 is perceived as somewhat traditional and it is felt to be losing out to subscription on-demand services such as Netflix. All 4 is compared favourably with other free-to-air on-demand services, although its change of identity from 4OD has left it light on image, while 4Seven is the least familiar Channel 4 Corporation brand.

Quantitatively, 42% of Channel 4 Corporation viewers gave it a high overall favourability rating⁴ whilst only 18% gave it a low rating⁵. Advocates were more likely to be regular viewers, aged 16-34, female and from the higher ABC1 socio-economic groups.

Nevertheless, there is some scope for the favourability rating to be improved as, with the rating of 42%, Channel 4 Corporation trailed Netflix (76%) and Amazon Prime Instant Video (69%) on favourability amongst viewers, underlining the threat these services pose. The BBC family of services⁶ (60%), Sky⁷ (59%) and the ITV family of services⁸ (48%) also had a higher percentage of viewers giving a high rating but Channel 4 Corporation led over the Channel 5 family of services⁹ (26%).

Channel 4 is performing well against its Public Service remit duties across *innovation, experimentation and creativity, education and distinctiveness*

Channel 4 itself was perceived to be performing well in relation to its specific Public Service Broadcaster (PSB) remit duties. Audiences considered it distinctive, edgy, culturally diverse and inclusive, and more Channel 4 viewers gave a high performance rating¹⁰ than a low performance rating¹¹ across all duties, with the majority rating performance in line with importance.

Performance and importance scores were higher among regular viewers and, in particular, viewers from the core target group of 16-34 year olds. Viewers in the higher ABC1 socio-economic groups also tended to give higher performance and importance scores than viewers in the lower C2DE socio-economic groups.

This is supported by findings from the qualitative research, where most participants spoke positively about Channel 4 in all of these remit areas.

⁴ This was a score between seven and ten on a ten-point favourability scale used to give general impression.

⁵ This was a score between one and four on the same ten-point favourability scale.

⁶ The BBC family (including all BBC TV channels, BBC Radio, BBC website and BBC iPlayer)

⁷ Sky family (including Sky One, Sky Atlantic, Sky Living, Sky Cinema, Sky Sports and Sky Kids App)

⁸ ITV family (including ITV and ITV 2,3,4, CITV, ITV Be and the ITV Hub)

⁹ Channel 5 family (including Channel 5 and 5Star, 5USA, Spike and Demand 5)

¹⁰ A high performance rating was a score between 7 and 10.

¹¹ A low performance rating was a score between 1 and 4.

A wide range of risk-taking programmes were cited to demonstrate Channel 4's strength in *innovation, experimentation and creativity*

Overall, the evidence suggests that Channel 4 is performing well in *innovation, experimentation and creativity* with the majority of viewers rating performance in line with importance. The qualitative research also highlighted that core Channel 4 viewers recognise it for having new ideas and that its distinctive image is centred on being informative, challenging and controversial - a risk-taking trailblazer amongst broadcasters. Programmes put forward to support this argument included 'Big Brother', 'Skins', 'Shameless' and more recent examples 'Gogglebox', 'Undateables', and 'Naked Attraction'.

Whilst *innovation, experimentation and creativity* was considered an important duty, when more in-depth consideration was given – and the duty was assessed alongside others with more societally-focused values – new ideas, risk-taking and pushing boundaries were considered to be less important than providing educational programmes.

Channel 4 is well-regarded for *providing educational content* incidentally within its programmes

Channel 4 performs well against its duty to *include programmes of an educational nature* when the statement is interpreted in the broadest sense to include thought-provoking, challenging programming. In this sense Channel 4 was praised for providing incidental, accessible learning across different topics using a range of genres.

However, before given time to consider, people struggled to think of didactic education content and this may explain why this duty was considered more important within the qualitative research than is apparent within the quantitative research. Nevertheless, the majority of viewers rated performance in line with importance within the quantitative phase.

Channel 4's *distinctive* character is rooted in its edgy, innovative image

Although considered the least important of Channel 4's duties within both the qualitative and quantitative research, with further consideration, *exhibiting a distinctive character* - in the sense of not delivering the same content as other channels - was still perceived as valuable.

The majority of viewers rated Channel 4 performance in line with importance, backing up views within the qualitative research that Channel 4 is distinctive. Channel 4's distinctiveness was perceived to be rooted in it having a reputation for taking risks other broadcasters won't take, pushing boundaries and tackling social issues in an innovative way.

The wider Channel 4 Corporation is also performing well against its media content duties

The majority of viewers gave performance scores that were in line with their importance score across all of Channel 4 Corporation's duties. Performance and importance scores were higher among regular viewers who are more familiar with the channel and, in particular, viewers from the core target group of 16-34 year olds. Viewers in the higher ABC1 socio-economic groups also tended to give higher performance and importance scores than viewers in the lower C2DE socio-economic groups.

This leads to the conclusion that Channel 4 Corporation is performing in line with audience expectations throughout its Remit. This is supported by the qualitative research which found Channel 4 Corporation to be performing well in all areas, and particularly well in virtually all those areas considered more important, particularly to wider society. The only exception being adults' perceptions of its provision of programmes that appeal to older children.

Channel 4 Corporation is perceived to provide unbiased news and current affairs coverage from a more human angle than other providers

Providing news and current affairs was considered to be one of the most important areas for Channel 4 Corporation to provide, particularly from a societal perspective. Performance was also rated highly in both the quantitative and qualitative research.

Channel 4 Corporation's news was perceived to perform well in offering unbiased views and different views, opinions that may be overlooked by other providers and a more human angle. It was considered not to shy away from tackling controversial topics.

Representing a diverse range of people on screen is perceived as a strength of Channel 4 Corporation

Overall, diversity was considered to be an area of strong performance for Channel 4 Corporation, achieving some of the highest performance scores. Around seven in ten viewers rated performance in line with importance across each of the three statements used to assess this duty.

Channel 4 was perceived to be delivering a range of content that *appeals to a culturally diverse society* by including a range of people from different ethnic origins in its programmes. It was perceived to be a trailblazer in challenging mainstream ideas about different cultures and ways of life. 'Indian Summers', 'Keeping up with the Khans', 'Deutschland 83', 'Queer as Folk', 'Skins', 'The Undateables' and the 2016 Paralympics were cited as examples of programmes which support this argument.

Performance scores were slightly lower for the specific duty '*reflects my culture fairly*' but they remained in line with performance for the majority. Scores among BAME¹² respondents and people with a disability were similar to the total population for these statements.

However, there appears to be room for improvement on this duty in certain nations. Specifically, performance was rated lower than its perceived importance by viewers in Scotland and Northern Ireland, suggesting that Channel 4 Corporation could better represent viewers in these nations.

Findings from the qualitative research were consistent with participants generally agreeing that this is both a very important duty for Channel 4 Corporation to meet, particularly from a societal perspective, as well as one in which it performs strongly. A few participants in the qualitative phase also conveyed a feeling of Channel 4 Corporation being urban/London focused and therefore not giving much sense of Northern Ireland/Scotland/Wales to younger viewers in those nations. There were also a few younger participants (16-24 year olds) in lower socio-economic grades in Northern Ireland and Wales who felt there was a lack of positive representation of people and life in their own part of the UK.

¹² Black and minority ethnic

***Promoting alternative views and new perspectives* is also something strongly associated with Channel 4 Corporation, forming part of its distinctiveness**

Although important, particularly from a societal point of view, *promoting alternative views and new perspectives* was not the most important theme within the quantitative research. Nevertheless, the quantitative findings suggest Channel 4 Corporation is performing strongly in this area, with performance in line with importance for the majority of viewers.

This is supported by evidence from the qualitative sessions. Participants argued that *promoting alternative views and new perspectives* is an area that Channel 4 Corporation is known for, predominantly through Channel 4 specifically, and something that feeds its distinctiveness.

The duty was viewed as being closely linked to Channel 4 Corporation's perceived risky and more edgy approach than other Public Service Broadcasters. The Corporation was recognised for looking at different angles surrounding issues in society that are rejected by mainstream media and for providing a platform for groups that aren't always heard in mainstream media. Examples of relevant programmes include: 'Dispatches', 'The Undateables', 'NHS for a Day', and 'The Secret Life of Prisons'.

Challenging content can polarise opinion, and some viewers in the qualitative research perceived that Channel 4 Corporation can sometimes push boundaries too far, and broadcast content with titles and topics that are too provocative, leading them to feel the topics are treated in an unsympathetic way or people are being mocked.

Although Channel 4 Corporation's performance in *stimulating participation in society* is rated lower than for the previous themes it remains in line with importance

Stimulating participation in society was generally an area of the Remit which was perceived to be less important to people than diversity, film and news, particularly from a personal point of view. Performance scores were also generally lower, reflecting the finding from the qualitative research that strong performance was harder to achieve on a national level, and something that local media might be able to deliver more successfully.

Nevertheless, the vast majority of Channel 4 Corporation viewers rated performance in line with importance across the duties within this theme showing again that Channel 4 Corporation was perceived to perform in line with expectations.

One duty within this theme was rated as particularly important: '*cover issues from around the world*' which links with news and current affairs output. This recorded a similarly high performance rating making this a strength of Channel 4 Corporation.

Whilst not necessarily being the top of mind channel, Channel 4 was viewed as performing well at hosting public debates in the run up to national elections, and was thought by its viewers to have a more objective coverage of debates compared with the BBC.

Some argued that the Channel 4 Corporation is well known for having a strong focus on social issues and has encouraged social inclusion for various groups who might feel marginalised within our society as well as motivating people with disabilities to participate in sports thanks to its coverage of the Paralympics.

Channel 4 Corporation is rated highly for its *film* output but Film4 faces a threat from services like Netflix

Overall, the evidence from the quantitative research suggests that Channel 4 Corporation is performing strongly with regards to *film*, with the majority of viewers rating performance in line with importance. Furthermore, the percentages of viewers giving high performance scores were among the highest of all the duties.

Although the quantitative research suggested this is perhaps Channel 4 Corporation's most important duty when viewed from a personal perspective, evidence from the qualitative research helps to conclude that this duty is not as important as others, particularly from a societal perspective. Whilst viewers appreciate Film4 broadcasting films, making films was considered less important when thinking of the Channel 4 Corporation as a whole and many were not aware that Film4 actually makes films.

Younger qualitative participants felt that Film4 is starting to feel quite dated as a platform (rather than its content) when compared with Netflix and Amazon Prime as it is difficult to compete with the wide choice available through these services and their on-demand nature. Film4 was felt to be restricted by its schedule.

Channel 4 Corporation is perceived to be doing well for young adults but the qualitative research highlighted that some parents felt children aged 10-14 were underserved

Providing content that appeals to older children and young adults was considered less important than other remit areas within the quantitative research amongst adults. This lower priority was matched by relatively low performance scores too, in terms of the hierarchy of duties.

However, as one would expect, both importance and performance scores were significantly higher for Channel 4 Corporation viewers in households with children than for viewers in general, reflecting the stronger relevance of these statements for these audience groups. As these sub-groups are likely to be more familiar with this content, looking at these groups portrays a more accurate and positive representation.

As mentioned previously, the qualitative research revealed that some participants, parents in particular, felt that this area was an important duty, but provision for older children was weak and there was a lack of bespoke content for this age group. This applied not only to C4C, but across the PSBs more broadly as well. Participants did, however, agree that there was plenty of content available for young adults (with an entire channel in E4 dedicated to this age group).

Some of the young adults in the qualitative research also expressed concerns about whether some of the programming watched by older children is entirely suitable for them. These comments related to programmes such as 'The Big Bang Theory' and 'Hollyoaks', which some of the younger adults considered to contain themes or storylines which could be considered unsuitable for older children.

These adult views contrasted with the opinions of regular C4C viewers aged 10-14 themselves, the majority of whom found C4C programming of strong appeal, offering programmes they like, for people their age.

In addition, when prompted with the list of programmes C4C has identified as of appeal to this age group, around half of the 10-14s surveyed said that they watched them, and then went on to rate them broadly positively.

2. Research overview

2.1 Background

Channel 4 Corporation (“C4C”) is publicly-owned, but commercially-funded, and operates a not-for-profit model. The main channel, Channel 4, is a public service broadcaster and was launched in 1982 with the aim of extending the choice available to viewers, appealing to tastes and interests not generally catered for by other broadcasters, and in doing so, encouraging innovation. Since then, C4C has launched a range of additional services such as digital portfolio channels (E4, More4, 4Seven, 4Music and Film4), and an on-demand service (All 4).

While the main channel has a unique public service remit and should also contribute to the overall objectives of public service broadcasting (“PSB”), the Digital Economy Act 2010 (“DEA”) extended C4C’s obligations beyond the main channel by introducing media content duties which C4C can deliver across its full suite of services.

The DEA also introduced a requirement for C4C to produce an annual Statement of Media Content Policy (“Statement”) setting out how it delivered its remit over the course of the previous year and how it plans to do so in the coming year. This research study was commissioned by Ofcom to explore the extent to which audiences in the UK feel Channel 4 as a Public Service Broadcaster (PSB) is meeting its PSB Remit Duties and how the Channel 4 Corporation as a whole is meeting its media content duties. The findings from the study have been used to inform Ofcom’s assessment of the Statement¹³.

The research included qualitative and quantitative stages. The qualitative component focused on Channel 4’s core target audience of 16-34 year olds. The quantitative survey was conducted among a nationally representative sample of all adults aged 16+ in the UK. There was an additional children’s online survey among 10-14 year olds who watch any Channel 4 Corporation service.

This report discusses findings from all elements of the research.

2.2 Aims

The overall aim of the qualitative and quantitative research was to understand and measure attitudes towards Channel 4 Corporation as a whole, and its individual services, with particular reference to the extent to which it is perceived by its audience to have delivered on its parliamentary remit.

Channel 4 Corporation’s media content duties under the Communications Act 2003 are as follows:

- The making of a broad range of relevant media content of high quality that, taken as a whole, appeals to the tastes and interests of a culturally diverse society
- The making of high quality films intended to be shown to the general public at the cinema in the United Kingdom
- The broadcasting and distribution of such content and films

¹³ Note: a sub-set of duties relevant to audiences was included in the research programme as not all of the duties were suitable for discussion (e.g. matters relating to supporting creative talent and issues of distribution were not discussed).

- The making of relevant media content that consists of news and current affairs
- The making of relevant content that appeals to the tastes and interests of older children and young adults
- The broadcasting or distribution by means of electronic communications networks of feature films that reflect cultural activity in the United Kingdom (including third party films)
- Promote measures intended to secure that people are well-informed and motivated to participate in society in a variety of ways
- Support and stimulate well-informed debate on a wide range of issues, including by providing access to information and views from around the world and by challenging established views
- Promote alternative views and new perspectives
- Provide access to material that is intended to inspire people to make changes in their lives

Specific requirements for Channel 4, within its public service remit to provide a broad range of high quality and diverse programming, are to:

- Demonstrate innovation, experimentation and creativity in the form and content of programmes
- Exhibit a distinctive character
- Make a significant contribution to meeting the need for the licensed public service channels to include programmes of an educational nature and other programmes of educative value
- Appeal to the tastes and interests of a culturally diverse society

Overall, the research aimed to explore and quantify the extent to which the Channel 4 Corporation is perceived by audiences to have delivered on its parliamentary remit. Specific objectives for the research were therefore as follows:

- Explore and understand how audiences feel about the Channel 4 Corporation as a whole, (including Channel 4, E4, More4, 4Music, Film4, 4Seven, All 4 and online offerings)
- Investigate how Channel 4 compares against the other main PSBs and other broadcasters in order to understand what makes it unique
- Measure and understand audiences' views on the importance of the duties specific to Channel 4 and the Channel 4 Corporation
- Measure and understand audiences' views on the performance of these duties by Channel 4 and the Channel 4 Corporation

The main purpose of the online survey among 10-14 year olds was specifically to assess the delivery of C4C's duty to appeal to older children.

This is directly linked to Ofcom's five-year review of Channel 4 Corporation's delivery of its media content duties in 2014¹⁴. Here it was stated that C4C lacked ambition in meeting its duty to provide content of appeal to older children. Furthermore, in response to Channel 4 Corporation's Statement of Media Content Policy for 2015/16¹⁵, Ofcom also raised some potential concerns about C4C's approach to providing content that appeals to older children, whereby the Corporation seeks to reach this audience through programmes in peak-time, pre-watershed slots which cover themes that will resonate with older children, but will also appeal to a broader audience. As such, Ofcom wanted to commission some specific research to get to the heart of what this audience group really thinks about C4C's content and whether they find it of appeal.

2.3 Methodology

There were three components of research:

- Stage 1: a deliberative qualitative stage amongst 16-34 year olds (a key target audience for the Channel 4 Corporation) who have watched Channel 4 in the last six months
- Stage 2: a quantitative stage amongst adults aged 16+ in the UK
- Stage 3: a quantitative survey among children aged 10-14

More details about each element of this study are outlined in the following sections.

Stage 1: Qualitative research with the core target audience

The qualitative research used a deliberative approach to introduce the remit duties, which allowed a more considered view of their importance and delivery. It explored societal views in addition to personal views. The research was focused on 16-34 year olds, which is a core target audience for Channel 4. It was also limited to those who had actually watched Channel 4 in the last 6 months, to ensure the exploration was meaningful.

Six deliberative workshops were conducted across six regions of the UK, covering England, Northern Ireland, Scotland and Wales. Each comprised two simultaneous group discussion sessions with part of the workshop conducted in plenary. Each workshop lasted three hours and included about 18 participants. Fieldwork was conducted between 17th January and 2nd February 2017.

In addition, ten mini-groups were conducted in the same areas as the workshops (with the exception of central London). Each lasted about one and a half hours and included two to four participants, with most comprising three participants. Some of the mini-groups comprised teenagers between 16 and 19 years old who knew each other (in order to aid group dynamics), while other mini-groups covered people in their early 20s of social grade E, whose views might be less clearly expressed in a workshop setting. In total, 126 people participated in the qualitative stage of the research.

Further details of how the qualitative research was conducted are provided in Appendix C.

¹⁴ https://www.ofcom.org.uk/data/assets/pdf_file/0024/62736/c4-content-review.pdf

¹⁵ https://www.ofcom.org.uk/data/assets/pdf_file/0019/84313/ofcom_letter_to_channel_4_corporation_on_its_statement_of_media_content_policy_2015_2016.pdf

Stage 2: Face-to-face quantitative research amongst adults aged 16+

Whilst the qualitative stage provides an in-depth assessment of the target audience's view, based on participants' considered views, the quantitative stage represents the views of all adults aged 16+ in the UK. This gives a broader view, albeit at a more top-of-mind level. In addition, Channel 4 viewers were identified to enable results to be filtered to this group.

The quantitative survey was conducted face-to-face in respondents' homes using Kantar's CAPI¹⁶ Omnibus. One wave of research was conducted to achieve 2,184 interviews. Fieldwork took place between 21st February and 7th March 2017.

Within the quantitative questionnaire, respondents were asked to rate Channel 4 against four purpose remit attributes. Firstly, from the perspective of how important it is that Channel 4 delivers against each one, using a 1-10 rating scale, where 10 is extremely important. Secondly, respondents were asked to rate Channel 4 in terms of delivery, or performance, against the same statements, using a 1-10 rating scale where 10 is the highest score.

This was followed by rating the Channel 4 Corporation as a whole on 17 attributes reflecting the media content duties applying across all of its services, again in terms of importance and performance using the same ten-point scales.

The UK adults survey was weighted to be nationally representative of the UK population aged 16+ years.

Sample details and the questionnaire are provided in Appendix C.

Stage 3: Online quantitative research amongst children aged 10-14

The older children's survey lasted around 10 minutes and was conducted online with the sample recruited via parents from an online panel. Firstly, a sample of the general UK population aged over 25 years was screened to identify parents of children aged 10-14. These parents then gave permission for their children aged 10-14 years old to complete the survey themselves. Only children aged 10-14 who watch at least one Channel 4 Corporation service were eligible to take part.

Fieldwork was conducted between 7th and 13th March 2017.

The interviews covered the following topics:

- TV viewing habits including usage of different TV channels and on-demand services, on-demand viewing behaviour, where watching occurs and what Channel 4 Corporation programmes are watched
- General impression of different TV services
- How appealing C4C content is to this age group

¹⁶ Computer Assisted Personal interviewing

The sample of parents of the older children taking part was weighted on parental characteristics to be representative of all parents of 10-14 year olds in the UK in terms of social grade, region and the age and gender of their child.

Sample details are provided in Appendix C.

The results from the qualitative research and quantitative research amongst adults are reported together as integrated findings within chapters 3 to 5. The older children's research is reported separately within a standalone section (chapter 6).

3. General Impressions of Channel 4 Corporation

Summary

Most of the Channel 4 Corporation brands have a clear image in viewers' minds. Channel 4 is recognised as the original brand, with an edgier, more risk-taking image than other Public Service Broadcasters (PSBs), broadcasting content that can at times be challenging and controversial, but still enjoying fairly broad appeal. E4 and 4Music appeal to younger viewers, while More4 is perceived as targeting a more mature audience. Film4 is perceived as somewhat traditional and it is felt to be losing out to subscription on-demand services such as Netflix. All 4 is compared favourably with other free-to-air on-demand services, although its change of identity from 4OD has left it light on image, while 4Seven is the least familiar Channel 4 Corporation brand.

42% of Channel 4 Corporation viewers gave it a high 7-10 overall rating whilst only 18% gave it a low 1-4 rating. Advocates were more likely to be regular viewers, aged 16-34, female and from the higher ABC1 socio-economic groups.

This chapter looks at perceptions of Channel 4 Corporation services, using findings from both the quantitative and qualitative stages of the research.

Firstly though, we will set the context by providing information on consumption of Channel 4 Corporation services.

3.1 Television consumption

In the quantitative research, nearly four in five (79%) UK adults claimed to be Channel 4 viewers with 24% classified as regular viewers¹⁷. The data was self-reported based on recall of viewing and it should be noted that reach of Channel 4, as measured by the industry-accepted television audience measurement service, BARB, was 95% over a period of six months to the end of April 2017.

This difference is to be expected as BARB collects data in a fundamentally different way, using a set top box to passively record consumption when respondents have indicated presence in the room. The difference in consumption can be further explained by people's ability to attribute what they are watching to a particular channel and to recall viewing occasions that happened more than a few weeks before. The claimed reach figure (79%) is much more similar to the average monthly reach of Channel 4 according to BARB (80%).

Claimed reach of the Channel 4 Corporation overall (Channel 4, E4, More4, 4Music, Film4, 4Seven), as measured in the quantitative survey, was 85%. When broadening the definition to Channel 4 Corporation, reach over the six months to April 2017 increased according to BARB to 98%.

¹⁷ Regular viewers were defined as those claiming to watch a channel every day or most days, medium viewers claimed to watch 1, 2 or 3 times per week and light viewers claimed to watch less than once a week.

Figure 1: Claimed survey reach versus BARB measured reach of Channel 4 Corporation services

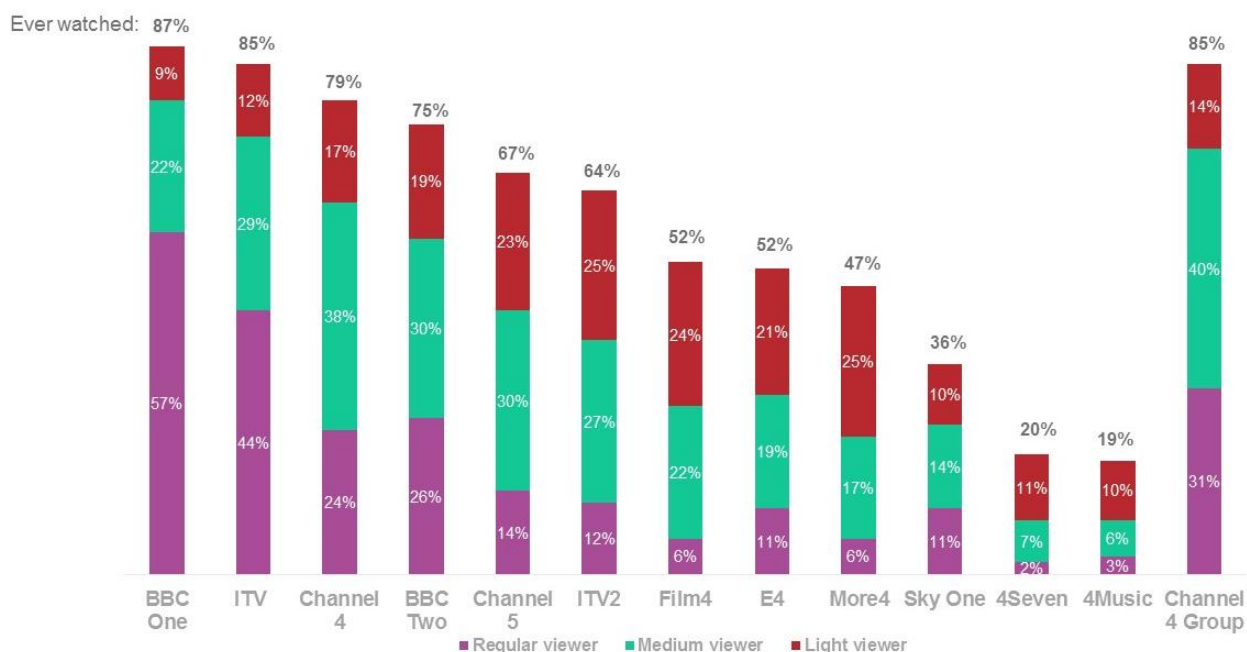
	Quantitative survey	BARB month reach	BARB 6 month reach
Base – all UK adults aged 16+	2,184	12,522	12,522
Channel 4	79%	80%	95%
E4	52%	41%	70%
More4	47%	40%	71%
Film4	52%	37%	64%
4Seven	20%	24%	57%
4Music	19%	14%	34%
All Channel 4 Corporation TV services	85%	87%	98%

Half of UK adults (52%) claimed to watch E4 (11% regular viewers); a similar proportion claimed to watch More4 (47% ever watch the channel and 6% regular viewers) and Film4 (52% watching the channel and 6% regular viewers). Claimed viewing of 4Seven and 4Music was lower at 20% and 19% respectively. See Figure 2, below.

The difference from BARB's measured reach over a six-month period was more pronounced for these services which may suffer from lower attribution of viewing, as it is less frequent. Claimed reach from the survey tends to sit between the BARB monthly and 6-monthly reach figures, again reflecting the ability to accurately recall programming to the channel.

The qualitative research supports this observation. All the qualitative participants completed a viewing diary prior to attending the research sessions in order to sensitise them to their viewing behaviour. Many were surprised to discover how many Channel 4 Corporation channels they viewed, especially More4 and 4Seven. This not only helps to explain why the claimed reach of Channel 4 Corporation services is lower than measured by BARB but also highlights the weakening of channel brands as people are becoming more content-driven.

Figure 2: Claimed frequency of channel viewing



Q1. How frequently do you watch each of the following channels?
 Base: All adults 16+ (2184). Regular viewer = Every day/Most days, Medium viewer = 2-3 times a week/About once a week, Light viewer = Less than once a week

Figures 3 and 4, below, compare the profiles of Channel 4 viewers and Channel 4 Corporation viewers within the quantitative survey with the profile of the same audiences, as measured by BARB (November 2016 to April 2017).

Channel 4 viewers within the quantitative research had a slightly younger profile than BARB would suggest is the case. This is likely to be a sampling effect of the research as there were no hard quotas set on age to match C4Cs known demographic profile.

Figure 3: Channel 4 viewer profile, quantitative survey vs. BARB

		Quantitative survey	BARB month reach	BARB 6 month reach
Base: Channel 4 viewers		1,740	11,933	11,933
Sex	Male	48%	41%	44%
	Female	52%	59%	56%
Age	16-34	29%	20%	22%
	35-54	32%	35%	36%
	55+	38%	45%	42%
SEG	ABC1	52%	50%	51%
	C2DE	48%	50%	49%

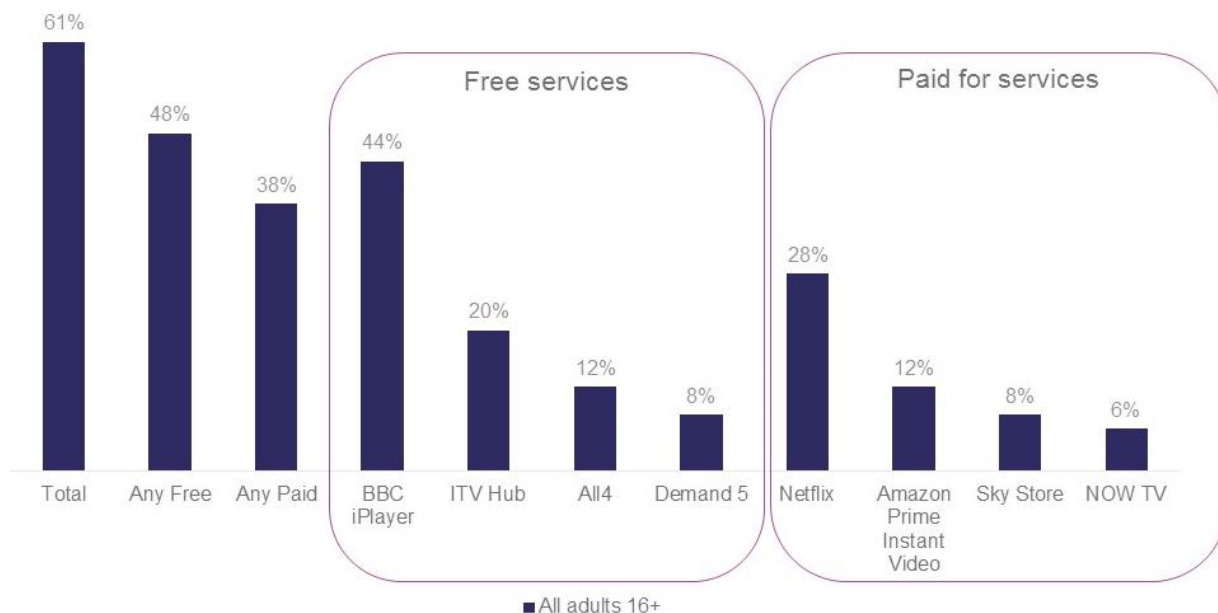
Figure 4: Channel 4 Corporation viewer profile, quantitative survey vs. BARB

		Quantitative survey	BARB month reach	BARB 6 month reach
Base: Channel 4 Corporation viewers		1,861	12,234	12,234
Sex	Male	48%	43%	44%
	Female	52%	57%	56%
Age	16-34	30%	24%	25%
	35-54	32%	34%	36%
	55+	37%	42%	39%
SEG	ABC1	51%	46%	47%
	C2DE	49%	54%	53%

3.2 Consumption of on-demand services

In the quantitative research, respondents were also asked about their use of on-demand services with 61% of adults claiming to have ever used an on-demand service. Figure 5, below, shows that the market is dominated by iPlayer among free services and Netflix among paid services. Around a tenth (12%) of adults claimed to have used All 4.

Figure 5: Use of on-demand services amongst all adults aged 16+



Q2. Have you ever used any of the following services to watch films or television programmes recently?
Base: All adults 16+ (2184)

Figure 6, below, looks at the proportion of respondents using on-demand services by age, both those available free and those available on a subscription basis.

Use of All 4 was highest amongst the youngest 16-34 year old age group with 16% claiming to have used it, significantly higher than the corresponding 12% for 35-54 year olds, which in turn is higher than the 7% for those aged 55 or over. Use of All 4 amongst the young was similar to the proportion using ITV Hub (19%).

Figure 6: Use of on-demand services by age group



Q2. Have you ever used any of the following services to watch films or television programmes recently?
 Base: All adults 16+ (2184), 16-34 (635), 35-54 (609), 55+ (940)

Perceptions of All 4 amongst younger audiences were explored further in the qualitative stage. Being less driven by channel brands, younger participants clearly enjoy the ability to use All 4 to select content of interest from across the Channel 4 Corporation channels.

“The thing I like about All 4 is it has all Four channels. But you can see a programme that’s on E4 live and catch up on this... It shows you everything.” (Leeds, 18-19, female, E)

“Shows I pay more attention to are on 4OD. There are always good new shows or documentaries I want to watch.” (London, 18-24, female, C1C2)

Perceptions of All 4 are discussed in more detail in the following sections.

3.3 The impact of on-demand services on channel brands

In the qualitative workshops, participants undertook a collaborative mapping exercise whereby they grouped television brands in order to explore their perceptions of where the Channel 4 Corporation brands fit within the market. This confirmed the strong role of on-demand services, such as Netflix and Amazon Prime, suggested by the figures above, particularly for younger audiences. They are considered to have changed the way television is used through their combination of depth and breadth of content with personalisation and control. They are also considered to offer the advantage of ad-free viewing.

“I can almost always find something entertaining to watch on YouTube or Netflix.” (Leeds, 22, male, DE)

“There are so many adverts through one show [on linear TV] it breaks it up and ruins the flow of the viewing.” (London, 18-24, female, C1C2)

On-demand services may be weakening channel brands as viewing habits become more non-linear and methods of programme selection are changing. Generally, younger audiences displayed less detailed knowledge of linear channel brands, while older viewers were more guided by the long established ‘main channels’. Channel 4 tended to be positioned alongside other formerly terrestrial TV channel brands; All 4 was often grouped with other on-demand services; the other Channel 4 Corporation brands were either grouped together as a family of brands, or gathered in smaller groups defined by genre and perceived target audience.

The exercise also revealed the incomplete understanding of the TV landscape. Sometimes, by deduction, less familiar brands were grouped with other channels within a family of brands – indicating some lack of knowledge or limited experience of some the Channel 4 Corporation channels (such as 4Seven being grouped with E4 and Channel 5 in the example in Appendix A). Furthermore, probing sometimes led to differentiation of the channels by appeal, which tended to pull apart by genre and perceived target audience – with E4 typically being in a group of preferred brands among younger audiences.

Nevertheless, as participants spent time considering the range of channels and services provided by Channel 4 Corporation, many acknowledged the wide range of choice offered.

“They’ve got such a variety – a range of channels, shows, everything. It caters to everyone no matter who you are.” (Woking, 18-24, male, C2D)

3.4 Service impressions

Respondents were asked, in the quantitative survey, what their overall impressions were of a number of different television services, including Channel 4 Corporation services. The question used a ten-point favourability scale where 1 was the lowest score and 10 was the highest. The full list of television services detailed in the survey were:

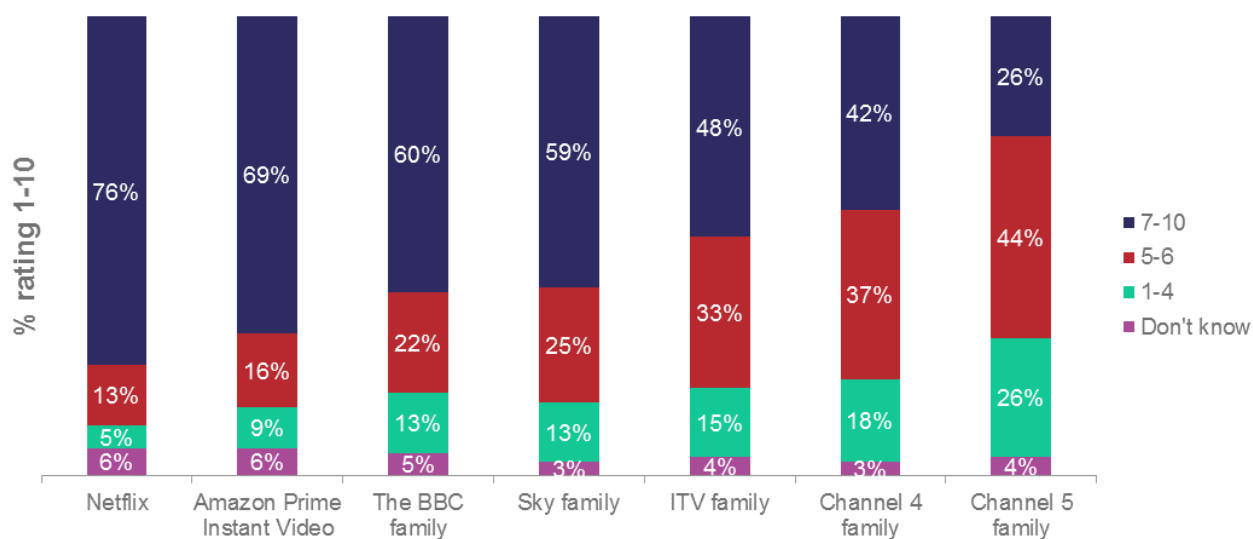
- The BBC family (including BBC TV channels, BBC Radio, BBC website and BBC iPlayer)
- ITV family (including ITV and ITV 2,3,4, ITV Be and the ITV Hub)
- Channel 4 family (including Channel 4 and E4, More4, 4 Seven, Film 4, 4Music and All4)
- Channel 5 family (including Channel 5 and 5Star, 5USA, Spike and Demand 5)
- Sky family (including Sky One, Sky Atlantic, Sky Living, Sky Cinema and Sky Sports)
- Netflix
- Amazon Prime Instant Video

Familiarity with a service amongst the wider adult population was highly dependent on reach. Therefore, services with lower reach were less likely to get high favourability scores amongst all adults because of a lower likelihood to have an opinion.

To account for this, Figure 7, below shows the favourability ratings of each service amongst only those who use each service. The on-demand-only services Netflix and Amazon Prime Instant Video achieved the highest favourability scores but it should be borne in mind that people have actively chosen to pay for these services.

The C4C family trails the BBC, Sky and ITV families on favourability amongst viewers but leads over another public service broadcaster, Channel 5 family.

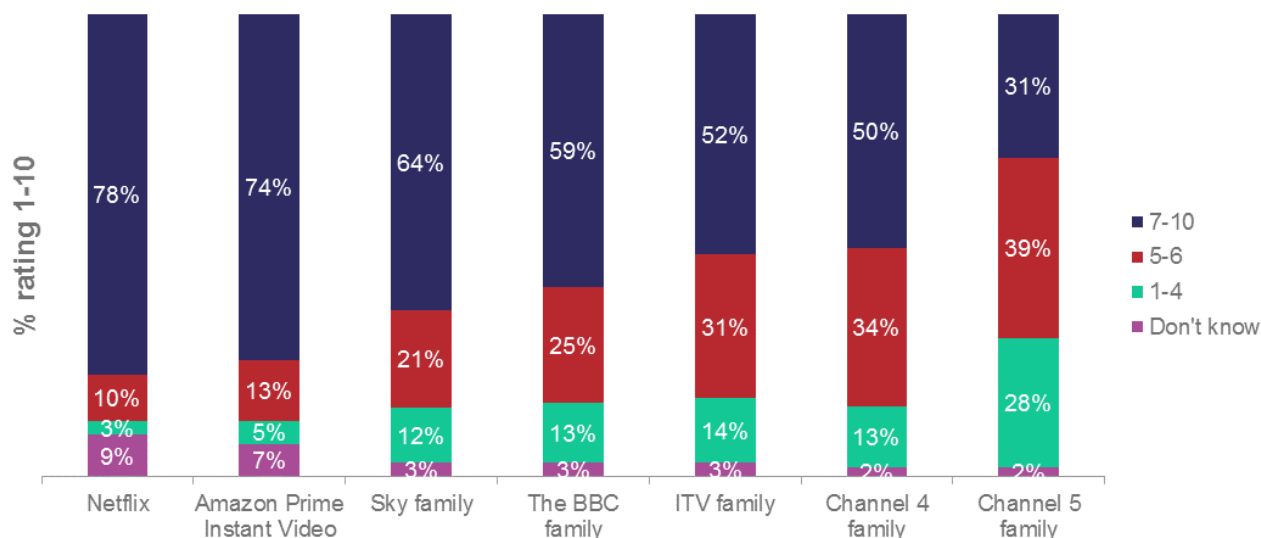
Figure 7: General impression of services among all adults who view/use each service



Q3. I am now going to read out the names of some different TV services and would like you to tell me your general impression of each one. Please give a score of 1-10, where 1 means you have an extremely unfavourable impression and 10 means you have an extremely favourable impression. Base: Viewers of: Netflix (542), Amazon Prime (228), The BBC family (1928), Sky family (765), ITV family (1899), Channel 4 family (1861), Channel 5 family (1482)

Looking at this specifically amongst viewers of each service aged 16 to 34, the picture is similar, although Sky moves into the lead amongst the traditional broadcasters. The percentage of viewers who have high favourability increases to 50% for Channel 4 Corporation when limiting to viewers in its core 16-34 age target.

Figure 8: General impression of services among 16-34 year olds who view/use each service



Q3. I am now going to read out the names of some different TV services and would like you to tell me your general impression of each one. Please give a score of 1-10, where 1 means you have an extremely unfavourable impression and 10 means you have an extremely favourable impression. Base: 16-34 year old viewers of: Netflix (275), Amazon Prime (101), The BBC family (473), Sky family (225), ITV family (479), Channel 4 family (496), Channel 5 family (349)

Channel 4 Corporation viewers rating C4C at the lower end of the scale on favourability tended to be older, with 43% aged 55 or over and 77% aged 35 or over. Those giving C4C a high

favourability rating (7-10) tended to be younger (36% were 16-34). Advocates of Channel 4 Corporation were also more likely to be female than male and in the higher ABC1 rather than lower C2DE socio-economic groups. Favourability ratings were also higher among more frequent C4C viewers (53% of regular viewers rated C4C 7-10).

Figure 9: Profile of Channel 4 Corporation viewers by their Channel 4 Corporation rating

		Scored 1-4	Scored 5-6	Scored 7-10
Base: Channel 4 Corporation viewers		342	695	768
Sex	Male	52%	49%	46%
	Female	48%	51%	54%
Age	16-34	23%	28%	36%
	35-54	34%	30%	33%
	55+	43%	42%	30%
SEG	ABC1	50%	47%	54%
	C2DE	50%	53%	46%
Frequency of viewing	Regular Channel 4 Corporation viewer	20%	28%	53%

3.5 Perceptions of Channel 4 Corporation channels and services

In the qualitative workshops, participants also undertook a group exercise to uncover their perceptions of each of the Channel 4 Corporation channels and services (Channel 4, E4, More4, 4Music, Film4, 4Seven and All 4). Each one is a brand in its own right – and brands hold associations that are encoded in people’s minds. To help uncover these associations, participants created collages of each of the brands on flipchart paper using images they had been tasked to bring to the sessions. These collages were used to stimulate discussion within the group, drawing out descriptive words and phrases that captured participants’ image of each brand. The exercise revealed participants’ rich perceptions of some of the brands (notably Channel 4 and E4), but also exposed the paucity of perceptions of a few of the less familiar brands (most notably 4Seven).

In addition, participants were guided through a personification exercise. This encouraged people to imagine a brand as a person, revealing the brand’s personality and adding to understanding of brand perceptions. This exercise helped to tease out differentiated perceptions of the Channel 4 Corporation brands.

Channel 4



Channel 4 is perceived as the main driving force within the Channel 4 Corporation portfolio. It delivers a wide array of programmes, which appeal to a diverse audience. It is believed to tackle moral issues and offer different perspectives, which can be challenging and even controversial, while also being informative. In doing so it is also considered to demonstrate creativity.

Channel 4 has a stronger and more developed image among the qualitative participants aged 25 and over, who perceived it as dynamic, edgy and distinctive when compared with other TV brands. This is driven by a few factors: news and current affairs programmes; content that is considered educational, informative and alternative; a record of showing entertainment shows that are innovative and more edgy than content from other PSBs; and a history of iconic shows that are strongly linked with the channel, such as 'Big Brother' and 'Friends'.

"The exposing documentaries would focus maybe less on immigration but more what an immigrant would go through. A social angle, yes. Like a human, more human angle." (Dundee, 25-34, male, non-parent, ABC1)

"It's bringing things – like problems or issues – bringing them to light in mainly a way that is overlooked in society." (Leeds, 25-34, female, non-parent, C2DE)

"It's always been quite good for that, in leading the way, and that, and putting out quite cutting edge stuff." (Leeds, 25-34, female, parent, C1C2)

"Channel 4 has got a good reputation to uphold, because it started out so edgy, and although it's become commonplace it still comes up with new things." (Leeds, 25-34, male, non-parent, C2DE)

However, based on its programming, many assume it is targeting an audience aged 30+, albeit a younger target than that of some other PSBs. This perception is reinforced by the black and white design of the logo, which is relatively stark when compared with the designs of the other Channel 4 Corporation brands.

"I think they need something for everyone on Channel 4. No matter what you're into there's always something available for you." (Leeds, 25-34, female, parent, C1C2)

Among some younger participants of lower socio-economic grade, who are less familiar with Channel 4, it is perceived as being a little conservative, middle class and targeted at older people. However, on being shown examples of Channel 4 content, this perception shifted towards the more generally held views of Channel 4.

"I always thought, like, Channel 4 was boring. But obviously not." (Woking, 16-17, female, E)

"I don't think many people my age would watch Channel 4. I think they'd watch E4 more than Channel 4 programmes." (Belfast, 20-21, female, E)

"Channel 4 is a bit more grown up [than E4]. She is a bit more sensible, but she has a little fun side." (Leeds, 18-19, female, E)

"I watch it more than I thought I did, seeing the programmes here... It's not as boring as I thought it was." (Woking, 25-34, female, parent, ABC1)

Previous research by Ofcom¹⁸ has shown that generally people are not aware of, or have limited understanding of public service broadcasting, and when they do this is often linked to the BBC. Therefore it is not surprising that only a minority of participants were aware of Channel 4's PSB status. Amongst those aware, this lent a halo of goodwill and reinforced perceptions of quality.

E4



E4 is particularly popular among its assumed core target of people in their late teens and early twenties and was often cited as a favourite channel by this target group. It is considered youthful, lively, quirky and funny.

E4 is also the Channel 4 Corporation brand with the most consistent image, which reflects the strong match between its target audience and the audience researched. The significant presence of E4 within younger participants' viewing diaries suggests it is one of the few channels to have a strong brand presence among the less brand loyal younger participants.

"E4 appeals to a younger audience. If you'd done this test with somebody in their fifties it would be totally different as well. But E4 appeals to people of our age." (Dundee, 22, male, DE)

"I actually think E4 might be more tailored to younger people... E4 is just fun, fun, fun and then go to sleep. And then wake up and have more fun." (Leeds, 18-19, female, E)

E4 is known to offer light-hearted easy viewing entertainment with an appealing mix of American sitcoms as well as other comedies and reality shows.

"E4 was fun, entertainment, more comedy, sort of basically easing you into programmes." (Dundee, 22, male, DE)

"Well E4 is more like your fun... Even the E4 thing, it bounces and it does its little comedy thing, doesn't it?" (Leeds, 25-34, female, parent, C1C2)

"[If] I'm not really in the mood to watch anything but I want to watch TV, E4 has got something I'll want to watch." (Dundee, 22, male, DE)

However, the type of programming on offer is described by some as superficial and leads some to describe E4 as 'car crash TV'. It was also considered to contain a lot of adult humour, and whilst older children are reported to watch a lot of E4 content, a few participants in the qualitative research felt some programming was unsuitable for them (e.g. 'The Big Bang Theory').

More4



More4 is perceived as a lifestyle channel aimed at an older and more serious audience of people aged 30 and over, possibly with a female skew. It is associated with popular lifestyle programmes such as 'Come Dine with Me', 'A Place in the Sun', 'Location

Location Location' and 'Grand Designs' which hold wide appeal, and are often shown on the channel during the daytime.

"My mum watches More4 – all my mum's favourites. It's a channel for older people." (Belfast, 25-34, female, parent, C2DE)

¹⁸ https://www.ofcom.org.uk/data/assets/pdf_file/0035/78659/psb-review-ipsos-mori.pdf

"More4 would probably be more like the grannies and grandads of the party." (Belfast, 20-21, female, E)

As a channel with a more niche proposition than Channel 4, More4 also can feel a little repetitive.

"Do you know, one thing I don't like about More4... I can't just switch and be, like, let's put this on instead. More4 just plays the same thing every day." (Leeds, 18-19, female, E)

Among viewers it is considered to offer good quality content with a mature, sophisticated approach and a middle class image. However, the older targeting of the channel means the brand is less well-known by younger audiences and some struggled to guess at the channel proposition, wondering whether the name suggests a digital repeat service.

4Music



4Music is perceived as fun loving, vibrant and loud, with the youngest audience of all the Channel 4 Corporation services. It is considered to target young adults who enjoy popular music, with its appeal extending to people in their early twenties, particularly as part of getting ready for a night out. It is also popular with families, because of its appeal to children.

"I have 4Music on a lot as background." (Woking, 25-34, female, parent, ABC1)

"That is probably just the term I use, but it is kind of pop culture." (Belfast, 18-24, female, BC1)

This relatively young appeal means that audiences can grow out of the channel as more niche musical tastes develop, leaving some considering 4Music to be trashy. Some younger audiences (16-24 year olds) considered it somewhat immature.

"You know, when I was a bit younger, yes, 4Music was like the one. But, like, when I was like thirteen. But not anymore." (Leeds, 18-19, female, E)

"I'm not really in to the type of music that they play. I used to be into the music they play, but not so much now." (Dundee, 16-17, female, ABC1)

"Sixteen, annoying teenager kind of thing." (Belfast, 18-24, male, BC1)

Some also wondered how 4Music can continue to compete in an environment of blossoming music streaming services such as Spotify.

"Yes, but we don't know why it exists anymore. Like, a few years ago it was good for... parties or whatever. But I don't know if it exists for that anymore... You've got Spotify now." (Dundee, 25-34, female, non-parent, ABC1)

Film4



Film4 has a serious image and a complex, independent and traditional character. Among its viewers it is considered to provide a good selection of films, which are easy to access because they are broadcast on a linear TV channel. While some pointed out that services such as Netflix are undermining the benefit of Film4 as a dedicated film service, others

appreciate that the restriction of choice can be a benefit because it renders decision-making easier – too much choice can be overwhelming – and encourages serendipitous film consumption.

“If, like, you want to watch a movie... Film4 is the only channel I can sit and do that. I actually thought it was someone in Hollywood that made the films though.” (Belfast, 25-34, female, parent, C2DE)

However, on-demand subscription services, such as Netflix and Amazon Prime, have undoubtedly had an impact on viewing behaviour, raising expectations of film services.

“When I was in high school I always used to watch Film4. But since I've got Netflix I kind of stopped watching Film4 as much.” (Leeds, 18-19, female, E)

“Says VHS to me.” (Dundee, 25-34, male, non-parent, ABC1)

Film4 is criticised by some for the variable quality of the films it shows, the annoyance of advertising, and the lack of choice.

“I think it's old films. Like it needs to catch up a bit more.” (Swansea, 18-24, female, C1C2)

“It tends to be classic movies on there.” (Leeds, 25-34, male, non-parent, C1C2)

“Instead of using Film4 to watch films I used Netflix as an alternative – easier to watch a broader range of films on a range of devices.” (Woking, 18-24, female, C2D)

Film4 is associated with British culture and values by those more familiar with the channel. However, there was relatively little awareness of Film4 as a producer of films.

“I think it's creative because it actually does make its own films.” (Dundee, 25-34, male, non-parent, ABC1)

4Seven



4Seven is the least known of Channel 4 Corporation's services. The task of viewing the channel before the workshop left some participants with questions about 4Seven's identity: because it is a service of repeats, there was some confusion about the differentiation of 4Seven from other Channel 4 Corporation services. The almost blank collages (see Appendix A) plainly revealed the lack of understanding of 4Seven.

Most participants in the workshops were not aware of the service, and they struggled to work out its purpose from the name.

“Never heard of it.” (Dundee, 25-34, male, parent, C2DE)

“I have no idea what goes on 4Seven.” (Woking, 18-24, female, C2D)

On consideration, participants felt it was a service aimed at older viewers (mid-forties and over) who might not be comfortable using an on-demand service to catch up on programmes that have been missed; the younger participants, in particular, were bemused by a linear channel dedicated to repeats.

“Who would use it? I suppose, like, older people, if they don't know how to use like All 4 and stuff.” (Swansea, 18-24, female, C1C2)

"I don't see the point of 4Seven – literally don't. I think it's a waste of money because I know it's a repeat, but you've got on demand." (Swansea, 18-24, female, C1C2)

"4Seven just repeats Channel 4." (Leeds, 25-34, male, non-parent, C1C2)

All 4



Although the brand name is not top-of-mind for everyone (because the old name, 4OD, is still in people's minds), the service is considered important because it allows wider access and reach. This is particularly appealing to younger audiences, who are more driven by on-demand access to content.

"The best thing about All 4 is, rather than keep making you watch the same advert over and over, they try to change it and shorten the adverts the longer you're watching, which is a good thing." (Leeds, 18-19, female, E)

The service also holds strong appeal for the more technically savvy, although technology was not considered a personal barrier by anyone in the qualitative research, which included only 16-34 year olds, many of whom are digital natives. Indeed, on-demand represents the modern way of viewing content although, when compared with dedicated VoD services, such as Netflix and Amazon Prime, All 4 is considered more limited in its offering and is perceived more as a catch-up service than a first port of call destination. Nevertheless, it is considered a good service for access to on-demand content from Channel 4, E4 and other Channel 4 Corporation channels.

"Aye, he [All 4] can go and speak to the young people. He can speak to the other ones and then the older ones. He can speak to them all." (Dundee, 25-34, male, non-parent, ABC1)

All 4 is perceived as easy to use, modern, rounded, organised and helpful, but as a brand its image is limited and remains somewhat functional due to the change in branding from 4OD.

4. Channel 4 PSB Remit duties

Summary

Channel 4 is performing well against its Public Service Remit duties across innovation, experimentation and creativity, education and distinctiveness.

This is supported by findings from the qualitative research, where most participants spoke positively about Channel 4 in all of these areas. Furthermore, within the quantitative research, more Channel 4 viewers gave a high performance rating than a low performance rating across all duties, and the majority rated performance in line with importance.

4.1 Channel 4 PSB Remit duties

Within the Channel 4 Corporation, the specific Channel 4 service has separate, individual duties to perform because it is a Public Service Broadcaster.

In this section, we evaluate audiences' ratings of Channel 4 against these duties. We do this by drawing on both the quantitative and qualitative research described in section 2.

Channel 4 has to fulfil four key public service duties. Three of these duties are listed below¹⁹. They were measured in the quantitative research using the corresponding statements in bold text:

- Demonstrate innovation, experimentation and creativity in the form and content of programmes
 - **'Channel 4 comes up with new ideas'**
 - **'Channel 4 programmes are edgy and push the boundaries'**
- Make a significant contribution to meeting the need for the licensed public service channels to include programmes of an educational nature and other programmes of educative value
 - **'Channel 4 programmes help me learn something new'**
- Exhibit a distinctive character
 - **'Channel 4 is different from other channels'**

The quantitative research provides measures of how well audiences feel Channel 4 is performing against each of these duties, in the context of how important audiences consider each one to be.

The four statements used to measure the perceived importance of these duties were read out in a random order. For each one, respondents were asked to give a score between 1 and 10, where 1 was not at all important and 10 was extremely important. The same four statements were then repeated, with respondents asked to rate Channel 4 performance using a scale from 1 to 10, where 10 was the highest score and 1 the lowest.

¹⁹ The fourth duty is 'to appeal to the tastes and interests of a culturally diverse society' which is shared with the Channel 4 Corporation duties. This is assessed within section 5.

These three themes were also explored in the initial qualitative research, among the core audience²⁰. This gave greater depth of understanding about *why* audiences provided such ratings.

4.2 How we report on Channel 4's performance in the context of importance

What people consider important about a channel tends to be related to something they like about the channel. Hence importance and performance ratings tend to be highly correlated.

Against that background, it is clear that a measure of success is whether Channel 4 performance on a particular duty is rated as highly as the importance of that duty for an individual respondent.

Therefore, performance is assessed in the context of importance using a grid for each of the duties throughout the report. Each grid summarises the relationship between importance and performance at an individual respondent level from the quantitative research.

The number in each square (and its size) represents the percentage of Channel 4 viewers who:

- **Green squares:** gave a performance score that was in the same band as their importance score.

Channel 4 is performing in line with the importance of the duty. Throughout the report, this will be referred to as the green, strength zone.

The top-right square where both importance and performance is high denotes the percentage of viewers who consider the statement to be a key strength.

- **Orange squares:** gave a performance score that was higher than their importance score.

Channel 4 is exceeding expectations or potentially over-performing in an area not considered so important. This will be referred to as the orange, exceeding expectations zone.

- **Red squares:** gave a performance score that was lower than their importance score.

Channel 4 is not performing in line with the importance of the duty. This will be referred to as the red, opportunity zone.

When analysing performance in the context of importance we consider only Channel 4 viewers, not all UK adults, as only users of the channel can offer a considered view of its performance.

4.3 Overview of perceived importance of Channel 4 duties

Figure 10 below, shows that all four statements, covering the three duties, were considered important by around a third of all adults in the quantitative research. There was little variation in importance ratings between the statements used to measure the duties and this remained true when narrowing the audience to Channel 4 viewers, regular Channel 4 viewers or its core target of 16-34 year olds.

The core target of 16-34 year olds were no more likely than adults in general to consider the remit duties important. However, the actual percentage considering the statement important increased

²⁰ The qualitative research was conducted with Channel 4's target audience of 16-34 year olds.

with frequency of viewing Channel 4. Indeed, it makes sense that the more you watch a channel, the more you are likely to consider what it does to be important.

Within the qualitative research, which allowed more detailed consideration, 'Education' was considered the most important of the Channel 4 duties, particularly from a societal rather than personal point of view.

Figure 10: Importance of Channel 4's duties for audience groups

Statement	Importance (7-10) (Base: All adults, 2,184)	Importance (7-10) (Base: All 16-34 year olds, 635)	Importance (7-10) (Base: Channel 4 viewers, 1,740)	Importance (7-10) (Base: 16- 34 year old Channel 4 viewers, 445)	Importance (7-10) (Base: Regular Channel 4 viewers ²¹ , 528)	Importance (7-10) (Base: 16-34 year old regular Channel 4 viewers, 160)
Channel 4 comes up with new ideas	35%	34%	42%	43%	53%	50%
Channel 4 programmes help me learn something new	33%	33%	39%	40%	52%	52%
Channel 4 is different from other channels	32%	32%	38%	41%	52%	51%
Channel 4 programmes are edgy and push the boundaries	32%	32%	38%	40%	52%	55%

²¹ Regular viewers claimed to watch Channel 4 either every day or most days.

4.4 Overview of Channel 4's perceived performance against its duties

Similar patterns were evident for perceived performance with little variation in the percentage of viewers rating Channel 4's performance highly between statements²² (see Figure 11 below).

As seen with the importance data, a greater percentage of regular Channel 4 viewers gave a high performance score than of all Channel 4 viewers. This is unsurprising given that what people consider important about a channel tends to be related to something they like about the channel. Hence importance and performance ratings tend to be highly correlated.

Whilst the core audience of 16-34 year old viewers was no more likely to consider the remit duties important, it was more likely to give a high performance score for Channel 4 than older viewers, with this effect magnified even further when looking at regular viewers to the channel.

Core viewers participating in the qualitative research also recognised Channel 4 for having new ideas, being creative and having a distinctive image.

Figure 11: Channel 4's perceived performance against its duties for audience groups

Statement	Performance (7-10) (Base: Channel 4 viewers, 1,740)	Performance (7-10) (Base: 16-34 year old Channel 4 viewers, 445)	Performance (7-10) (Base: Regular Channel 4 viewers, 528)	Performance (7-10) (Base: 16-34 year old regular Channel 4 viewers, 160)
Channel 4 comes up with new ideas	36%	40%	50%	54%
Channel 4 programmes help me learn something new	35%	39%	50%	54%
Channel 4 is different from other channels	37%	41%	52%	55%
Channel 4 programmes are edgy and push the boundaries	37%	41%	52%	58%

In the remainder of this section we take each of the three themes and discuss audiences' views on Channel 4's performance within each theme, in the context of importance, drawing on both the quantitative and qualitative research findings.

²² Note, when analysing the quantitative performance measures data we consider only Channel 4 viewers, not all UK adults, as only users of the channel can offer a considered view of its performance. Within this section on Channel 4's PSB Remit, viewers are defined as those watching Channel 4 specifically, rather than any Channel 4 Corporation channel.

4.5 Demonstrating innovation, experimentation and creativity

Overall, the evidence suggests that Channel 4 is performing well in innovation, experimentation and creativity with the majority of viewers rating performance in line with importance on the statements: '*Channel 4 comes up with new ideas*' and '*Channel 4 programmes are edgy and push the boundaries*'.

Both performance and importance ratings were higher among regular viewers who are more familiar with the channel and, in particular, viewers from the core target group of 16-34 year olds. There was not a major difference between men and women but viewers in the higher ABC1 socio-economic groups tended to give higher performance and importance scores than viewers in the lower C2DE socio-economic groups.

The qualitative research also highlighted that core Channel 4 viewers recognised it for having new ideas and that its distinctive image is centred on being informative, challenging and controversial.

Channel 4 comes up with new ideas

Importance

As with the other statements assessing Channel 4's duties, around a third of adults (35%) considered this a particularly important part of Channel 4's role, giving it an importance score of 7-10. This was similar for all 16-34 year olds (34%) but rose to 42% among Channel 4 viewers, 43% among viewers aged 16-34 and 53% among regular Channel 4 viewers.

Within the UK adult population as a whole, the 35-54 year old age group (42%) were more likely to feel this was important, significantly higher than 16-34 year olds (34%) and those aged 55 or over (29%). Those in the higher ABC1 socio-economic group were more likely to feel this was important (39%) than those in the lower C2DE socio-economic group (31%). These sub-group differences are mirrored among Channel 4 viewers in the analysis.

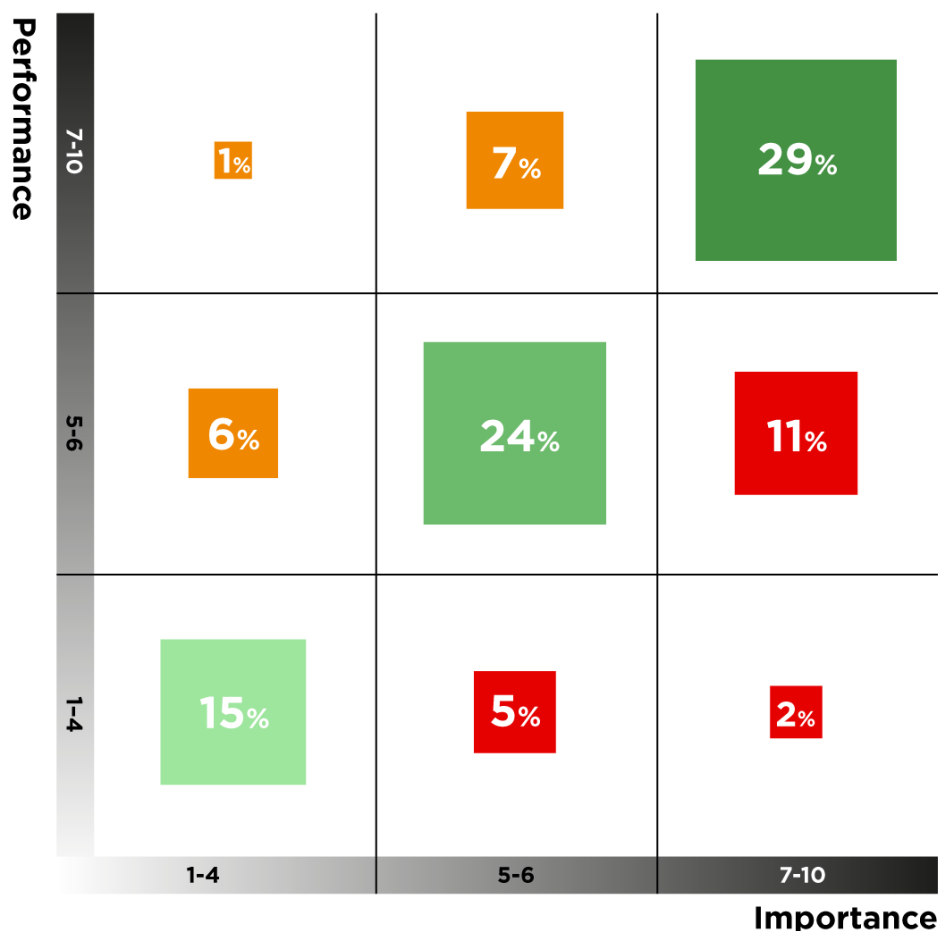
Performance

36% of Channel 4 viewers gave a high performance score (7-10) for '*comes up with new ideas*', rising to 40% among viewers aged 16-34, 50% among regular viewers and 54% among regular viewers aged 16-34.

Almost 7 in 10 Channel 4 viewers (68%) gave Channel 4 a score for performance that was in the same band as their score for importance, thus falling into the green, strength zone (see Figure 12, below). This demonstrates that Channel 4's performance was largely perceived to be in line with expectations in this area. Further, more Channel 4 viewers fell into the top-right key strength square (29%) than into the entire red, opportunity zone (18%).

When looking at the performance rating by sub-groups, Channel 4 viewers aged 35-54 (42%) and 16-34 (40%) were more likely to rate Channel 4 highly on '*coming up with new ideas*' than those aged 55+ (28%). Channel 4 viewers in the higher ABC1 socio-economic group (45%) were also more likely to rate Channel 4 highly than those in the lower C2DE socio-economic group (39%). This variation between socio-economic grades was supported to some extent within the qualitative phase where some of the younger participants in lower socio-economic groups tended to be less familiar with Channel 4 and viewed it as being a little too conservative, middle class and middle aged.

Figure 12: Importance vs Performance Grids: Channel 4 comes up with new ideas



Channel 4 comes up with new ideas.
Base: Channel 4 viewers (1740)

Channel 4 programmes are edgy and push the boundaries

Importance

Similar to the previous statement assessing this duty, around a third of adults (32%) thought that 'Channel 4 programmes are edgy and push the boundaries' as a particularly important part of Channel 4's role, giving it an importance score of 7-10. This was again similar among all 16-34 year olds (32%) but rose to 38% among Channel 4 viewers, 40% among viewers aged 16-34, 52% among regular Channel 4 viewers and 55% among regular viewers aged 16-34.

Importance ratings were again higher amongst Channel 4 viewers aged under 55 (42%) than aged 55+ (30%) and amongst the higher ABC1 socio-economic group (40%) than amongst the lower C2DE socio-economic group (36%). This pattern was repeated throughout the survey.

Performance

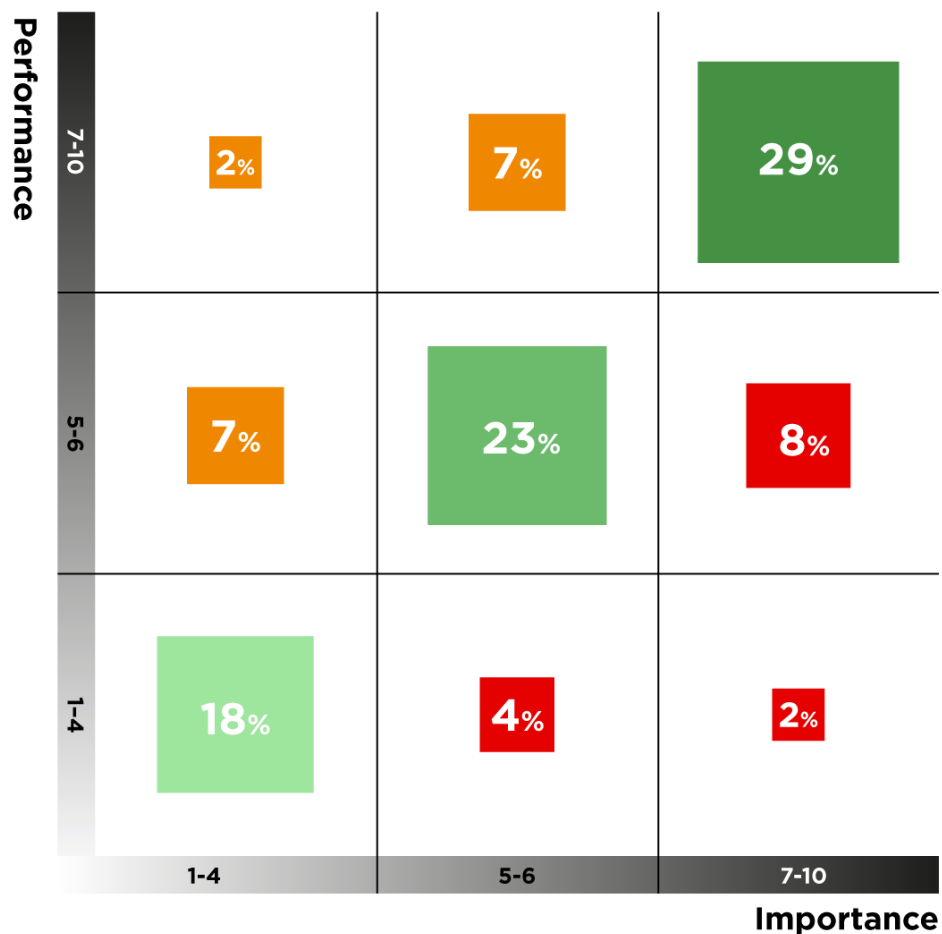
Performance scores were also similar to '*comes up with new ideas*': 37% of Channel 4 viewers gave a high performance score (7-10) for '*Channel 4 programmes are edgy and push the boundaries*'. This rose to 41% among viewers aged 16-34, 52% among regular Channel 4 viewers and 58% among regular viewers aged 16-34.

Performance ratings were higher than average amongst the same sub-groups as seen for importance scores, namely Channel 4 viewers aged under 55 (43%) and within the higher ABC1 (41%) socio-economic group. Therefore, although performance scores were lower for viewers aged 55+ (28%) and in the lower C2DE socio-economic group (33%) this is not something to be concerned about as performance was still broadly in line with importance.

Overall, 70% of Channel 4 viewers were in the green, strength zone (see Figure 13, below). With around seven in ten Channel 4 viewers rating performance in line with importance across both statements assessing its duty to demonstrate innovation, experimentation and creativity, we can conclude that Channel 4's performance is in line with expectations.

The percentage of Channel 4 viewers falling into the top-right key strength square (29%) was again significantly larger than the percentage in the entire red, opportunity zone (14%).

Figure 13: Importance vs Performance Grids: Channel 4 programmes are edgy and push the boundaries



Channel 4 programmes are edgy and push the boundaries.
Base: Channel 4 viewers (1740)

Qualitative consideration of ‘Demonstrating innovation, experimentation and creativity’

Participants within the qualitative research – conducted amongst 16-34 year olds – agreed that ‘demonstrating innovation, experimentation and creativity’ was an important duty for Channel 4, particularly as this duty is instrumental in helping to create and maintain a more distinctive character that involves risk-taking and pushing boundaries. However, when more in-depth consideration was given – and the duty was assessed alongside others with more societally-focused values – new ideas, risk-taking and pushing boundaries were considered to be less important than the duty relating to ‘*helping me learn something new*’ through the provision of educational programmes.

Viewers participating in the qualitative research also recognised Channel 4 for having new ideas. Those who were more familiar with Channel 4 argued it has always been a risk-taking trailblazer – breaking taboos and showing content that other channels are afraid to broadcast. Programmes put

forward to support this argument included 'Big Brother', 'Skins', 'Shameless' and more recent examples 'Gogglebox', 'The Undateables', and 'Naked Attraction'.

"They started with things like Big Brother... things that other channels wouldn't do... It's almost like Channel 4 has got a good reputation to uphold, because it started out so edgy and although it's become commonplace it still comes up with new things." (Leeds, 25-34, male, non-parent, C2DE)

"It is one of the traits of Channel 4 that I like – that they take the risks." (Belfast, 25-34, male, parent, C2DE)

4.6 Includes programmes of an educational nature

Channel 4 performs well against this duty when the statement is interpreted in the broadest sense to include thought-provoking, challenging programming. However, before given time to consider in the qualitative groups, people struggle to think of didactic education content. Nevertheless, the majority of viewers rated performance in line with importance.

Channel 4 programmes help me learn something new

Importance

Given that a quantitative survey environment does not provide the space for detailed consideration and explanation of remit statements, it is likely that respondents took a more narrow interpretation and personal (as opposed to societal) view when answering about this duty within the quantitative survey.

As such, it scored slightly lower than creativity in terms of importance. A third of adults (33%) rated '*Channel 4 programmes help me learn something new*' 7-10 on importance, rising to 39% amongst Channel 4 viewers and 52% among regular viewers.

There was no difference between all adults and 16-34 year olds in terms of perceived importance but 35-54 year olds (38%) were more likely to consider this duty important than adults aged 55+ (30%). Having children in the household did not make a significant difference (36%).

Performance

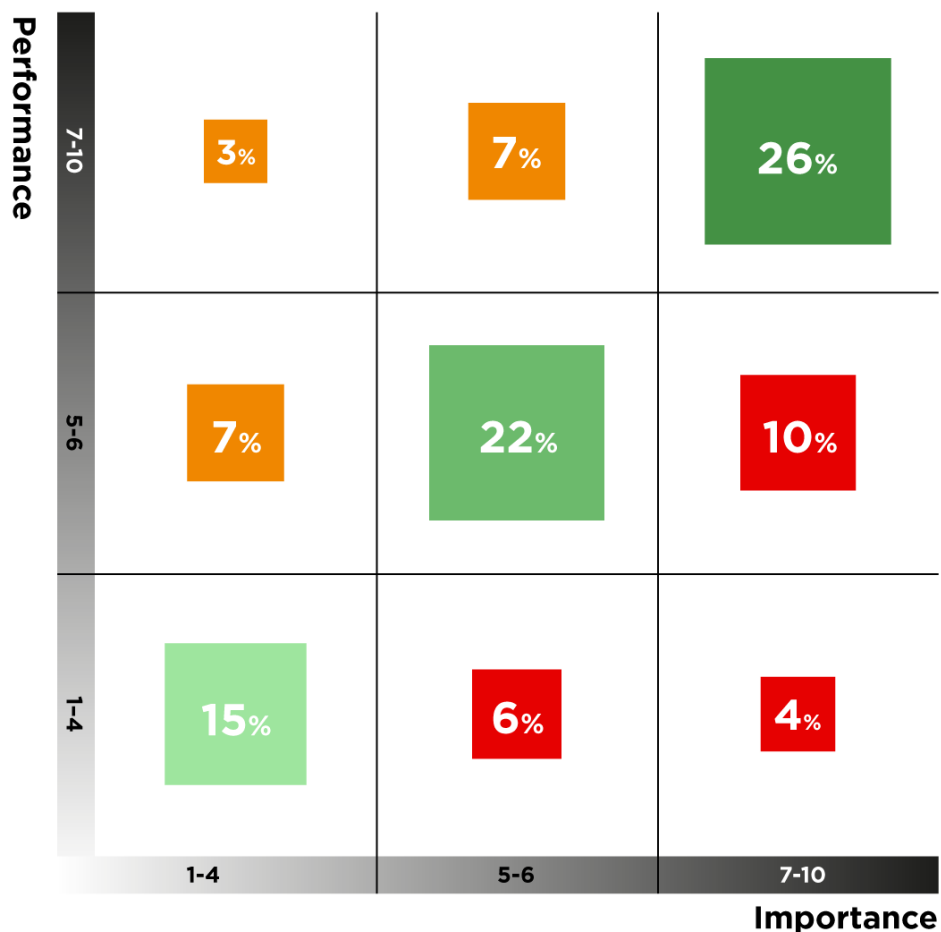
Channel 4 was perceived to perform well against the statement 'programmes help me learn something new.'

35% of Channel 4 viewers gave a high performance score (7-10) for '*programmes help me learn something new*', rising to 39% among viewers aged 16-34, 50% among regular viewers and 54% among regular viewers aged 16-34.

As for creativity and innovation, the majority of Channel 4 viewers in the quantitative research fell into the green, strength zone (63%). However, this was the lowest percentage of the four statements relating to Channel 4's duties and the percentage in the red, opportunity zone (20%) was highest (see Figure 14, below). The whole red, opportunity zone was still smaller than the top-right key strength square (26%) though.

Performance scores were again higher amongst Channel 4 viewers aged under 55 (39%) than aged 55+ (30%) but there was not a significant difference between higher ABC1 (37%) and lower C2DE (34%) socio-economic groups.

Figure 14: Importance vs Performance Grids: Channel 4 programmes help me learn something new



Channel 4 programmes help me learn something new.
Base: Channel 4 viewers (1740)

Qualitative consideration of 'Includes programmes of an educational nature'

In the qualitative research, which allowed more detailed consideration, 'Education' was considered the most important duty. It was considered even more important from a societal than personal point of view. This is because participants tended to take a broad societal perspective when evaluating this remit statement, describing education and learning as important to society as a whole.

Many at first related the duty to didactic, school-like learning. Those less familiar with the channel struggled to think of any examples of school-style educational content and this weakened their performance rating of this duty, which may explain why the red, opportunity zone was bigger for

this duty than the others in the quantitative research. However, on further consideration, most participants agreed that learning can come in many forms and in this sense Channel 4 was rated highly for providing incidental, accessible learning across different topics using a range of genres.

“Whilst it’s not necessarily educational it’s still giving you information that, again, people are taking on board without really taking it as education.” (Leeds, 25-34, female, non-parent, C2DE)

In this broad sense, the interpretation of educational programmes included news and current affairs and extended to thought-provoking content that presents new and alternative perspectives. Thus, a wide range of Channel 4 content could be considered educational – ‘Dispatches’ and ‘Embarrassing Bodies’ illustrate the range.

“Black Mirror it shows them (younger audience), it’s looking in that black mirror. It’s showing them things that they are already doing but shows them why that’s bad.” (Dundee, 25-34, male, non-parent, ABC1)

Nevertheless, the qualitative research identified scope for improvement in the area of educational content for older children. This was mentioned across the qualitative research sessions and not just by parents.

“Channel 4 doesn’t have anything to do with, like, educational programmes for... children [aged 10-14].” (Belfast, 20-21, female, E)

Provision of programming that appeals to older children is addressed in more detail in section 6.

4.7 Exhibiting a distinctive character

This was considered the least important of Channel 4’s duties within both the qualitative and quantitative research but with further consideration, not delivering the same content as other channels was still perceived as valuable.

The majority of viewers rated Channel 4 performance in line with importance, backing up views within the qualitative research that Channel 4 is distinctive, because it is innovative and edgy.

Channel 4 is different from other channels

Importance

Around a third (32%) of adults felt that it was particularly important (7-10 score) that Channel 4 is different from other channels, rising to 38% among Channel 4 viewers and 52% among regular viewers. As for the other duties, people aged 16-34 within each of these groups were not significantly different from all adults because a higher percentage among 35-54 year olds (39%) balanced a much lower percentage amongst adults aged 55+ (27%). There was a notable difference between the higher ABC1 (37%) and lower C2DE (28%) socio-economic grades too.

The percentage of adults rating this duty important was significantly lower than the percentage rating ‘*Channel 4 comes up with new ideas*’ as important (35%). The duty was also not considered to be as important as Channel 4’s other duties, which have more obvious and practical benefits, either from a personal or societal perspective, within the qualitative research.

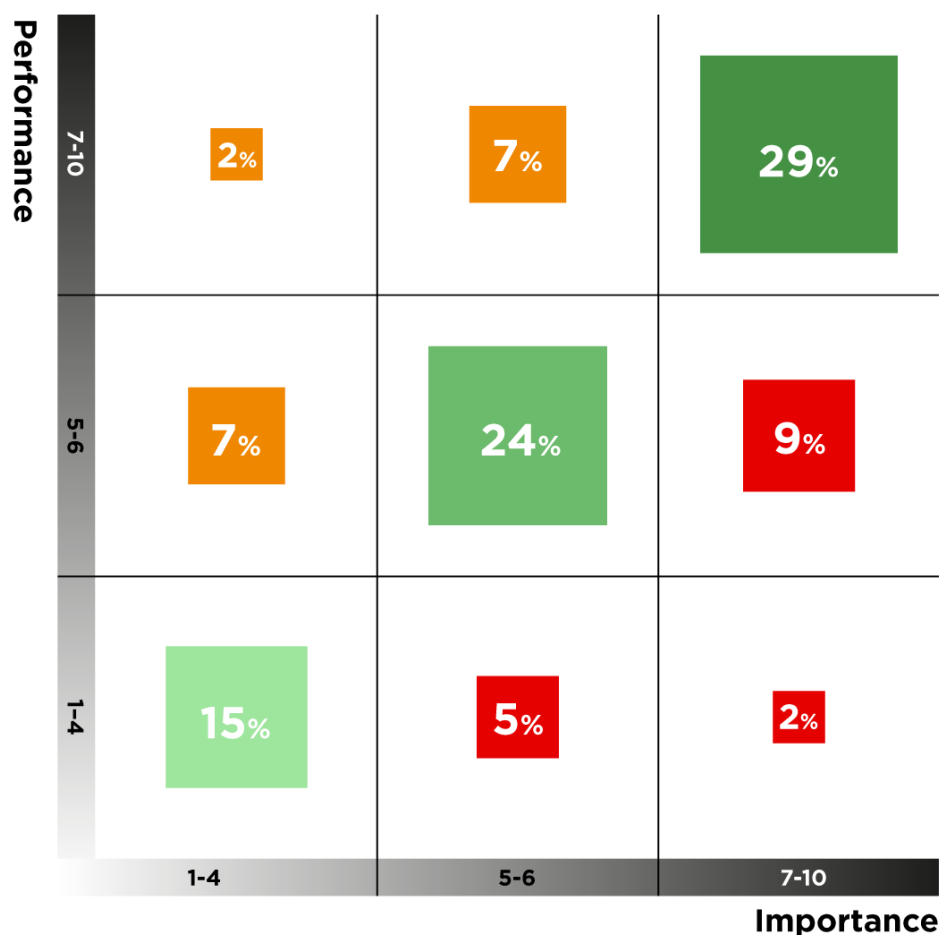
Performance

Quantitatively, the pattern of responses was very similar to the other duties with 37% of viewers giving a high performance rating, rising to 41% of viewers aged 16-34, 52% of regular viewers and 58% of regular viewers aged 16-34.

Movements within sub-groups were similar to importance with viewers aged 55+ (29%) less likely than the average viewer to give a higher performance score and higher ABC1 socio-economic grades (41%) more likely to give a high performance score than lower C2DE (33%) socio-economic grades.

Confirmation that Channel 4 performs well within this duty comes from the fact that two-thirds of viewers (68%) fell into the green, strength zone and 29% in the top-right key strength square compared with 16% across the whole red, opportunity zone (see Figure 15, below).

Figure 15: Importance vs Performance Grids: Channel 4 is different from other channels



Channel 4 is different from other channels.
Base: Channel 4 viewers (1740)

Qualitative consideration of ‘Exhibiting a distinctive character’

In the qualitative research, the idea of a channel having a distinctive character was, at first, a little difficult for some to comprehend and a few initially interpreted the statement as referring to the characters in a programme. The duty was widely considered relatively unimportant, and this opinion did not vary between personal and societal perspectives. It was only when the discussion touched on content that some participants felt distinctiveness could be important because a channel with a strong identity carries a promise of the type of content offered.

“I didn’t know until people started name dropping the programmes that I realised they’re all on that channel.” (Woking, 25-34, female, parent, ABC1)

Many agreed that Channel 4’s programmes are distinctive because they are innovative and edgy, which are reflections of the other duties.

“Channel 4 is quite out there. I think it’s quite cutting edge and they tend to put a lot of the controversial stuff on and they always have done for years.” (Leeds, 25-34, female, parent, C1C2)

“It kind of broke a lot of taboos... Channel 4 has historically done that.” (Leeds, 25-34, female, parent, C1C2)

Participants felt that being distinctive in a positive way and not delivering the same content as other channels was valuable. Channel 4 was perceived as different from the other main channels (BBC1, BBC2, ITV and Channel 5) both in terms of its brand image and the programmes it shows. It has an image that is quite sophisticated, educated and informed, with a streak of rebelliousness – although this somewhat middle class image can be a little alienating to some younger people of lower socio-economic grades.

“Well, mostly they perform very well...extremely well where they’ve showed distinctive character because when Channel 4 comes on, you just know it’s Channel 4.” (Swansea, 23-24, female, E)

“Extremely well for ‘show distinctive character’, in my opinion... I think we are all able to describe it quite well, you know – educated, witty, a reliable source of information.” (Belfast, 25-34, male, parent, C2DE)

“Yes, because you know that if you go to Channel 4 you’re not going to get the same as these other places. And you know the kind of thing you’re going to get.” (Dundee, 25-34, male, non-parent, ABC1)

Channel 4’s distinctiveness was seen to be delivered in several ways. It was perceived as pushing boundaries and risk-taking – it is the channel that launched ‘Big Brother’, ‘Skins’ and ‘Shameless’, and showed ‘Naked Attraction’. It tackles social issues (e.g. ‘The Secret Life of Prisons’, ‘Educating Yorkshire’) and includes characters on screen who represent diverse cultures and ethnicities (e.g. ‘Gogglebox’, ‘Indian Summer’).

Within the Channel 4 Corporation portfolio, Channel 4 stands out for having more mass market appeal, especially when compared with the niche offers of E4, 4Music and Film4. However, this can be somewhat diluted by the sharing of content across the portfolio.

5. Channel 4 Corporation's media content duties

Summary

Channel 4 Corporation is broadly delivering against its Remit requirements and is performing in line with audience expectations across its media content duties.

Consistently, viewers in Channel 4's core target group of 16-34 year olds rate Channel 4 Corporation's performance across its duties higher than older viewers aged 55 or over. Performance ratings are higher still among regular C4C viewers aged 16-34.

Qualitatively, C4C is seen as the service which, from its early days, has always taken up an alternative point of view, or represented perspectives within UK society that are not always represented by other PSBs. Across the research, C4C was also seen to perform well on news and current affairs, along with diversity. These and other specific findings from this research will be drawn out through the rest of this chapter in the relevant areas.

5.1 Channel 4 Corporation Remit duties

The media content duties that apply to the whole of Channel 4 Corporation cover a wide range of areas. In this section, we again evaluate audiences' ratings of Channel 4 Corporation against these duties, both in terms of perceived importance of each element of the remit, and how well audiences feel Channel 4 Corporation is performing against it²³.

The various media content duties can be summarised into six themes. Performance and importance were measured in the quantitative research using the statements in bold text within each theme:

- News and current affairs
 - ***'Channel 4 Corporation news and current affairs programmes help me understand what's going on in the world'***
 - ***'Channel 4 Corporation news and current affairs programmes show different points of view'***
- Diversity
 - ***'Channel 4 Corporation celebrates the diversity of the UK'***
 - ***'Channel 4 Corporation reflects my culture fairly'***

²³ Note: a sub-set of duties relevant to audiences was included in the research programme as not all of the duties were suitable for discussion (e.g. matters relating to supporting creative talent and issues of distribution were not discussed). An additional statement, 'Channel 4 Corporation's Facebook news helps me understand what's going on in the world', was asked but this has not been reported as it was not possible to analyse by Facebook users or those aware of the service, to make the analysis more meaningful.

- ***'Channel 4 Corporation shows programmes which are appealing to people like me'***
- Promoting alternative views and new perspectives
 - ***'Channel 4 Corporation programmes shows a different perspective and alternative views'***
 - ***'Channel 4 Corporation challenges established views'***
- Stimulating participation in society
 - ***'Channel 4 Corporation covers issues from around the world'***
 - ***'Channel 4 Corporation helps me understand issues in our society'***
 - ***'Channel 4 Corporation shows programmes that make me stop and think'***
 - ***'Channel 4 Corporation shows programmes that I want to talk about'***
 - ***'Channel 4 Corporation programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle)'***
- Film
 - ***'Channel 4 Corporation shows films that reflect different cultures in the UK'***
 - ***'Film4 productions make high quality films'***
- Older children and young adults
 - ***'Channel 4 Corporation makes programmes that appeal to older children (aged 10-14)'***
 - ***'Channel 4 Corporation makes programmes that appeal to young adults (aged 14-19)'***

The sixteen statements used to measure perceived importance of these duties were read out in a random order. For each one, respondents were asked to give a score between 1 and 10, where 1 was not at all important and 10 was extremely important. The same sixteen statements were then repeated with respondents asked to rate Channel 4 Corporation performance using a scale from 1 to 10, where 10 was the highest score and 1 the lowest.

Findings from the qualitative research again helped to shed light on the ratings by providing greater depth and understanding for each of the six themes.

Nine statements were explored in the qualitative research relating to the Channel 4 Corporation duties. They were covered under the same six themes as follows:

- News and current affairs
 - ***'Provide news and current affairs'***

- Diversity
 - ***‘Appeal to a culturally diverse society’***
- Promoting alternative views and new perspectives
 - ***‘Provide alternative views and perspectives’***
- Stimulating participation in society
 - ***‘Provide information and view from around the world’***
 - ***‘Stimulate debate and inspire change’***
 - ***‘Motivate participation in society’***
- Film
 - ***‘Make high quality films’***
 - ***‘Broadcast films that reflect cultural activity in the UK’***
- Older children and young adults
 - ***‘Include content for older children and young adults’***

5.2 How we report on Channel 4 Corporation’s performance in the context of importance

We follow the same format as for Channel 4 itself in the previous section but in this section we assess Channel 4 Corporation as a whole. Throughout this section, we will refer to Channel 4 Corporation viewers (viewers of any of the range of services in the Group, including All 4), a different group from Channel 4 viewers (who specifically watch the Channel 4 channel).

Performance is assessed in the context of importance using a grid for each of the duties throughout the report. Each grid summarises the relationship between importance and performance at an individual respondent level from the quantitative research.

The number in each square (and its size) represents the percentage of Channel 4 Corporation viewers²⁴ who:

- **Green squares:** gave a performance score that was in the same band as their importance score.

Channel 4 Corporation is performing in line with the importance of the duty. Throughout the report, this will be referred to as the green, strength zone.

The top-right square where both importance and performance is high denotes the percentage of viewers who consider the statement to be a key strength.

- **Orange squares:** gave a performance score that was higher than their importance score.

²⁴ In this section, viewers are defined as those who watch any of Channel 4 Corporation’s services.

Channel 4 Corporation is exceeding expectations or potentially over-performing in an area not considered so important. This will be referred to as the orange, exceeding expectations zone.

- **Red squares:** gave a performance score that was lower than their importance score.

Channel 4 Corporation is not performing in line with the importance of the duty. This will be referred to as the red, opportunity zone.

When analysing performance in the context of importance we consider only Channel 4 Corporation viewers, not all UK adults, as only users of the services can offer a considered view of their performance.

5.3 Overview of perceived importance of Channel 4 Corporation duties

Figure 16, below shows each of the statements ranked in order of perceived importance amongst all adults. However, it should be borne in mind that whilst the majority of duties have relevance for all, some have most relevance to specific target groups. This applies particularly to the statements concerning older children and young adults. Figures 17, and 18, further below, detail the importance scores given by audiences for whom the statements are particularly relevant.

Similarly, for those statements concerning diversity and representation, we draw out scores amongst relevant target audiences where appropriate throughout the analysis.

Although statements relating to film rank highly in the table below, within the qualitative research, other themes were found to be more important than 'film'. This may be linked with a tendency to rate statements purely from a personal point of view within the quantitative research, whilst participants in the qualitative research were also encouraged to consider duties from a societal perspective.

Both adults and Channel 4 Corporation viewers aged 16-34 and 35-54 tended to give higher importance scores across the duties than those aged 55 or over. Similarly, adults and viewers in the higher ABC1 socio-economic groups gave higher importance scores than those in the lower C2DE socio-economic groups.

The hierarchy of duties does not change amongst Channel 4 Corporation viewers or regular viewers. However, amongst regular viewers aged 16-34, *'shows programmes which are appealing to people like me'* and *'Channel 4 Corporation makes programmes that appeal to young adults (aged 14-19)'* move up the rank order whilst *'news and current affairs programmes show different points of view'* moves down.

Figure 16: Importance of Channel 4 Corporation's duties for audience groups

Statement	Importance (7-10) (Base: All adults, 2,184)	Importance (7-10) (Base: All 16-34 year olds, 635)	Importance (7-10) (Base: Channel 4 Corporation viewers, 1,861)	Importance (7-10) (Base: 16-34 year old Channel 4 Corporation viewers, 496)	Importance (7-10) (Base: Regular Channel 4 Corporation viewers ²⁵ , 681)	Importance (7-10) (Base: 16- 34 year old regular Channel 4 Corporation viewers, 214)
Film4 productions make high quality films	39%	39%	45%	48%	56%	60%
Channel 4 Corp. covers issues from around the world	39%	41%	44%	50%	56%	59%
Channel 4 Corp. shows programmes which are appealing to people like me	38%	42%	44%	51%	55%	61%
Channel 4 Corp. shows films that reflect different cultures in the UK	37%	40%	42%	48%	53%	57%
Channel 4 Corp. celebrates the diversity of the UK	37%	40%	42%	47%	53%	57%
Channel 4 Corp. news and current affairs programmes help me understand what's going on in the world	37%	39%	41%	46%	53%	56%

²⁵ Regular viewers claimed to watch any Channel 4 Corporation channel either every day or most days.

Channel 4 Corp. programmes shows a different perspective and alternative views	36%	39%	41%	47%	51%	55%
Channel 4 Corp. news and current affairs programmes show different points of view	36%	37%	41%	44%	51%	50%
Channel 4 Corp. helps me understand issues in our society	35%	39%	40%	47%	52%	54%
Channel 4 Corp. challenges established views	34%	35%	39%	42%	50%	53%
Channel 4 Corp. shows programmes that make me stop and think	34%	35%	39%	41%	50%	50%
Channel 4 Corp. reflects my culture fairly	32%	32%	36%	38%	48%	49%
Channel 4 Corp. shows programmes that I want to talk about	31%	36%	35%	44%	48%	53%
Channel 4 Corp. makes programmes that appeal to young adults (aged 14-19)	28%	35%	32%	41%	43%	52%
Channel 4 Corp. programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle)	24%	26%	27%	31%	36%	39%

Channel 4 Corp. makes programmes that appeal to older children (aged 10-14)	21%	22%	24%	27%	33%	35%
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The two statements relating to younger audiences have most relevance for those survey respondents with children. Figure 17 below, shows that perceived importance is higher amongst this group for both statements. However, adults with children were more likely to consider all of Channel 4 Corporation's Remit duties important so the youth theme remains at the lower end of the hierarchy, even for those with children (see Appendix B).

Figure 17: Importance of Channel 4 Corporation's younger audience duties amongst adults with children aged under 16 in the household

Statement	Importance (7-10) (Base: All adults with children in household, 584)	Importance (7-10) (Base: Channel 4 Corporation viewers with children in household, 493)	Importance (7-10) (Base: Regular Channel 4 Corporation viewers ²⁶ with children in household, 189)
Channel 4 Corp. makes programmes that appeal to young adults (aged 14-19)	35%	40%	57%
Channel 4 Corp. makes programmes that appeal to older children (aged 10-14)	27%	31%	43%

Further, adults and C4C viewers with children aged 10-14 specifically were more likely still to rate the duty to make programmes that appeal to older children (aged 10-14) important. Importance rose no further for regular C4C viewers with children aged 10-14 (see Figure 18, below).

²⁶ Regular viewers claimed to watch any Channel 4 Corporation channel either every day or most days.

Figure 18: Importance of Channel 4 Corporation's older children duty amongst adults with children aged 10-14 in the household

Statement	Importance (7-10) (Base: All adults with children aged in household aged 10-14, 246)	Importance (7-10) (Base: Channel 4 Corporation viewers with children in household aged 10-14, 218)	Importance (7-10) (Base: Regular Channel 4 Corporation viewers with children in household aged 10-14, 86)
Channel 4 Corp. makes programmes that appeal to older children (aged 10-14)	32%	36%	42%

5.4 Overview of Channel 4 Corporation's perceived performance against its duties

The order of the statements in terms of performance generally matched the order for importance. As we found in the previous section, what people consider important about a channel tends to be related to something they like about it so we tend to see high correlations. Consequently, the majority of viewers gave performance scores that were within the same band as their importance score across all of Channel 4 Corporation's duties.

This leads to the conclusion that Channel 4 Corporation is performing in line with audience expectations across its Remit. This is supported by the qualitative research which found Channel 4 Corporation to be performing well in all areas, and particularly well in virtually all those areas considered more important, particularly to wider society, the only exception being its provision of programmes that appeal to older children.

As for importance, the core audience of viewers aged 16-34 and viewers aged 35-54 were more likely to give a high performance score for Channel 4 Corporation than older viewers aged 55 or over and performance scores also increased with frequency of viewing Channel 4 Corporation channels.

Similarly, viewers in the higher ABC1 socio-economic groups gave higher performance scores than those in the lower C2DE socio-economic groups. There did not tend to be a difference between male and female viewers for performance or importance across the duties.

Figure 19: Channel 4 Corporation's perceived performance on its duties for audience groups

Statement	Performance (7-10) (Base: Channel 4 Corporation viewers, 1,740)	Performance (7-10) (Base: 16-34 year old Channel 4 Corporation viewers, 445)	Performance (7-10) (Base: Regular Channel 4 Corporation viewers, 528)	Performance (7-10) (Base: 16-34 year old regular Channel 4 Corporation viewers, 160)
Film4 productions make high quality films	39%	42%	53%	55%
Channel 4 Corp. covers issues from around the world	38%	40%	52%	53%
Channel 4 Corp. shows programmes which are appealing to people like me	37%	42%	53%	57%
Channel 4 Corp. shows films that reflect different cultures in the UK	36%	39%	51%	50%
Channel 4 Corp. celebrates the diversity of the UK	35%	40%	48%	52%
Channel 4 Corp. news and current affairs programmes help me understand what's going on in the world	36%	38%	48%	52%
Channel 4 Corp. programmes shows a different perspective and alternative views	35%	38%	48%	50%

Channel 4 Corp. news and current affairs programmes show different points of view	35%	36%	48%	51%
Channel 4 Corp. helps me understand issues in our society	35%	39%	47%	51%
Channel 4 Corp. challenges established views	34%	36%	46%	47%
Channel 4 Corp. shows programmes that make me stop and think	33%	36%	46%	48%
Channel 4 Corp. reflects my culture fairly	30%	33%	42%	45%
Channel 4 Corp. shows programmes that I want to talk about	31%	35%	43%	46%
Channel 4 Corp. makes programmes that appeal to young adults (aged 14-19)	26%	37%	41%	50%
Channel 4 Corp. programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle)	25%	28%	35%	38%
Channel 4 Corp. makes programmes that appeal to older children (aged 10-14)	19%	24%	30%	35%

We have presented performance scores for the two young audience statements amongst those with children aged under 16 in the household in Figure 20, below. Performance scores were significantly higher for this group in households with children, but, mirroring the pattern seen in the importance ratings, scores were relatively lower than for other duties, even amongst those with children (see Appendix B).

Figure 20: Channel 4 Corporation's perceived performance on its children's duties amongst Channel 4 Corporation viewers with children aged under 16 in the household

Statement	Performance (7-10) (Base: Channel 4 Corporation viewers with children in household, 493)	Performance (7-10) (Base: Regular Channel 4 Corporation viewers ²⁷ with children in household, 189)
Channel 4 Corp. makes programmes that appeal to young adults (aged 14-19)	35%	54%
Channel 4 Corp. makes programmes that appeal to older children (aged 10-14)	26%	41%

C4C viewers, or regular viewers, with children aged 10-14 specifically were no more likely than those with children of any age under 16 to give a high performance score as shown in Figure 21 below.

Figure 21: Channel 4 Corporation's perceived performance on its older children duty amongst Channel 4 Corporation viewers with children aged 10-14 in the household

Statement	Performance (7-10) (Base: Channel 4 Corporation viewers with children in household aged 10-14, 218)	Performance (7-10) (Base: Regular Channel 4 Corporation viewers ²⁸ with children in household aged 10-14, 86)
Channel 4 Corp. makes programmes that appeal to older children (aged 10-14)	27%	40%

²⁷ Regular viewers claimed to watch any Channel 4 Corporation channel either every day or most days.

²⁸ Regular viewers claimed to watch any Channel 4 Corporation channel either every day or most days.

In the remainder of this section we will take each of the six themes and discuss audiences' views on Channel 4 Corporation's performance within each theme, in the context of importance, drawing on both the quantitative and qualitative research.

5.5 News and current affairs

The statements within this theme scored highly for importance and this was supported in the qualitative research with news and current affairs argued to be one of the most important areas for Channel 4 Corporation to provide from a societal perspective.

Statements referring to news and current affairs performed relatively strongly in the quantitative research. Over half (52%) of regular viewers aged 16-34 rated C4C highly for delivering '*news and current affairs programmes help me understand what's going on in the world*'. Similarly around half (51%) of regular viewers aged 16-34 gave a 7-10 score for delivering '*news and current affairs programmes that show different points of view*'. Qualitatively C4C's provision of news and current affairs was considered to be one of its strongest areas of performance among its viewers. Channel 4's news in particular was considered to be impartial, covering stories from different angles than the other providers, and was praised for not shying away from tackling controversial topics.

Channel 4 Corporation news and current affairs programmes help me understand what's going on in the world

Importance

Channel 4 Corporation's news and current affairs programmes were seen as important to 'help me understand what's going on in the world' by 37% of adults, 41% of viewers, 53% of regular viewers and 56% of regular viewers aged 16-34, placing this statement in the top third of all those covered by the research for importance.

As seen within the previous themes, viewers aged 16-34 (46%) and 35-54 (44%) were more likely to say the statement was important than viewers aged 55+ (35%) and viewers in the higher ABC1 socio-economic groups (44%) more likely than those in the lower C2DE socio-economic groups (38%).

Performance

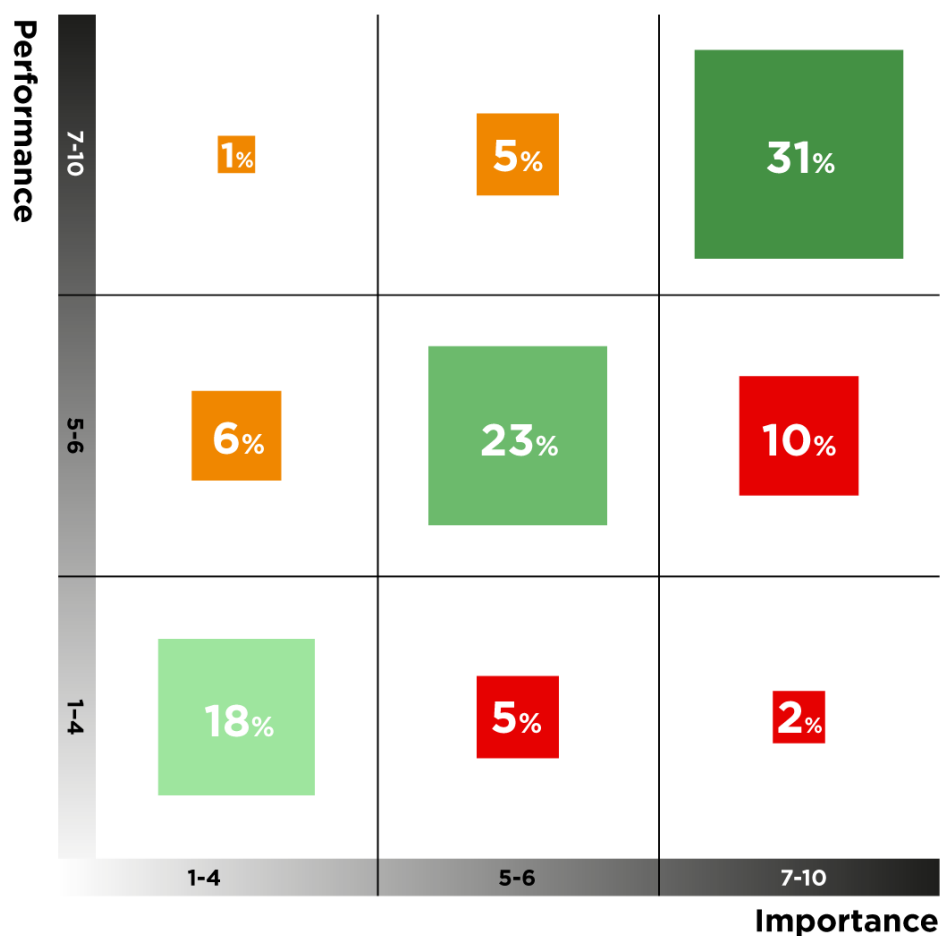
Similarly, performance against '*Channel 4 Corporation news and current affairs programmes help me understand what's going on in the world*' was relatively high compared with the range of other statements asked. 36% of Channel 4 Corporation viewers gave a high performance score rising to 38% of viewers aged 16-34, 48% of regular viewers and 52% of regular viewers aged 16-34.

As for importance, viewers aged 16-34 (38%) and 35-54 (41%) were more likely to rate performance highly than viewers aged 55+ (29%).

Usually, we have seen that viewers in the higher ABC1 socio-economic groups rate Channel 4 Corporation higher than those in the lower C2DE socio-economic grades for both importance and performance. However, for this statement, although ABC1s were more likely to consider the statement important, the percentages giving high performance scores were similar (ABC1 36% vs C2DE 35%).

Around seven in ten (72%) of Channel 4 Corporation viewers fell into the green, strength zone in Figure 22, below, showing that the majority of viewers rated performance in line with importance. The percentage classified in the red, opportunity zone was similar to other themes at 17%.

Figure 22: Importance vs Performance Grids: Channel 4 Corporation news and current affairs programmes help me understand what's going on in the world



Channel 4 group news and current affairs programmes help me understand what's going on in the world. **Base: Channel 4 Group viewers (1861)**

Channel 4 Corporation news and current affairs programmes show different points of view

Importance

This statement relating to news and current affairs was also in the top half of those covered within the quantitative research in terms of importance with 36% of all adults rating this highly, as did 41% of Channel 4 Corporation viewers, 51% of regular viewers and 50% of regular viewers aged 16-34.

We see the same demographic patterns with viewers aged 16-34 (44%) and aged 35-54 (46%) more likely to have given a high importance score than viewers aged 55+ (35%) and viewers in the higher ABC1 socio-economic groups (46%) more likely than those in the lower C2DE socio-economic groups (36%) to have done so.

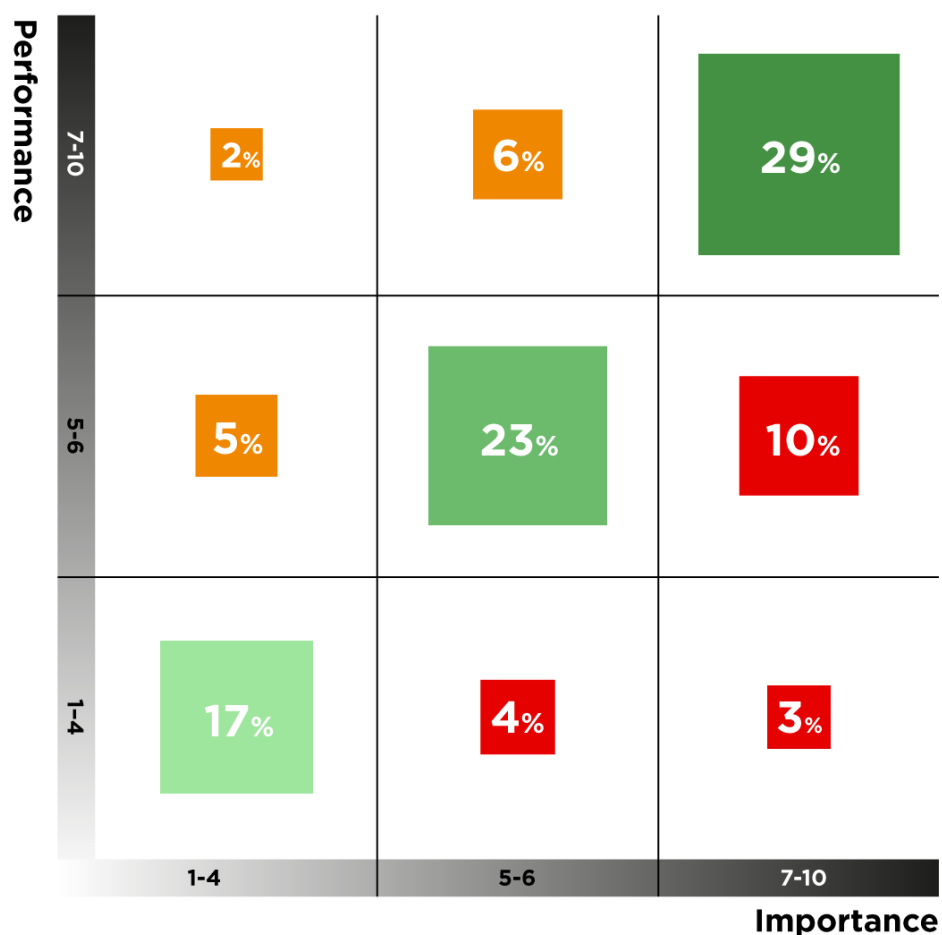
Performance

The statement ranked similarly highly in terms of performance with 35% of Channel 4 Corporation viewers, 36% of viewers aged 16-34, 48% of regular viewers and 51% of regular viewers aged 16-34 giving a 7-10 score for performance.

Viewers aged 16-34 (36%) and 35-54 (42%) and viewers in the higher ABC1 socio-economic groups (38%) were more likely to have given a high performance score than viewers aged 55+ (29%) and in the lower C2DE socio-economic groups (33%).

A similar percentage of Channel 4 Corporation viewers fell into the green, strength zone (69%) and red, opportunity zone (17%) compared with other duties (see Figure 23, below).

Figure 23: Importance vs Performance Grids: Channel 4 Corporation news and current affairs programmes show different points of view



Channel 4 group news and current affairs programmes show different points of view. **Base: Channel 4 Group viewers (1861)**

Qualitative consideration of news and current affairs

Focusing specifically on the young in the qualitative stage, although they might be less interested in viewing news and current affairs themselves, delivering this type of programming to society more generally was considered to be one of Channel 4 Corporation's most important duties. This was reflected in the greater degree of importance attributed to wider society rather than to them personally in the qualitative sessions.

Channel 4 Corporation was also considered to be performing well in the provision of news and current affairs, although commentary was tempered by the more limited exposure to and experience of this type of content.

"The news on Channel 4 is probably the most serious news. It's quite influential" (Leeds, 25-34, female, non-parent, C2DE)

Whilst the BBC was considered to be a stronger brand for delivering world news, those who value Channel 4 Corporation's news coverage considered it more balanced than other broadcasters' coverage. This is thought to be driven firstly by Channel 4 Corporation not being shy at tackling controversial topics and challenging guest speakers, and secondly, Channel 4 Corporation was thought to be better at having a more 'human' angle compared with other broadcasters, by providing news that explores the impact on local people and the local perspective.

"If you watch the BBC... they'll elaborate more on what they want the audience to hear, whereas Channel 4 won't. Channel 4 will inform you so you can make your own choices" (Leeds, 25-34, male, parent, C1C2)

"I don't know, I just find it, I like to see them challenging people that come on to be interviewed. I don't think that the BBC would push as hard to challenge." (Belfast, 25-34, female, parent, C2DE)

"So the way it (Channel 4) presents the news.... And documentaries and things like that... focus maybe less on immigration and more on what an immigrant would go through... like social angle... a more human angle." (Dundee, 25-34, male, non-parent, ABC1)

As well as Channel 4 News, Channel 4 Corporation was recognized for providing documentaries, short pieces and other educational content. Channel 4 was seen as the leading brand within the Channel 4 Corporation family for news and current affairs, with Dispatches often cited as a strong example of current affairs programming.

"With the current affairs that they cover, they did that programme on drugs and I remember when they were testing affects in the brain. No other channels have really done that." (Leeds, 25-34, male, non-parent, C2DE)

However, some were unsure how to assess this duty because they were unfamiliar with this content from Channel 4 Corporation. This was more noticeable among younger audiences (aged 16-22) and those in the lower socio-economic groups. Some also felt the strength of Sky and the BBC in news provision, with their dedicated news channels, obscured Channel 4 Corporation as a provider of content in this area.

5.6 Diversity

Overall, this was considered to be an area of strong performance for Channel 4 Corporation, achieving some of the highest performance scores for '*appealing to people like me*' and '*celebrates the diversity of the UK*'. Around seven in ten viewers rated performance in line with importance across each of the three statements used to assess this duty.

Performance ratings were higher among regular viewers, and particularly among viewers in Channel 4 Corporation's target of 16-34 year olds but this was mirrored by higher importance ratings too so there was similar alignment between the two measures.

Performance scores were slightly lower for '*reflects my culture fairly*'. Performance ratings did not differ among BAME respondents or those with a disability from the total sample on these statements. However, performance was more likely to be rated lower than importance by viewers in Scotland and Northern Ireland suggesting that Channel 4 Corporation has an opportunity to improve how these devolved nations are represented.

Findings from the qualitative research were consistent with participants generally agreeing that this is both a very important duty for Channel 4 Corporation to meet, particularly from a societal perspective, as well as one in which it performs strongly. A few participants in the qualitative phase also conveyed a feeling of Channel 4 Corporation being urban/London focused and therefore not giving much sense of Northern Ireland/Scotland/Wales to younger viewers in those nations. There were also a few younger participants (16-24 year olds) in lower socio economic grades in Northern Ireland and Wales who felt there was a lack of positive representation of people and life in their own part of the UK.

Channel 4 Corporation shows programmes which are appealing to people like me

Importance

Viewed as the most important diversity statement, 38% of all adults rated this as 7-10 for importance, rising to 44% for Channel 4 Corporation viewers, 55% for regular viewers and 61% for regular viewers aged 16-34, the highest rating across all statements within this sub-group.

Two thirds (67%) of adults in Northern Ireland felt that it was important that the Channel 4 Corporation '*shows programmes which are appealing to people like me*' making this the only nation of the UK to rate this priority more important than average.

Channel 4 Corporation viewers with a disability (41%) and from minority ethnic groups (41%) were not significantly different from viewers overall (44%) in terms of rating this statement important whilst viewers with children did consider the statements more important than average (51%).

Performance

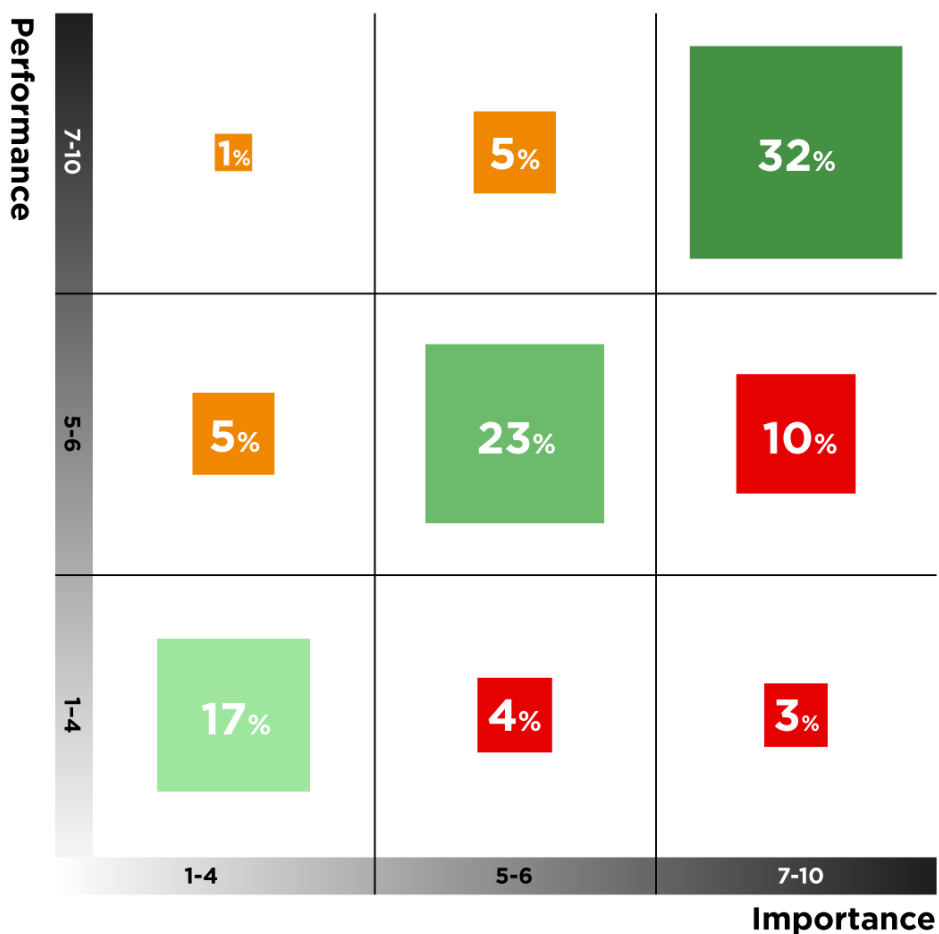
The high importance of this statement was reflected by the fact that this statement also achieved the third highest percentage of Channel 4 Corporation viewers giving it a high performance score (37%). Further, 53% of regular Channel 4 Corporation viewers scored this statement from 7-10 and 57% of regular viewers aged 16-34 (the highest of all statements for this group, as for importance).

Within demographic sub-groups, performance also reflected perceived importance with 57% of viewers in Northern Ireland giving a score of 7-10 which was significantly higher than the 32% for England, 30% in Scotland and 30% in Wales. Viewers with a disability (37%) or in minority ethnic

groups (38%) were again not significantly different from average whilst viewers with children were also more likely than average to give a high performance score (43%).

The balance between importance and performance across demographic groups is demonstrated by the fact that seven in ten (72%) Channel 4 Corporation viewers fell into the green, strength zone in Figure 24, below. Only 17% were in the red, opportunity zone, vastly outnumbered by the 32% in the top-right key-strength square.

Figure 24: Importance vs Performance Grids: Channel 4 Corporation shows programmes which are appealing to people like me



The Channel 4 group shows programmes which are appealing to people like me.
Base: Channel 4 Group viewers (1861)

Channel 4 Corporation celebrates the diversity of the UK

Importance

The percentage of all adults considering 'Channel 4 Corporation celebrates the diversity of the UK' important was similar to the first statement assessing the diversity duty at 37%. Once again, this

grew amongst Channel 4 Corporation viewers (42%) and regular viewers (53%) and amongst Channel 4 Corporation's core target of 16-34s (40% of all, 47% viewers, 57% regular viewers).

Channel 4 Corporation viewers aged under 55 were particularly likely to think that this was important (47%) compared with those aged 55+ (32%) as were viewers in the higher ABC1 socio-economic groups (46%) compared with viewers in the lower C2DE socio-economic groups (37%).

Again, we did not see that viewers from minority ethnic groups (41%) or those with disabilities (40%) were any more or less likely to rate this statement important. However, a similar difference by UK nation was noted with viewers in Northern Ireland (60%) more likely to give a score of 7-10 than average.

Performance

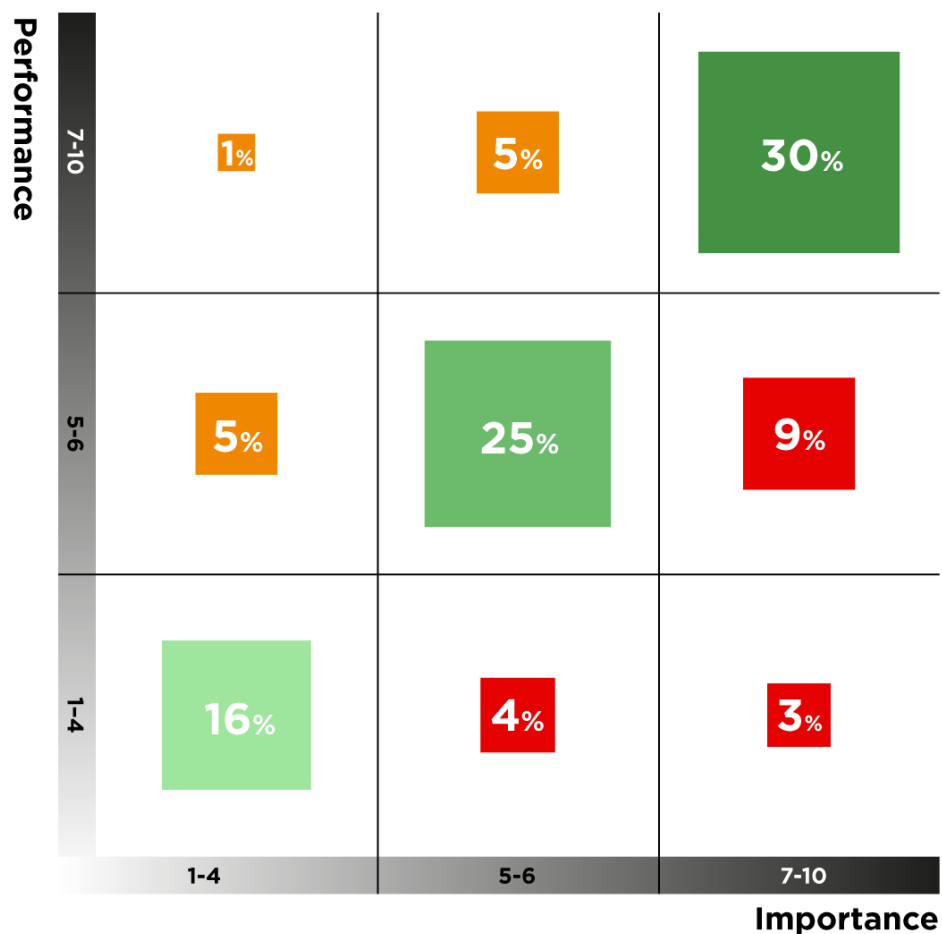
Mirroring importance, performance scores were higher for this statement than most others across Channel 4 Corporation's duties. Around a third of Channel 4 Corporation viewers (35%) gave a high performance score rising to 40% among viewers aged 16-34, 48% among regular viewers and 52% among regular viewers aged 16-34.

It is particularly relevant to look at performance against the diversity attributes amongst those from minority groups. The percentages of Channel 4 Corporation viewers from minority ethnic groups (38%) or with a disability (36%) giving a high performance score were broadly in line with all viewers (35%). This was the case for importance too, indicating that opinions relating to Channel 4 Corporation's portrayal of diversity are no different within these sub groups when compared to the mainstream.

Performance scores were higher in Northern Ireland than other parts of the UK with 57% of Channel 4 Corporation viewers in Northern Ireland giving a high performance score. However, with importance also rated higher in this nation of the UK, the conclusion is that Channel 4 Corporation is performing in line with expectations in Northern Ireland, as elsewhere, rather than performance being particularly strong in Northern Ireland.

As for the previous statement within Channel 4 Corporation's diversity duty, around seven in ten Channel 4 Corporation viewers (71%) fell into the green, strength zone in Figure 25, below. Only 16% of viewers were classified in the red, opportunity zone too, confirming that Channel 4 is generally perceived to perform well against this statement.

Figure 25: Importance vs Performance Grids: Channel 4 Corporation celebrates the diversity of the UK



The Channel 4 group celebrates the diversity of the UK.
Base: Channel 4 Group viewers (1861)

Channel 4 Corporation reflects my culture fairly

Importance

Just under a third (32%) of all adults felt that this was an important area for the Channel 4 Corporation making it mid-range within its list of duties. As we saw for the previous statements within the diversity duty, Channel 4 Corporation viewers (36%) and regular viewers (48%) were more likely than average to consider '*reflects my culture fairly*' important.

Channel 4 Corporation viewers aged 16-34 (38%) and particularly aged 35-54 (43%) were more likely than viewers aged 55+ (29%) to consider this important. There were no major differences between viewers in the higher ABC1 (38%) and lower C2DE (34%) socio-economic groups or for viewers in minority ethnic groups (34%) or with a disability (35%). As for the other diversity

statements, viewers in Northern Ireland were more likely to rate the statement important (65%) than average.

Performance

Performance scores for this statement were also lower than the other diversity statements with 30% of Channel 4 Corporation viewers giving a high performance rating rising to 33% of viewers aged 16-34, 42% of regular Channel 4 Corporation viewers and 45% of regular viewers aged 16-34.

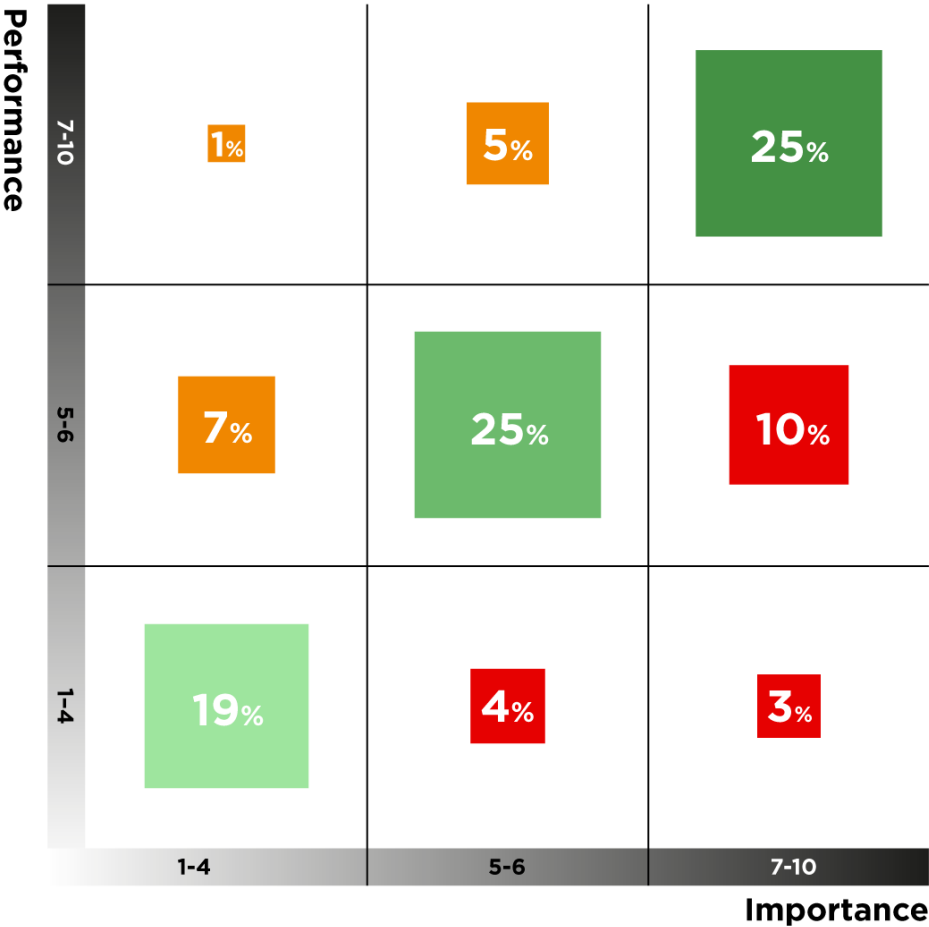
Nevertheless, with importance scores also lower, a similar percentage of Channel 4 Corporation viewers fell into the green, strength zone (69%) and red, opportunity zone as for the other diversity statements (see Figure 26, below).

Consequently, the same pattern of responses by demographics is seen as for importance with viewers aged 16-34 (33%) and aged 35-54 (35%) rating performance higher than those aged 55+ (23%), and little difference between viewers in ABC1 (31%) and C2DE (29%) socio-economic groups or viewers in minority ethnic groups (29%) or with a disability (29%).

Viewers in Northern Ireland were more likely to consider this statement important than average (65%) but although this was also true for performance (50%) it was not to the same extent so there was a much bigger difference between perceived importance and performance in this nation. The performance score in Scotland amongst viewers (25%) was also lower than importance (38%). Consequently, the percentages in the red, opportunity zone were higher in these nations (19% in Northern Ireland, 24% in Scotland).

This reflects the qualitative research finding whereby some participants mentioned too much of a London-centric feel, and a slight bias towards negative representation of people outside London, as examined below.

Figure 26: Importance vs Performance Grids: Channel 4 Corporation reflects my culture fairly



The Channel 4 group reflects my culture fairly.
Base: Channel 4 Group viewers (1861)

Qualitative consideration of diversity

Within the qualitative phase, diversity was viewed as encompassing a range of characteristics including: ethnic origin, religion, region, class, sexual orientation, people with alternative lifestyles and groups that slip out of mainstream society such as travelling communities. Covering issues relating to diverse groups was considered to be a particularly important duty for wider society. Channel 4 was considered to perform better than other channels in exploring diverse cultures and lifestyles, and was perceived to have been a trailblazer historically in challenging mainstream ideas about different cultures and ways of life.

“It appeals to everyone because they try and cover different perspectives of society in the different diverse cultures.” (Leeds, 25-34, male, non-parent, C2DE)

"I put extremely well because I think they do. They do show a lot of stuff about different cultures like Asian people, black people." (Leeds, 18-19, female, E)

"They cater for everyone, to be honest." (Leeds, 18-19, female, E)

With regard to ethnic origin and religion specifically, Channel 4 was perceived to be delivering a range of content that appeals to a culturally diverse society by including a range of people from different ethnic origins. 'Indian Summers', 'Keeping up with the Khans', and 'Deutschland 83' were cited as examples of programmes which support this argument.

However, it was considered weaker in terms of providing content designed to appeal specifically to those different ethnic and religious groups, although some pointed out that it is difficult to judge whether content appeals to a different group of people. Diverse representation on screen, and sensitive portrayals, do suggest diverse audience appeal.

In terms of sexual diversity, Channel 4 was considered to have been a trailblazer historically in tackling issues relating to sexual orientation, and targeted to younger audiences, with successful but risky ventures such as 'Queer as Folk' and 'Skins'. Representing disability was also considered an area of strength – broadcasting the Paralympics was a highlight.

Channel 4 was also perceived to tackle other groups that face exclusion from mainstream culture, although the example of 'The Undateables' can polarise opinion, because some fear it is mocking and demeaning. However, most considered the programme to be respectful and sensitive, regarding it as sending a positive message to those who feel isolated or excluded from mainstream society. Concerns tended to be raised in response to the provocative title by those unfamiliar with the programme.

Among some younger people in Northern Ireland, Scotland and Wales, especially those of lower SEG, Channel 4 Corporation was felt to have a strong urban image. Representation of life outside urban London could sometimes feel skewed towards the negative or patronising (e.g. 'Benefits Street', 'Educating Yorkshire') according to a few younger respondents in lower socio economic grades within Northern Ireland and Wales. The lack of positive portrayals was a criticism levelled in general at all PSBs.

"It's not about us. We have something bad said about us all the time!" (Belfast, 20-21, female, E)

"I think they've got most of the things covered, but it's just maybe, like, show different parts of the UK (in a more positive light)." (Swansea, 23-24, female, E)

5.7 Promote alternative views and new perspectives

Two statements were included to address the Corporation's obligation to promote alternative views and new perspectives, '*Channel 4 Corporation programmes shows a different perspective and alternative views*' as well as '*Channel 4 Corporation challenges established views*'.

The quantitative research suggested this is an important area of the Corporation's Remit, although not the most important, and it was also considered important within the qualitative phase of research, not only from a personal perspective but also for society more generally. It is the type of topic that lends itself to the more detailed discussion that was possible in the more immersive qualitative stage.

The quantitative findings suggest Channel 4 Corporation is performing strongly in this area; evidence from the qualitative sessions supports this. Participants argued that promoting alternative views and new perspectives is an area that Channel 4 Corporation is known for, looking at different angles surrounding issues in society that are rejected by mainstream media.

Channel 4 Corporation programmes show a different perspective and alternative views

Importance

This was viewed as one of the more important statements for Channel 4 Corporation to deliver on. 36% of adults rated this statement 7-10 for importance, rising to 41% among all viewers, and half (51%) among regular viewers. This statement was perceived to be slightly more important by the core 16-34 year old audience with 47% of viewers of this age finding it important and 55% of regular viewers. This suggests it is one of the more important issues for this core age group.

Within sub-groups, 33% of Channel 4 Corporation viewers aged 55 and over rated this as important compared with 47% of 16-34 year olds and 43% of 35-54 year olds. Viewers in the higher ABC1 socio-economic group were more likely to find this important (45%) than those in the lower C2DE socio-economic groups (36%).

Performance

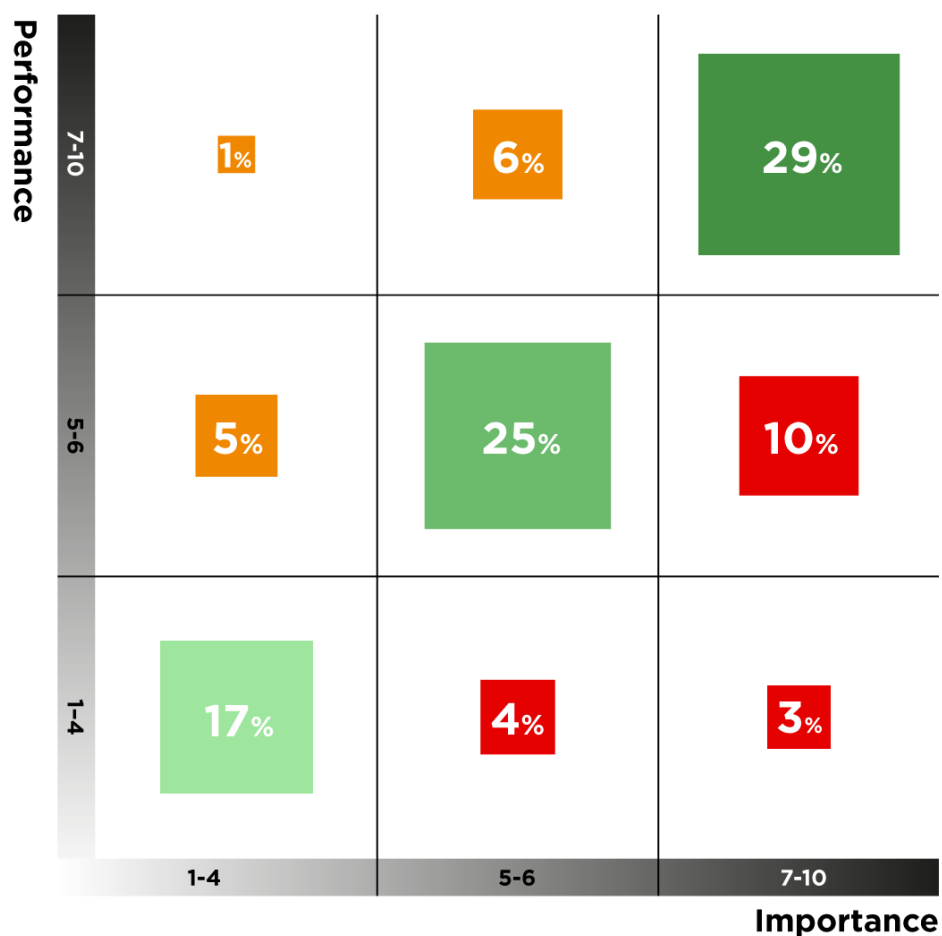
Among Channel 4 Corporation viewers, 35% gave it a high performance score of 7-10, which rose to 38% of viewers aged 16-34. Among regular viewers, 48% rated the Corporation highly on performance and 50% of 16-34 year olds.

When looking at the performance rating by sub-groups, Channel 4 Corporation viewers aged 35-54 (41%) and 16-34 (38%) were more likely to give high performance scores on '*shows a different perspective and alternative views*' than those aged 55+ (27%). Viewers in the higher ABC1 socio-economic group (38%) were also more likely to rate the Corporation highly than those in the lower C2DE socio-economic group (32%).

Relatively high performance and importance scores are underlined by Figure 27 below, with the largest percentage of Channel 4 Corporation viewers (29%) falling into the top-right key strength square.

Similar to all the other duties, around seven in ten 71% rated performance in line with importance thus falling into the green, strength zone whereas only 17% of viewers fell into the red, opportunity zone by rating importance higher than performance.

Figure 27: Importance vs Performance Grids: Channel 4 Corporation programmes show a different perspective and alternative views



Channel 4 group programmes shows a different perspective and alternative views.
Base: Channel 4 Group viewers (1861)

Channel 4 Corporation challenges established views

Importance

The second statement within this section, '*Channel 4 Corporation challenges established views*' was deemed to have similar importance to '*provide different perspective and alternative views*', with 34% of adults and 39% of Channel 4 Corporation viewers giving it a high important score. Among regular viewers, a higher percentage (50%) rated this as important.

There were also smaller differences in importance scores within the 16-34 year old age group compared to the previous statement. 42% of viewers aged 16-34 found it important and 53% of regular viewers of this age.

As we have seen for many priorities, the percentage of Channel 4 Corporation viewers rating this duty as important was significantly higher (43%) among respondents in the higher ABC1 than lower C2DE (34%) socio-economic groups.

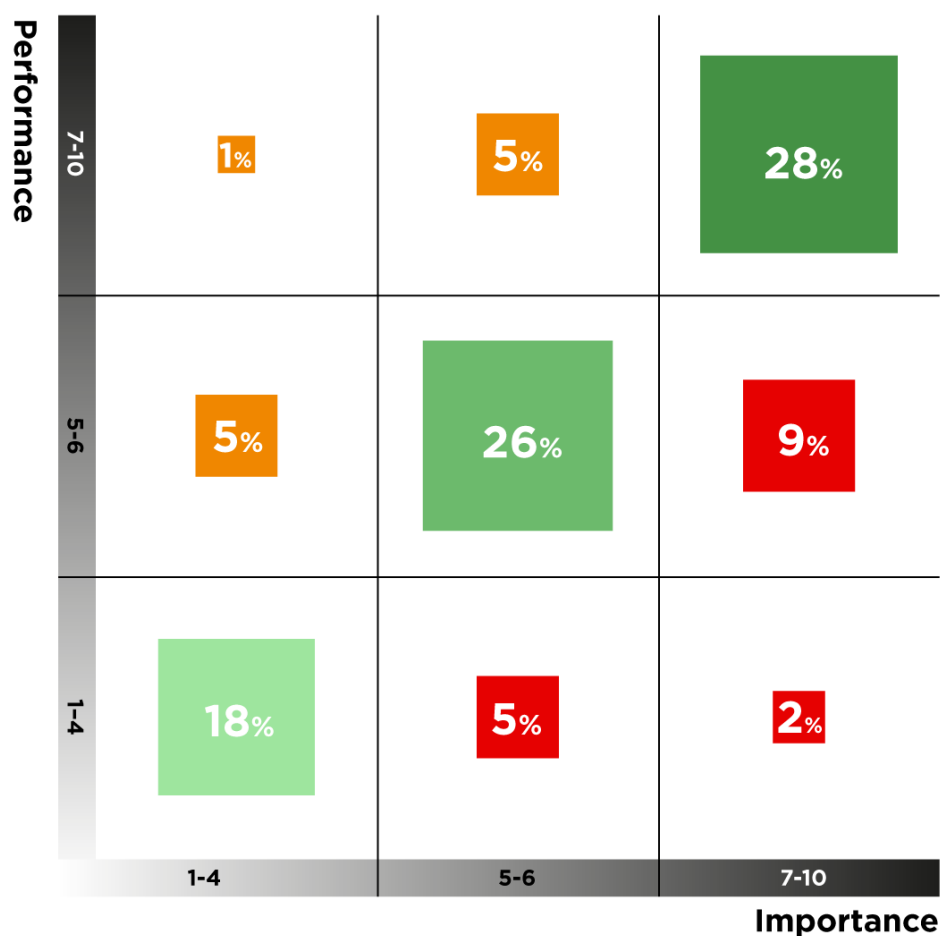
Performance

As with importance, scores on performance were also similar for this statement compared with the previous statement within this theme. Among viewers, 34% gave a high performance score, similar to the 36% among viewers aged 16-34. This rose to 46% among regular viewers and 47% of regular viewers aged 16-34.

40% of 35-54 year olds viewers rated performance 7-10, significantly higher than the 26% of those aged 55 or over. Performance on this statement was also more likely to be rated highly among viewers in the higher ABC1 (37%) socio-economic groups than the lower C2DE socio-economic groups (31%).

As shown in Figure 28 below, 72% of Channel 4 Corporation viewers rated both importance and performance within the same bracket, falling into the green, strength zone. 28% of viewers rated both importance and performance as 7-10, appearing in the top-right key strength square, almost double the number of viewers in the entire red, opportunity zone (16%).

Figure 28: Importance vs Performance Grids: Channel 4 Corporation challenges established views



The Channel 4 group challenges established views.
Base: Channel 4 Group viewers (1861)

Qualitative consideration of alternative views and perspectives

The general consensus during the qualitative phase of research was that Channel 4 Corporation is well known for, and performs particularly well at, promoting alternative views and new perspectives, so it is not surprising that this theme received relatively high performance ratings.

Indeed, we saw in the qualitative sessions that the Channel 4 Corporation brand family, and in particular Channel 4, has historically been known for highlighting social issues and providing a platform for groups that aren't always heard in mainstream media. Examples of relevant programmes include: 'Dispatches', 'The Undateables', 'NHS for a Day', and 'The Secret Life of Prisons'.

Showing social issues and providing a platform for groups that aren't always heard in mainstream media appears to be a core strength of Channel 4 Corporation, driven predominantly by the group's main channel – Channel 4. This duty was viewed as being closely linked to Channel 4

Corporation's perceived risky and more edgy approach than other Public Service Broadcasters. The previously mentioned programmes were cited as promoting views and new perspectives that are not normally broadcast on television.

"It's bringing things like problems or issues, bringing them to light in mainly a way that is overlooked in society...So I watched quite recently The Secret Life of Prisons. I knew that sort of thing happened anyway, but it was quite refreshing for someone to touch upon such things." (Leeds, 25-34, female, non-parent, C2DE)

However, a few felt uncomfortable about some topics being treated in an unsympathetic way. 'The Undateables' was cited by concerned respondents as being an example of Channel 4 Corporation possibly 'going too far'. As mentioned previously in section 5.6, these concerns tended to be raised by those who were less familiar with the actual programme and either influenced by the somewhat provocative title or the mocking social media response to the programme's title and content.

5.8 Stimulating participation in society

The Remit requires Channel 4 Corporation to make programming that encourages viewers to participate in society in a variety of ways, as well as to provide them access to material that is intended to inspire them to make changes in their lives. The quantitative stage included five statements that focused on this area. It is generally an area of the Remit which was perceived to be less important to people than diversity and news, particularly from a personal point of view.

However, these kinds of statements are more challenging for people to consider in a quantitative survey as they are less tangible and they are also more challenging for Channel 4 Corporation to deliver. Consequently, it is a duty that is difficult to judge and both importance and performance scores tended to be lower.

The one attribute that was rated as particularly important was to '*cover issues from around the world*' which has a link with news and current affairs. This recorded a similarly high performance rating making this a strength of Channel 4 Corporation.

Overall however, encouraging and facilitating participation in society was seen as a less important aspect of Channel 4 Corporation's Remit, with lower performance scores reflecting lower importance. The vast majority of Channel 4 Corporation viewers rated performance in line with performance across the duties within this theme.

Within the qualitative research, participants were more likely to feel that this duty was important to society than personally. However, participants were unsure as to whether meeting this duty should be required of Channel 4 Corporation, and that strong performance was harder to achieve on a national level, and something that local media might be able to deliver more successfully.

Channel 4 Corporation covers issues from around the world

Importance

The one attribute within this section that was rated as particularly important was '*Channel 4 Corporation covers issues from around the world*', for which 39% of all adults, and 41% of 16-34 year olds gave it a high score. This was seen as one of the most important attributes across all of the statements.

Among Channel 4 Corporation viewers, 44% of adults felt this was important, as did 50% of those aged 16-34, rising to 56% of all regular viewers and 59% of regular viewers aged 16-34.

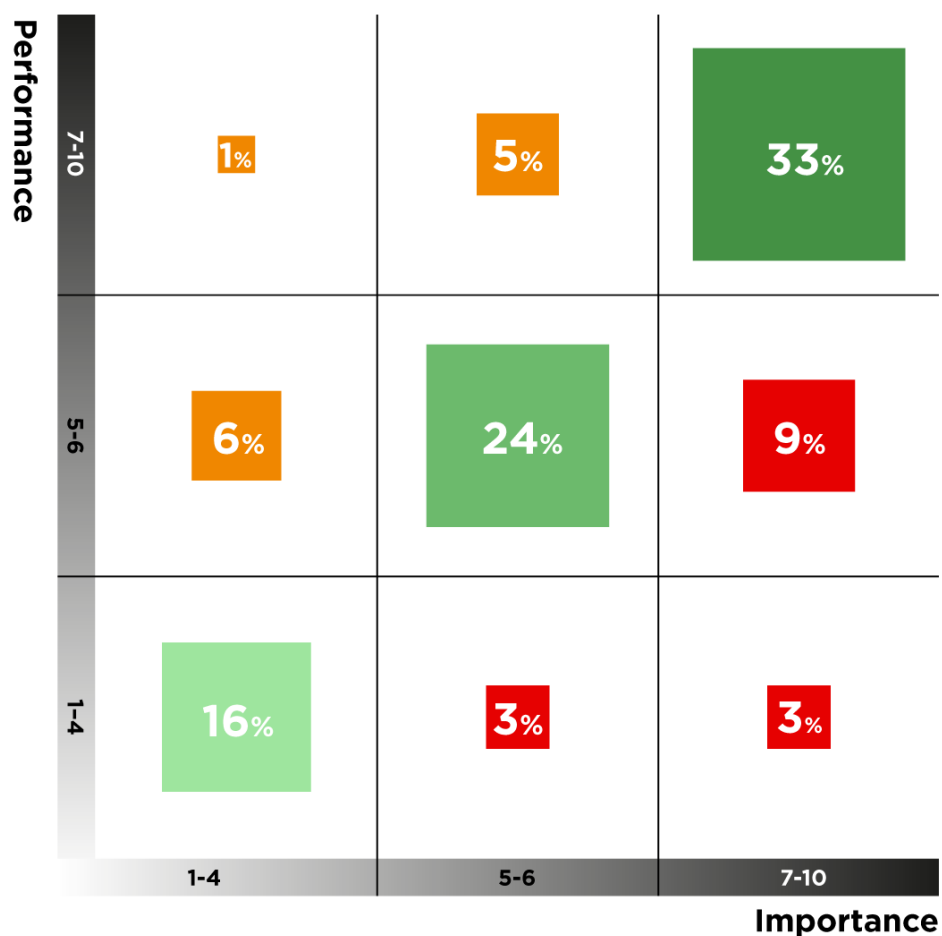
The importance of this statement may be explained by the different elements the statement conveys. '*Covering issues from around the world*' is related to the provision of news (news related statements are generally deemed important), whereas the word '*issues*' perhaps conveys a more social and societal aspect, which also led to higher ratings of importance in both the quantitative and qualitative research.

Performance

As with importance, this duty was rated highly on performance compared with the rest of the statements. 38% of Channel 4 Corporation viewers gave this duty a high performance score of 7-10 and 52% of regular viewers. Scores were very similar within the 16-34 year old age group among viewers (40%) and regular viewers (53%). This was another statement that was rated more highly by viewers in the higher ABC1 socio-economic groups (41%) than by those in the lower C2DE socio-economic groups (34%).

In line with the high ratings for performance, 33% of Channel 4 Corporation viewers fell into the top-right high performance/high importance square in Figure 29, below. All of this resulted in 73% of Channel 4 Corporation viewers falling into the green, strength zone, the highest for all statements covered across all duties. Just 15% fell into the red, opportunity zone, in which expectations based on perceived importance are higher than the performance rating.

Figure 29: Importance vs Performance Grids: Channel 4 Corporation covers issues from around the world



The Channel 4 group covers issues from around the world.
Base: Channel 4 Group viewers (1861)

Channel 4 Corporation helps me understand issues in our society

Importance

This statement was regarded as relatively important with 35% of all adults giving it an importance score of 7-10. It was considered of greater importance in the qualitative research when tapping into a societal viewpoint.

Once again, this grew amongst Channel 4 Corporation viewers (40%) and regular viewers (52%) and amongst the core target of 16-34 year olds (39% of all, 47% viewers, 54% regular viewers).

The pattern of responses within demographic sub-group was in line with what we have seen for other areas, lower among viewers aged 55+ (32%) compared with viewers aged 16-34 (47%) and 35-54 (43%) and higher among those in the higher ABC1 (44%) than lower C2DE (36%) socio-

economic groups. Channel 4 Corporation viewers with children in the household were also more likely to find this duty important (48%) compared with the average (40%).

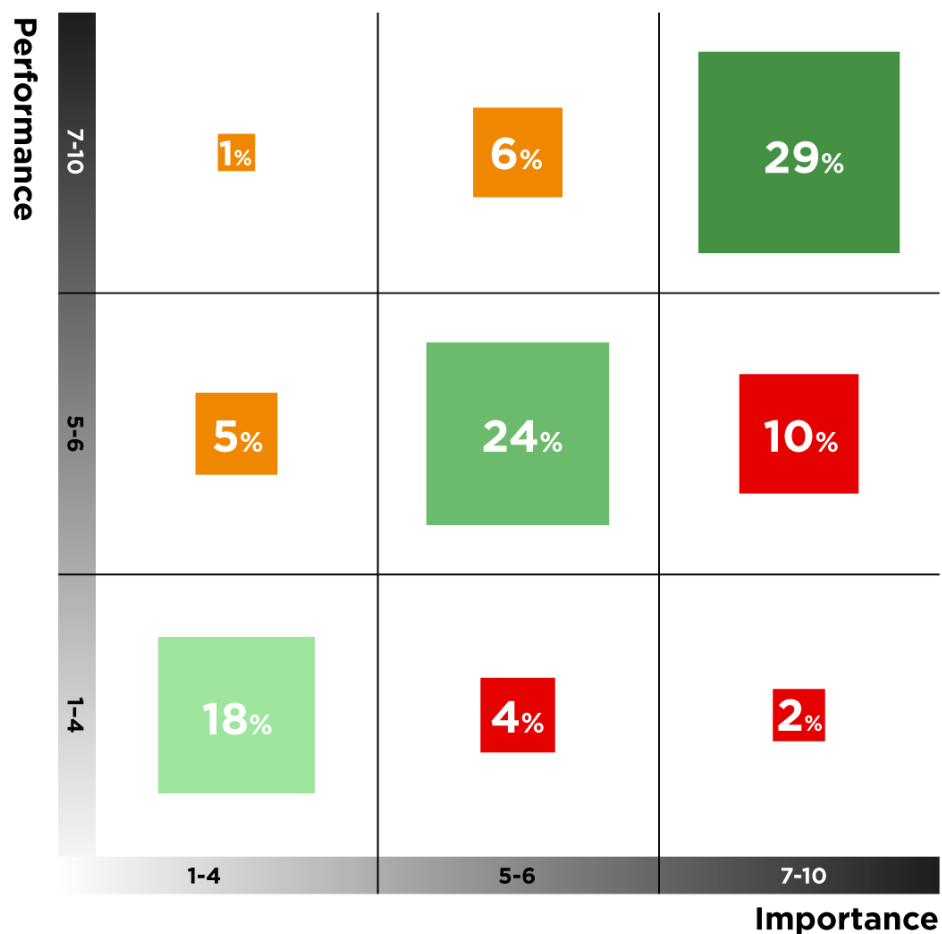
Performance

Performance scores for this statement were slightly lower than those for *'covers issues from around the world'* but were still relatively strong with 35% of viewers and 47% of regular viewers giving a high performance score, rising to 39% of viewers aged 16-34, 51% of regular viewers the same age.

As for importance, viewers aged 55+ (27%) were less likely to rate performance highly than viewers aged under 55 (40%). However, there was only a small difference between viewers in the higher ABC1 socio-economic groups (37%) and the lower C2DE groups (33%). Channel 4 Corporation viewers with children were also more likely than average to give a high performance score for this duty (43%).

Three in ten viewers (29%) felt that the Corporation delivered in line with their high expectations in this area, falling into the top-right key strength square in Figure 30, below. Around seven in ten (71%) Channel 4 Corporation viewers fell into the green, strength zone, much higher than the 16% in the red, opportunity zone.

Figure 30: Importance vs Performance Grids: Channel 4 Corporation helps me understand issues in our society



The Channel 4 group helps me understand issues in our society.
Base: Channel 4 Group viewers (1861)

Channel 4 Corporation shows programmes that make me stop and think

Importance

This statement was given lower importance ratings than the previous two statements, appearing in the bottom half of statements overall. Just over a third (34%) of all adults gave this statement a high importance score, rising to 39% and 50% among viewers and regular viewers respectively. Unlike other statements, there were very small differences among the core target group of 16-34s (35% all, 41% viewers, 50% regular viewers). This is because a higher percentage among 35-54 year olds (44%) balanced a much lower percentage amongst adults aged 55+ (32%).

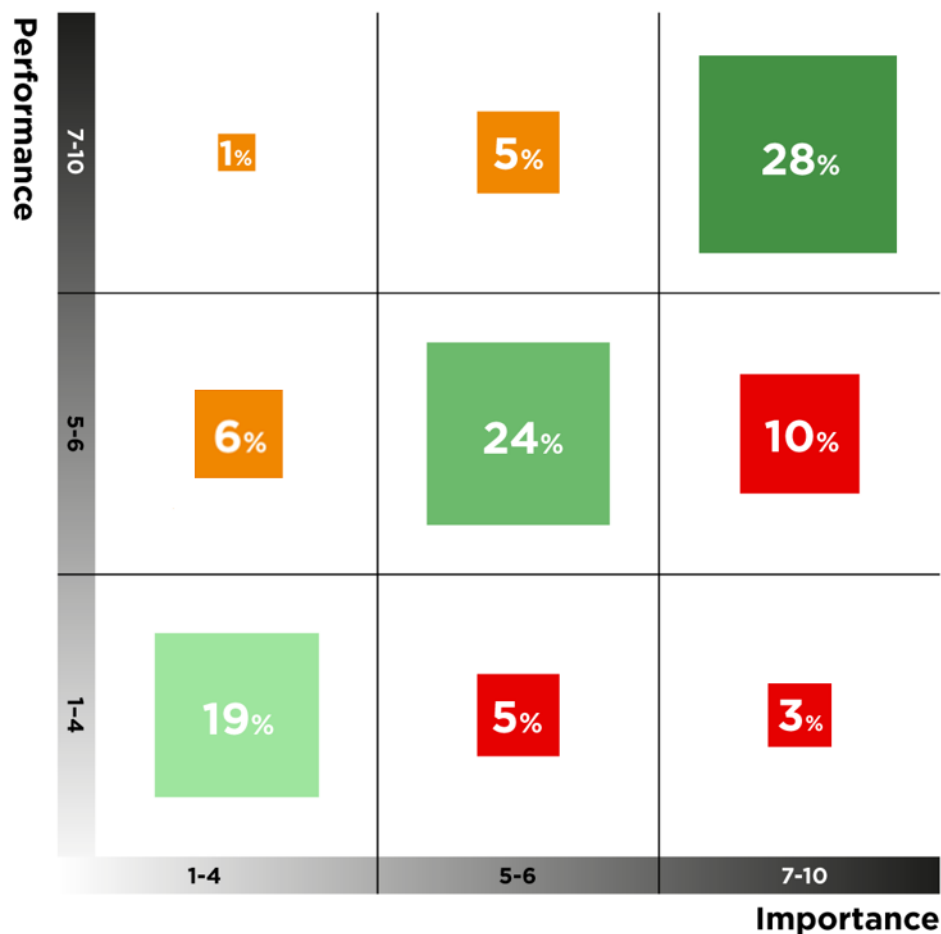
Performance

Quantitatively, the pattern of responses was very similar to the ratings given for importance, with a third of viewers giving a high performance score and 46% of regular viewers (36% of viewers and

48% of regular viewers aged 16-34). Only 26% of viewers aged 55+ gave a high performance score compared with 39% of 35-54 year olds. There was only a small increase among viewers in the higher ABC1 socio-economic group (35%) compared with viewers in the lower C2DE group (31%).

Although the large majority of viewers (71%) fell into the green, strength zone (see Figure 31), nearly 1 in 5 viewers (18%) rated importance higher than performance and consequently fell into the red, opportunity zone.

Figure 31: Importance vs Performance Grids: Channel 4 Corporation shows programmes that make me stop and think



The Channel 4 group shows programmes that make me stop and think.
Base: Channel 4 Group viewers (1861)

Channel 4 Corporation shows programmes that I want to talk about

Importance

At first glance, '*Channel 4 Corporation shows programmes that I want to talk about*' looks to be one of the least important statements, with 31% of adults giving it a high importance score, increasing to 35% among viewers and 48% among regular viewers. Among the core target audience of 16-34 year olds, however, there was a larger increase than for most statements: 44% of 16-34 year olds viewers compared with 37% of viewers aged 35-54 and 26% aged 55+. Among 16-34 year old regular viewers, this rises to 53%.

This increase among the core target age group may reflect a greater social need among younger audiences wishing to discuss content with their friends.

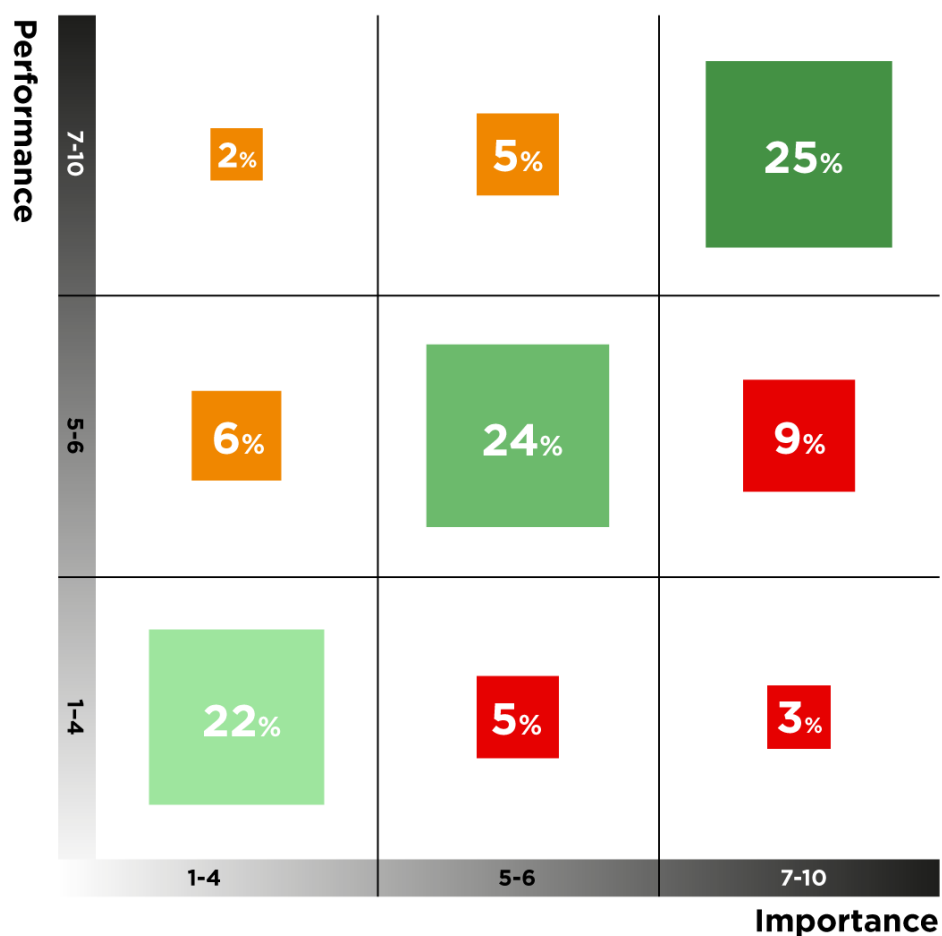
Performance

Perhaps surprisingly, a relatively low 31% of Channel 4 Corporation viewers said that the Corporation showed programmes that they want to talk about, rising to 43% of regular viewers. There were again increases among 16-34 year olds, albeit smaller than for the importance ratings, with 35% of viewers and 46% of regular viewers aged 16-34 scoring this duty between 7 and 10 on performance.

Viewers aged 55+ were less likely to score performance highly (22%) reflecting the pattern of importance scores, although 35-54 year old viewers score similarly to the younger audience (36%). Viewers within the ABC1 and C2DE socio-economic groups had a similar percentage giving a high performance score (32% and 30% respectively).

In Figure 32, below, we see 71% of viewers fell into the green, strength zone with the largest square (25%) being the top-right key strength square. As with the other statements within this society theme, '*Channel 4 Corporation shows programmes that make me stop and think*', saw a minority of viewers (17%) fall into the red, opportunity zone.

Figure 32: Importance vs Performance Grids: Channel 4 Corporation shows programmes that I want to talk about



The Channel 4 group shows programmes that I want to talk about.
Base: Channel 4 Group viewers (1861)

Channel 4 Corporation programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle)

Importance

This was a priority which achieved particularly low scores for importance. Around a quarter (24%) of adults said that this was important with a significantly higher 35% giving a low score of 1-4. Among viewers, 27% deemed this duty as important, which rose to 36% among regular viewers and 39% among regular viewers aged 16-34.

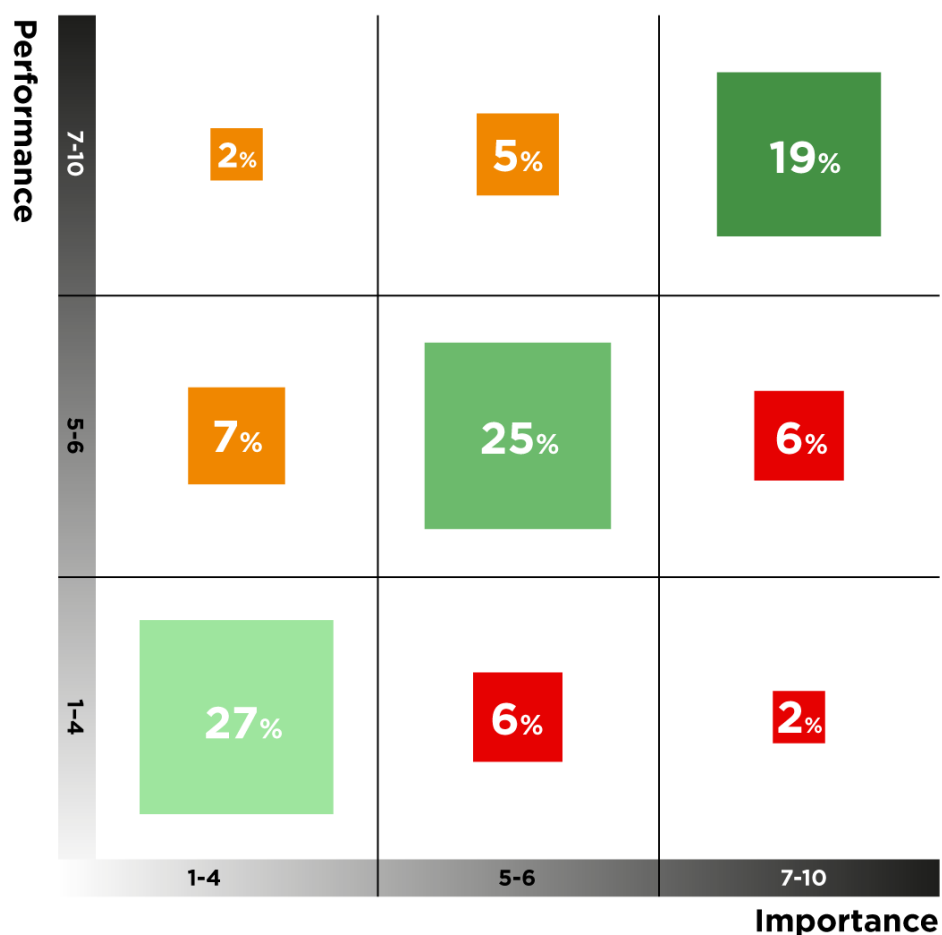
There weren't many differences in importance ratings within sub-groups, except that viewers aged 55+ (18%) were significantly less likely than those aged under 55 (32%) to give a high importance rating.

Performance

Reflecting the low importance scores, this is an aspect of the Remit that people mostly feel ambivalent about with just 25% of all adult viewers and 28% of 16-34 year old viewers giving a high performance score. This increased to 35% and 38% respectively among regular viewers. As for the importance ratings, the only noticeable difference for performance ratings within the sub-groups were that viewers aged 55+ were significantly less likely to give a high score (17%) than those aged under 55 (29%).

Despite lower performance scores, as this was also perceived to be a less important duty, the percentage of viewers who fell into the green, strength zone in Figure 33, below, remains similar to the other statements at 71% whilst only 14% fell into the red, opportunity zone by scoring importance higher than performance. The relative lack of importance of this duty is underlined by the largest square being the bottom-left low importance/low performance square (27%).

Figure 33: Importance vs Performance Grids: Channel 4 Corporation programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle)



Channel 4 group programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle).

Base: Channel 4 Group viewers (1861)

Qualitative consideration of stimulating participation in society

During the qualitative phase, stimulating participation in society was considered important to wider society, but less so from a personal perspective. It was also viewed as somewhat less important than other remit duties in relation to Channel 4 Corporation. There were two reasons for this; firstly, when respondents were asked to consider this duty, some assumed this related to national debates with public members of a studio audience about important national events. National government election voting is often a time where societal participation follows discussions, debates and election campaigns, and Channel 4 was seen as performing well at hosting public debates in the run up to national elections, and even having a more objective coverage of debates compared to the BBC. Although, BBC1 programmes such as BBC News and Question Time sprang to mind more easily.

Secondly, with the exception of national elections it was easier to think of examples of societal participation at a local rather than national level, and local media tended to be more top of mind when considering this type of participation. Some, particularly younger, respondents found it easier to think of their attendance at local events than at national events. Examples include: local nightlife events, much anticipated famous DJ events, local sporting events, community fayres, charity fundraising galas, local elections, local government consultations, protests etc. As such, local media, such as UTV and local radio stations would more naturally spring to mind as the most appropriate channel for stimulating this type of participation.

"I was thinking more BBC 1 and UTV for doing that. We've got UTV which is like the one that shows all the stuff about Belfast over here... they're always debating on UTV about what's happening over here. Whereas you don't see that (Belfast related debates) on Channel 4."
(Belfast, 20-21, female)

Upon reflection, this duty was thought to relate to the "inspire change" duty, and Channel 4 Corporation is thought to do better than other PSBs to inspire change in views, perspectives and behaviour. Examples of programmes which support this view include Channel 4's broadcast of the Paralympics since 2012, which was considered a highlight in terms of showing people with disabilities in an inspirational way. Food Unwrapped was another example put forward of a programme which helped encourage viewers to think differently, and here they were encouraged to think about the food they ate and the impact on their health.

"There's the Food Unwrapped programme and they show you what's in all the food and that's getting people to change their eating habits and targeting obesity in children." (Woking, 16-17, female, ABC1)

Participants would often argue that Channel 4 Corporation is well known for having a strong focus on social issues and for encouraging inclusion within society for various groups, who might feel marginalised within our society. 'The Undateables' was frequently put forward as a programme which encourages people who feel socially excluded and isolated to participate in common social practices such as dating.

"It's people who like have disabilities and stuff and it shows that they can go out. So if you're sitting in the house and you have a disability it's showing you, you know it's motivating you oh I can go out and have a date." (The Undateables) (Belfast, 20-21, female, E)

In addition, some claimed that Channel 4 Corporation performs well at encouraging its audience to think about working in different industries or getting involved in local community work or volunteering. The programme '24 Hours in A&E' highlights what it is like to work in the NHS, and was put forward as an example to support this argument.

The qualitative research also enables us to understand the low importance and performance scores for '*Channel 4 Corporation programmes encouraged me to think about changing something in my life*'. Participants saw this as less important overall, and particularly from a personal perspective when compared with the other duties as some argued they watch television for entertainment purposes, not necessarily to be inspired to make a change in their life.

It was also perceived to be harder to achieve, needing behavior change whereas other duties directly related to providing types of content.

5.9 Film

Overall, the evidence from the quantitative research suggests that Channel 4 Corporation is performing strongly with regard to film, with the majority of viewers rating performance in line with importance on the statements '*Film4 productions make high quality films*' and '*Channel 4 Corporation shows films that reflect different cultures in the UK*'. Furthermore, the percentages of viewers giving high performance scores were among the highest of all the duties. The high quantitative scores reflect personal preference as opposed to a more considered societal view, which comes through after more careful consideration within the qualitative research where importance was rated lower. This is a point which will be explored further, below.

Both performance and importance ratings were higher among regular viewers, viewers aged 16-34 and 35-54 than viewers aged 55+ and among viewers within the higher ABC1 socio-economic groups than lower C2DE socio-economic groups, though they remained in line with average for viewers from minority ethnic groups for the statement referring to '*different cultures*'.

Film4 productions make high quality films

As a note of caution, based on findings from the qualitative research, it seems that many people are unaware that Film4 is directly involved in film production. This suggests that many may be basing their responses on the many films broadcast on the channel rather than films directly produced by Film4. This potentially accounts for such high scores.

Importance

On the surface, it appears that this statement was rated the most important of all of Channel 4 Corporation's duties with 39% of adults, 45% of Channel 4 Corporation viewers and 56% of regular viewers giving an importance score of 7-10. The core target of 16-34 year olds did not rate the statement significantly differently within any of these groups but Channel 4 Corporation viewers aged 55+ were less likely than those aged under 55 (49%) to consider this duty important (38%). Viewers in the higher ABC1 socio-economic grades were more likely to consider the duty important (48%) than viewers in the lower C2DE socio-economic grades (41%).

However, the statement asked specifically about Film 4, rather than the Channel 4 Corporation as a whole. So, with Film 4 explicitly linked with film in its name, it's likely that this would get a higher importance score than if people had been considering Channel 4 Corporation as a whole, as for

the other statements. The fact that this duty was considered of lower importance than others during the qualitative research supports this theory. This is discussed further in the 'Qualitative consideration of film' section below.

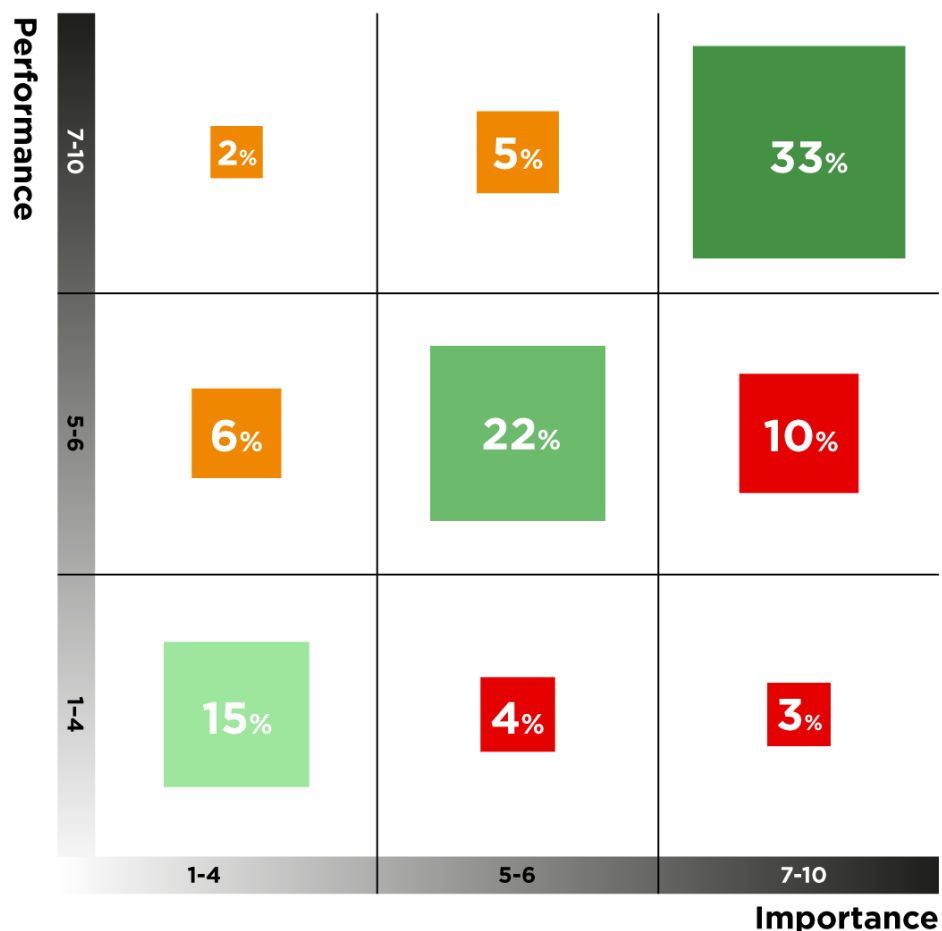
Performance

Similarly, this statement was rated highest in terms of performance too with 39% of Channel 4 Corporation viewers, and 53% of regular viewers giving a score between 7 and 10. As for importance, viewers aged 55+ (32%) and in the lower C2DE socio-economic grades (36%) were less likely to rate highly than viewers aged under 55 (44%) and viewers in the higher ABC1 socio-economic grades (42%).

Channel 4 Corporation viewers with children were more likely than average to give high scores for both importance (49%) and performance (48%) for this duty.

All of this resulted in 70% of Channel 4 Corporation viewers falling into the green, strength zone in Figure 34, below. Furthermore, a particularly high 33% were in the top-right key strength square with only 17% spread through the red, opportunity zone.

Figure 34: Importance vs Performance Grids: Film4 productions make high quality films



Film4 productions make high quality films.
Base: Channel 4 Group viewers (1861)

Channel 4 Corporation shows films that reflect different cultures in the UK

Importance

Arguably, 'Channel 4 Corporation shows films that reflect different cultures in the UK' relates to diversity as well as film and it may be this that leads it to be rated as one of the most important duties of Channel 4 Corporation with 37% of adults, 42% of Channel 4 Corporation viewers, 53% of regular viewers and 57% of regular viewers aged 16-34 giving an importance score of 7-10.

Channel 4 Corporation viewers aged 16-34 (48%) and 35-54 (49%) were more likely to consider this statement important than those aged 55+. Viewers in the higher ABC1 socio-economic grades were more likely to rate the statement important (46%) than those in the lower C2DE socio-economic grades (39%).

Channel 4 Corporation viewers from minority ethnic groups (41%) were no more likely than average (41%) to rate this duty important but those with children were (51%). Within the nations of the UK, viewers in Northern Ireland were particularly likely to say this was important (58%).

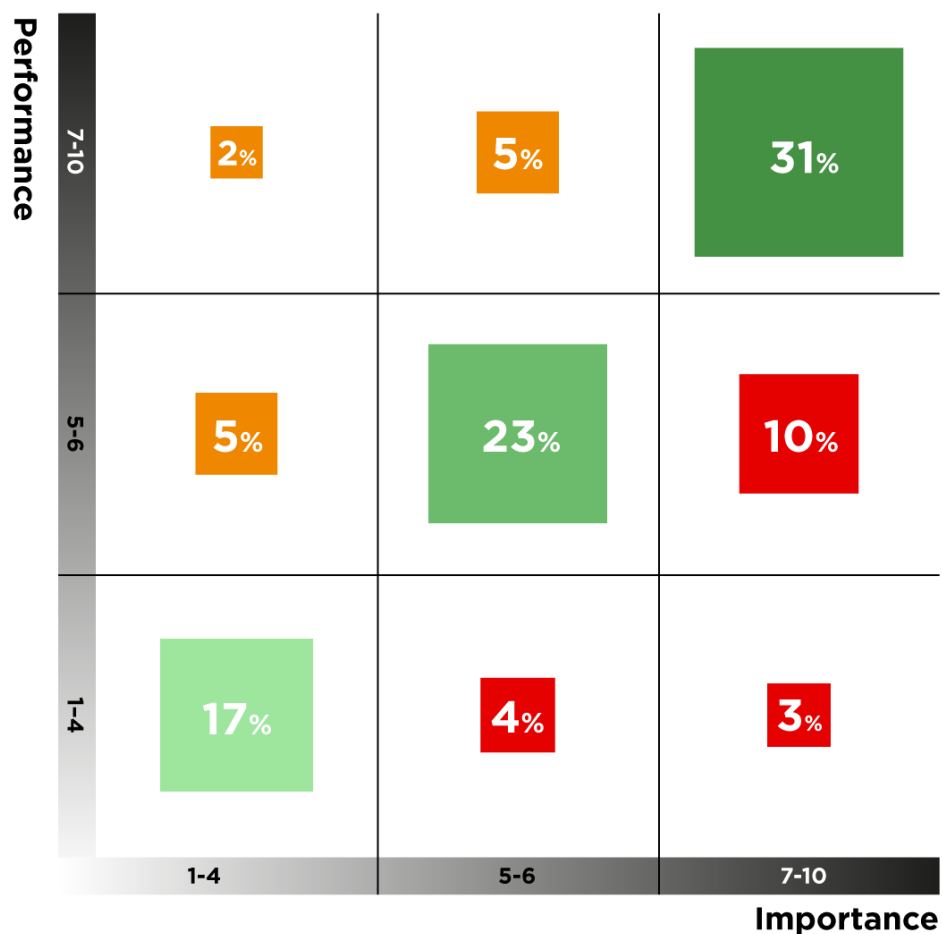
Performance

As is normal, the patterns seen for importance were repeated in terms of performance ratings with *'Channel 4 Corporation shows films that reflect different cultures in the UK'* gaining one of the highest performance scores too with 36% of Channel 4 Corporation viewers, 51% of regular viewers and 50% of regular viewers aged 16-34 giving a performance score of 7-10.

This is also true within demographic groups as viewers aged 16-34 (39%) and 35-54 (42%) were more likely to give a high performance score than viewers aged 55+ (29%). The difference between ABC1s (39%) and C2DEs (33%) was similar as for importance and again, viewers from minority ethnic groups were in line with viewers overall for performance (36%). Viewers in Northern Ireland were more likely to give a high performance score (55%), reflecting the higher importance to this group of viewers.

Once again, around seven in ten (71%) viewers fell within the green, strength zone (see Figure 35, below) with only 17% in the red, opportunity zone, confirming that Channel 4 is largely meeting the expectations of audiences for this duty.

Figure 35: Importance vs Performance Grids: Channel 4 Corporation shows films that reflect different cultures in the UK



The Channel 4 group shows films that reflect the different cultures in the UK.
Base: Channel 4 Group viewers (1861)

Qualitative consideration of film

Film was seen as much less important in the qualitative stage but this may be linked with the fact that the quantitative questionnaire asked specifically about Film4 whereas the qualitative discussions covered the topic more widely in the context of the overall Channel 4 Corporation and allowed for participants to learn more about Film4 and its film production activity. Furthermore, the lower importance also reflects that the film duties were perceived to have less societal value than others. The conclusion is that whilst it was felt important for Film4 to make high quality films (since this is core in its role as a film producer), it was perhaps considered less important when thinking of the Channel 4 Corporation as a whole and the range of themes within its Remit.

During the qualitative phase, Film4 was praised for broadcasting high quality films, such as '12 Years a Slave' and 'Trainspotting', reflecting the high performance score from the quantitative research. But, there tended to be low awareness that Channel 4 Corporation *produces* its own

films for cinema release. When respondents were made aware of this and shown examples of content, Channel 4 Corporation received more praise.

"I didn't know that they actually made films. I thought they just showed them." (Leeds, 25-34, male, non-parent, C2DE)

"Twelve Years a Slave. I had no idea that it was a Film4 film." (Leeds, 25-34, male, non-parent, C2DE).

This finding from the qualitative research calls into question whether respondents in the quantitative phase were actually rating Film4 in terms of film *production*, rather than the films it broadcasts, when answering '*Film4 productions make high quality films*'.

A few within the qualitative phase did not appreciate the value of a PSB being involved in film production, preferring to think of film production being made in Hollywood and outside of TV broadcasting.

Some participants opined that because Film4 repeats films to allow viewings at different times of the day / week, limiting the amount of films that can be broadcast, this makes it difficult for them to compete with the wide choice available on platforms such as Netflix and Amazon Prime. Consequently, younger qualitative participants felt that Film4 is starting to feel quite dated as a platform (rather than content) compared to Netflix and Amazon Prime.

"But going back before Netflix and things, if you were away and you came back you would think oh what's on Film4 because there's bound to be some sort of film. Whereas now you don't, you're not bothered because you've got Netflix and Amazon." (Dundee, 25-34, Female, non-parent, ABC1)

"I used to watch a lot of Film4, but then when I got Netflix and stuff like that, if I wanted to watch a film I wouldn't go to Film4 now, I would go to Netflix or Sky on Demand." (Woking, 18-24, male, C2D).

5.10 Older children and young adults

Providing content that appeals to older children and young adults was considered less important than other themes within the quantitative research amongst adults with children as well as adults in general. This was reflected by relatively low performance scores too, in terms of the hierarchy of duties, again amongst both all adult Channel 4 Corporation viewers and those with children specifically.

However, both importance and performance scores were significantly higher for Channel 4 Corporation viewers with children than for viewers in general and for those in the younger age groups, reflecting the stronger relevance of these statements for these groups. As these sub-groups are likely to be more familiar with this content, looking at these groups portrays a more accurate representation.

As both importance and performance were relatively low, the proportion of Channel 4 Corporation viewers, and viewers with children, rating performance in line with importance was similar to the other themes at around seven in ten.

'Makes programmes that appeal to older children' recorded a lower percentage rating performance 7-10 amongst Channel 4 Corporation viewers and viewers with children than *'makes programmes that appeal to young adults'*.

The lower performance scores, particularly for older children, were supported by the qualitative research in which some of the participants expressed the view that there was limited content specifically produced for older children aged 10-14. This opinion was not limited to C4C but applied across the PSBs more broadly as well. There was some recognition of C4C programmes which would appeal to older children, even if not directly targeted at them, such as family-appeal shows; although it was also noted that some C4C programmes which 10-14s may watch might not always be suitable for their age range as they contain themes or storylines which could be considered inappropriate for their age (e.g. The Big Bang Theory and Hollyoaks). It should however also be noted that older children aged 10-14 years surveyed in the online stage of the research were generally positive about C4C with a high proportion agreeing that the Channel 4 family (which includes its television and online services) shows programmes that they like, and programmes for people their age. More details from the survey among 10-14 year olds are discussed in the next chapter.

Channel 4 Corporation makes programmes that appeal to older children (aged 10-14)

Importance

When asked about the delivery of programming for children aged 10-14, only 21% of adults deemed this to be important, giving a score of 7-10. This only rose slightly to 24% among viewers and 33% among regular viewers, increases that are generally seen across all statements. There was little difference between all adults and 16-34 year olds (22%) in terms of perceived importance.

Increases were seen within sub-groups that may be directly impacted by this duty. Channel 4 Corporation viewers who have children aged under 16 in their household were more likely to think this was important, with 31% giving it a 7-10 rating, a figure that rises to 43% among regular viewers. When the children in the household were of the ages 10-14, 36% of viewers deemed it important and 42% of regular viewers.

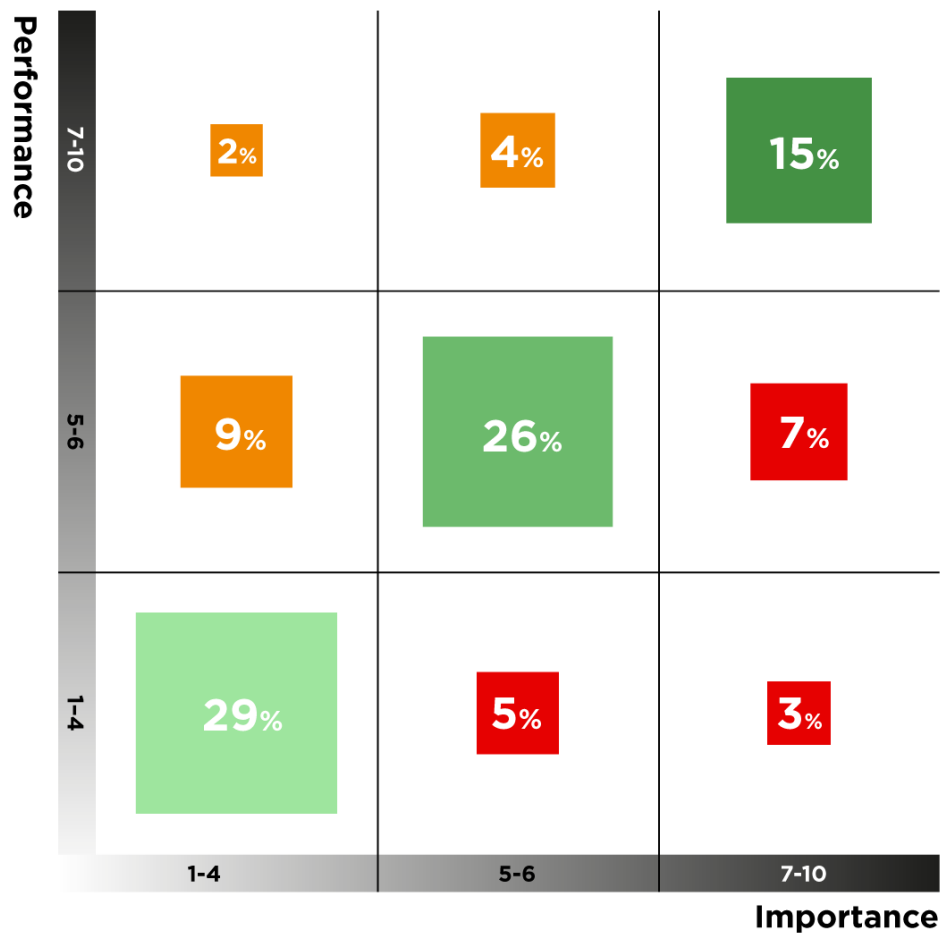
Performance

In terms of performance, this statement received the equal lowest score, with just 19% of viewers giving it a high performance score (7-10), and 24% of viewers aged 16-34, rising to 30% of regular viewers and 35% of regular viewers aged 16-34.

When looking at scores from those for whom this duty is most relevant, i.e. viewers with children aged under 16 in the household, 26% rated performance 7-10, rising to 41% among regular viewers. A similar pattern in scores was experienced amongst viewers (27%) or regular viewers (40%) with children aged 10-14 specifically. By contrast, amongst viewers aged 55 or over, the respondents perhaps least familiar with this statement, only 14% gave a high performance score.

Indeed, despite low performance scores, Figure 36, below, shows that the majority of Channel 4 Corporation viewers fell into the green, strength zone (70%) as those giving a low score on performance also did not deem it important. The relative lack of importance is underlined by the fact that 29% of viewers fell into the bottom-left square. The red, opportunity zone remained small (15%). A similar 70% fell into the green, strength zone amongst only Channel 4 Corporation viewers with children.

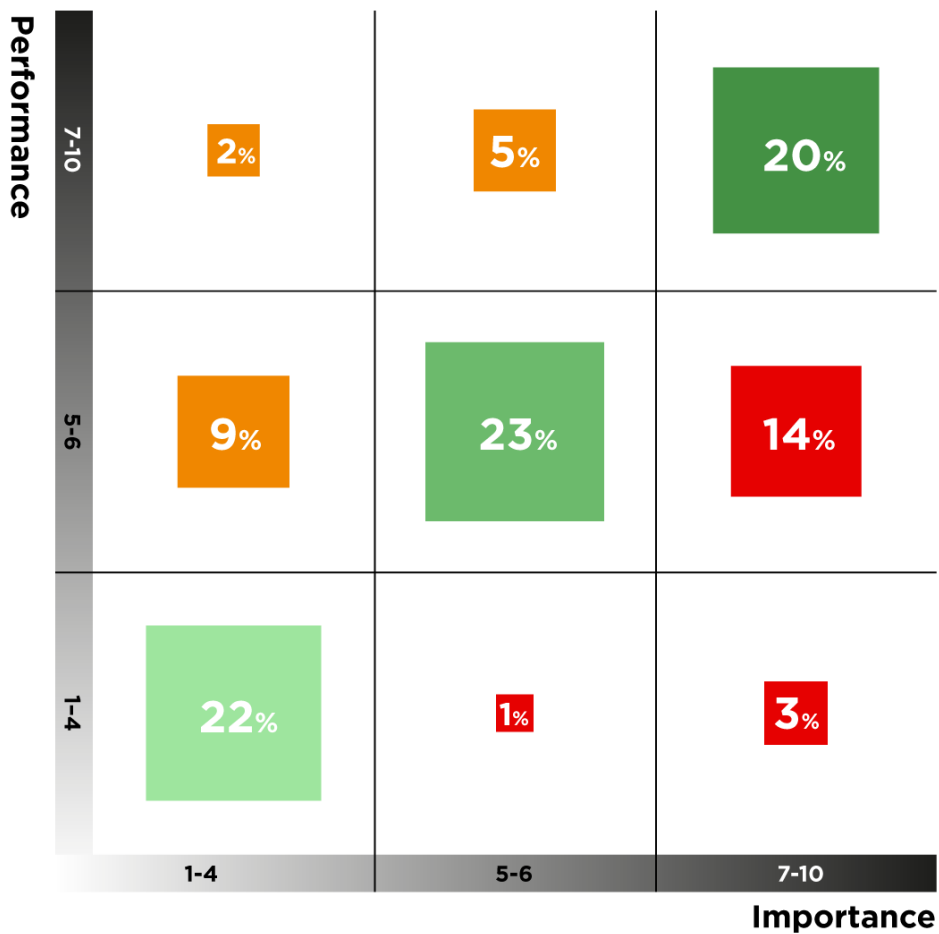
Figure 36: Importance vs Performance Grids: Channel 4 Corporation makes programmes that appeal to older children (aged 10-14)



The Channel 4 group makes programmes that appeal to older children (aged 10-14). **Base: Channel 4 Group viewers (1861)**

Figure 37, below, shows the same information for C4C viewers for whom this statement has most relevance, those with children aged 10-14. This greater relevance is shown by higher numbers in the 7-10 importance column (on the right) than in Figure 36, above. The percentage in the top-right, key strength square, increases to 20% but overall a lower percentage falls into the green, strength, zone (65%) than above.

Figure 37: Importance vs Performance Grids: Channel 4 Corporation makes programmes that appeal to older children (aged 10-14) amongst C4C viewers with children aged 10-14



The Channel 4 Group makes programmes that appeal to older children (aged 10-14)
Base: Channel 4 Group viewers with children in the household aged 10-14 (218)

Channel 4 Corporation makes programmes that appeal to young adults (aged 14-19)

Importance

Looking at a slightly older age group, it was felt that delivery to 14-19 year olds was slightly more important, though still relatively low when compared to the other statements. 28% of all adults felt that it was important that programming was delivered for 14-19 year olds, rising to 32% of viewers and 43% of regular viewers.

As with the previous statement, there were increases in importance among respondents for whom the statement was most relevant. Over a third (35%) of adults aged 16-34 deemed this an important statement, which increased to 40% when only looking at those aged 16-24. Among viewers, 41% of 16-34 year olds rated it as important (47% aged 16-24) and 52% of regular viewers aged 16-34 (56% of 16-24 year olds).

Again, respondents with children in the household were also more likely to find this statement more important, with 35% of all, 40% of viewers, and 57% of regular viewers with children scoring this 7-10. In contrast, 20% of viewers aged 55 or over scored this statement as important.

Performance

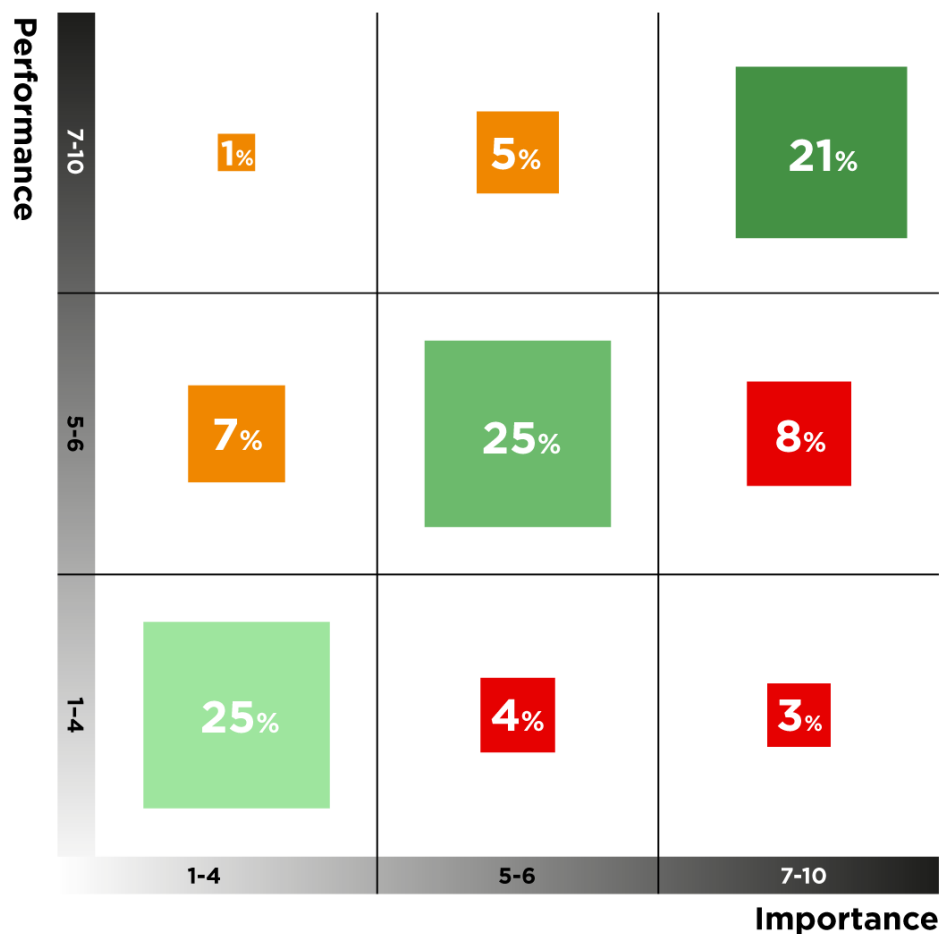
Quantitatively, the pattern of responses was similar to the preceding statement, with lower scores compared with most other statements, but strong improvements among the sub-groups for whom this duty is most relevant. 26% of viewers gave a high performance rating, rising to 37% of viewers aged 16-34, 41% of regular viewers and 50% of regular viewers aged 16-34. Performance scores were higher than for the previous statement relating to older children.

Movements within sub-groups were similar to importance with 41% of viewers aged 16-24 giving a high performance score and 56% of regular viewers this age. In contrast, only 16% of viewers aged 55 and 28% of those aged 35-54 gave a high performance score.

Overall, 71% of Channel 4 Corporation viewers were in the green, strength zone (see Figure 38, below) this was a similar 70% amongst viewers with children.

With seven in ten Channel 4 Corporation viewers rating performance in line with importance, the stronger performance scores from relevant sub-groups and the red, opportunity zone remaining small, we can conclude that Channel 4 Corporation's performance on this duty is in line with expectations.

Figure 38: Importance vs Performance Grids: Channel 4 Corporation makes programmes that appeal to young adults (aged 14-19)



The Channel 4 group makes programmes that appeal to young adults (aged 14-19). **Base: Channel 4 Group viewers (1861)**

Qualitative consideration of programming of appeal to older children and young adults

Unsurprisingly, parent participants in the qualitative research felt it more important that C4C provides programming of appeal to older children and young adults than non-parents due to greater personal relevance. However, some non-parent participants also viewed this provision important as they took a broader perspective. Younger respondents also viewed this as important as they tended to answer this with younger siblings or other younger relatives in mind.

In terms of performance, some participants felt that the Channel 4 Corporation was under-delivering in this area and that there was limited content specifically produced for older children aged 10-14. Participants struggled to think of any specific programme titles within this area. By contrast E4 was recognised as a channel dedicated to young adults in their late teens and 20s, so on consideration and discussion the absence of a similar channel or channel segment for older children was more noticeable. It should be noted that this opinion was not limited to C4C but applied to the other PSBs as well.

Some parents ventured that Channel 4 Corporation ought to provide a dedicated channel for older children and suggested it would be more valuable than 4seven, which is the least familiar in the portfolio.

"I think there needs to be more programmes for children... all they watch is... You Tube, there is nothing really on for them to sit and watch." (Belfast, 25-34, parent, female, C2DE)

"The young adults have it better than older children, I don't think there is anything for older children." (Belfast, 25-34, parent, male, C2DE)

Some people noted that much of the content older children and families view across Channel 4 Corporation is not designed specifically for their age range (e.g. 'The Big Bang Theory' on E4) but targets young adults instead. There was also some recognition that some C4C programmes appeal to older children, even if not directly targeted at them, such as family-appeal shows (e.g. 'The Goldbergs') although participants struggled to think of many specific top-of-mind examples in the sessions. It was suggested by a few parents that programmes should feature more characters aged 10-14 years old to appeal to older children.

"E4 programmes might not be appropriate (for older children)." (Belfast, 16-17, male, C1C2)

"E4 ...it wouldn't be suitable for older children." (Belfast, 16-17, male, C1C2)

"I love E4, but the rest of the sitcoms (apart from 'Goldbergs') aren't family (oriented), they (the characters) are friendship groups which are older people in their 30s, so there aren't relatable characters, so that is probably what they [Channel 4 Corporation] need to learn from it, the shows like the Goldbergs, so if you want something that is appropriate for 10 to 14 year olds you need to broadcast shows that have 10 to 14 year olds in it." (Belfast, 25-34, parent, C2DE)

In contrast to the provision of programming for older children, Channel 4 Corporation was rated highly for delivering content for young adults (14-19 year olds), especially because of E4, which appeals to viewers in their late teens and 20s.

"I actually think E4 might be more tailored to younger people (young adults) ...E4 is just fun, fun, fun and then go to sleep. And then wake up and have more fun!" (Leeds, 18-19, female, E).

Chapter 6 details the attitudes of 10-14 year olds themselves which were gathered via an online survey.

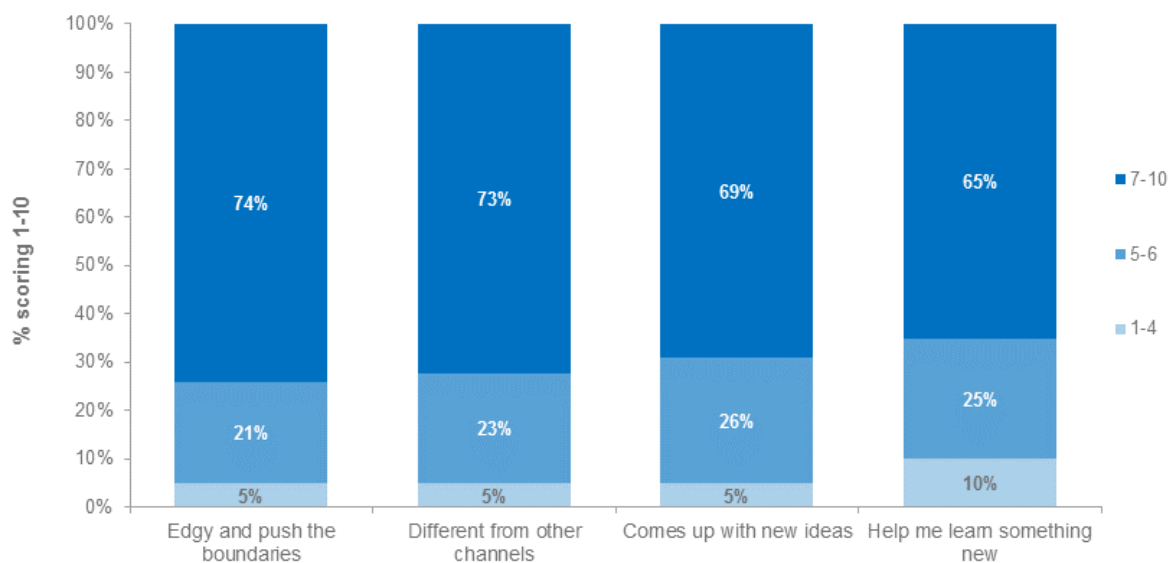
5.11 Summary of performance in the context of importance

As we have seen throughout the previous two chapters, the vast majority of Channel 4/Channel 4 Corporation viewers rated performance in line with importance, perceiving both Channel 4 and C4C to be performing well across its duties.

To summarise this, we now focus on the group of viewers who rated importance highly (7-10) for each statement, across both the Channel 4 and Channel 4 Corporation duties. We have broken down their performance scores into three bands; high (7-10), medium (5-6) and low (1-4), see Figure 39 and 40, below²⁹.

Looking specifically at Channel 4 remit statements, this analysis shows that the vast majority of Channel 4 viewers who rated each statement important (7-10) also rated performance highly (at least 65% for all). However, there is some variation. The analysis indicates that 'edgy', 'distinctive' and being 'different' are key strengths of Channel 4 with nearly three in four Channel 4 viewers who rated importance highly giving a high performance score. The statement '*Channel 4 programmes help me learn something new*' performed least well among the Channel 4 statements with 10% of viewers who rated importance highly giving a low (1-4) performance score.

Figure 39: Performance scores for statements amongst Channel 4 viewers who rated importance 7-10



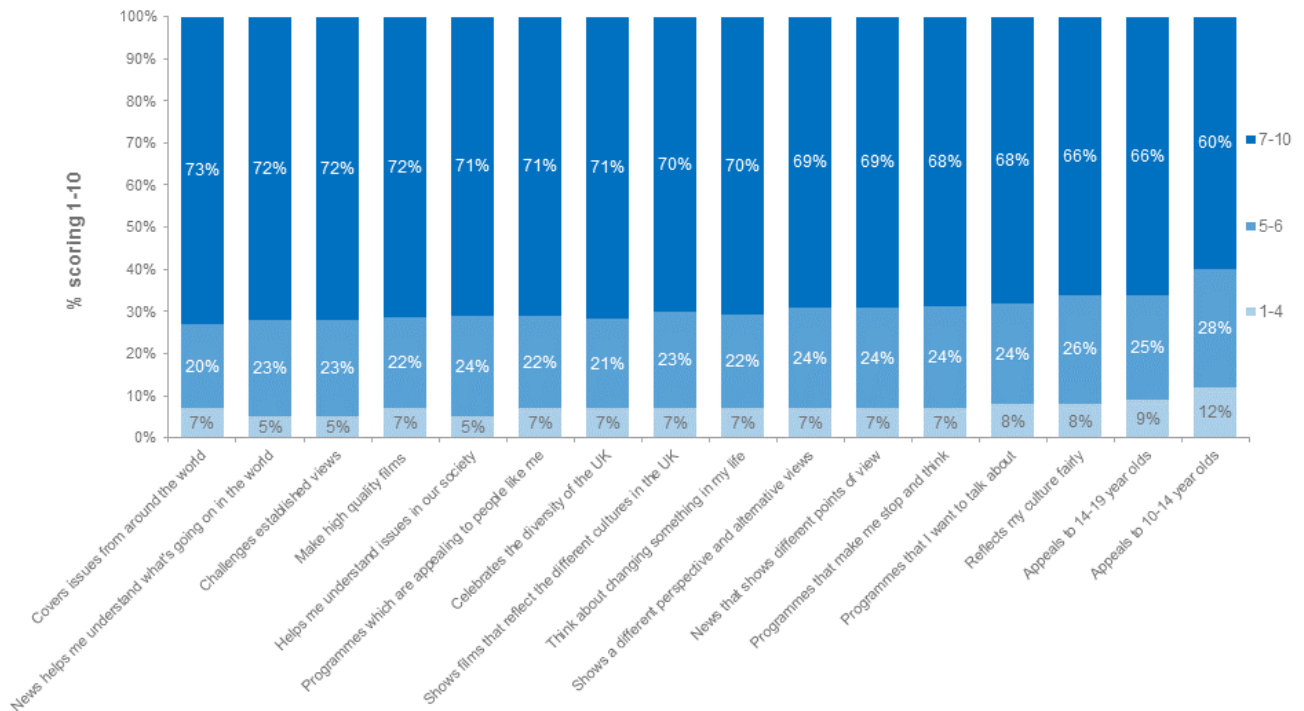
Thinking about the Channel 4 group and what they do on TV, online and in the cinema, please tell me how you would rate the Channel 4 group on the following statements, where 10 is the highest score and 1 is the lowest.

Base: Those giving a 7-10 importance rating who are C4 viewers. From left to right (657, 659, 728, 695)

There are similar results for the statements focussing on Channel 4 Corporation's media content duties, with C4C viewers who rated each statement as important (7-10) also rating performance highly (at least 60% for all). The rank order further indicates that 'covering issues from around the world' is a key strength. Only one statement had more than 10% of viewers who rated importance highly giving a low (1-4) performance score. This was '*C4C makes programmes that appeal to older children (aged 10-14)*'.

²⁹ For ease of charting these statements have been shortened

Figure 40: Performance scores for statements amongst Channel 4 Corporation viewers who rated importance 7-10



Thinking about the Channel 4 group and what they do on TV, online and in the cinema, please tell me how you would rate the Channel 4 group on the following statements, where 10 is the highest score and 1 is the lowest.

Base: Those giving a 7-10 importance rating who are C4C viewers. From left to right (803, 758, 702, 820, 722, 798, 741, 758, 486, 735, 745, 714, 637, 671, 566, 450)

6. Older Children's Attitudes to Channel 4 Corporation

Summary

Channel 4 Corporation is perceived to be performing well in providing content that appeals to older children (aged 10-14) by that age group itself. Channel 4 Corporation has a large reach among this age group and is generally well-liked.

A high proportion of the children aged 10-14 surveyed agreed that the Channel 4 family (which includes its television and online services) shows '*programmes that they like*', and '*programmes for people their age*'. It also performed strongly for showing programmes which older children say they '*like to watch with their family*', reflecting C4C's strategy to reach this audience through broad-appeal programming. Agreement with all of these statements increased significantly among regular viewers. In addition, when prompted with the list of programmes C4C has identified as of appeal to this age group, around half of the 10-14s surveyed said that they watched them, and then went on to rate them broadly positively.

6.1 Older children's views captured in an online survey

In addition to the qualitative and quantitative research with adults, a third element of research surveying the views of children aged 10-14 who watch Channel 4 Corporation services also took place. The main purpose of the online survey among 10-14 year olds was specifically to assess the delivery of C4C's duty to appeal to older children.

6.2 Television consumption

As with the adult survey, data was collected to identify the frequency of viewing of Channel 4 Corporation channels and its competitors. Respondents were eligible to take part if they ever use at least one Channel 4 Corporation service. They were then categorised as light, medium or regular viewers³⁰ based on how they answered the question. This was primarily to be used for cross-analysis purposes.

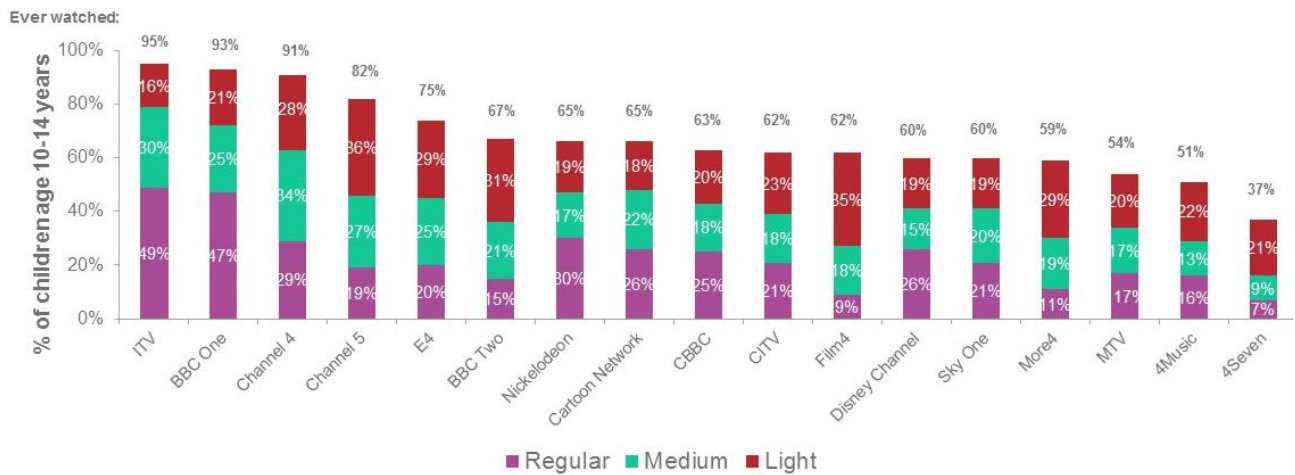
Figure 41, below, shows that Channel 4 was the third highest channel ever viewed amongst 10-14 year olds who ever watch any Channel 4 Corporation service, behind BBC One and ITV, and the fourth in terms of regular viewers.

E4 was the fifth highest channel ever viewed among this group, which is interestingly higher than is seen for the more children-focussed channels such as Nickelodeon, Cartoon Network, CITV, CBBC and Disney Channel. That being said, E4's figure of 20% regular viewers is lower than the previously mentioned children-focussed channels suggesting it has wider reach but viewing it is

³⁰ Regular viewers claimed to watch a Channel 4 Corporation channel either every day or most days. Medium viewers claimed to watch a Channel 4 Corporation channel at least once a week and light viewers claimed to watch less than once a week.

less of a frequent habit, with children perhaps 'dipping into' its programming rather than it being a regular part of their repertoire.

Figure 41: Frequency of channel viewing among 10-14 year olds who watch any Channel 4 Corporation service



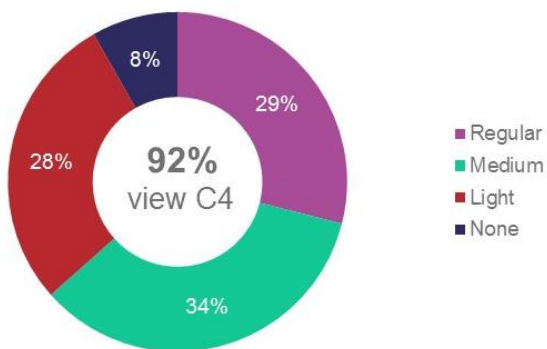
QK1. How often do you watch...?

Base: Children aged 10-14 years (511). Nickelodeon, Cartoon Network & Disney Channel base: Children with pay TV (412)

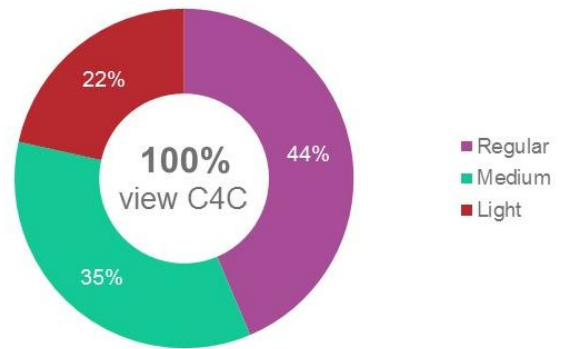
Out of the older children who watch Channel 4, nearly two thirds are regular/medium viewers, as illustrated by Figure 42, below.

Figure 42: Frequency of channel viewing among 10-14 year olds who watch any Channel 4 Corporation service

Frequency of watching Channel 4



Frequency of watching Channel 4 Group



QK1. How often do you watch...?

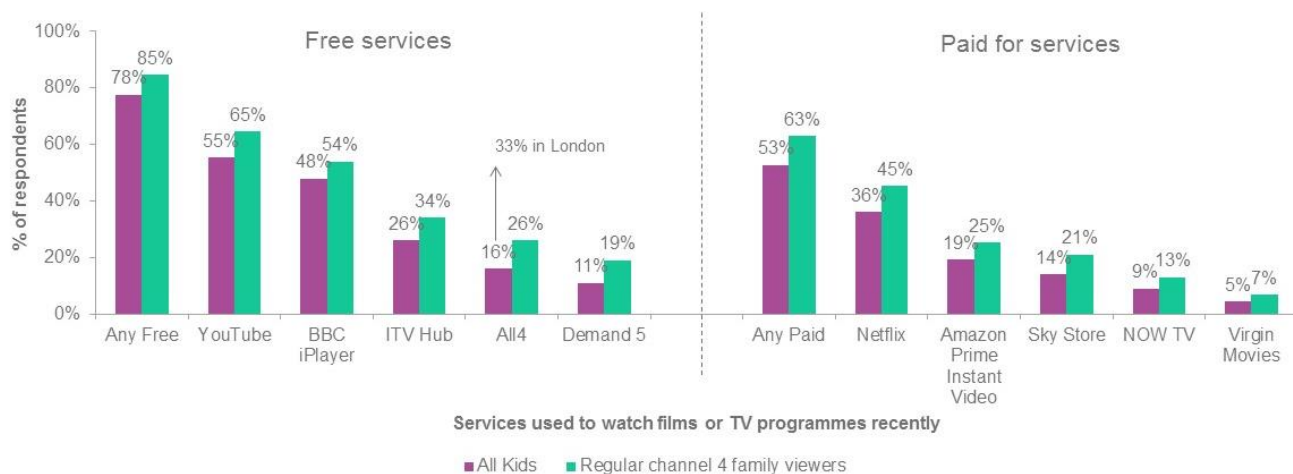
Base: Children aged 10-14 years (511)

6.3 Consumption of on-demand services

The older children were also asked about their use of on-demand services. The category is dominated by YouTube (used by 55% of children aged 10-14 who watch any Channel 4 Corporation service) and BBC iPlayer (48%). Netflix is also a well-used service amongst this group with 36% saying they had watched films or TV programmes on it recently. ITV Hub was also used by just over a quarter of this group (26%), followed by Amazon Prime and All4³¹, used by 19% and 16% of children aged 10-14 who watch any Channel 4 Corporation service respectively.

There were differences by age with 14 year olds being more likely to have used All4 (26%) than 10 or 11 year olds (12% and 11% respectively). There was also significantly higher usage of All4 in London compared to in the North West, Yorkshire & Humberside, East Midlands, West Midlands and South West. This was also true for other on-demand services but to a greater extent for All4.

Figure 43: Usage of on-demand services among 10-14 year olds who watch any Channel 4 Corporation service



Q.K2 Have you used any of these services to watch films or television programmes recently?
Base: Children aged 10-14 years (511), Regular channel 4 family viewers (220)

6.4 Service impressions

Children aged 10-14 who watch any Channel 4 Corporation service were also asked to give their general impression of several different TV services, scoring each service on a scale of 1 to 5, where 1 meant that they don't like them at all and 5 meant that they loved them. The list of services covered the following groups of services:

- The BBC family (including all BBC TV channels, BBC Radio, BBC website and BBC iPlayer)
- ITV family (including ITV and ITV 2,3,4, CITV, ITV Be and the ITV Hub)
- Channel 4 family (including Channel 4 and E4, More4, 4 Seven, Film 4, 4Music and All4)
- Channel 5 family (including Channel 5 and 5Star, 5USA, Spike and Demand 5)
- Sky family (including Sky One, Sky Atlantic, Sky Living, Sky Cinema, Sky Sports and Sky Kids App)

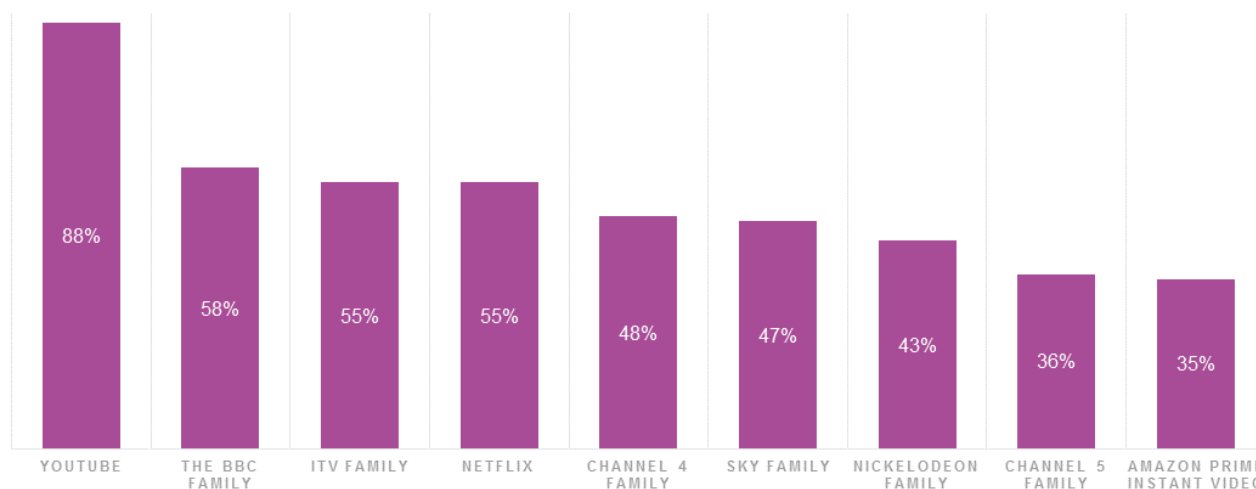
³¹ Note that unlike other PSB players, you must be at least 16 years old to register for All4. All4 viewers must sign in to watch content.

- Nickelodeon family (Nickelodeon, Nick Jr, Nick Jr Too, NickToons)
- Netflix
- Amazon Prime Instant Video
- YouTube

YouTube recorded strong scores among most of this group with 88% saying they 'like' or 'love' it. The BBC family, ITV family and Netflix were next in the ranking, liked by 58%, 55% and 55% of children aged 10-14 who watch any Channel 4 Corporation service respectively.

The Channel 4 Corporation holds a comfortable position, rated 'liked' or 'loved' by almost half of this group (48%). This is, however, significantly lower than the percentage seen to like the BBC family, ITV family and Netflix, but in line with the ratings seen for the Sky and Nickelodeon.

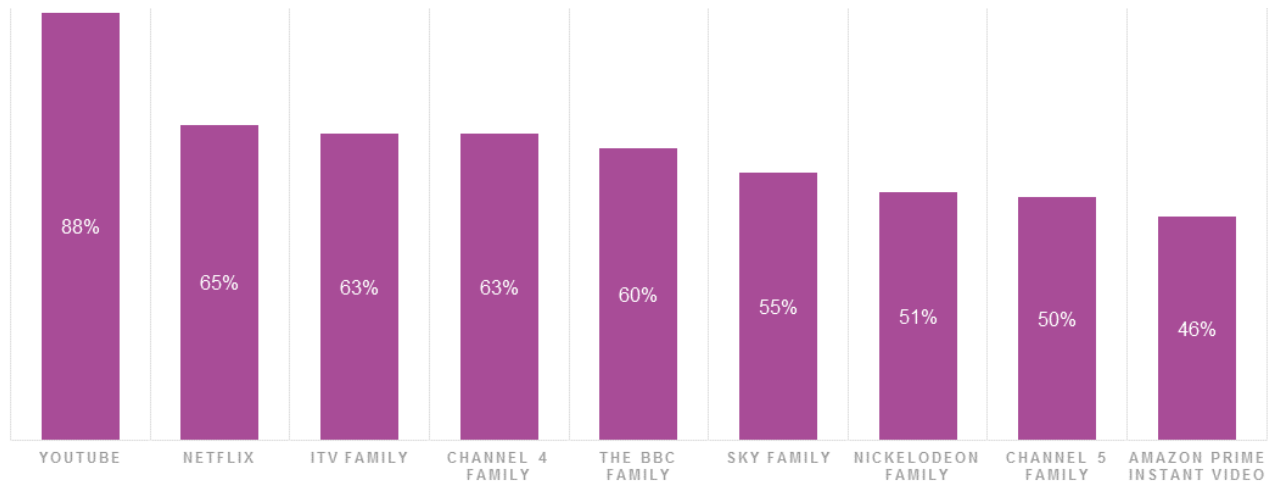
Figure 44: Proportion of those who 'like' or 'love' each service among 10-14 year olds who watch any Channel 4 Corporation service



QK5. Here are some different TV services. I would like you to tell me what you think of each one.
Base: Children aged 10-14 years (511)

A higher percentage of regular Channel 4 Corporation viewers said they like the Channel 4 family, increasing to over 6 in 10 (63%). This is in line with the comparable levels of liking the BBC family, ITV family and Netflix, albeit still markedly lower than seen for YouTube.

Figure 45: Proportion of those who 'like' or 'love' each service among 10-14 year olds who are regular Channel 4 Corporation viewers



QK5. Here are some different TV services. I would like you to tell me what you think of each one.
Base: Regular viewers of Channel 4 Corporation aged 10-14 (220)

6.5 Perceived performance of Channel 4 Corporation against its Remit

To assess the appeal of C4C services to children aged 10-14 who watch any Channel 4 Corporation service the older children surveyed were asked to what extent they agreed with a range of statements.

The following statements were asked:

- The Channel 4 family shows programmes that I like
- The Channel 4 family shows programmes I watch with my family
- The Channel 4 family shows programmes for people my age
- The Channel 4 family shows programmes I watch with my friends
- The Channel 4 family shows programmes I talk about with my friends
- The Channel 4 family shows programmes that are talked about on social media (Facebook/Instagram/etc.)
- Programmes shown on the Channel 4 family of channels are different from programmes on other channels
- I've learnt new things / interesting facts from programmes on the Channel 4 family of channels
- Film4 shows films / movies I want to see

The highest level of agreement was for the statement '*The Channel 4 family shows programmes I watch with my family*' with two thirds of children in the group (67%) agreeing with this statement.

A similar proportion (66%) agreed that 'the Channel 4 family shows programmes that I like'.

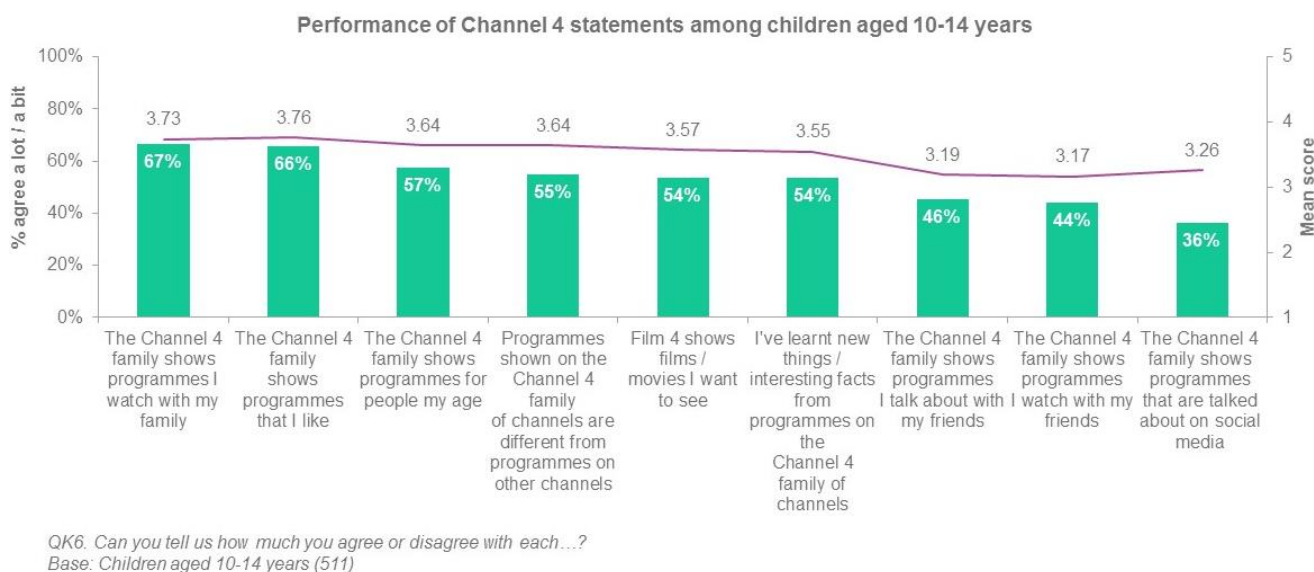
Focussing on specific areas of the Remit and initially on the requirement for C4C to 'exhibit a distinctive character', 55% of children aged 10-14 who watch any Channel 4 Corporation service

agreed that '*programmes on the Channel 4 family of channels are different from programmes on other channels*'.

In terms of the requirement to include programmes of an educational nature or of educative value, 54% of older children viewers agreed that they had '*learnt new things or interesting facts from programmes on the Channel 4 family*'.

The lowest level of agreement was for the statement '*the Channel 4 family shows programmes that are talked about on social media*' with only 36% of children aged 10-14 who watch any Channel 4 Corporation service agreeing that was the case. It is unlikely, however, that all children in the 10-14 year old age group are actively accessing social media.

Figure 46: Perceived performance of Channel 4 Corporation against its duties among 10-14 year olds who watch any Channel 4 Corporation service



There were differences in how the children responded to these statements by age. Children from the older 13-14 year age band were more likely (72%) to say that the Channel 4 Corporation shows programmes that they like to watch with their family (compared with 63% of 10-12 year olds).

They were also more likely to agree that '*The Channel 4 family shows programmes for people my age*': 64% of 13-14 year olds agreed with this which is significantly higher than the 53% of 10-12 year olds. This reflects some of the findings from the adult research when parents said that the younger children were not as well provided for.

The older 13-14 year olds were also more likely to agree that '*The Channel 4 family shows programmes that are talked about on social media*' than 10-12 year olds, reflecting that older children are more likely to be using social media.

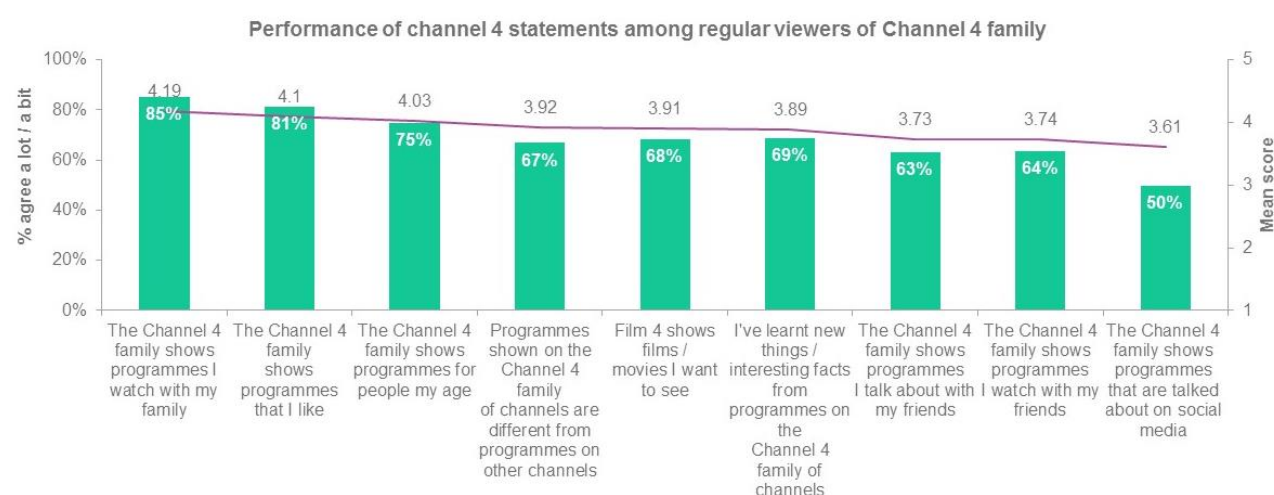
Figure 47: Ratings of Channel 4 Corporation by age band

% agreeing a little / a lot	10-12 year olds	13-14 year olds
The Channel 4 family shows programmes I watch with my family	63%	72%
The Channel 4 family shows programmes that I like	63%	70%
The Channel 4 family shows programmes for people my age	53%	64%
Programmes shown on the Channel 4 family of channels are different from programmes on other channels	52%	59%
Film 4 shows films / movies I want to see	54%	54%
I've learnt new things / interesting facts from programmes on the Channel 4 family of channels	53%	55%
The Channel 4 family shows programmes I talk about with my friends	43%	49%
The Channel 4 family shows programmes I watch with my friends	41%	48%
The Channel 4 family shows programmes that are talked about on social media	31%	44%

QK6: Can you tell us how much you agree or disagree with each ...? Base: Children aged 10-12 (305) 13-14 (206) who watch any Channel 4 Corporation service.

When looking at the results among regular viewers of the Channel 4 Corporation, again we see marked increases in the levels of agreement. Each statement supports the idea that the more frequently one views Channel 4 Corporation channels, the more favourable one is when rating performance.

Figure 48: Perceived performance of Channel 4 Corporation against its duties among 10-14 year olds who regularly watch any Channel 4 Corporation service

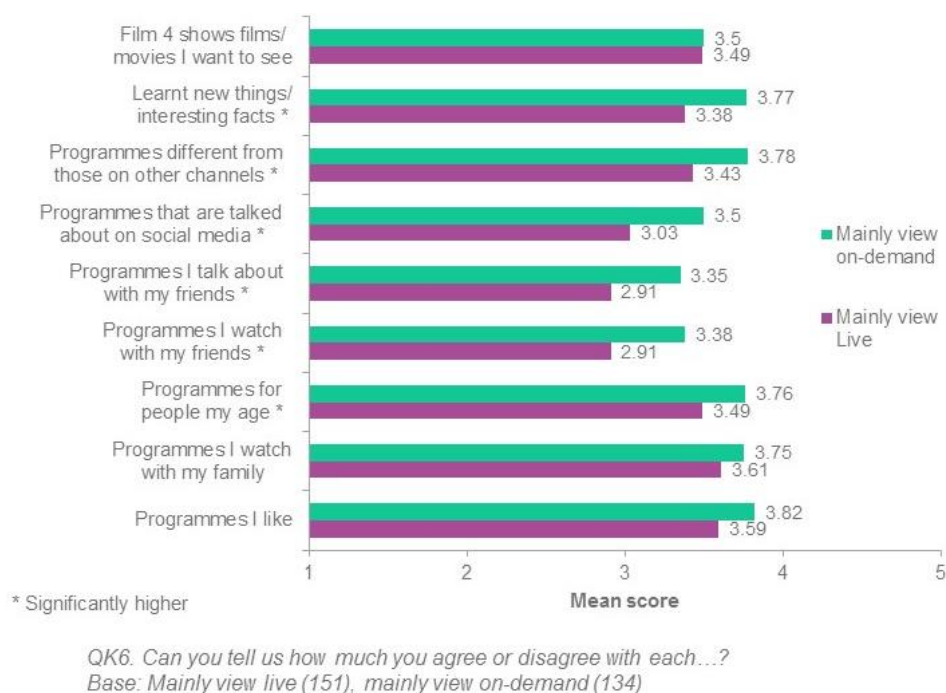


QK6. Can you tell us how much you agree or disagree with each...?
Base: Regular viewers of Channel 4 Corporation aged 10-14 years (220)

We also see higher agreement scores for respondents who mainly view content on-demand as opposed to mainly viewing live/linear TV.

This audience appears to be more content-engaged across both broadcasters and platforms. They generally watch TV channels more frequently, rate broadcasters more highly and are more likely to use mobile devices to watch programmes, films or videos.

Figure 49: Channel 4 Corporation ratings by type of viewer – mainly live or on-demand



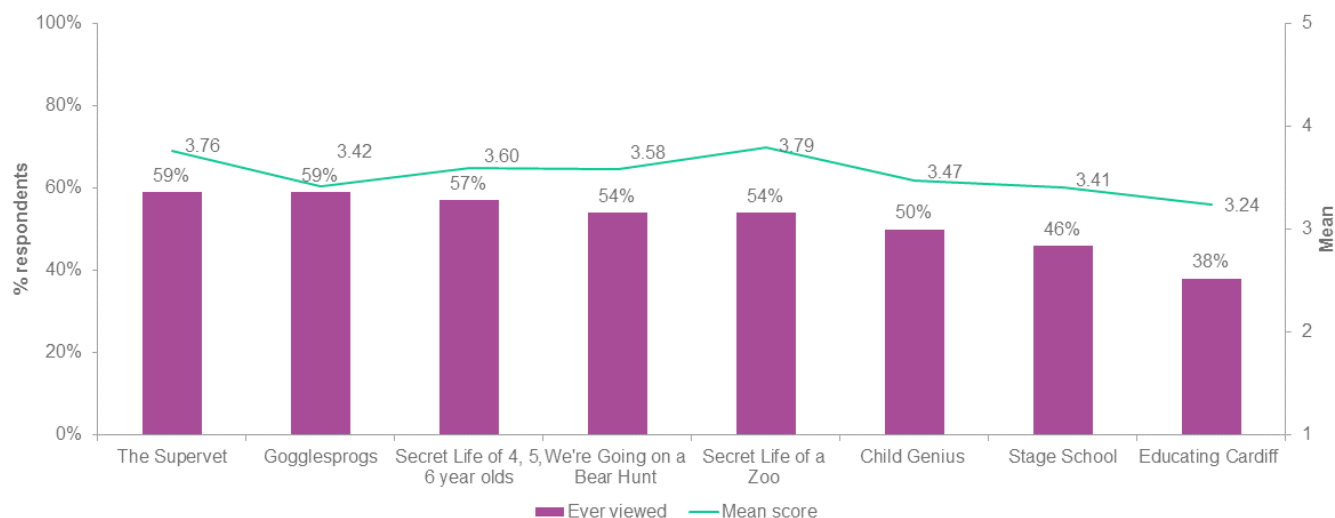
6.6 Programmes watched

Respondents were asked if they had watched a number of specific C4C programmes which C4C has identified as appealing to this audience, and if they had, how they liked them.

'The Supervet' and 'Gogglesprogs' had the highest levels of claimed viewing - 59% of 10-14 year olds who watch any Channel 4 Corporation service said they had ever watched these programmes. 'Educating Cardiff³²' was the least- watched programme on the list (38% of the group said they have ever watched it).

³² 'Educating Cardiff' was broadcast in 2015 so the time period that has elapsed may have affected recall.

Figure 50: Programmes viewed and ratings among 10-14 year olds who watch any Channel 4 Corporation service



QK6: I'd like you to tell me what you think of each one. Please move the slider between 1 and 5 where 1 means you don't like it at all and 5 means you love it.
Base: Children aged 10-14 years (511)

In terms of ratings, 'The Secret Life of a Zoo' and 'The Supervet' were rated highest (mean scores of 3.79 and 3.76 respectively) while 'Educating Cardiff', as well as being the least watched, was rated the lowest (3.24 mean score).

Looking at this by age, 13-14 year olds were more likely to have watched 'Educating Cardiff', 'Supervet' and 'Child Genius' whereas 10-12 year olds were more likely to have watched 'We're Going on a Bear Hunt'.

The older children were also given the opportunity to spontaneously mention programmes they watched on Channel 4 Corporation services before they were shown this list of specific programmes: interestingly, the programmes Channel 4 Corporation identified as of appeal actually received relatively few mentions (if any): 'The Supervet' (17 mentions), 'Secret Life of the Zoo' (7 mentions), 'Secret Life of 4, 5 and 6 year olds' (6 mentions), 'Educating Yorkshire' (1 mention), 'Stage School' (1 mention), 'Gogglesprogs' (1 mention), 'Child Genius' (0 mentions) and 'We're Going on a Bear Hunt' (0 mentions). The programmes with the most spontaneous mentions were 'Hollyoaks' (63 children named it), 'The Big Bang Theory' (59 mentions) and 'The Simpsons' (50 mentions). So, while older children do seem to watch and enjoy the programmes identified as of appeal, they seem more likely to be watching other content on Channel 4 Corporation.

7. Appendix A – Qualitative stage exercises

The deliberative workshops included exercises that helped reveal perceptions of the TV viewing landscape (a mapping exercise) and perceptions of the channel/service brands within the Channel 4 Corporation (a collage task). Examples are provided below.

7.1 Perceptions of the TV landscape

These are examples of a mapping exercise conducted by participants in Belfast and Woking.



Belfast, male, 16-17, C1C2



Woking, 18-24, C2D

7.2 Perceptions of the Channel 4 Corporation brands

The following illustrations are examples of a collage exercise conducted by participants in the workshops. Each Channel 4 Corporation brand was explored separately.

Channel 4



Woking, 18-24, C2D



Belfast, 18-24, BC1

variety show

quirky

creative

comedic

not dull

new ideas
difficult

unique

lively

young

right mix

something for everyone

E4

[illegible]

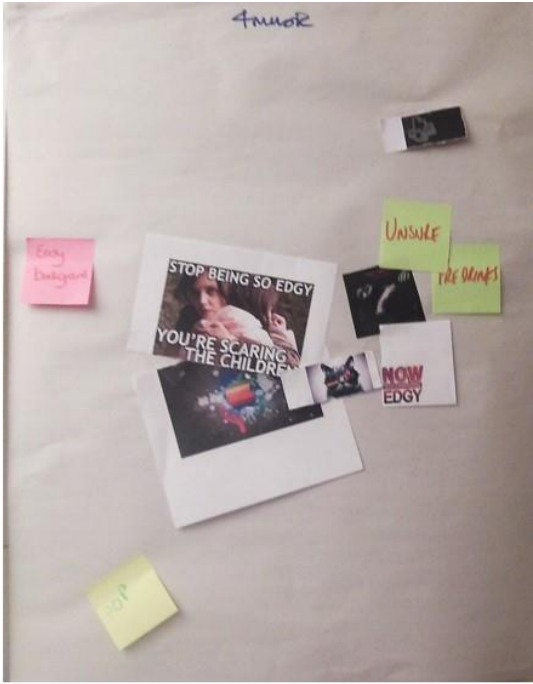
A photograph of a student's desk with a collage of images and text. The collage includes a black and white photo of a person lying down, a pink sticky note with the word "Nature", a strip of five small photos, a large yellow map of Europe, a pink sticky note with the word "Lifestyle", and several other smaller photos and text snippets. The word "Sustainable" is written on a pink sticky note at the bottom.

103

4Music

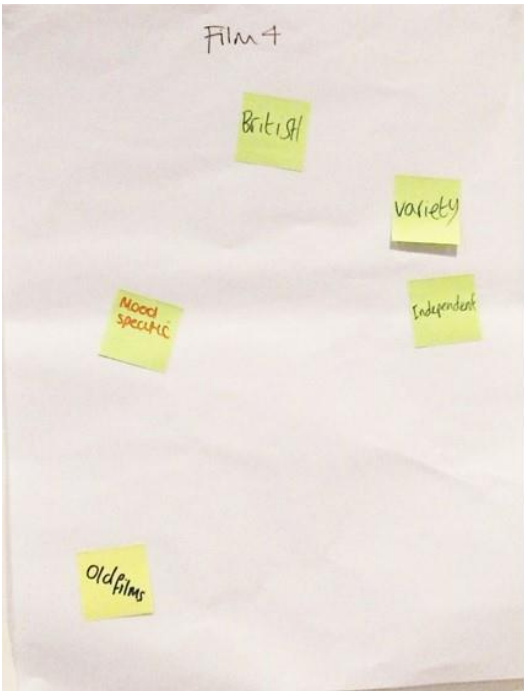


Leeds, 25-34, non-family, C2DE

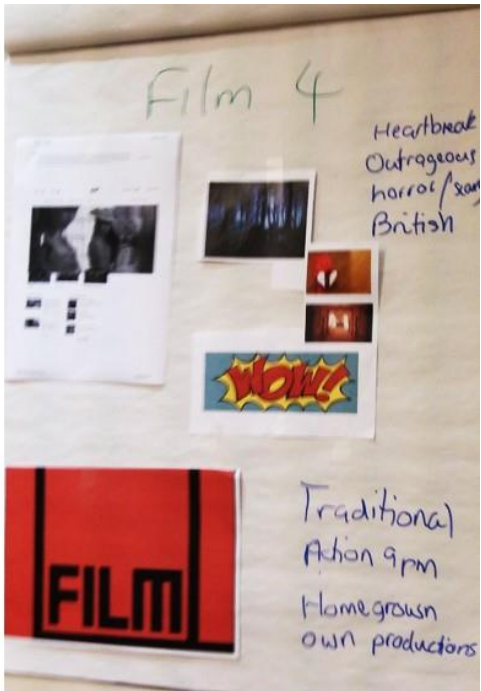


Dundee, 25-34, non-family, ABC1

Film4

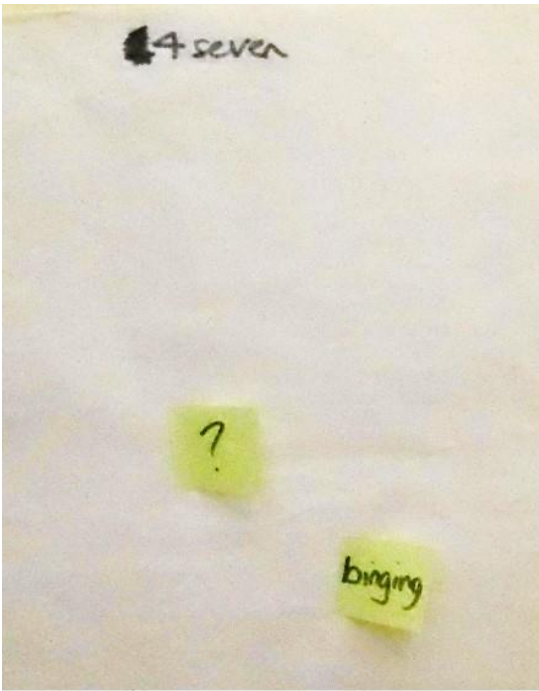


Swansea, 18-24, C1C2

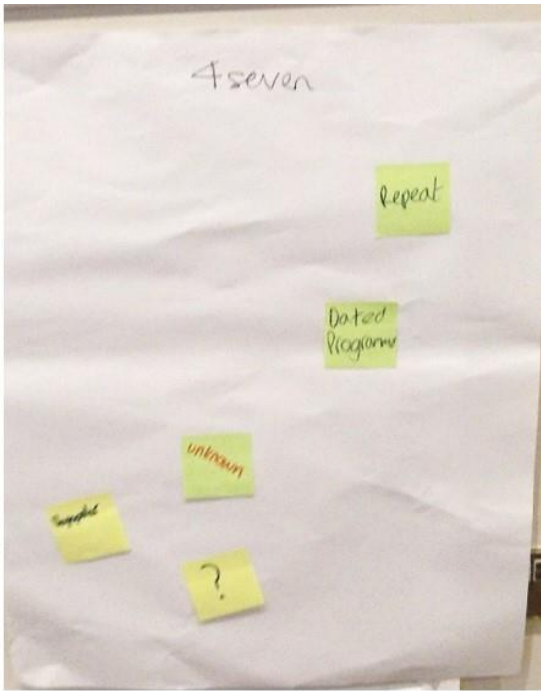


Leeds, 25-34, family, C1C2

4Seven



Belfast, 18-24, BC1



Swansea, 18-24, C1C2

All 4



Swansea, 18-24, C1C2



Woking, 18-24, C2D

8. Appendix B – Data tables

Importance (7-10) among Channel 4 viewers

Statement	Male (Base: 830)	Female (Base: 910)	16-34 (Base: 445)	35-54 (Base: 507)	55+ (Base: 788)	ABC1 (Base: 795)	C2DE (Base: 945)	With children (Base: 453)	Minority ethnic group (Base: 132)	With disability (Base: 388)
Channel 4 comes up with new ideas	35%	41%	43%	50%	34%	45%	39%	50%	39%	41%
Channel 4 programmes help me learn something new	37%	42%	40%	45%	34%	41%	37%	43%	35%	41%
Channel 4 is different from other channels	39%	38%	41%	45%	31%	42%	34%	45%	37%	40%
Channel 4 programmes are edgy and push the boundaries	38%	37%	40%	44%	30%	40%	36%	42%	38%	36%

Performance (7-10) among Channel 4 viewers

Statement	Male (Base: 830)	Female (Base: 910)	16-34 (Base: 445)	35-54 (Base: 507)	55+ (Base: 788)	ABC1 (Base: 795)	C2DE (Base: 945)	With children (Base: 453)	Minority ethnic group (Base: 132)	With disability (Base: 388)
Channel 4 comes up with new ideas	36%	35%	40%	42%	28%	40%	32%	42%	41%	33%
Channel 4 programmes help me learn something new	34%	37%	39%	39%	30%	37%	34%	38%	35%	38%
Channel 4 is different from other channels	36%	39%	41%	44%	29%	41%	33%	43%	33%	35%
Channel 4 programmes are edgy and push the boundaries	37%	37%	41%	44%	28%	41%	33%	45%	36%	34%

Statement	Importance (7-10) among Channel 4 Corporation viewers									
	Male (Base: 885)	Female (Base: 976)	16-34 (Base: 496)	35-54 (Base: 536)	55+ (Base: 829)	ABC1 (Base: 837)	C2DE (Base: 1024)	With children (Base: 493)	Minority ethnic group (Base: 143)	With disability (Base: 426)
Film4 productions make high quality films	46%	43%	48%	49%	38%	48%	41%	49%	36%	45%
Channel 4 Corp. covers issues from around the world	43%	45%	50%	47%	37%	47%	41%	53%	43%	46%
Channel 4 Corp. shows programmes which are appealing to people like me	43%	44%	51%	47%	35%	45%	42%	51%	41%	41%
Channel 4 Corp. shows films that reflect different cultures in the UK	41%	44%	48%	49%	32%	46%	39%	51%	41%	42%
Channel 4 Corp. celebrates the diversity of the UK	39%	44%	47%	47%	32%	46%	37%	48%	41%	40%
Channel 4 Corp. news and current affairs programmes help me understand what's going on in the world	41%	42%	46%	44%	35%	44%	38%	47%	38%	41%
Channel 4 Corp. programmes shows a different perspective and alternative views	39%	42%	47%	43%	33%	45%	36%	46%	33%	40%
Channel 4 Corp. news and current affairs programmes show different points of view	41%	42%	44%	46%	35%	46%	36%	46%	45%	41%
Channel 4 Corp. helps me understand issues in our society	38%	42%	47%	43%	32%	44%	36%	48%	43%	39%
Channel 4 Corp. challenges established views	40%	38%	42%	44%	32%	43%	34%	45%	35%	39%

Importance (7-10) among Channel 4 Corporation viewers										
Statement	Male (Base: 885)	Female (Base: 976)	16-34 (Base: 496)	35-54 (Base: 536)	55+ (Base: 829)	ABC1 (Base: 837)	C2DE (Base: 1024)	With children (Base: 493)	Minority ethnic group (Base: 143)	With disability (Base: 426)
Channel 4 Corp. shows programmes that make me stop and think	38%	40%	41%	44%	32%	41%	36%	45%	37%	40%
Channel 4 Corp. reflects my culture fairly	35%	38%	38%	43%	29%	38%	34%	43%	34%	35%
Channel 4 Corp. shows programmes that I want to talk about	33%	37%	44%	37%	26%	37%	33%	40%	39%	35%
Channel 4 Corp. makes programmes that appeal to young adults (aged 14-19)	32%	32%	41%	37%	20%	33%	31%	40%	32%	31%
Channel 4 Corp. programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle)	24%	30%	31%	32%	18%	28%	26%	34%	30%	29%
Channel 4 Corp. makes programmes that appeal to older children (aged 10-14)	23%	25%	27%	30%	18%	24%	25%	31%	24%	24%

Performance (7-10) among Channel 4 Corporation viewers										
Statement	Male (Base: 885)	Female (Base: 976)	16-34 (Base: 496)	35-54 (Base: 536)	55+ (Base: 829)	ABC1 (Base: 837)	C2DE (Base: 1024)	With children (Base: 493)	Minority ethnic group (Base: 143)	With disability (Base: 426)
Film4 productions make high quality films	40%	38%	42%	45%	32%	42%	36%	44%	36%	41%
Channel 4 Corp. covers issues from around the world	36%	39%	40%	44%	30%	41%	34%	45%	34%	40%
Channel 4 Corp. shows programmes which are appealing to people like me	35%	39%	42%	43%	28%	40%	35%	43%	38%	37%
Channel 4 Corp. shows films that reflect different cultures in the UK	35%	37%	39%	42%	29%	39%	33%	43%	36%	38%
Channel 4 Corp. celebrates the diversity of the UK	34%	37%	40%	41%	26%	38%	32%	42%	38%	36%
Channel 4 Corp. news and current affairs programmes help me understand what's going on in the world	35%	36%	38%	41%	29%	36%	35%	43%	36%	36%
Channel 4 Corp. programmes shows a different perspective and alternative views	34%	36%	38%	41%	27%	38%	32%	42%	38%	36%
Channel 4 Corp. news and current affairs programmes show different points of view	35%	36%	36%	42%	29%	38%	33%	42%	35%	38%
Channel 4 Corp. helps me understand issues in our society	35%	35%	39%	41%	27%	37%	33%	43%	38%	36%
Channel 4 Corp. challenges established views	34%	33%	36%	40%	26%	37%	31%	41%	29%	35%

Performance (7-10) among Channel 4 Corporation viewers

Statement	Male (Base: 885)	Female (Base: 976)	16-34 (Base: 496)	35-54 (Base: 536)	55+ (Base: 829)	ABC1 (Base: 837)	C2DE (Base: 1024)	With children (Base: 493)	Minority ethnic group (Base: 143)	With disability (Base: 426)
Channel 4 Corp. shows programmes that make me stop and think	30%	36%	36%	39%	26%	35%	31%	42%	32%	33%
Channel 4 Corp. reflects my culture fairly	29%	31%	33%	35%	23%	31%	29%	35%	29%	29%
Channel 4 Corp. shows programmes that I want to talk about	28%	33%	35%	36%	22%	32%	30%	37%	33%	31%
Channel 4 Corp. makes programmes that appeal to young adults (aged 14-19)	26%	27%	37%	28%	16%	27%	26%	35%	29%	24%
Channel 4 Corp. programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle)	23%	27%	28%	30%	17%	26%	24%	30%	31%	25%
Channel 4 Corp. makes programmes that appeal to older children (aged 10-14)	18%	20%	24%	21%	14%	18%	21%	26%	20%	20%

Importance (7-10) among Channel 4 Corporation viewers								
Statement	England (Base: 1533)	Scotland (Base: 139)	Wales (Base: 76)	Northern Ireland (Base: 113)	London (188)	North (Eng) (Base: 458)	South (Eng) (Base: 596)	Midlands (Eng) (Base: 479)
Channel 4 Corp. shows programmes which are appealing to people like me	43%	42%	45%	72%	41%	46%	44%	38%
Channel 4 Corp. shows films that reflect different cultures in the UK	42%	41%	38%	61%	43%	48%	42%	37%
Channel 4 Corp. celebrates the diversity of the UK	42%	36%	35%	60%	44%	43%	45%	38%
Channel 4 Corp. reflects my culture fairly	36%	38%	33%	65%	35%	37%	36%	33%

Performance (7-10) among Channel 4 Corporation viewers								
Statement	England (Base: 1533)	Scotland (Base: 139)	Wales (Base: 76)	Northern Ireland (Base: 113)	London (188)	North (Eng) (Base: 458)	South (Eng) (Base: 596)	Midlands (Eng) (Base: 479)
Channel 4 Corp. shows programmes which are appealing to people like me	36%	37%	39%	61%	36%	40%	37%	33%
Channel 4 Corp. shows films that reflect different cultures in the UK	35%	35%	40%	59%	35%	43%	34%	31%
Channel 4 Corp. celebrates the diversity of the UK	35%	34%	35%	57%	35%	40%	34%	31%
Channel 4 Corp. reflects my culture fairly	30%	25%	34%	50%	28%	37%	27%	26%

9. Appendix C - Fieldwork and Sample Details

9.1 Stage 1: Qualitative research with the core target audience

The qualitative research comprised pre-task workshops and mini-groups conducted around the UK.

Workshops

The sample was structured to ensure delivery of the following quota requirements:

- Age / life stage
- Men / women
- Even mix of men and women within the workshop groups
- Parents / non-parents
- Employment status
- BAME reflective of locations
- Urban / rural
- Channel 4 viewers – a heavy / medium / light viewing
- Attitudes towards Channel 4
- Inclusion of viewers of other Channel 4 family brands
- Pay / non-pay TV

Group	Age/Lifestage	SEG	C4 Attitude	Location
1	Young adults (18-24yrs)	C1C2	Med to high approvers	Central London
2	Pre-family (25-34yrs)	ABC1	Low to med approvers	Central London
3	Young adults (18-24yrs)	C2D	Low to med approvers	Surrey
4	Family (25-34yrs)	ABC1	Med to high approvers	Surrey
5	Pre-family (25-34yrs)	C2DE	Low to med approvers	Leeds
6	Family (25-34yrs)	C1C2	Med to high approvers	Leeds
7	Young adults (18-24yrs)	BC1	Med to high approvers	Belfast
8	Family (25-34yrs)	C2DE	Low to med approvers	Belfast
9	Pre-family (25-34yrs)	ABC1	Med to high approvers	Scotland

10	Family (25-34yrs)	C2DE	Low to med approvers	Scotland
11	Young adults (18-24yrs)	C1C2	Low to med approvers	Swansea
12	Pre-family (25-34yrs)	ABC1	Med to high approvers	Swansea

Mini-groups

Mini-group	Age/Lifestage	SEG	C4 Attitude	Location
1	Young adults (16-17yrs) - Female	ABC1	Low to med approvers	Woking
2	Young adults (16-17yrs) - Female	E	Low to medium approvers	Woking
3	Young adults (16-17yrs) - Male	C2D	Med to high approvers	Leeds
4	Young adults (18-19yrs) - Female	E	Med to high approvers	Leeds
5	Young adults (16-17yrs) - Male	C1C2	Med to high approvers	Belfast
6	Young adults (20-21yrs) - Female	E	Med to high approvers	Belfast
7	Young adults (16-17yrs) - Female	ABC1	Low to med approvers	Dundee
8	Young adults (22-23yrs) - Male	E	Low to med approvers	Dundee
9	Young adults (16-17yrs) - Male	C2D	Low to med approvers	Swansea
10	Young adults (23-24yrs) - Female	E	Low to med approvers	Swansea

Logistics

- Free find recruitment
- All fieldwork was audio recorded
- All respondents were given an incentive for participation in the fieldwork and for completing a pre-task
- Pre-task included media consumption diary, brought images relating to Channel 4 Corporation brands, to make a collage, deprivation and forced exposure of Channel 4 Corporation channel brands
- All respondents completed two sets of self-completion exercises during the sessions, capturing attitudes towards Channel 4 Corporation brands (importance of remit delivery and performance) pre / post discussion

Pre-task

Prior to the research sessions, respondents were asked to complete a pre-task that involved keeping a media diary, swapping a commonly watched channel for a less familiar one and (for the workshops only) bringing images that they felt represented the Channel 4 family. The tasks helped

to sensitise respondents to their own behaviour, expose them to services they were not previously aware of and get them thinking about the Channel 4 family. Below are the main pages from the pre-task:

PART 1 – viewing diary

For this first task, we'd like you to complete a diary of all the times you view something over 3-5 days. Please include at least 3 week days (e.g. Monday, Weds and Friday) and one weekend day (Sat or Sun).

For each day, we'd like you to note down:

1. **Time viewed:** e.g. 6.40pm – 8.55pm
2. **Programme /content:** e.g. Strictly come dancing
3. **Channel / service:** e.g. BBC1, iPlayer or Netflix etc
4. **Location:** Where you are, when viewing, i.e. whether at home, in the living room or in your bedroom, at a friend's house etc.
5. **Device:** What device you used, e.g. TV or an internet enabled device, such as a tablet, smartphone, etc.
6. **Type of viewing:** whether you are paying attention to it or just having it on in the background and dipping in and out of it (i.e. background noise).
7. **Who selected it:** who decided what to put on, or who influenced you i.e. your husband, child, or a friend etc.

On the next two pages, we've provided two different examples of completed diary entries for one day. Please complete a diary for your viewing in a similar style for a minimum of 3-5 days. Please feel free to use extra paper if you need to.

Day 1 – date: <i>Friday 16th December 2016</i>				EXAMPLE 1		
Time viewed	Programme / content e.g. Strictly come dancing	Channel / service e.g. BBC1	Location i.e. in the bedroom at home, in the living room, at a friend's	Device i.e. TV, Ipad, Phone	Paying attention or background noise	Who selected it

6:00am – 7:30am	<i>BBC Breakfast team</i>	<i>BBC 1</i>	<i>Bedroom at home</i>	<i>TV</i>	<i>Background noise</i>	<i>Me</i>
6.20-6.45pm	<i>In the night garden</i>	<i>Cbeebies</i>	<i>Daughter's bedroom</i>	<i>Ipad</i>	<i>Background noise</i>	<i>Me and daughter</i>
8pm-9pm	<i>Watchdog</i>	<i>BBC 1</i>	<i>Living room at home</i>	<i>Main TV</i>	<i>Paying attention</i>	<i>Husband</i>
10-11pm	<i>Game of Thrones</i>	<i>Sky Atlantic</i>	<i>Living room at home</i>	<i>Main TV</i>	<i>Paying attention</i>	<i>Me and husband</i>

PART 2- Living without your usual choice and trying something else.

For this task, we have asked you to NOT view _____ (for at least one day) on a day when you might normally view it. And instead to view _____. If we have not inserted a channel in the blank spaces for you, please contact us.

At the end of the task, we'd like you to describe your experiences of living without your usual channel and viewing the other channel instead.

We'd like to know:

- What did you miss most / least?
- What alternatives did you use?
- What did living without your usual channel and viewing the other channel instead make you notice?

Please write down your experiences in the box on the next page, and give as much detail as possible!

Self-completions

Throughout the discussion, respondents were also asked to fill out two self-completion sheets to record their opinions of 13 Remit duties. The first self-completion (A) asked respondents how important they thought it was to them personally, and to society, for all broadcasters to meet the duties. The second self-completion sheet (B) asked how important it was to them personally, and to society, for just Channel 4 Corporation/Channel 4 to meet the duties and how well they perform in meeting them.

Self-completion A:

Self-completion A

Q1. Please think about what broadcasters do on TV and online...

How important, *to you personally*, are each of the following 12 issues?

Please tick one box per row to indicate how important you consider each issue to be.

		Extremely important	Very important	Fairly important	Not very important	Not at all important	Don't know
1.	Provide news and current affairs						
2.	Include content for older children and young adults						
3.	Make high quality films						
4.	Broadcast films that reflect cultural activity in the UK						
5.	Appeal to a culturally diverse society						
6.	Provide alternative views and perspectives						
7.	Provide information and views from around the world						
8.	Stimulate debate and inspire change						
9.	Motivate participation in society						
10.	Show distinctive character						
11.	Demonstrate innovation, creativity and experimentation						
12.	Include educational programmes						

Q2. Still thinking about what broadcasters do on TV and online...

How important, *more generally for society*, are each of the following 12 issues?

Please tick one box per row to indicate how important you consider each issue to be for society.

		Extremely important	Very important	Fairly important	Not very important	Not at all important	Don't know
1.	Provide news and current affairs						
2.	Include content for older children and young adults						
3.	Make high quality films						
4.	Broadcast films that reflect cultural activity in the UK						
5.	Appeal to a culturally diverse society						
6.	Provide alternative views and perspectives						
7.	Provide information and views from around the world						
8.	Stimulate debate and inspire change						
9.	Motivate participation in society						
10.	Show distinctive character						
11.	Demonstrate innovation, creativity and experimentation						
12.	Include educational programmes						

Self-completion B:

Self-completion B

Q1. Please think about the Channel 4 Group and what they do on TV and online...

How important is it *to you personally*, that Channel 4 Group/Channel 4 provide the following?

Please tick one box per row to indicate how important you consider each Channel 4 Group/Channel 4 duty to be.

	Channel 4 Group duties	Extremely important	Very important	Fairly important	Not very important	Not at all important	Don't know
1.	Provide news and current affairs						
2.	Include content for older children and young adults						

3.	Make high quality films						
4.	Broadcast films that reflect cultural activity in the UK						
5.	Appeal to a culturally diverse society						
6.	Provide alternative views and perspectives						
7.	Provide information and views from around the world						
8.	Stimulate debate and inspire change						
9.	Motivate participation in society						
	Channel 4 duties	Extremely important	Very important	Fairly important	Not very important	Not at all important	Don't know
1.	Show distinctive character						
2.	Demonstrate innovation, creativity and experimentation						
3.	Appeal to a culturally diverse society						
4.	Include educational programmes						

Q2. Still thinking about what Channel 4 Group offers on TV and online...

How important is it *for society more generally*, that Channel 4 Group/Channel 4 provide the following?

Please tick one box per row to indicate how important you consider each Channel 4 Group/Channel 4 duty to be for society more generally.

	Channel 4 Group duties	Extremely important	Very important	Fairly important	Not very important	Not at all important	Don't know
1.	Provide news and current affairs						
2.	Include content for older children and young adults						
3.	Make high quality films						
4.	Broadcast films that reflect cultural activity in the UK						
5.	Appeal to a culturally diverse society						
6.	Provide alternative views and perspectives						
7.	Provide information and views from around the world						
8.	Stimulate debate and inspire change						
9.	Motivate participation in society						
	Channel 4 duties	Extremely important	Very important	Fairly important	Not very important	Not at all important	Don't know

1.	Show distinctive character						
2.	Demonstrate innovation, creativity and experimentation						
3.	Appeal to a culturally diverse society						
4.	Include educational programmes						

Q3. Still thinking about what Channel 4 Group offers on TV and online...

How well do you think Channel 4 Group/Channel 4 perform in the following?

Please tick one box per row to indicate how well you think Channel 4 Group/Channel 4 are performing for each duty.

	Channel 4 Group duties	Extremely well	Very well	Fairly well	Not very well	Not at all well	Don't know
1.	Provide news and current affairs						
2.	Include content for older children and young adults						
3.	Make high quality films						
4.	Broadcast films that reflect cultural activity in the UK						
5.	Appeal to a culturally diverse society						
6.	Provide alternative views and perspectives						
7.	Provide information and views from around the world						
8.	Stimulate debate and inspire change						
9.	Motivate participation in society						
	Channel 4 duties	Extremely well	Very well	Fairly well	Not very well	Not at all well	Don't know
1.	Show distinctive character						
2.	Demonstrate innovation, creativity and experimentation						
3.	Appeal to a culturally diverse society						
4.	Include educational programmes						

Discussion structure

The discussion structure covered the following sections:

Current media consumption

This section focussed on respondents' viewing habits and behaviours, picking up on what they found interesting about their behaviour after completing the media diary. Respondents also did self-completion A and reviewed the importance of the 13 duties.

Perceptions of channel brands

Respondents completed a mapping exercise in which they were asked to group different channels and online services by similarity. Building on how they viewed these services, they carried out a personification task for the Channel 4 Corporation brands, imagining each service as a human. This helped to explore the character and brand of each service. Finally, they used the images they had brought with them to create collages for each Channel 4 Corporation channel/service, which helped reveal how they perceive each channel.

Introducing the Channel 4 Corporation duties

In the second half of the discussion groups, respondents gave their opinions on how well they thought Channel 4 Corporation were doing in meeting these 13 duties. Each duty was discussed in turn.

Workshop discussion guide:

Ofcom C4C Remit Research Workshop Guide

Aim & objectives

Overall to explore attitudes towards Channel 4 Corporation (C4C) and its effectiveness in delivering against the C4C remit/duties

Specifically to:

- Explore and understand how people feel about Channel 4 as a whole, including the C4 brand family (E4, More 4, Film 4, 4Seven, All4 and online offerings), and what it is about them that encourages these views
- Explore how people feel about the Channel 4 remit/duties
- Investigate how Channel 4 stacks up against the other main PSBs and broadcasters, including analysis of what makes Channel 4 unique
- Understand in greater detail how people feel about Channel 4's media content duties, and how successfully it is delivering against them

Key principles for researchers to follow when using the guide

This guide is intended to be used as a guide rather than a questionnaire, and as such it lists the key themes and sub-themes to be explored within each session.

It does not include follow-up questions like 'why', 'when', 'how', etc. as participants' contributions will be fully explored in response to what they tell us throughout in order to understand how and why views and experiences have arisen.

The order in which issues are addressed and the amount of time spent on different themes will vary but the key areas for discussion are the same.

1. INTRODUCTION TO THE SESSION – PLENARY (10 mins | 6.30-6.40pm)

Lead moderator to welcome everyone into the main room / plenary and give introductory presentation. Welcome to the workshop, lead moderator to explain how the session will work, structure of the session, house rules, location of facilities, etc

- **Introduce researchers and observers** – Kantar, independent research company, and some others working on the project are observing (disclose Ofcom at the end if not obvious by then).
- **Introduce research and purpose of the session** – research to explore audience views towards specific TV channels and to discuss their roles. It will become clear which specific channels we are more interested in as we progress.
- **Length / comfort break** – will run from 6.30pm until 9.30pm, with a 10 minute break with refreshments and sandwiches provided half way through the session at about 8pm.
- **Reassurances** – no ‘right’ or ‘wrong’ answers, we are simply asking for people’s views and opinions; discussion, relaxed and informal, keen to hear everyone’s thoughts, we are after a range of opinions, not seeking consensus, lots to go through, we will be moving between rooms from time-to-time, we will aim to ensure everyone’s views and experiences are heard.
- **MRS guidelines** – anonymity and confidentiality – no names attributed to comments – anonymous results will be published later in the year.
- **Logistics** – there will be two groups, group A (blue sticker) and group B (red sticker). Introduce the groups to their moderator and which room is theirs.
- **Reminder about audio recording** – the interview will be recorded so that researchers capture everything and can listen back when analysing the data.
- **Housekeeping** – fire alarms, WCs, facilities, mobiles etc.
- **Any questions/concerns?**

INTRODUCTIONS – PARALLEL GROUPS (10 mins | 6.40-6.50pm)

Split into two BREAK-OUT GROUPS for parallel sessions

Once settled, repeat introductions, purpose of the research, reassurances, MRS guidelines, audio recording, presence of observers. Any questions/concerns?

Start recording – acknowledge participant consent for being recorded

- **SELF-COMPLETION A (personal & societal) (10 mins)** – distribute hand-outs and explain (importance rating for broadcasters for each duty, personal and then societal – 5 point scale) – think about this for the main broadcasters (BBC, ITV, Channel 4, Channel 5)
 - (1.) Provide news and current affairs
 - (2.) Include content for older children and young adults
 - (3.) Make high quality films
 - (4.) Broadcast films that reflect cultural activity in the UK
 - (5.) Appeal to a culturally diverse society
 - (6.) Provide alternative views and perspectives
 - (7.) Provide information and views from around the world
 - (8.) Stimulate debate and inspire change
 - (9.) Motivate participation in society
 - (10.) Show distinctive character
 - (11.) Demonstrate innovation, creativity and experimentation
 - (12.) Include educational programmes
- Paired introductions
- Name, family/household, work status, hobbies/interests

2. **CURRENT MEDIA CONSUMPTION – PARALLEL GROUPS (15 mins | 6.50-7.05pm)**

Whilst we are focusing on participants’ own viewing habits and behaviours, we are also interested in the perspective of others they live with including children and the level of influence others in the household have on them

- Introduce the **topic of TV viewing (5 mins)**
 - What programmes/films have you been enjoying on TV (live, catch-up, on-demand)
 - When do you tend to watch TV, explain a typical scenario
 - What do you enjoy about watching TV, probe emotional aspects – how does TV make you feel, what’s special about it – e.g. companionship, familiarity/routine, etc.
- **Pre-task completed diary (5 mins)** – ask all to have their completed diary in front of them, so they can refer to it throughout the session
- Observations about patterns in their own viewing behaviour and preferences, any surprises

- Which TV/online channels/services do you use, when, how often, with whom
- Probe on active consumption – what do you select
- Probe on passive consumption – what do you have on without really viewing as its on in background, or someone else put it on
- Which devices are used (main TV set, tablet, etc), by whom (partner, kids, etc)
- Which channels, what needs do these channels fulfil
- Anything you avoid
- Explore important elements recorded in **Self-completion A (5 mins)**
 - Review the 13 criteria for broadcasters – which are more/less important
 - Any differences between what is important personally vs from a societal perspective
 - Briefly explore anything that seemed unclear, ensure comprehension

3. PERCEPTIONS OF DIFFERENT CHANNEL BRANDS – **PARALLEL GROUPS (55 mins | 7.05-8.00pm)**

In this section, the main focus to remember is PSBs, their brand families and their competitors. However, it is also important to capture the appeal of competitor channel services as a point of comparison

- **Mapping exercise (20 mins)** – here is a range of TV channels on cards (C4C channels, other PSBs, Netflix, etc) – please group them in any way you feel they go together
 - *Photograph mapping and any changes made during discussion*
 - Explore groupings and dimensions – e.g. types of content/genres, style of channel, perceived audience/age, sub-brands/family
 - Any reference to PSBs (unlikely, but might refer to 'main/original five channels')
 - Which group/s feel closest to, why
- Focus on C4C brands
 - Where do C4C brands sit, which groupings, how compare with PSBs/competitors
 - Which of these do you watch, why (refer to diary), when use
 - Explore for others in household/children
 - How distinctive are they from each other, what are their similarities/differences
 - Who for, who is the target audience
 - To which do you feel closest, which is your favourite
 - Sum-up description
- **'Personification' exercise (10 mins)** – focus on C4C brands (C4, E4, More4, Film4, 4Seven, All4)...
 - Imagine the different brands have gone to the same party together...
 - How behave, what drinking, how do you get along – explore the impressions made by each at the party
 - Would they be missed if they hadn't turned up, would they be popular
 - Any individuals who stand out for any particular reason
 - Any changes over time ("timelines" probe)
- **Deprivation & alternative behaviour pre-task exercise (15 mins)** – reminder that we asked everyone to not view a more familiar C4C channel and to view another less familiar C4C channel (C4, E4, More4, 4music, Film4, 4seven, All4)
- Explore observations / things they noticed during the deprivation / exposure task
 - More familiar channel deprivation – tell me about your experience, what did you miss, how did you feel, what is your relationship with this channel
 - Less familiar channel exposure – what were you expecting, how did it compare, how did you feel about this channel
 - Compare and contrast the channels (probe: style, genres, quality of output etc)
 - What is each channel known for doing / doing well (if anything)
 - Any surprises, any other interesting observations
- Note/explore content perceptions (news & current affairs, films, educational, alternative views, views from around the world, distinctive, experimental)
- Note/explore perceived audience (older children (10-14) & young adults (15-19), culturally diverse, UK cultures)
- Note/explore impact (debate, inspire change, inspire participation, digital awareness/access)
- **Collage exercise (10 mins)** – ask participants to collate images (brought to the session) to represent the C4C brands. Collate images on flipchart – work in pairs on two brands (so that we cover all 7 brands – C4, E4, More4, Film4, 4seven, All4)
 - Explore meanings behind images used – character/personality, unique attributes

- Write down summary words to explain/prompted by images
- Note any differences in views across group

BREAK (10 mins) to provide downtime in readiness to shift to a new part of the workshop

4. INTRODUCING THE C4C DUTIES – PLENARY (8.10-8.25pm | 15 mins)

The lead moderator will explain the **current Channel 4 Corporation duties** using a visual presentation and some printed copies/posters for reference. The focus from hereon is the C4C brand family which includes: Channel 4, E4, More 4, Film 4, 4Seven and All4

- **C4C duties presentation** – lead moderator to explain the C4C duties using visual charts and printed handouts
- **Quiz** – a series of questions will be displayed on the main screen and the lead moderator to invite participants to answer them
- Ensure comprehension (possibly involving Ofcom) – any other questions

5. ATTITUDES TO C4C DELIVERING AGAINST DUTIES – PARALLEL GROUPS (8.25-9.00pm | 35 mins)

The focus is now how well C4C is delivering against its duties. Have these family brands on display to refer to when discussing C4C.

Participants to keep their plenary hand-outs, which list the C4C duties, to use as a reference

- Double-check comprehension and ensure everyone understands the points presented (refer to the hand-outs)
- Explore meaning / interpretation (for each duty)
- **SELF-COMPLETION B (5 mins)** – distribute hand-outs and explain (importance rating for C4C for each duty x9 & each C4 duty x4, personal then societal, then performance rating on the same)
 - C4C: (1.) Provide news and current affairs
 - C4C: (2.) Include content for older children and young adults
 - C4C: (3.) Make high quality films
 - C4C: (4.) Broadcast films that reflect cultural activity in the UK
 - C4C: (5.) Appeal to a culturally diverse society
 - C4C: (6.) Provide alternative views and perspectives
 - C4C: (7.) Provide information and views from around the world
 - C4C: (8.) Stimulate debate and inspire change
 - C4C: (9.) Motivate participation in society
 - C4: (1.) Show distinctive character
 - C4: (2.) Demonstrate innovation, creativity and experimentation
 - C4: (3.) Appeal to a culturally diverse society
 - C4: (4.) Include educational programmes
- Put all C4C brand cards on table and explore duties in turn, probing whether any particular C4C brands (C4, E4, More4, 4music, Film4, 4Seven, All4) are delivering better (but 4x C4 duties only for C4); also show content examples board to facilitate evaluation
- **Explore ratings (20 mins)** – open up to group, share and discuss views from Self-Completion B
 - How is the C4 group/family doing (performance)
 - Explore how the duties are being delivered – get examples
 - Are some of the brands/family driving this, how
 - Identify any gaps where criteria are not being delivered
 - Compare with competitors / other PSB brand families
 - Check how important the duties are – personally, societally
- **Flipchart summary of key themes (10 mins)** – moderator to ensure key themes are summarised on flipchart with the help of participants
 - Importance – which elements of the C4C duties are more/less important, why – to you personally, to society
 - Performance – which elements does C4C deliver against, not deliver against

6. SUM UP LEARNINGS – PLENARY (9.00-9.30pm | 30 mins)

Display the collages in an exhibition in the main room / plenary.

Lead moderator to welcome, and explain this is the final stage plenary, where main themes from each group will be shared and discussed, before the session ends

- **Collage exhibition (15 mins)** – bring collages into plenary room – participants encouraged to walk around and view the collages labelled with explanatory words
 - Spokesperson for each group to explain brand perceptions captured in collages
 - Share and compare perceptions of the C4C brands (C4, E4, More4, 4music, Film4, 4seven, All4) – note similarities/differences
- **Review of the duties (9+4) (15 mins)** – show the 13 duties and review each in turn
 - Performance – which are being delivered well, how – probe personal, societal
 - Performance – which are *not* being delivered well, how – probe personal, societal
 - Probe any C4C brands that are driving the performance of each duty
 - Check the importance of the duties – personally, societally
 - Any ratings changed through the course of the discussion, how/why
- Any final questions, comments participants would like us to feed back
- Disclose Ofcom, reassurances on how data to be used and next steps
- Collect materials, administer incentives, thank and close

Mini-groups discussion guide:

1. INTRODUCTIONS (10 mins)

Researcher introduction

- **Introduce researchers and observers** – Kantar, independent research company, and some others working on the project are observing (disclose Ofcom at the end if not obvious by then).
- **Introduce research and purpose of the interview** – research to explore audience views towards specific TV channels and to discuss their roles. It will become clear which specific channels we are more interested in as we progress.
- **Length** – will run 1.5 hours.
- **Reassurances** – no 'right' or 'wrong' answers, we are simply asking for people's views and opinions; discussion, relaxed and informal, keen to hear everyone's thoughts, we are after a range of opinions & not seeking consensus.
- **MRS guidelines** – anonymity and confidentiality – no names attributed to comments – anonymous results will be published later in the year.
- Reminder about **audio recording** – the interview will be recorded so that researchers capture everything and can listen back when analysing the data.
- **Housekeeping** – fire alarms, WCs, facilities, mobiles etc.
- Any **questions/concerns**?

Before respondents introduce each-other ask them to complete SC A

- **SELF-COMPLETION A (personal & societal)** – distribute hand-outs and explain (importance rating for broadcasters for each duty, personal and then societal – 5 point scale) – think about this for the main broadcasters (BBC, ITV, Channel 4, Channel 5)
 - (1.) Provide news and current affairs
 - (2.) Include content for older children and young adults
 - (3.) Make high quality films
 - (4.) Broadcast films that reflect cultural activity in the UK
 - (5.) Appeal to a culturally diverse society
 - (6.) Provide alternative views and perspectives
 - (7.) Provide information and views from around the world
 - (8.) Stimulate debate and inspire change
 - (9.) Motivate participation in society
 - (10.) Show distinctive character
 - (11.) Demonstrate innovation, creativity and experimentation
 - (12.) Include educational programmes

Respondent's introduction

- Each to introduce a friend
- Name, family/household, work / study status, hobbies/interests

2. CURRENT MEDIA CONSUMPTION (20 mins)

Whilst we are focusing on participants' own viewing habits and behaviours, we are also interested in the perspective of others they live with and the level of influence of others in the household

- Introduce the topic of TV viewing – what have you been enjoying on TV (live, catch up, on-demand)
 - When do you tend to watch TV, explain a typical scenario
 - What do you enjoy about watching TV, probe emotional aspects – how does TV make you feel, what's special about it – e.g. companionship, familiarity/routine, etc.

Pre-task completed diary

Ask all to have their completed diary in front of them, so they can refer to it throughout the session

- Observations about patterns in their own viewing behaviour and preferences, any surprises
 - Which TV/online channels/services do you use, when, how often, with whom
 - Probe on active consumption – what do you select
 - Probe on passive consumption – what do you have on without really viewing as its on in background, or someone else put it on
 - Which devices are used (main TV set, tablet, etc), by whom
 - Which channels, what needs do these channels fulfil
 - Anything you avoid
- Explore important elements recorded in Self-completion A
 - Review the 13 criteria for broadcasters – which are more/less important
 - Any differences between what is important personally vs from a societal perspective
 - Briefly explore anything that seems unclear, ensure comprehension

PERCEPTIONS OF DIFFERENT CHANNEL BRANDS (30 mins)

In this section, the main focus to remember is PSBs, their brand families and their competitors. However, it is also important to capture the appeal of competitor channel services as a point of comparison

- **Mapping exercise (15 mins)** – here is a range of TV channels on cards (C4C channels, other PSB,, Netflix, etc) – please group them in any way you feel they go together
 - *Photograph mapping and any changes made during discussion*
 - Explore groupings and dimensions – types of content/genres, style of channel, perceived audience/age, sub-brands / families
 - Any reference to PSBs (unlikely, but might refer to 'main / original five channels')
 - Which group feels closest to
- Focus on C4C brands
 - Where do C4C brands sit, which groupings, how compare with PSBs/competitors
 - Which of these do you watch, (refer to diary), when use
 - Explore for others in household
 - How distinctive are they from each other, what are their similarities / differences
 - Who for, who is the target audience
 - To which do you feel closest, which is your favourite
 - Sum-up description
- **'Personification' exercise (5 mins)** – focus on C4C brands (C4, E4, More4, Film4, 4Seven, All4)...
 - Imagine the different brands have gone to the same party together...
 - How do they behave, what are they drinking, how do you get along with them – explore the impressions made by each at the party
 - Would they be missed if they hadn't turned up, would they be popular
 - Any individuals who stand out for any particular reason
 - Any changes over time ("timelines" probe)
- **Deprivation & alternative behaviour pre-task exercise (10 mins)** – reminder that we asked everyone to not view a more familiar C4C channel and to view another less familiar C4C channel (C4, E4, More4, 4music, Film4, 4seven, All4)
- Explore observations / things they noticed during the deprivation / exposure task
 - More familiar channel deprivation – tell me about your experience, what did you miss, how did you feel, what is your relationship with this channel
 - Less familiar channel exposure – what were you expecting, how did it compare, how did you feel about this channel

- Compare and contrast the channels (probe: style, genres, quality of output etc)
 - What is each channel known for doing / doing well (if anything)
 - Any surprises, any other interesting observations
- Note/explore content perceptions (news & current affairs, films, educational, alternative views, views from around the world, distinctive, experimental)
- Note/explore perceived audience (older children (10-14) & young adults (15-19), culturally diverse, UK cultures)
- Note/explore impact (debate, inspire change, inspire participation, digital awareness/access)

3. ATTITUDES TO C4C DELIVERING AGAINST REMIT (30 mins)

Explain the **current Channel 4 Corporation remit** using presentation / visual handouts. The focus from hereon is the C4C brand family which includes: Channel 4, E4, More 4, Film 4, 4Seven and All4

- **C4C Remit (5 mins)** – moderator to explain the C4C Remit using stimulus
- Ensure comprehension – any other questions
 - Explore meaning / interpretation (for each individual element of the Remit)

The focus is now how well C4C is delivering against its remit. Have these family brands on display to refer to when discussing C4C.

Participants to keep their hand-outs, which list the C4C remit criteria, to use as a reference

- **SELF-COMPLETION B (20 mins)** – distribute hand-outs and explain (importance rating for C4C for each duties x9 & each C4 duties x4, personal and then societal, and then performance rating on the same)
 - C4C: (1.) Provide news and current affairs
 - C4C: (2.) Include content for older children and young adults
 - C4C: (3.) Make high quality films
 - C4C: (4.) Broadcast films that reflect cultural activity in the UK
 - C4C: (5.) Appeal to a culturally diverse society
 - C4C: (6.) Provide alternative views and perspectives
 - C4C: (7.) Provide information and views from around the world
 - C4C: (8.) Stimulate debate and inspire change
 - C4C: (9.) Motivate participation in society
 - C4: (1.) Show distinctive character
 - C4: (2.) Demonstrate innovation, creativity and experimentation
 - C4: (3.) Appeal to a culturally diverse society
 - C4: (4.) Include educational programmes
- Put all C4C brand cards on table and explore duties in turn, probing whether any particular C4C brands (C4, E4, More4, 4music, Film4, 4Seven, All4) are delivering better (but 4x C4 duties only for C4); also show content examples board to facilitate evaluation
- Open up to group – share and discuss views from Self-Completion B
 - How is the C4 group/family doing (performance)
 - Explore how the duties are being delivered – get examples
 - Are some of the brands/family driving this, how
 - Identify any gaps where criteria are not being delivered
 - Compare with competitors / other PSB brand families
 - Check how important the duties are – personally, societally
- **Flipchart summary of key themes (5 mins)** – moderator to ensure key themes are summarised on flipchart with the help of participants
 - Importance – which elements of the C4C duties are more/less important, why – to you personally, to society
 - Performance – which elements does C4C deliver against, not deliver against
 - C4C channels/services)

Final questions & close

- Any final questions, comments participants would like us to feed back

- *Disclose Ofcom, reassurances on how data to be used and next steps*

9.2 Stage 2: Face-to-face quantitative research amongst adults aged 16+

The following sample sizes were achieved:

KEY SUBGROUPS FOR ANALYSIS		Incidence	Sample
Total – UK adults 16+		100%	2,184
Sex	Male	48%	1,044
	Female	52%	1,140
Age	16-34	29%	635
	35-54	28%	609
	55+	43%	940
SEG	ABC1	44%	957
	C2DE	56%	1,227
Nation	England	81%	1,774
	Scotland	8%	184
	Wales	5%	98
	Northern Ireland	6%	128
Ethnic Origin	White	90%	1,968
	Minority Ethnic	9%	201
Disability	No disability	76%	1,649
	Disability	23%	492

The UK adults survey was weighted to be nationally representative of the UK population aged 16+ years.

The questionnaire used for this stage of research is below.

Quantitative questionnaire

I would like to ask you some questions about your TV viewing ...

ASK ALL

SINGLECODE. DO NOT RANDOMISE.

QTVch. How frequently do you watch each of the following television channels?

BBC One

BBC Two

ITV (STV/ UTV/ ITV Wales)

Channel 4

Channel 5

ITV2

E4
More 4
Sky One
Film 4
4seven
4music

1. Everyday
2. Most days
3. 2-3 times a week
4. About once a week
5. Less than once a week
6. Never

ASK ALL

MULTICODE

QfreeTV. Have you used any of the following services to watch films or (television) programmes recently?

Free services

1. BBC iPlayer
2. ITV Hub (formerly ITV Player)
3. All4 (formerly 4OD)
4. Demand 5

Paid for services

5. Netflix
6. Amazon Prime Instant Video
7. NOW TV
8. Sky Store
9. Other

(DK), (NA) **BUTTONS**

ASK ALL, SC

QGI. I am now going to read out the names of some different TV services and would like you to tell me your general impression of each one.

Please give a score of 1-10, where 1 means you have an extremely unfavourable impression and 10 means you have an extremely favourable impression.

The BBC (including BBC TV channels, BBC Radio, BBC website and BBC iPlayer)

ITV (including ITV and ITV 2,3,4, ITV Be and the ITV Hub)

Channel 4 (including Channel 4 and E4, More4, 4 Seven, Film 4, 4Music and All4)

Channel 5 (including Channel 5 and 5Star, 5USA, Spike and Demand 5)

Sky (including Sky One, Sky Atlantic, Sky Living, Sky Cinema and Sky Sports)

Netflix

Amazon Prime Instant Video

SCRIPTER: PLEASE PUT A SCALE OF 1 TO 10 WITH 1 AS EXTREMELY UNFAVOURABLE AND 10 EXTREMELY FAVOURABLE WITH THE STATEMENT ABOVE THE SCALE.

RANDOMISE ORDER

(DK), (No opinion), (Not heard of [...]) - **BUTTONS**

General impression of [...]	1	2	3	4	5	6	7	8	9	10
-----------------------------	---	---	---	---	---	---	---	---	---	----

Extremely
Unfavourable

Extremely
Favourable

ASK ALL, MC, FIXED ORDER

QGenreC41: Which of the following types of programming do you ever watch on Channel 4? Please select all that apply.

Drama (Examples include Humans, Indian Summers)

Documentaries (Examples include Educating Cardiff, 24 Hours in A and E, Benefits Street)

Factual Entertainment (Examples include The Undateables, Gogglebox, Gogglesprogs, The Secret life of 4, 5 and 6 year olds)

Comedy (Examples include No Offence, Friday Night Dinner, Man Down)

Entertainment (Examples include The Jump, 8 Out of 10 Cats does Countdown)

News & Current Affairs (Examples include Channel 4 News, Dispatches, Unreported World)

Educational (Examples include Food Unwrapped, How to Lose Weight Well)

International (Examples include Walking the Americas, Escape to the Wild, The Tribe)

Sport (Examples include The Paralympics, horseracing, Formula 1)

ASK ALL, MC, FIXED ORDER

QGenreC42: Which of the following types of programming do you ever watch on other Channel 4 group channels – e.g. E4, More4, 4 Seven, Film 4, 4Music, All4 ? Please select all that apply.

Films (Examples include Amy, Suffragette, 12 Years a Slave)

Drama (Examples include Supernatural, My Mad Fat Diary)

Documentaries (Examples include 24 Hours in A and E, Obsessive Compulsive Cleaners, Great Canal Journeys)

Factual Entertainment (Examples include Made in Chelsea, Tattoo Fixers, The Supervet, Grand Designs)

Comedy (Examples include Chewing Gum, The Aliens, Big Bang Theory)

Entertainment (Examples include Hollyoaks, Come Dine with Me)

News & Current Affairs (Examples include Dispatches, Unreported World)

Educational (Examples include Time Team, Food Unwrapped)

International (Examples include Deutschland 83 (Walter Presents), Case (Walter Presents))

Music (Examples include UK HOTMIX Top 20, The Official Box Upfront Chart)

SECTION 4 - Role of C4 as Public Service Broadcaster

SHOW CARD A EXPLAINING CHANNEL 4 ONLY AND LEAVE ON DISPLAY

ASK ALL, SC, RANDOMISE STATEMENTS

QC4oImp. Thinking about Channel 4 only (not E4, More 4, Film 4, 4seven, 4music, All4) and what they do on TV and online, please tell me how important it is to you personally that Channel 4 provides the following.

Please give a score of 1-10, where 1 means not at all important and 10 means extremely important.

- Channel 4 programmes are edgy and push the boundaries
- Channel 4 comes up with new ideas
- Channel 4 is different from other channels
- Channel 4 programmes help me learn something new

SCRIPTER: PLEASE PUT A SCALE OF 1 TO 10 WITH 1 AS NOT AT ALL IMPORTANT AND 10 EXTREMELY IMPORTANT WITH THE STATEMENT ABOVE THE SCALE.

RANDOMISE ORDER

(DK), (No opinion) **BUTTONS**

	1	2	3	4	5	6	7	8	9	10
Not at all important					Extremely Important					

SHOW CARD A EXPLAINING CHANNEL 4 ONLY AND LEAVE ON DISPLAY

ASK ALL, SC, RANDOMISE STATEMENTS

QC4oPerf. Thinking about Channel 4 only (not E4, More 4, Film 4, 4seven, 4music, All4) and what they do on TV and online, please tell me how you would rate Channel 4 on the following statements, where 10 is the highest score and 1 is the lowest.

- Channel 4 programmes are edgy and push the boundaries
- Channel 4 comes up with new ideas
- Channel 4 is different from other channels
- Channel 4 programmes help me learn something new

SCRIPTER: PLEASE PUT A SCALE OF 1 TO 10 WITH THE STATEMENT ABOVE THE SCALE.

RANDOMISE ORDER

(DK), (No opinion)

	1	2	3	4	5	6	7	8	9	10
Lowest score					Highest score					

SHOW CARD B EXPLAINING CHANNEL 4 FAMILY OF CHANNELS AND LEAVE ON DISPLAY FOR THIS QUESTION

INTERVIEWER NOTE –THIS QUESTION APPLIES TO ALL CHANNEL 4 CHANNELS AND SERVICES INCLUDING THE MAIN CHANNEL. PLEASE CHECK AND CONFIRM RESPONDENT HAS READ SHOW CARD BEFORE ANSWERING.

ASK ALL, SC, RANDOMISE STATEMENTS

QC4CImp. The Channel 4 group is made up of Channel 4, E4, More 4, Film 4, 4seven, 4music, All4.

Thinking about the Channel 4 group and what they do on TV, online and in the cinema, please tell me how important it is to you personally that the Channel 4 group provide the following.

Please give a score of 1-10, where 1 means not at all important and 10 means extremely important.

- The Channel 4 group celebrates the diversity of the UK
- The Channel 4 group reflects my culture fairly
- The Channel 4 group shows programmes which are appealing to people like me
- Channel 4's Facebook news helps me understand what's going on in the world **[ONLY ASK ANY INTERNET USERS, INCLUDING MOBILE ONLY]**
- Channel 4 group news and current affairs programmes help me understand what's going on in the world
- Channel 4 group news and current affairs programmes show different points of view
- The Channel 4 group makes programmes that appeal to older children (aged 10-14)
- The Channel 4 group makes programmes that appeal to young adults (aged 14-19)
- The Channel 4 group shows films that reflect the different cultures in the UK
- Film 4 productions make high quality films
- The Channel 4 group helps me understand issues in our society
- The Channel 4 group covers issues from around the world
- The Channel 4 group shows programmes that i want to talk about
- The Channel 4 group shows programmes that make me stop and think
- The Channel 4 group challenges established views
- Channel 4 group programmes shows a different perspective and alternative views
- Channel 4 group programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle)

SCRIPTER: PLEASE PUT A SCALE OF 1 TO 10 WITH 1 AS NOT AT ALL IMPORTANT AND 10 EXTREMELY IMPORTANT WITH THE STATEMENT ABOVE THE SCALE.

RANDOMISE ORDER

(DK), (No opinion) **BUTTONS**

	1	2	3	4	5	6	7	8	9	10
Not at all important					Extremely important					

ASK ALL, SC, RANDOMISE STATEMENTS

SHOW CARD B EXPLAINING CHANNEL 4 FAMILY OF CHANNELS AND LEAVE ON DISPLAY FOR THIS QUESTION

INTERVIEWER NOTE – THIS QUESTION APPLIES TO ALL CHANNEL 4 CHANNELS AND SERVICES INCLUDING THE MAIN CHANNEL. PLEASE CHECK AND CONFIRM RESPONDENT HAS READ SHOW CARD BEFORE ANSWERING.

QC4CPerf. The Channel 4 group is made up of Channel 4, E4, More 4, Film 4, 4seven, 4music, All4.

Thinking about the Channel 4 group and what they do on TV, online and in the cinema, please tell me how you would rate the Channel 4 group on the following statements, where 10 is the highest score and 1 is the lowest

- The Channel 4 group celebrates the diversity of the UK
- The Channel 4 group reflects my culture fairly
- The Channel 4 group shows programmes which are appealing to people like me
- Channel 4's Facebook news helps me understand what's going on in the world **[ONLY ASK ANY INTERNET USERS, INCLUDING MOBILE ONLY]**
- Channel 4 group news and current affairs programmes help me understand what's going on in the world
- Channel 4 group news and current affairs programmes show different points of view
- The Channel 4 group makes programmes that appeal to older children (aged 10-14)
- The Channel 4 group makes programmes that appeal to young adults (aged 14-19)
- The Channel 4 group shows films that reflect the different cultures in the UK
- Film 4 productions make high quality films
- The Channel 4 group helps me understand issues in our society
- The Channel 4 group covers issues from around the world
- The Channel 4 group shows programmes that i want to talk about
- The Channel 4 group shows programmes that make me stop and think
- The Channel 4 group challenges established views
- Channel 4 group programmes shows a different perspective and alternative views
- Channel 4 group programmes encouraged me to think about changing something in my life (e.g. change in attitude or lifestyle)

SCRIPTER: PLEASE PUT A SCALE OF 1 TO 10 WITH THE STATEMENT ABOVE THE SCALE.

RANDOMISE ORDER

(DK), (No opinion)

	1	2	3	4	5	6	7	8	9	10
--	---	---	---	---	---	---	---	---	---	----

Lowest score

Highest score

ASK ALL

**QAbility. Which of these, if any, limit your daily activities or the work you can do?
Please select all that apply.**

MULTICODE

A	Breathlessness or chest pains	1
B	Poor vision, partial sight or blindness	2
C	Difficulty in speaking or in communicating	3
D	Poor hearing, partial hearing or deafness	4
E	Cannot walk at all / use a wheelchair	5
F	Cannot walk far or manage stairs or can only do so with difficulty	6
G	Limited ability to reach	7
H	Mental health problems or difficulties	8
I	Dyslexia	9
J	Other illnesses or health problems which limit your daily activities or the work that you can do (WRITE IN AND CODE 10) _____	10
	None	11
	Don't know / refused	12

AUTOCODE AS 'DISABILITY' IF CODE 1//10

9.3 Stage 3: Online quantitative research amongst children aged 10-14

The following sample sizes were achieved:

KEY SUBGROUPS FOR ANALYSIS		Incidence	Sample
Total – Children		100%	511
Age 10	Male	10%	50
	Female	10%	50
Age 11	Male	11%	58
	Female	9%	47
Age 12	Male	10%	52
	Female	9%	48
Age 13	Male	10%	50
	Female	10%	50
Age 14	Male	11%	55
	Female	10%	51

KEY SUBGROUPS FOR ANALYSIS		Incidence	Sample
Total – Parents		100%	511
SEG	A	7%	36
	B	30%	151
	C1	28%	141
	C2	16%	83
	D	12%	61
	E	7%	39
Nation	England	87%	443
	Scotland	5%	23
	Wales	7%	35
	Northern Ireland	1%	10

The sample of parents of the children taking part was weighted on parental characteristics to be representative of all parents of 10-14 year olds in the UK in terms of social grade, region and the age and gender of their child.

The questionnaire used for this stage of research is below.

Quantitative questionnaire

ASK ALL, SC

S1. Are you the parent/guardian of any children aged 10 to 14 in your household?

Please select your answer from the drop down list below.

SCRIPTER: SET UP AS DROP DOWN MENU

1. No children aged 10-14
2. Yes, 1 child aged 10-14
3. Yes, 2 children aged 10-14
4. Yes, 3 children aged 10-14
5. Yes, 4 children aged 10-14
6. Yes, 5 children aged 10-14

TERMINATE IF CODE 1 SELECTED AT S1, ELSE CONTINUE

ONLY SHOW IF GENDER UNKNOWN. AUTOFILL IF KNOWN.

SC

S2. Are you male or female? –

1. Male
2. Female

ONLY SHOW IF AGE UNKNOWN. AUTOFILL IF KNOWN.

SC

S3. How old are you?

CODE: –

<ENTER NUMERIC>

MIN 30, MAX 100. TERMINATE IF OUTSIDE THIS RANGE

SC, ONLY SHOW IF REGION UNKNOWN. AUTOFILL IF KNOWN.

S4. In which region do you currently live?

1. North East
2. North West
3. Yorkshire & Humber
4. East Midlands
5. West Midlands
6. South West
7. Eastern
8. London
9. South East
10. Wales
11. Scotland
12. Northern Ireland

RECODE FOR QUOTAS:

1. **NORTH – CODES 1,2,3,11,12**
2. **MIDLANDS – CODES 4,5,7,10**
3. **SOUTH – CODES 6,8,9**

SHOW SCREEN - MULTI CHOICE

ss4. Through which of the following ways, if any, do you receive television in your household?
Please think about all the TV sets in your household.

- 1 ☐ Sky - Digital Satellite TV for a monthly subscription
- 2 ☐ Satellite TV from someone other than Sky for a monthly subscription
- 3 ☐ Free-Sat - Digital Satellite TV WITHOUT a monthly subscription
- 4 ☐ Virgin Media through cable
- 5 ☐ Freeview through a TV aerial and set-top box
- 6 ☐ TV set which has Freeview channels built in (without a separate set-top box)
- 7 ☐ YouView set top box
- 8 ☐ BT TV
- 9 ☐ Talk Talk TV
- 10 ☐ Other

SC, ONLY SHOW IF SOCIAL GRADE UNKNOWN. AUTOFILL IF KNOWN.

S5. Please select the occupation that best describes what the Chief Income Earner in your household does, or the group that fits best.

Please answer based on the Chief Income Earner's most recent occupation if:

- The Chief Income Earner is retired and/or widowed and receives a private/company pension
- The Chief Income Earner is not in a paid employment but has been out of work for less than 6 months

PLEASE SELECT ONE ANSWER ONLY

1. Higher managerial, administrative or professional

(e.g. Bishops, Established doctors, Lawyers, Solicitor, Self employed farmers with 10+ employees, Board Director in large organisation (200+ employees), Bank Branch Manager or higher, Police Superintendent, Chief Constable, top level civil servant/public service employee etc...)

SCRIPTING: CLASSIFIES AS SOCIAL GRADE A = CODE 1

2. Intermediate managerial, administrative or professional

(e.g. Vicar, Parson, Newly qualified (under 3 years) Doctors, Solicitor, Self employed farmers 2-9 employees, Board Director small organisation, Senior Managers, Bank Clerks with special responsibilities (e.g Chief Clerk), middle management executives in large organisation (200+ employees), Principle officers in local government and civil service, etc...)

SCRIPTING: CLASSIFIES AS SOCIAL GRADE B = CODE 2

3. Supervisory or clerical, junior managerial, administrative or professional

(e.g. Curate, Monk, Nun, Student Doctor and student on grants, Articled Clerk, Self employed farmers with only 1 employee, Foreman with 25+ employees, Bank Clerk, Salesperson, etc...)

SCRIPTING: CLASSIFIES AS SOCIAL GRADE C1 = CODE 3

4. Skilled manual workers

(e.g. Foreman with up to 24 employees, Police Constable, Agricultural Workers with special skills (Head Cowman, Chief Shepherd), Self employed unskilled manual workers with 1-4 employees, Bus Driver, Ambulance Driver, AA Patrolman, Skilled Bricklayer, Carpenter, Plumber, Painter, Electricians, Pub/bar worker, Nurses etc...)

SCRIPTING: CLASSIFIES AS SOCIAL GRADE C2 = CODE 4

5. Semi and unskilled manual workers

(e.g. Non-HGV drivers, All apprentices and trainees to skilled workers, Caretaker, Park keeper, Postman, Fisherman, Forestry Worker, Bus Conductor, Traffic Warden, Shop Assistant, Supermarket Shelf-Filler, Check-out Operator, etc...)

SCRIPTING: CLASSIFIES AS SOCIAL GRADE D = CODE 5

6. Student (other than student on grants)

7. Casual workers (not in permanent employment)

8. Housewife/husband

9. Retired (living on state pension)

10. Unemployed or not working due to long-term sickness (for more than 6 months)

11. Not working due to disability

12. Full time carer of other household member

96. Other (please specify)

SCRIPTING: CLASSIFIES AS SOCIAL GRADE E = CODE 6

And now, just a couple of questions about your [child] if S1= 2 [children] if S1= 3//7

ASK ALL

Kid2a. Using the drop down boxes, please indicate the age and gender of [your child] **IF S1 = 2** [each of your children] **IF S1=3//6**.

SCRIPT WITH DROP DOWN BOX LABELLED 'GENDER'. PLEASE SHOW OPTIONS: BOY, GIRL. IN THE SAME ROW, SCRIPT DROP DOWN BOX LABELLED 'AGE IN YEARS'. PLEASE SHOW OPTIONS: 10, 11, 12, 13, 14.
IF CODE 2 AT S1, SHOW ONCE THIS ROW ONCE. IF CODE 3 AT S1 SHOW TWICE, IF CODE 4 AT S1 SHOW THREE TIMES, IF CODE 5 AT S1 SHOW FOUR TIMES, IF CODE 6 AT S1 SHOW FIVE TIMES.

CHECK AGAINST QUOTAS AND SELECT CHILD FOR STUDY ACCORDINGLY OR CLOSE IF NECESSARY

Qavail. We are conducting research about the TV viewing behaviour of children aged 10 to 14. Is your child [age/gender from quota check] available to complete this short survey?

SC

1. Yes, my child is available now - **continue**
2. No - **close**

Section 2 – Kids questionnaire

TEXT SCREEN

We would like to ask you some questions about TV programmes and films – this might be watching them on your TV set, laptop, smartphone or other device like an iPad.

ASK ALL. SC. DYNAMIC GRID, SCRIPT WITH IMAGES

QK1. How often do you watch...?

ROWS

1. BBC One
2. BBC Two
3. ITV
4. Channel 4
5. Channel 5
6. E4
7. CBBC
8. CITV
9. More 4
10. Sky One
11. Film 4
12. 4seven
13. MTV
14. 4music
15. Nickelodeon – **SHOW IN PAY TV HH ONLY (CODES 1,2,4,8,9 at SS4)**
16. Cartoon Network – **SHOW IN PAY TV HH ONLY (CODES 1,2,4,8,9 at SS4)**

17. Disney Channel – **SHOW IN PAY TV HH ONLY (CODES 1,2,4,8,9 at SS4)**

ONLY CONTINUE IF RESPONDENT ANSWERS EVERYDAY, MOST DAYS, ABOUT ONCE A WEEK OR LESS THAN ONCE A WEEK FOR AT LEAST ONE OF CODES 4,6,9,11,12,14.

COLUMNS

1. Everyday
2. Most days
3. About once a week
4. Less than once a week
5. Never
6. I don't know this channel

**ASK ALL
MULTICODE**

QK2. Have you used any of these services to watch films or television programmes recently?

SHOW LOGO FOR EACH SERVICE

Free services

10. BBC iPlayer
11. ITV Hub (formerly ITV Player)
12. All4 (formerly 4OD)
13. Demand 5
14. YouTube

Paid for services

15. Netflix
16. Amazon Prime Instant Video
17. NOW TV
18. Sky Store
19. Virgin Movies

20. Other
21. (Don't Know)
22. (Not applicable)

ASK ALL

QK3. There are different ways to watch programmes. These include:

- Programmes that are shown as normal on TV at a certain time
- Programmes that you access on-demand; you can choose to watch them when you want

Can you tell us, using the sliding scale below, how much time you spend watching TV programmes and films that are shown normally and how much time you spend watching TV programmes and films on demand?

<SCRIPTER: SCALE FOR SLIDER, SHOW ACROSS TOP, START IN MIDDLE – ALWAYS WATCH PROGRAMMES SHOWN NORMALLY, MOSTLY SHOWN NORMALLY, HALF AND HALF, MOSTLY ON DEMAND, ALWAYS WATCH PROGRAMMES ON DEMAND> INCLUDE DK BUTTON TOO

ASK ALL, MULTICODE

QK4. Think about ALL of the times that you watch programmes, films or videos. Which of these do you ever use to watch them?

- Main TV set in home
- TV set in your bedroom/den
- Smartphone
- Tablet (iPad, Kindle Fire, Google, Nexus)
- Laptop/PC
- Games console (XBOX, Playstation, Wii)
- Portable / handheld games player (Nintendo DS, Sony PS Vita)
- iPod Touch or Mp3/Mp4 player
- None of these **[SC]**

ASK ALL. SC FOR EACH, RANDOMISE BRANDS

QK5. Here are some different TV services.

I'd like you to tell me what you think of each one. Please move the slider between 1 and 5, where 1 means you don't like them at all and 5 means you love them.

The BBC family (including all BBC TV channels, BBC Radio, BBC website and BBC iPlayer)

ITV family (including ITV and ITV 2,3,4, CITV, ITV Be and the ITV Hub)

Channel 4 family (including Channel 4 and E4, More4, 4 Seven, Film 4, 4Music and All4)

Channel 5 family (including Channel 5 and 5Star, 5USA, Spike and Demand 5)

Sky family (including Sky One, Sky Atlantic, Sky Living, Sky Cinema, Sky Sports and Sky Kids App)

Nickelodeon family (Nickelodeon, Nick Jr, Nick Jr Too, NickToons)

Netflix

Amazon Prime Instant Video

YouTube

SCRIPTER: SHOW SLIDING SCALE WITH 5 POINTS, WHERE 1 IS DON'T LIKE IT AT ALL, 2 IS DON'T LIKE IT MUCH, 3 IS I DON'T MIND IT, 4 IS I LIKE IT AND 5 IS I LOVE IT. PLEASE PUT SLIDER IN THE MIDDLE OF THE SCALE TO START.

INCLUDE A DON'T KNOW BUTTON/ I'VE NOT HEARD OF IT BUTTON AT THE END OF THE SCALE.

TEXT SCREEN.

For the next few questions, we will ask you to think about these TV channels only. These channels are all part of the same company and are called the Channel 4 Family of channels.

SHOW ALL CHANNEL 4 CHANNEL LOGOS WITH THEIR DESCRIPTIONS (KIDS IMAGE 1).

ASK ALL, SC, ROTATE STATEMENTS. SHOW ALL CHANNEL 4 CHANNEL LOGOS ON SCREEN

QK6. We're going to show you some things that people have said about the Channel 4 family of channels. Some people might agree and some people might not.

Can you tell us how much you agree or disagree with each one, using the sliding scale below?

1. The Channel 4 family shows programmes that I like
2. The Channel 4 family shows programmes I watch with my family
3. The Channel 4 family shows programmes for people my age
4. The Channel 4 family shows programmes I watch with my friends
5. The Channel 4 family shows programmes I talk about with my friends
6. The Channel 4 family shows programmes that are talked about on social media (Facebook/Instagram/etc)
7. Programmes shown on the Channel 4 family of channels are different from programmes on other channels
8. I've learnt new things / interesting facts from programmes on the Channel 4 family of channels
9. Film 4 shows films / movies I want to see

SCRIPTER: SHOW SLIDING SCALE WITH 5 POINTS, WHERE 1 IS DISAGREE A LOT, 2 IS DISAGREE A BIT, 3 IS I DON'T AGREE OR DISAGREE, 4 IS AGREE A BIT AND 5 IS AGREE A LOT. PLEASE PUT SLIDER IN THE MIDDLE OF THE SCALE TO START. INCLUDE A DON'T KNOW BUTTON AT THE END OF THE SCALE.

ASK ALL AGREEING AT QK6 WITH ANY OF STATEMENTS 1,2,4 (SCORE 4,5). OPEN END (VERBATIMS ONLY)

QK7. It sounds like there might be programmes on the Channel 4 family of channels that you like to watch, either on your own, or with family or friends.

Can you tell me the names of any of those programmes? (SCRIPTER: ALLOW UP TO TEN LINES FOR RESPONSES)

ASK ALL, SC

QK8. This is something that people have said about the Channel 4 family of channels. Some people might agree and some people might not.

- I would miss the Channel 4 family (Channel 4, More4, E4, 4Music, 4Seven, All4) if it wasn't around anymore

Can you tell us how much you agree or disagree with this, using the sliding scale below?

SCRIPTER: SHOW SLIDING SCALE WITH 5 POINTS, WHERE 1 IS DISAGREE A LOT, 2 IS DISAGREE A BIT, 3 IS I DON'T AGREE OR DISAGREE, 4 IS AGREE A BIT AND 5 IS AGREE A LOT. PLEASE PUT SLIDER IN THE MIDDLE OF THE SCALE TO START. INCLUDE A 'DON'T KNOW' BUTTON AT THE END OF THE SCALE.

ASK ALL, SC, SCRIPT WITH IMAGES

QK9. To finish we are going to show you some the names of some TV programmes.

I'd like you to tell me what you think of each one. Please move the slider between 1 and 5, where 1 means you don't like it at all and 5 means you love it.

1. Gogglesprogs (Channel 4)
2. Secret Life of 4, 5, 6 year olds (Channel 4)
3. Secret Life of a Zoo (Channel 4)
4. Child Genius (Channel 4)
5. The Supervet (Channel 4)
6. Stage School (E4)
7. Educating Cardiff (Channel 4)
8. We're Going on a Bear Hunt (Channel 4)

If you don't know the programme or haven't heard of it, just click one of the buttons at the end of the slider.

SCRIPTER: SHOW SLIDING SCALE WITH 5 POINTS, WHERE 1 IS DON'T LIKE IT AT ALL, 2 IS DON'T LIKE IT MUCH, 3 IS I DON'T MIND IT, 4 IS I LIKE IT AND 5 IS I LOVE IT. PLEASE PUT SLIDER IN THE MIDDLE OF THE SCALE TO START.

INCLUDE 'I HAVE NEVER WATCHED THIS PROGRAMME' AND 'DON'T KNOW' OPTIONS FOR EACH.

THANK AND CLOSE