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12 July 2023

Dear Alex,

## [Channel Four Television Corporation's Statement of Media Content Policy 2022](#)

I would like to thank you and your team for engaging constructively with us on our annual review of Channel Four Television Corporation ('C4C')'s Statement of Media Content Policy (the 'Statement'). I am writing to you with a summary of our findings and have enclosed the full report below.

As you know, these reviews are an important way in which we hold C4C to account for its performance in delivering its public service remit and media content duties. We welcome the engagement with your team on developing new reporting metrics for this year's Statement, which will enhance our understanding of how C4C is delivering for audiences across all its platforms.

We recognise that C4C faced significant uncertainty during most of this reporting period from the ongoing debate about your ownership and future operating model. Against this backdrop, the continued commitment to successful delivery of the remit and media content duties which we have highlighted in this report, and the broad range of diverse and innovative content that C4C has produced, have been testament to the effective leadership of C4C during this time.

### C4C delivered successfully for audiences in 2022

Turning to this year's report, we are pleased to see that content spend across all C4C services was above £700m for the first time, at £713m, following C4C's strong financial recovery in 2021. This continued investment in high-quality, originated UK content is essential to C4C retaining its existing audiences and building relationships with new ones. New programmes such as thriller series *Suspect* and prison drama *Screw* enjoyed notable success, alongside returning favourites like *Derry Girls*.

As you know, for the last few years we have pushed C4C to do more for older children and younger adults in our response to C4C's Statements. We therefore commend C4C for the range of initiatives for older children and teenagers that were launched in 2022. New services such as *Channel 4.0* and the new current affairs series *Untold* could play an important and positive role in building a relationship with those audiences who do not currently engage with the Channel 4 brand. As part of the next phase of your digital strategy, we would like to see you set out how you plan to bring those harder to reach audiences that you are targeting on social media platforms into C4C's own linear and broadcast video on demand (BVOD) services.

C4C continues to positively represent cultural diversity by showing programming that reflects the broad range of viewpoints, cultures and communities in the UK. Our research continues to indicate that audiences consider that C4C performs well in representing the diversity of the UK. Notable events have included the *Proud All Over* campaign; C4C reported that the TV trailer reached 44% of

the adult population, with two-thirds of viewers agreeing that it reflected the diversity of the UK and brought important issues to a mainstream audience.

We would also pay tribute to C4C's ongoing commitment to Paralympic sport. Your successful and innovative coverage of the *2022 Beijing Winter Paralympic Games*, using a presenting team made up entirely of disabled people, reached 7 million people across the Games. C4C's own research shows that nearly 70% of viewers agreed that watching the Games made them think about the challenges facing disabled people in a different way. We are pleased to see a renewed focus on disability in the plans for 2023, reflecting the need to continue to focus on disability in years without the Paralympics.

Given the continued importance to audiences of high-quality, trusted, accurate and impartial news, it is encouraging to see that Channel 4's weekday evening bulletin increased its viewing share among all individuals in 2022. We are also pleased to see that, following the use of a temporary studio in Leeds since the start of 2022, *Channel 4 News* will now be presented four nights a week from both London and the newly opened purpose-built Leeds studio. This makes it the first national evening news programme to co-present from two locations. This could help to improve the delivery of news from across the whole of the UK and drive investment in local production infrastructure. Beyond your main linear bulletins, it is also important that C4C continues to focus on its strategy to drive digital engagement with news, particularly amongst younger audiences.

Finally, following last year's major technical outage, we are pleased to see the steps you have taken for audiences who rely on your access services provision. We welcome the commitment to meeting your broadcast access service targets, as well as making continued improvements to provision through your on-demand service.

## Supporting the creative sector

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C4C continues to play a crucial role in supporting the creative economy outside London. In 2022, the main channel once again exceeded its voluntary target of 50% of spend on first-run originated content with suppliers located outside London. In 2022, C4C set a new record for expenditure on content commissioned from production companies based outside London, spending £228m across the whole TV portfolio, of which £45m was on originated content in the Nations, up 15% from £38m the previous year. At the same time, it is positive to see that C4C continues to expand its physical footprint outside London as part of your '4 All the UK' strategy. At the end of 2022, 485 roles were located outside London (up from 400 in 2021) and you have said that this figure is due to increase over the next few years. As you deliver your 4 All the UK strategy, we encourage you to continue to focus investment across the UK and welcome your new partnership with Northern Ireland Screen to develop commissioning in Northern Ireland.

Another important role that C4C plays in the broadcasting ecosystem is the continued support for the development of skills and talent in the creative industries; this is a key part of your media content duties. We are pleased to see that the 4Skills programme is due to double to £10m per year by 2025. The 4Schools initiative continues to engage young people, particularly those from diverse and disadvantaged socio-economic backgrounds, and encourages them to pursue a career in the creative industries.

## Focusing on the future

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C4C must now look to build on this strong performance. We are conscious that you find yourselves at something of a turning point following the conclusion of the ownership discussions, with many challenges and opportunities ahead.

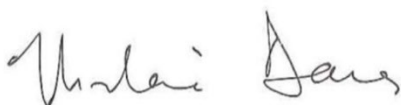
The forthcoming Media Bill will play a crucial part in supporting PSBs, including C4C, in their digital transformations. We welcome the draft Bill, which takes forward many of the recommendations we made to Government in our [Small Screen: Big Debate](#) review. The proposed legislation allows PSBs to deliver their public service remit across a broader range of services, including third-party online platforms. It also introduces a new regime to ensure the availability and prominence of live and on-demand PSB content on major smart TV platforms, complementing existing EPG prominence rules. There will be much detail to be worked out by Ofcom across all areas of the Bill once the legislation has passed, and we welcome ongoing engagement with C4C on this.

Although the ownership question has been settled, C4C continues to operate in uncertainty. The draft Media Bill proposes removing C4C's publisher broadcaster restriction, which has the potential to create a significant change to your business model, and your current licence term ends at the end of next year. At the same time, the difficulty in retaining audiences and the continuing decline of the linear advertising market mean that it is crucial that C4C continues at pace with its digital transformation.

Now is the time for you to set out longer-term plans. We are keen to see much more detail from C4C on how you are proposing to meet these challenges and take advantage of the opportunities. Specifically, we would like to see you articulate clearly how you will evolve the Future4 strategy beyond the existing 2025 targets, securing your transformation to being a truly digital broadcaster. As the findings in this report show, the successful delivery and renewal of the Future4 strategy is a crucial part of being able to continue to deliver for audiences, particularly younger viewers, as well as helping to secure C4C's long-term sustainability. Ofcom will also be able to play its part through the process of renewing the Channel 4 licence which will underpin C4C's obligations after 2024. Our respective teams are working closely on this, and we intend to publish a consultation on a new licence in the autumn. We look forward to discussing this in more detail with you and your team later in the year.

I welcome your thoughts on any of the issues raised in this letter and report. I am copying this letter and annex to the Secretary of State for Culture, Media and Sport and the Chairs of the House of Commons Select Committee for Culture, Media and Sport, and the House of Lords Select Committee for Communications and Digital. We also intend to publish both documents on our website.

Yours sincerely,



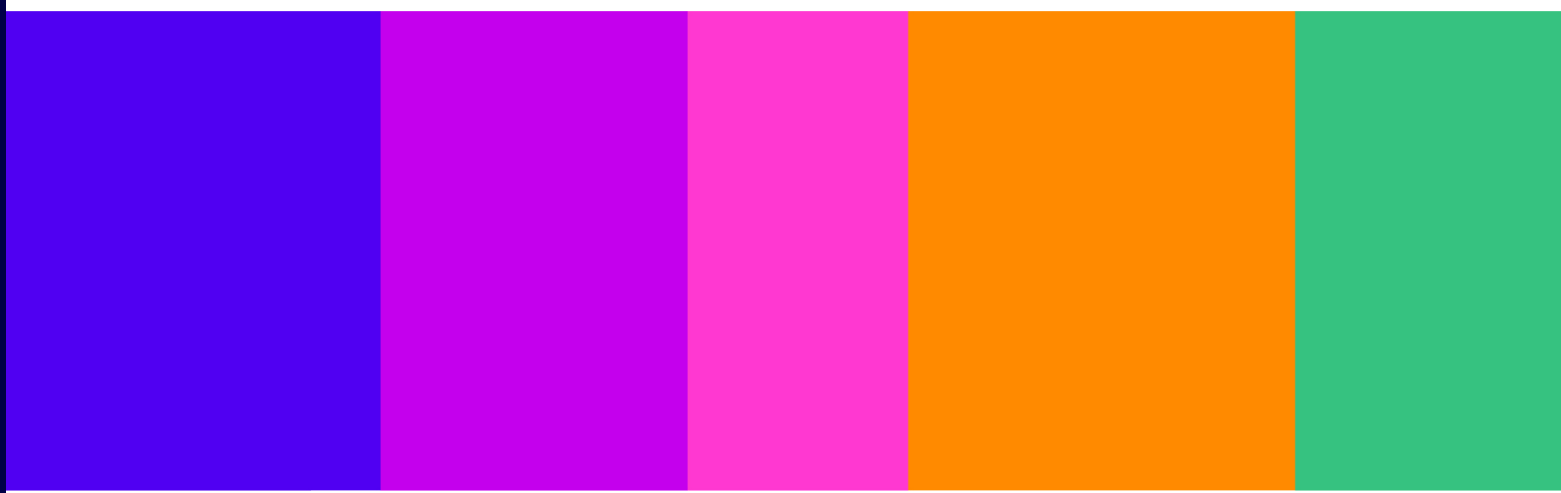
Melanie Dawes

# Channel Four Television Corporation's performance in delivering its remit and media content duties in 2022

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**Report**

Published 12 July 2023



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# Overview

## What we have found – in brief

This document is Ofcom’s response to Channel Four Television Corporation’s (C4C) Statement of Media Content Policy. Under the Communications Act 2003 C4C must prepare an annual statement setting out its plans for meeting its media content duties in the coming year and reporting on its performance over the past year. C4C must consult with Ofcom in preparing the publication and have regard to Ofcom guidance.

Overall, we have concluded that C4C has performed well against its remit and media content duties in 2022, especially given the ongoing uncertainty over its ownership during the reporting period. In particular:

- C4C introduced a number of initiatives and new content strands for younger audiences, launching new services such as the digital-first current affairs strand, *Untold*, and dedicated YouTube channel, *Channel 4.0*.
- C4C continued to play an important role in supporting the development of the UK’s creative industries, growing its base outside London, investing in skills and training programmes such as 4Skills, and spending record levels on content commissioned from the Nations and Regions.
- C4C strengthened its commitment to representing the diversity of the UK on and off-screen, including with its coverage of the *Beijing Winter Paralympics* by an all-disabled presenting team, as well as the relaunch of its Commissioning Diversity Guidelines, designed to improve diversity behind the camera.

We consider that C4C made reasonable progress in 2022 against the targets set out in its ‘Future4’ strategy, which aims to shift viewing and revenues from linear to digital. Nevertheless, viewing to its streaming service was down from the record high of 2021, so C4C needs to redouble its efforts to bring people to the platform if it is to meet its goal of 2 billion views by 2025 up from 1.4 million currently.

To ensure that it continues to deliver strongly against its media content duties, now is the time for C4C to set out its plans beyond the end of its current strategy. We would like to see it articulate clearly how it will manage the ongoing transition to being a digital-first broadcaster, while continuing to deliver strongly against its remit and media content duties.

# About this review

Channel Four Television Corporation ('C4C') is a publicly owned, not-for-profit body, funded by commercial revenues. Its main channel, Channel 4, 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 and the development of the independent production sector. Since then, C4C has launched a range of additional services such as portfolio channels (E4, E4 Extra, More4, Film4, The Box, Box Upfront, 4seven, 4Music, Kerrang, Kiss TV, Magic TV), and an on-demand service (All4). C4C has recently rebranded its BVOD player, All4 (as well as its portfolio channels), as 'Channel 4', in order to establish a single brand identity across its portfolio.<sup>1</sup> For the purposes of this report, we will continue to refer to the BVOD service as All4, given that this was its name during the reporting period.

While the main channel has a unique public service remit and should also contribute to the overall objectives of public service broadcasting ('PSB'),<sup>2</sup> the Digital Economy Act 2010 extended C4C's obligations beyond the main channel by introducing media content duties which C4C can deliver across its full suite of services.<sup>3</sup> C4C is required to produce an annual Statement of Media Content Policy ('Statement') setting out how it delivered its remit and media content duties over the course of the previous year and how it proposes to do so in the following year. In preparing the Statement, C4C must have regard to [guidance](#) issued by Ofcom and consult Ofcom.

Last year we said that we expected C4C to develop and report on more detailed measurements of online consumption and impact. This was in line with its Future4 strategy, enabling a more accurate and insightful evaluation of its delivery of its remit and media content duties through a broader range of services. This was important because C4C's existing measurement framework was largely linear-based and had not evolved significantly since it was introduced in 2008.

For this year's report, C4C has developed a new reporting and measurement framework. This new approach modernises and reduces the number of individual metrics while presenting a genuinely cross-platform approach. We welcome C4C's engagement with us during this reporting period in refining its analysis and measurement metrics.

As part of the consultation process, C4C has shared draft copies of its [2022 Statement](#) with Ofcom and has met with senior Ofcom executives to discuss its performance and strategies. This is an important mechanism in ensuring that C4C is effectively held to account for the delivery of its remit. In addition, C4C is required to lay its Annual Report and Accounts before Parliament.

This report represents Ofcom's response to the 2022 Statement, setting out our views on the delivery of C4C's duties and its future strategies.

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<sup>1</sup> Webpage: [Channel 4 transforms brand to help viewers navigate crowded digital world](#).

<sup>2</sup> These objectives are set out in sections 264(4) and (6) of the Communications Act 2003 and include (among other things) the provision of relevant television services which secure that programmes dealing with a wide range of subject matters are made available for viewing, and that such services are provided in a manner which is likely to meet the needs and satisfy the interests of as many different audiences as practicable.

<sup>3</sup> An overview of C4C's remit and duties can be found in Annex 1.

## The successful delivery and evolution of the Future4 strategy is key to C4C's future sustainability

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The UK broadcasting sector has undergone massive change in recent years. PSBs are having to work ever harder to attract audiences, given competition from global players, technological innovation and changes in the way people consume content. At the same time, challenging macroeconomic conditions driven by global events have led to instability in the advertising market and increasing content production costs.

As we have frequently reported, the main challenge facing all broadcasters is how to manage the transition from a primarily linear delivery model to a digital-first one, while continuing to meet audience needs. Individual PSBs are at different stages in this journey, with the profile of C4C's core audience being the quickest to adopt digital, making it imperative that C4C is at the forefront of digital transformation. This is essential to ensuring its future sustainability so that it can continue to deliver its remit and media content duties.

**C4C's main initiative in this is its 'Future4' strategy**, launched in November 2020, which underpins everything that it is doing in response to this challenge.<sup>4</sup> The main pillars of the Future4 strategy are to prioritise digital growth over linear, to diversify revenue streams to underpin C4C's sustainability and to focus on strategic partnerships to compete more effectively. In 2022, the Future4 strategy continued to permeate C4C's commissioning and scheduling decisions, with an intensified focus on driving viewing to All4. C4C's Statement indicates that in 2023, C4C will continue to prioritise certain content that it considers will drive BVoD growth in line with Future4.<sup>5</sup> As part of this, it will be investing in 'Premium Factual' box-sets and several major new young-skewing reality shows.

As part of Future4, C4C launched a new Global Format Fund in 2020 comprising ringfenced spending designed to stimulate the creation of original new formats from UK-based indies.<sup>6</sup> The fund invested £13m in 2022 with three Global Format Fund series: *Moneybags*, *Open House: The Great Sex Experiment* and *One and Six Zeroes*, airing on Channel 4 this year.

**C4C's advertising strategy is also evolving to support the Future4 strategy**, including by forming partnerships to make the broadcaster a more attractive destination for advertisers. In October 2022, C4C announced a partnership between 4Sales and ViewersLogic to develop a new platform which allows advertisers to measure, through passive data gathering from an opt-in panel, an individual consumer's journey from viewing a TV advertisement to making a purchase.<sup>7</sup> This year, C4C announced that it will be the first UK broadcaster to offer brands the option of using the automated ad-buying platform Xandr, a part of Microsoft Advertising, to fully automate the delivery of digital campaigns.<sup>8</sup> C4C has said that such strategic collaborations are a key pillar of its Future4 strategy, driving its transformation into a digital-first PSB.<sup>9</sup>

Underpinning its strategic pillars, Future4's headline targets for 2025 include reaching 2bn views on All4, and achieving 30% of revenue from digital advertising and 10% of total revenue from non-advertising sources.<sup>10</sup> In 2022, C4C reported 1.4bn views to All4,<sup>11</sup> down from 1.5bn in 2021 and a

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<sup>4</sup> Webpage: [Channel 4 sets out path to digital future with new strategy: Future4](#).

<sup>5</sup> Ibid, p. 23.

<sup>6</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 91.

<sup>7</sup> Webpage: [4Sales partners with ViewersLogic on TV attribution platform exclusive to Channel 4](#).

<sup>8</sup> Webpage: [Channel 4 to expand its digital ad-buying suite with Xandr](#).

<sup>9</sup> Ibid.

<sup>10</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 14.

<sup>11</sup> Ibid, p. 42.



digital proportion of revenue of 22%,<sup>12</sup> up 2% on 2021. C4C met its target of 10% of total income coming from non-advertising revenue<sup>13</sup> in 2022, posting £121m, up from £105m in 2021.<sup>14</sup> Given this, we consider that C4C is making reasonable progress on its Future4 targets as it reaches the midpoint of the strategy. Nonetheless, 2022 was clearly a difficult year, with a retraction of viewing on All4, which means that it is crucial that C4C continues to double down on the transformation to a digital-first business if it is to meet its target of 2bn views by 2025.

We said last year that we considered it appropriate for C4C to be pursuing a strategy that focuses on expanding its online and social media platforms and aggressively pursuing digital revenues.<sup>15</sup> However, competition for digital revenues will continue to intensify as more viewers migrate to on-demand consumption and its rivals develop their own offerings, so we encourage C4C to be ambitious in the pursuit of online audiences and revenues. As part of this, we would like to see C4C start to outline the next phase of its digital transformation beyond 2025, whether through setting new, more ambitious targets beyond the existing ones, or by launching a new strategy for 2025 onwards.

## C4C's revenues were broadly flat in 2022 but 'Future4' is changing the revenue profile

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Following a highly disruptive period during the Covid 19 lockdown, overall TV advertising spend experienced a sharp rebound in 2021, up 22% to £4.7bn. This contracted slightly to £4.5bn in 2022.<sup>16</sup> BVoD advertising, however, has experienced strong growth over the past decade, increasing from £60m in 2011 to £733m in 2021, and reaching £845m in 2022.<sup>17</sup> But, BVoD growth has not offset the declines in TV advertising spend; TV and BVoD combined decreased by 1% in 2022.

**C4C's performance broadly tracks the overall market;** its overall revenue in 2022 was £1.14bn, down slightly by 2% on the record-breaking 2021 revenues of £1.16bn.<sup>18</sup> This reflects the fact that linear advertising revenue fell 8% year-on-year at £766m, which C4C says was linked to the impact of declines in the linear advertising market, as well as the cost-of-living crisis and broader supply-chain issues, affecting business confidence.<sup>19</sup> C4C experienced a fall in share of all linear TV viewing in 2022, which it points to in its report, attributing this to competition faced from major events broadcast on other PSBs in 2022 (for example, the men's football *World Cup* and Queen Elizabeth II's funeral).<sup>20</sup> But, during the same period digital revenue was £255m, up 14% on the previous year and now representing 22% of overall revenue.<sup>21</sup> Although C4C's Future4 strategy is explicit about prioritising digital growth over linear ratings, linear advertising remains C4C's main source of income by some margin, and is likely to remain so for many years. While we support the ambitions of Future4, it is important that C4C carefully manages the transition over the next few years, increasing

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<sup>12</sup> Ibid, p. 14.

<sup>13</sup> This includes its sponsorship, equity from C4C ventures/ indie growth fund as well as subscription for the ad-free All4+.

<sup>14</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 18.

<sup>15</sup> Ofcom, [Channel Four Television Corporation's performance in delivering its remit and content duties in 2021](#), p. 2.

<sup>16</sup> AA/WARC. Data presented in nominal terms.

<sup>17</sup> AA/WARC. Data presented in nominal terms and includes PSB and non-PSB broadcaster on-demand services.

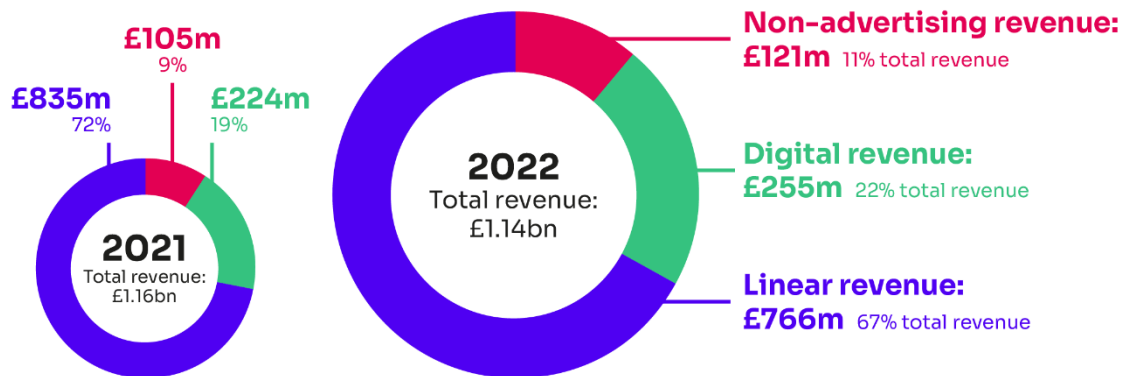
<sup>18</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 11.

<sup>19</sup> Ibid, p. 126.

<sup>20</sup> Ibid, p. 42.

<sup>21</sup> Ibid, p. 11.

revenues primarily through digital growth while recognising the continuing importance of linear revenues to its sustainability.



Source: Channel 4.

**The strength of C4C’s financial recovery in 2021 enabled it to invest record levels in its content budget for 2022** and restore content investment to pre-pandemic levels. C4C has gone even further this year, with content spend across all its services (originations and acquisitions) above £700m for the first time, at a record £713m.<sup>22</sup> This is up 6% from the previous year’s figure of £671m, and £18m higher than the previous record of £695m in 2016.

The content through which C4C primarily delivers its public service remit and creates its brand identity is its original content. So we are pleased to see that C4C has reported that in 2022 it delivered its highest ever level of investment in originated content (first-run originations and repeats) at £570m.<sup>23</sup> C4C noted in its Statement that this is the first time investment has exceeded £500m since 2017, and it represents a £200m increase on the low point two years ago, when the content budget dropped to £370m following the onset of the Covid-19 pandemic.<sup>24</sup>

The majority of originated content spend was on the main channel (accounting for 87% of the total) with spend rising by 13% to £494m.<sup>25</sup> But, proportionally the largest increase in originated content spend was on C4C’s portfolio channels, which rose by 59% to £67m. C4C has said that this was largely driven by an increase in E4’s original content budget, which almost doubled year-on-year. However, spend on originated digital media content<sup>26</sup> fell by 22% to £9m. C4C attributes this to a fall in production of branded content, reflecting reduced market-wide demand for such content.<sup>27</sup>

Overall content spend is being distributed more widely than before, with the main channel accounting for 77% of content spend (compared to 79% last year and 81% in 2017).<sup>28</sup> According to C4C, this reflects its strategy to expand its portfolio channels (where spend grew by 9% year-on-year to £129m) and its digital media offering.<sup>29</sup> The biggest percentage increase in overall content spend was in digital media which rose 36% to £34m, reflecting the strategy to drive viewing to streaming by offering more acquisitions alongside C4C’s own content.

<sup>22</sup> Ibid, p. 95.

<sup>23</sup> Ibid, p. 94.

<sup>24</sup> Ibid, p. 94.

<sup>25</sup> Ibid, p. 94.

<sup>26</sup> Including websites and cross-platform content.

<sup>27</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 94.

<sup>28</sup> Ibid, p. 95.

<sup>29</sup> Ibid, p. 95.

## Future4 is reflective of the changing ways in which audiences are watching C4C's content

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Ofcom's research on viewing trends shows that in recent years the average time spent watching all content from TV broadcasters<sup>30</sup> is decreasing, while BVoD viewing is increasing.<sup>31</sup> Viewing to C4C's content reflects these broader trends, and the Future4 strategy aims to drive viewing to BVoD. Nonetheless, linear TV remains the primary way for audiences to access C4C's content and we will continue to report on the total time audiences spend with C4C's content across linear and All4.

In 2022, average time spent with C4C content, by all audiences, across TV and devices in the home (including All4 but excluding social media) was 17 minutes a day.<sup>32</sup> Average time spent viewing All4 was 2 minutes a day, accounting for 12% of the total time. Linear viewing (live and recorded) took up the remaining 88% (15 minutes). Comparable data from Barb was not available to us for 2021, but using a combination of Barb and All4 data directly from C4C, we were able to estimate the total time spent with all the C4C services. This means that yearly changes are not directly comparable, only indicative. The figures indicate that the total time spent across C4C's services (linear and BVoD) has remained stable or slightly increased since 2021. Viewers aged 16-34 spent in total 9 minutes per day with C4C's content in 2022 (broadly level with 2021 estimates). Time spent on All4 made up 29% of total C4C viewing for this age group, a higher proportion than for all individuals (12%).

### Streaming and social media performance

Last year, C4C reported record growth for on-demand viewing to All4. This year, it reported 1.4bn streaming views in 2022, down 10% on 2021, which seems to indicate a return to pre-pandemic viewing levels. In its Statement, C4C suggested that the main reason for this decline was that viewing levels were inflated in the first half of 2021 due to the pandemic, when more people were at home. Although streaming views in 2022 were down 24% year-on-year, in the latter half of the year they were 5% higher than in the corresponding period in 2021 (despite competition from the *FIFA World Cup*, which was broadcast by the BBC and ITV, and the launch of ITV's new streaming service, ITVX).<sup>33</sup>

As noted above, All4 was watched for an average of 2 minutes per person per day in 2022, representing 12% of all in-home BVoD viewing and making it the fourth largest BVoD overall. People aged 16-34 watched All4 for an average of 3 minutes per person per day in 2022, representing 17% of their BVoD viewing and making All4 the second largest BVoD overall among this age group (after BBC iPlayer), and the most-watched commercial BVoD for this age group. As reported by C4C,<sup>34</sup> All4 is the youngest skewing BVoD service in the UK, with 16-34s comprising a third of its user base (compared to the PSB BVoD average of 23%).<sup>35</sup>

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<sup>30</sup> Across live, recordings, and on-demand, on all devices.

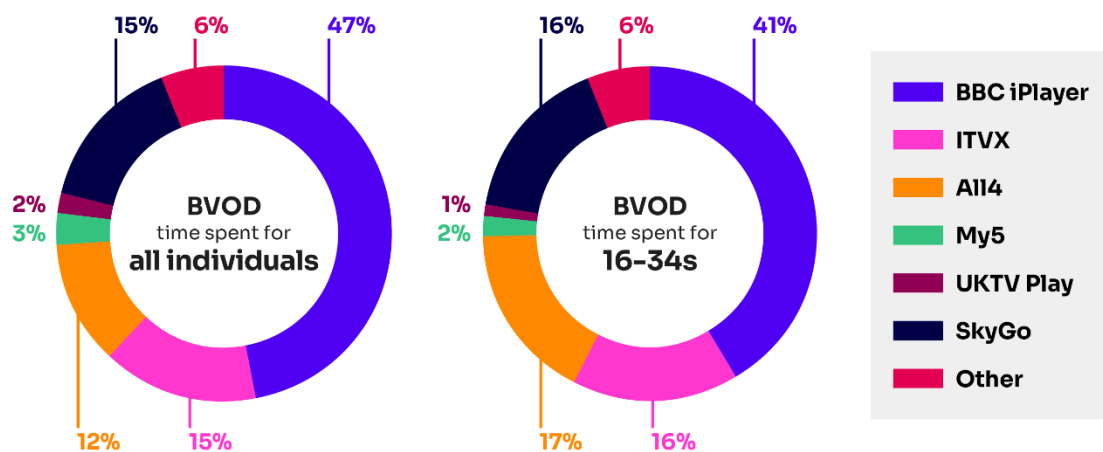
<sup>31</sup> Barb and Ofcom estimates modelled from Barb, TouchPoints and Comscore.

<sup>32</sup> Barb as-viewed data for linear channels and All4 in 2022. 2021 estimates from Channel 4 All4 data and Barb.

<sup>33</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 42.

<sup>34</sup> Ibid, p. 30.

<sup>35</sup> Barb, as viewed 2022. On demand only, all devices.



Source: Barb.

In a new metric, C4C has reported that audiences spent 49.2bn minutes viewing C4C content on streaming and social channels in 2022.<sup>36</sup> The vast majority (93%) of this time was spent viewing C4C content on streaming services (including via the TV app, mobile app and web browsers). In terms of social media, 1.3bn minutes (3% of total streaming time) were spent on YouTube, and content viewed on Facebook and Snapchat made up the remaining 2bn minutes (4% of total).<sup>37</sup>

## Linear viewing performance

C4C's main channel, Channel 4, is responsible for the delivery of its public service remit under the current regulatory framework, so it is essential that C4C continues to reach large numbers of linear audiences on Channel 4, while also focusing on increasing viewing through streaming.

**The trend of Channel 4's steadily declining weekly reach continued in 2022.**<sup>38</sup> This was common across the main five PSB channels,<sup>39</sup> as audiences continue to shift their viewing to non-linear platforms. Channel 4's reach fell most, by 4.3pp<sup>40</sup>, with BBC One having the next biggest decline, at 4pp. Channel 4's average weekly reach in 2022 stood at 33.7%, down from 38% in 2021 and 40.3% in 2020.<sup>41</sup>

<sup>36</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 43.

<sup>37</sup> These are the only social channels for which C4C has reliable viewing data.

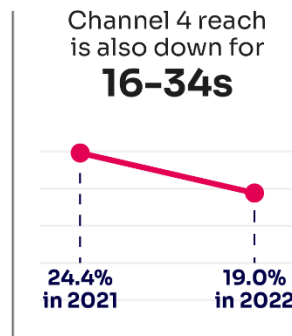
<sup>38</sup> All viewing figures are sourced from Barb, 28-day consolidated, and, unless otherwise stated, are for viewing via TV sets only and exclude Channel 4+1.

<sup>39</sup> BBC One, BBC Two, ITV1 (excl. +1), Channel 4 (excl. +1), Channel 5 (excl. +1).

<sup>40</sup> 'Pp' refers to 'Percentage points'.

<sup>41</sup> Barb 28-day consolidated. Average weekly reach, 15+ consecutive minutes.

**Decline of average weekly reach**  
2021 compared to 2020



Source: Barb, 28-day consolidated, excluding +1 channels, 15+ consecutive minute average weekly reach.

Despite this, C4C’s family of channels (Channel 4 and its portfolio channels) retained their fairly high overall reach among the UK population. In 2022, 45% of all individuals watched C4C’s TV channels for at least 15 consecutive minutes each week on average, although this too was down from 50% in 2021.<sup>42</sup>

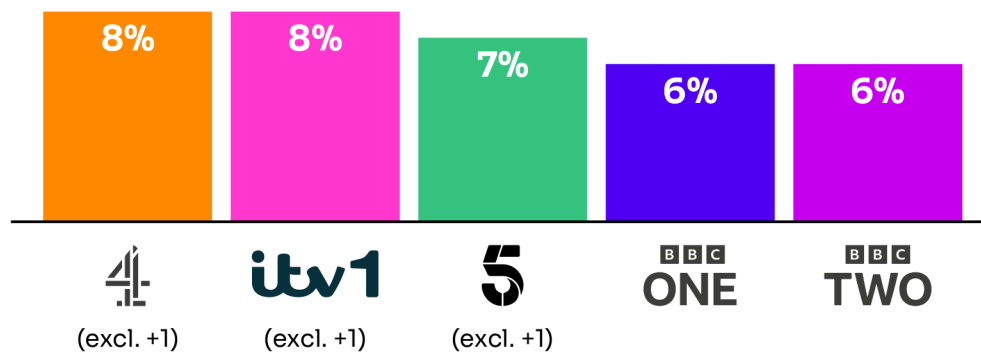
**For the 16-34 age group, total television’s average weekly reach continued to fall** sharply in 2022, down by 5.6pp year-on-year. Among the five main PSB channels, Channel 4 had the greatest decline in reach for this age group, at 5.4pp (from 24.4% in 2021 to 19% in 2022), compared to BBC One at 5.3pp, BBC Two at 2.6pp, ITV1 at 4.7pp and Channel 5 at 3.1pp.<sup>43</sup> It is unclear whether this decline in C4C’s linear reach among younger audiences is being replaced by viewing All4. Delivering for younger audiences is a core part of C4C’s remit, which means that it must do even more to manage the trend of this age group increasingly moving away from watching linear television, by attracting them to its online services.

**The reach of C4C’s main channel also declined among audiences in minority ethnic groups**, down from 22.2% in 2021 to 19.6% in 2022. Nevertheless, the audience profile of the main channel continues to be one of the most representative of the total TV viewing population in terms of the proportion of viewers in minority ethnic groups. Of the main channel’s total audience, 8% was accounted for by viewers in minority ethnic groups in 2022, joint-first with ITV’s main channel. The main channel’s share of viewing among these audiences remained at 4.6% in 2022.

<sup>42</sup> Barb 28-day consolidated. Average weekly reach, 15+ consecutive minutes.

<sup>43</sup> Barb 28-day consolidated. Average weekly reach, 15+ consecutive minutes.

## Viewers in minority ethnic groups in 2022



Source: Barb, 28-day consolidated, based on individuals aged 4+.

**C4C was successful in maintaining its overall share of viewing on the main channel**, despite the challenge of declining audiences faced by all broadcasters. This figure remained fairly stable at about 5%, and share in peak time (6pm-10.30pm)<sup>44</sup> was also stable at around 6%. The share of viewing among 16-34s to the main channel continued at about 7% and viewing share for this age group in peak time was also stable at around 8%.<sup>45</sup> In its Statement, C4C reported a decline in viewing share for this age group, attributing this to the absence in the 2022 schedules of the youth-skewing high-volume show *The Circle*, which attracted large audiences in 2021, and competition from ITV's *I'm a Celebrity*. It also notes the impact of C4C's Future4 strategy, which aims to drive younger viewers to watch more content via streaming. Nevertheless, it reported that Channel 4 still ranks as the third most popular of the main PSB channels for 16-34-year-olds, behind BBC One and ITV.<sup>46</sup>

**For younger audiences specifically, viewing share on the main channel was stable** at around 6% for 10-14-year-olds and 14-19-year-olds.<sup>47</sup> C4C told us that it does not necessarily expect all its youngest profiling linear content to achieve significant linear audiences as these audiences are more likely to stream content than watch on linear.

**The reach of C4C's portfolio channels<sup>48</sup> declined**, to 27.2% in 2022 from 30.7% in 2021, although share of viewing across the portfolio was maintained at 5%. C4C's largest portfolio channel, E4, faces particular challenges in retaining linear audiences due to the shifting viewing habits of its target audience, who increasingly watch content online. E4's reach among 16-34s is steadily declining; in 2022 it was 8.5%, down from 11% in 2021 and 13.1% in 2020. However, E4 was still the second most-watched digital TV channel for 16-34s, with 3.9% viewing share in this age group, behind ITV2 (5.3% viewing share). Among E4's top-performing programmes is *Married at First Sight UK*. The episode broadcast on 27 September 2022 was watched by 32.6% of 16-34s who were watching TV at the time.<sup>49</sup> This show was also one of C4C's best-performing streamed shows among this age group,

<sup>44</sup> Peak hours are defined as 1800-2230 under Channel 4's licence.

<sup>45</sup> Barb, 28-day consolidated.

<sup>46</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 41.

<sup>47</sup> Barb, 28-day consolidated, Channel 4 (excl. +1).

<sup>48</sup> Channel 4+1, E4, E4 Extra, More4, Film4, The Box, Box Upfront, 4seven, 4Music, Kerrang, Kiss TV, Magic TV. (incl. +1 variations).

<sup>49</sup> Barb, 28-day consolidated. Includes E4+1.

with the first episode of Series 7 averaging 783,000 16-34 viewers on All4 in 2022.<sup>50</sup> Since its launch (see below), E4 Extra has had 0.5% viewing share and 1.7% average weekly reach among 16-34s.<sup>51</sup>

## C4C delivered strongly against its remit and media content duties in 2022

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### Serving younger audiences

**We are pleased to see that C4C has responded positively to our call for it to invest more in its offering for older children and young adults,** with several new initiatives which are already performing well. In previous reports,<sup>52</sup> we have raised concerns about the need for C4C to invest more in high-quality content for older children and young adults, and to have a clear strategy for how it will serve these audiences, given that this forms a central part of its media content duties. C4C has responded positively to this challenge, introducing several new services, content and formats targeting younger audiences in 2022, while maintaining overall investment in content for this demographic. Notably, it launched a dedicated YouTube channel, *Channel 4.0*, as well as the digital-first current affairs strand *Untold*, which are both aimed at meeting the needs of younger audiences.<sup>53</sup> It has also created a second portfolio channel under the E4 brand, E4 Extra, which has replaced the 4Music channel.

*Channel 4.0* launched on YouTube in October 2022 as a dedicated online strand for younger audiences delivering short and medium-form content tailored to their viewing behaviours, and featuring entertainment-led content from some of the best-known 'Generation Z' talent (for example, *Secret Sauce*, a cooking show hosted by Chunkz, and *It's Alright To Be White*, in which Alhan Gençay seeks out Britain's 'whitest tribes'). By the end of 2022, eight new series had launched, generating 22.3m views, with 4m views by 13-24s in the UK.<sup>54</sup> In its Statement, C4C states that *Channel 4.0* aims to be a way into the Channel 4 brand for many (particularly younger) viewers who may never have engaged with it.<sup>55</sup>

According to C4C, the new current affairs strand *Untold* shown first on All4 is intended to strengthen its range of programmes that reflect the lives and interests of younger viewers.<sup>56</sup> The first series of *Untold* included ten documentaries which aimed to cover issues that young people care about, including *Gay Under the Taliban* and *The Secret World of Incels*. Other topics included *Inside the Shein Machine* and *The Jesse Lingard Story*, which were also broadcast on linear TV. In its Statement, C4C said that *Untold* has shown that younger viewers engage with serious topics when they are approached through stories that speak to their own experience and with a tone of voice and talent that they find relatable. It reported that the episodes of *Untold* had a total of 1.6m views in 2022, with 45% of these being from 16-34s.<sup>57</sup>

In June 2022, C4C launched a new youth-facing sibling channel to E4, E4 Extra, which occupies the EPG slot formerly held by 4Music. C4C has said that while E4 will focus on reality TV and popular

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<sup>50</sup> Barb, as viewed 2022. On demand only, all devices.

<sup>51</sup> Barb, 15+ consecutive minute reach.

<sup>52</sup> Ofcom, [Channel Four Television Corporation's performance in delivering its remit and content duties in 2021](#), p. 15.

<sup>53</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 18.

<sup>54</sup> Ibid, p. 35.

<sup>55</sup> Ibid, p. 33.

<sup>56</sup> Ibid, p. 64.

<sup>57</sup> Ibid, p. 64.

factual shows, its partner channel E4 Extra will focus on comedy and entertainment and acquired content, in order to strengthen the E4 brand among younger audiences.<sup>58</sup>

C4C also undertook a major piece of research in 2022 called 'Beyond Z', which aimed to better understand the views and perspectives of 'Generation Z' (people currently aged between 13 and 24).<sup>59</sup> C4C aims to use the findings of this research to help inform decisions about which types and forms of content to invest in, and where it can best reach younger audiences with its content. In its Statement, it said that its goal is to strengthen Channel 4's reputation among young audiences as a trusted source of information, and as a brand that helps to give them a voice in national debates on the issues that matter most to them.

In 2022 C4C continued to expand its Leeds-based digital content unit 4Studio, which is focused on producing content that reaches younger audiences. Now with 150 employees, it produced more than 35,000 pieces of content in 2022, generating 8bn global views across more than 150 channels.<sup>60</sup> As well as producing digital-first content, such as the short-form documentary series *I Survived*, C4C is seeking to find innovative ways to bring its more traditional long-form content to social platforms, including with the BAFTA-nominated immersive virtual reality *Hollyoaks* experience, 'The Long Walk Home'. A recent Enders Analysis report notes that forming partnerships with advertisers to deliver branded content and producing short-form original content commissioned specifically for social media are ways in which broadcasters can identify new revenue streams while boosting their reach amongst younger audiences.<sup>61</sup>

C4C has also continued to develop its strategic partnerships with platforms such as YouTube, Snapchat and TikTok to try to build its brand among younger people, who it considers to be less likely to use its own core services. C4C has reported increases in the level of engagement with its content on the main social platforms. Global watch-time on YouTube rose by 10% in 2022, while engagements on Instagram rose by over 60%.<sup>62</sup> Among 13-24s in the UK, views rose by over 25% on Snapchat and by over 500% year-on-year on TikTok, and there were 350m views of C4C's content on TikTok across the year. C4C has formed strategic partnerships with these platforms to better allow it to connect its brand and content with younger people. For example, C4C's collaboration with YouTube led to the publication of 1,000 hours of long-form content across its suite of channels and a new agreement to allow C4C to sell its own advertising around this content.<sup>63</sup>

C4C's YouTube deal reflects its strategy to increase its reach and awareness among younger audiences, by delivering content on online platforms where they are most likely to watch it. As part of this strategy, C4C will need to consider how it can most successfully monetise this content on platforms like YouTube, TikTok and Snapchat to contribute towards its long-term sustainability. While we acknowledge C4C's aspiration to build its brand amongst audiences that it doesn't consider likely to engage with its services, we also note that Enders Analysis research has identified the risk that uploading full episodes of content to platforms such as YouTube could result in the 'cannibalisation' of viewing on broadcasters' TV channels, where it is easier for audiences to be measured and monetised.<sup>64</sup>

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<sup>58</sup> Webpage: [E4 Brand extension sees 4Music become E4 Extra](#).

<sup>59</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 35.

<sup>60</sup> Ibid, p. 38.

<sup>61</sup> Enders Analysis, Reach without reward? Broadcasters and social media, p. 12.

<sup>62</sup> Ibid, p. 38.

<sup>63</sup> Ibid, p. 19.

<sup>64</sup> Enders Analysis, Reach without reward? Broadcasters and social media, p. 6.



**We are pleased to see that C4C has maintained the increase in overall investment in such content** across all its services. In 2022, C4C invested around £7m in content aimed at older children across all services (up from £5m in 2021 and £1m in 2020) and around £25m in content for teenagers (up from £17m in 2021 and £8m in 2020). C4C has said that for this age group it aims to deliver PSB content with educational value that reflects the lives of its audiences, while also having mainstream popular appeal.<sup>65</sup> Content recently commissioned for older children includes *Junior Bake-Off* and *Celebrity Lego Masters* on linear, and digital commissions for *Channel 4.0* such as *Trainspotting with Francis Bourgeois*. For teenagers, C4C aims to tackle important issues such as mental and physical health and bullying, via commissions such as the popular returning series *Ackley Bridge*, *Embarrassing Bodies* and *Britain's Tourette's Mystery*.

Our research continues to show that audiences consider content for younger audiences as a core aspect of C4C's remit; 85% of parents or guardians of children who had watched the Channel 4 TV channel in the last six months felt that it was important that it provides a wide range of high-quality and UK-made programmes for older children.<sup>66</sup>

## Delivering a broad range of distinctive, high-quality, originated content

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**C4C delivered 3,130 hours of first-run originated content** across its TV portfolio, down slightly from 3,171 hours the previous year. This investment and volume of programming was spread across a range of genres. Factual content made up the majority, at 1,695 hours, while there were 806 hours of entertainment, 316 hours of sport and 269 hours of news. First-run originated content made up 32% of output on the main channel, and 74% across peak time. It is positive to see that C4C's originated content continues to draw significantly larger audiences than its acquired content; it told us that viewing to network originations made up 75% of all viewing to its linear channels.

**According to both Ofcom's and C4C's research, audiences continue to rate Channel 4 TV channels highly for delivering programming that demonstrates innovation, experimentation, creativity and distinctiveness.** The findings of Ofcom's 2022 Public Service Media (PSM) Tracker demonstrated that audiences continue to find Channel 4's TV channels distinct from the offerings of other PSBs. When asked how well or badly PSBs deliver on '*programmes that are different in their approach to other providers*', Channel 4's TV channels had the highest proportion of viewers over the past six months saying that it performed well compared to other PSB channels, with 54% of viewers saying they thought it performed well on this statement, up 4pp from the previous year.<sup>67</sup> Similarly, Channel 4's TV channels performed well on the statement '*programmes that help me see things from a different angle/perspective*', with 54% of viewers in the last six months rating it highly, up from 51% last year.<sup>68</sup>

As part of its adoption of a new measurement framework C4C refreshed its approach to its own tracker statements aligned to its public service remit, expanding the statements to include a wider competitor set (including Sky and the main streaming services, alongside the PSBs). This provides another useful way for C4C to measure its performance in delivering creative and distinctive programming. It reported a 2pp year-on-year increase (to 49%) in the proportion of respondents

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<sup>65</sup> Ibid, p. 37.

<sup>66</sup> Ofcom Public Service Media (PSM) Tracker 2022. Webpage: [PSM-Tracker-2022-Data-Tables.pdf \(ofcom.org.uk\)](https://www.ofcom.org.uk/psm-tracker-2022-data-tables).

<sup>67</sup> Ibid.

<sup>68</sup> Ibid.

who agreed strongly with the statement 'Channel 4 is always trying something new'.<sup>69</sup> It also found that 52% of respondents believe strongly that 'Channel 4 pushes boundaries'.<sup>70</sup> In a new metric, C4C found that, across the 80 most-viewed first-run programmes on the main channel, 50% of viewers said that Channel 4's programming makes them think differently.<sup>71</sup> Particularly high scoring titles for this metric include *Falklands War: The Untold Story* (75% of viewers) and *Jeremy Kyle Show: Death on Daytime* (72%).

As reported in its Statement, C4C ran a special *Truth and Dare* season of programming from October to December 2022, during which time it showed five new commissions (including *Prince Andrew: The Musical* and *Jimmy Carr Destroys Art*) which it said demonstrated its risk-taking and experimental approach to programming.<sup>72</sup> According to C4C, these commissions reached 13.3% of the TV population via linear transmissions and generated 1.2m streaming views over the campaign period.

C4C has stated that it seeks to deliver innovative programming in many ways, including with new storytelling formats, new talent, new film-making approaches, new subject matters not typically dealt with on TV and technological and scheduling innovations.<sup>73</sup> Using a new metric, C4C reported that a third (34%) of its programmes in 2022 included at least one of these elements of innovation (68 out of 201 new titles). C4C suggests that this figure is impressive, given that competitive pressures lead many broadcasters to double down on content formats that have proved to be successful with audiences, rather than taking risks with their commissioning.<sup>74</sup> C4C's analysis found that the most common type of innovation (present in 43% of its new programmes) was for 'new or substantially redeveloped formats', followed by 'topics not typically featured on TV' (35% of new titles). With respect to E4, 80% of new titles in 2022 contained an innovative element. We will be interested to track how this new metric changes over the coming years.

**C4C delivered a range of high-performing programming in 2022.** Its best-performing drama was the thriller series *Suspect*, which had an average audience of 2.5m across the series and 11% viewing share.<sup>75</sup> Similarly, the prison drama *Screw* attracted average audiences of 1.8m across the series, with 8% share of viewing. There were also several popular returning series, including the thirteenth series of *The Great British Bake Off*, the first episode of which had 34% share of all TV viewing and 8.2m viewers (the series average was 7.6m viewers and 33% viewing share). Other favourites included *Gogglebox* (19% viewing share and 4m viewers on average across the series) and season three of *Derry Girls* (18% viewing share and 4m viewers for its first episode).<sup>76</sup> This was also C4C's top-performing streamed episode in 2022, with 3.6m viewers on All4 across the year.<sup>77</sup>

**Some of C4C's top-performing programming on its linear channels were sporting events.** C4C was named Sports Network of the Year at the British Sports Journalism Awards 2022 for its coverage of the Paralympics and Emma Raducanu's *US Open* win, among other programming in 2021. It has built on this success in 2022, forging successful partnerships to bring high-profile sporting events to free-

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<sup>69</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 40. NB C4C considers a score of 7+ out of 10 as strong performance.

<sup>70</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 68.

<sup>71</sup> Ibid, p. 69. Programme list is derived from 25 most-viewed first-run titles in each of four quarterly waves, giving 100 titles across the year. The recurrence of some shows in the multiple waves means that there were 80 unique titles in 2022.

<sup>72</sup> Ibid, p. 67.

<sup>73</sup> Ibid, p. 71.

<sup>74</sup> Ibid, p. 59.

<sup>75</sup> All programme viewing figures are from Barb, unless otherwise stated, exclude viewing on Channel 4+1 and include on demand and catch up until 28 days after broadcast on the TV set only.

<sup>76</sup> Barb, 28 day consolidated, Channel 4 excl. +1.

<sup>77</sup> Barb, As viewed 2022. On demand only, all devices.

to-air TV in the UK. In its first foray into men's football, C4C won the rights to show England's games in the *Nations League* European qualifiers to *UEFA EURO 2024* and *International Friendlies* until 2024; this is the first time that these games have been made available on free-to-air television.<sup>78</sup> The Germany vs. England *UEFA Nations League* match on 7 June 2022 averaged 4.3m viewers (representing 23% of viewing share).<sup>79</sup> C4C reported that its coverage of the six live matches broadcast in 2022 reached 21m viewers.<sup>80</sup> C4C also delivered live coverage of the *British Grand Prix* at Silverstone which brought large numbers of viewers; the race on 3 July 2022 averaged 2.3m viewers and 21% share.<sup>81</sup> C4C's deal with Sky will ensure that this free coverage of Formula One will continue throughout the 2023 season. C4C also won the rights to be the exclusive free-to-air UK TV home of the *ABB FIA Formula E World Championship* (all-electric motorsport world championships). As discussed in more detail below, C4C maintained its commitment to the Paralympics in 2022 with its innovative and diverse coverage of the *Beijing Paralympic Winter Games*, which reached a total of 7m linear viewers (11% of the TV population).<sup>82</sup>

## Reflecting the cultural diversity of the UK

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**An important part of C4C's remit is to appeal to the tastes and interests of a culturally diverse society.** C4C has said that it aims to do this by showing programming that represents the broad range of viewpoints, cultures, regions and communities in the UK.<sup>83</sup>

**C4C has an ongoing commitment to covering Paralympic sport,** and its coverage of the *2022 Beijing Winter Paralympic Games* is a strong example of its innovative approach to showcasing content which allows disabled people to see themselves on-screen. In what it has described as a 'world first', the broadcaster used a presenting team made up entirely of disabled people to deliver 86 hours of free-to-air content on linear TV and streaming on Channel 4's YouTube channel.<sup>84</sup> C4C's coverage of the games reached 7m people (11% of the total TV population) across its linear TV channels.<sup>85</sup> There is evidence that C4C's portrayal of disabled athletes in its coverage of the Paralympics challenged societal expectations around disabled people; its own research found that 69% of viewers agreed that watching the games made them think about the challenges facing disabled people in a different way, and 67% agreed that it brought important but difficult issues to a mainstream audience.<sup>86</sup> We commend C4C for this coverage and its ongoing commitment to the Paralympics, which is a key driver of the representation of disabled people on-screen. However, it is important that C4C continues to portray disability on-screen outside the Paralympic years. To that end, we are pleased to note that its 2023 slate includes a renewed focus on disability.

**C4C has demonstrated its commitment to reflecting the diversity of the UK on-screen through other programming.** For example, its *Proud All Over* campaign ran in June 2022 to mark the fiftieth anniversary of the Pride movement and included a TV trailer to promote regional Pride celebrations, which C4C reported reached 44% of the adult population, with two thirds of viewers agreeing that it

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<sup>78</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 52.

<sup>79</sup> Barb, 28 day Consolidated, individuals 4+.

<sup>80</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 52.

<sup>81</sup> Barb, 28 day consolidated, individuals 4+.

<sup>82</sup> Barb, 28-day consolidated, individuals 4+, 3+ minutes consecutive Reach across Channel 4 (incl. +1), More 4 (incl. +1) and 4seven.

<sup>83</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 45.

<sup>84</sup> Ibid, p. 52.

<sup>85</sup> Barb, 28-day consolidated. 3+ consecutive minute reach, individuals 4+, includes Channel 4 (incl. +1), 4Seven and More4 (incl. +1).

<sup>86</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 52.

reflected the diversity of the UK and brought important issues to a mainstream audience.<sup>87</sup> The campaign also included a series of LGBTQ+ themed programmes, such as *Celebrity Gogglebox* and *Freedom: 50 Years of Pride*.<sup>88</sup> C4C broadcast a range of programming in 2022 to give underrepresented voices in the UK a voice and draw attention to the sorts of issues facing marginalised groups. Notable commissions included the programme *Jews Don't Count*,<sup>89</sup> presented by David Baddiel, which explored the issue of antisemitism in British society, and *Troy Deeney: Where's My History*,<sup>90</sup> which drew attention to the lack of diversity in school curriculums.

In seeking to reflect the cultural diversity of the UK, C4C has said that it aims to ensure that as many audiences as possible feel they are represented by its programming. To measure how well it is achieving this aim, C4C has introduced a new metric to its Statement this year using Diamond system data.<sup>91</sup> In 2022, it reported that 50% of C4C's onscreen contributors were female (compared to a national average population of 51%), 18% were LGB (3% national population) and 19% were in minority ethnic groups (18% national population estimate). 8% of onscreen contributors were disabled, which is 10% below the national average of 18%. C4C has set out its plans for addressing this underrepresentation, including with its *Engage & Enable* disability strategy, which launched in 2021 and seeks to engage the industry to increase its inclusion of disabled people by focusing on high-level changes in practice and shifts in culture, including by identifying spaces and routes for disabled on-screen talent to grow within the C4C portfolio.<sup>92</sup> C4C also published a new Disability Code of Portrayal last year, which provides guidance for commissioners and programme makers on ways to improve the quality and quantity of on-screen representation of disabled people.<sup>93</sup> This drive for authentic representation has been reflected in C4C's commissioning in 2022, with, for example, the Rosie Jones documentary exploring society's attitudes to disability.<sup>94</sup>

**Ofcom's audience research indicates that Channel 4 viewers consider that Channel 4 TV Channels perform well in reflecting the diversity of the UK.** In 2022, Ofcom's PSM Tracker found that 60% of those who had watched any Channel 4 TV channels in the last 6 months rated it highly for delivering 'programmes which feature people from different backgrounds'.<sup>95</sup> This is an increase of 3pp since 2021. Furthermore, C4C's own research found that 57% of audiences strongly agreed that it performed well in 'showing different kinds of cultures and opinion'.<sup>96</sup>

**C4C has also continued to launch initiatives with the aim of increasing diversity behind the camera.** For example, in 2022 it relaunched its Commissioning Diversity Guidelines to increase diverse talent participation.<sup>97</sup> Among the new guidelines is a requirement for ethnically diverse senior leadership on all production teams for programmes commissioned by C4C, as well as detailed

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<sup>87</sup> Ibid, p. 47.

<sup>88</sup> Ibid, p. 47.

<sup>89</sup> Ibid, p. 65.

<sup>90</sup> Webpage: [Channel 4 commissions Troy Deeney – Where's My History? Exploring the lack of diversity on the national curriculum.](#)

<sup>91</sup> Channel Four Television Corporation Report and Financial Statements 2022p. 55. The Diamond system was established by the PSBs and Sky and is operated by the Creative Diversity Network (CDN). It works by asking those involved in the making of new UK TV programmes to supply information on their personal characteristics on a voluntary basis.

<sup>92</sup> Webpage: [Channel 4 sets out 'engage & enable' Disability Strategy](#)

<sup>93</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 51.

<sup>94</sup> Ibid, p. 22.

<sup>95</sup> Ofcom, Public Service Media (PSM) Tracker 2022. Webpage: [PSM-Tracker-2022-Data-Tables.pdf \(ofcom.org.uk\).](#)

<sup>96</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 54.

<sup>97</sup> Ibid, p. 51.

targets for regional representation and production spend for ethnically diverse off-screen talent. Having committed to ensuring that 20% of its commissioning department was ethnically diverse, C4C has gone further, stating that at least 20% of Channel 4's editorial decision-makers (Commissioning Editors and Commissioning Executives), as well as the most senior team members, are from ethnically diverse backgrounds.<sup>98</sup> C4C reported that in 2022, 13% (27 out of a total 209) of its suppliers were 'diverse' (i.e. production companies in which the leading decision makers and creative leaders comprise people from Black, Asian and minority ethnic backgrounds).<sup>99</sup> This is an increase from 12% the previous year. It is positive to see C4C taking material steps to ensure that more people from minority ethnic backgrounds are represented in senior positions. For those at the beginning of their careers, initiatives like 4Schools could play an important role in opening up the creative industry to young people from diverse backgrounds (see page 20).

C4C has demonstrated its commitment to improving its organisational focus on inclusion with the appointment of Marcia Williams as its first Director of Inclusion, responsible for the strategic direction of inclusion and diversity.<sup>100</sup>

Data from Ofcom's *Equity, diversity and inclusion in television and radio: 2021-22* report shows that C4C's staff profile broadly reflects the diversity of the UK: 58% are women (10pp above the UK labour market) and 18% are from minority ethnic backgrounds (5pp above).<sup>101</sup> Among all the main PSB channels, C4C had the second-highest proportion of employees from minority ethnic backgrounds in senior management positions, at 16%,<sup>102</sup> and the joint-highest proportion (with the BBC) of LGB employees, at 10%.<sup>103</sup> However, only 10% of its employees are disabled, 11pp lower than the UK labour market average.<sup>104</sup> As highlighted in our report, all the main broadcasters, including C4C, must continue to take steps to improve the representation of disabled people across their organisations, as well as increase the data collected on disability in order to build a more accurate picture of their workforces, so that they can better identify how best to support and retain their staff. Furthermore, the visible<sup>105</sup> data continues to indicate a persistent underrepresentation of people from certain socio-economic backgrounds in the TV industry. Of all the PSBs, C4C had the highest proportion of employees who had attended private school (16%), compared with the UK average of 7%, but conversely, the lowest proportion of employees who had parents in a professional occupation when they were aged 14 (48%), compared to the UK average of 33%.<sup>106</sup> C4C, along with the BBC, collected the most socio-economic diversity data of all the PSBs, helping them to gain a more accurate understanding of the composition of their workforce. C4C is currently working towards its own diversity targets<sup>107</sup> which it aims to reach in 2023; we will review its progress and any new targets set in next year's report.

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<sup>98</sup> Webpage: [Channel 4 embeds legacy of The Black To Front Project with more new commissions and targets.](#)

<sup>99</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 85.

<sup>100</sup> Webpage: [Channel 4 appoints Marcia Williams as its first Director of Inclusion.](#)

<sup>101</sup> Ofcom, *Equity, diversity and inclusion in television and radio: 2021-22*, p. 4.

<sup>102</sup> Ibid, p. 5.

<sup>103</sup> Ibid, p. 6.

<sup>104</sup> Ibid, p. 5.

<sup>105</sup> The data gaps for socio-economic background are so large that, for this characteristic alone, we continue to report on figures as a percentage of those who provided information (rather than as a percentage of the relevant industry workforce as a whole). This may allow us to give a more accurate picture of the likely makeup of the industry but provides only a partial view.

<sup>106</sup> Ofcom, *Equity, diversity and inclusion in television and radio: 2021-22*, p. 7.

<sup>107</sup> Webpage: [Channel 4 Inclusion and Diversity.](#)

# Helping to grow creative talent across the whole of the UK

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**As a broadcaster, C4C plays an essential role in supporting the creative economy and investing in the development of talent across the UK.** In 2018, it launched its '4 All the UK' strategy, which aims to expand C4C's presence outside London and increase content spend and impact in the Nations and Regions. Reflecting this, 485 roles had been located outside of London by the end of 2022 (up from 400 the previous year) and C4C has stated that this figure will increase over the next few years.<sup>108</sup>

C4C has set itself a voluntary target to ensure that 50% of spend on first-run originated content on the main channel is commissioned from suppliers outside London.<sup>109</sup> In 2022, it spent 52%, down slightly on 55% in the previous year. In addition, C4C spent its highest ever amount, £228m, across its TV portfolio on content made in the Nations and Regions, up 2% on 2021 (£222m). Of this, £183m was spent on commissions from the English regions, down slightly (1%) on the previous year's spend of £185m. C4C spent £45m on originated content in the Nations, up 15% on the previous year. Of this, £21.1m was spent in Scotland (representing 48.4% of total Nations spend), £18.8m in Wales (40.1% total) and £5m in Northern Ireland (11.5% total).<sup>110</sup> C4C's investment in the Nations and Regions is a crucial part of supporting the development of local production and commissioning.

Companies based in the Nations and Regions represented 29% of Channel 4's total supplier base in 2022 (down slightly from 30% in 2021).<sup>111</sup> This figure was driven partly by initiatives such as the 'More4 Northern Ireland' scheme (a result of C4C's partnership with Northern Ireland Screen) which aimed to secure a returnable commission for a Northern Ireland based indie.<sup>112</sup> It resulted in commissions for two independent production companies, Big Mountain and Tern.<sup>113</sup>

At the same time, as in 2021, C4C delivered 66% of hours of first-run originated programmes on the main channel that were commissioned from suppliers based in the Nations and Regions.<sup>114</sup> This is almost double its current licence quota of 35%. We are pleased to see that C4C is maintaining its commitment to supporting suppliers from all over the UK and developing the creative economy outside London.

**In addition to delivering above its commitments for output and spend in the Nations and Regions, C4C has continued to support the development of skills and talent in the creative industries,** which is an important element of its remit. For example, its Leeds-based 4Skills programme aims to provide training and development opportunities to people across the UK, in particular those largely underrepresented in the TV industry.<sup>115</sup> C4C has said that the programme's 2022 budget of £5m is due to double to £10m per year by 2025. It supported 28,000 people in 2022 (up from 6,158 in 2021), with a focus on young people in lower socio-economic groups and from diverse backgrounds including through 4Schools (see below).<sup>116</sup>

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<sup>108</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 17.

<sup>109</sup> Ibid, p. 74.

<sup>110</sup> Ibid, p. 84.

<sup>111</sup> Ibid, p. 85.

<sup>112</sup> Webpage: [Channel 4 and Northern Ireland Screen join forces to boost nation's broadcast industry.](#)

<sup>113</sup> Webpage: [Northern Ireland Screen and Channel 4 announce new commissions.](#)

<sup>114</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 74.

<sup>115</sup> Ibid, p. 12.

<sup>116</sup> Ibid, p. 77.

The 4Schools initiative aims to encourage young people, particularly those from diverse and disadvantaged socio-economic backgrounds, to pursue a career in the creative industries.<sup>117</sup> It engaged with 23,000 students in more than 60 schools in 2022, with activities such as workshops and talks from C4C and independent production companies. C4C has also expanded its Production Training Scheme in 2022, placing 33 trainees (75% based in the Nations and Regions) in independent production companies across the UK for a year of fully funded training.<sup>118</sup> We are also pleased to see C4C forming partnerships to help develop talent across the creative industries. Its partnership with the National Film and Television School (NFTS) delivered training days across the Nations and Regions for those already part of, but underrepresented in, the industry.<sup>119</sup> These initiatives could play an important role in supporting the growth of the creative industries in these areas and filling skills gaps, as well as helping C4C to create content that engages and appeals to audiences from all over the UK.

C4C is working with a wide range of suppliers, some for the first time, and in this way is demonstrating its commitment to supporting the independent creative sector in the UK. During the reporting period, across film, digital and TV, C4C worked with 319 content suppliers, up from 294 the previous year.<sup>120</sup> Of these companies, 170 were qualifying independent TV production companies,<sup>121</sup> an increase from 164 the previous year. C4C told us that, across all types of content, 38 companies were new suppliers to C4C in 2022.

**As well as supporting the development of creative talent across the UK, it is also important for C4C to represent and reflect the lives of audiences within the different UK Nations and Regions.**

Ofcom's research found that overall, 33% of those who had viewed Channel 4 TV channels in the past six months said it performed well on delivering '*programmes that feature my region/country*', up from 29% in 2021.<sup>122</sup> A third (33%) were neutral, and one in seven (14%) said they thought C4C performed badly on this measure. As in 2021, those in Northern Ireland are more likely than average to rate Channel 4 TV channels badly (22%), while those in London are more likely than average to say it performed well on this measure (51%). Last year, we suggested that C4C could be doing more to represent the different UK Nations in its programmes; we would like to reiterate the importance of this element of C4C's remit and media content duties and challenge it to do more to ensure that audiences across the UK can see themselves reflected in C4C's programming.

## Delivering high-quality news and current affairs

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**C4C has performed strongly against its duty to provide news and current affairs coverage to audiences in the UK in 2022.** Its Statement draws on international coverage highlights including its presentation from Ukraine of Russia's invasion (which has since received a BAFTA award) and reporting from Jamal Osman, who obtained access to extremist group Al Shabaab.<sup>123</sup>

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<sup>117</sup> Webpage: [Channel 4 launches 4Schools to open up creative careers to young people](#).

<sup>118</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 78.

<sup>119</sup> Ibid, p. 78.

<sup>120</sup> Ibid, p. 16.

<sup>121</sup> A company not tied to a UK broadcaster through significant common ownership. The Broadcasting (Independent Productions) Order 1991 (as amended) defines an independent producer as one: (i) who is not employed by a broadcaster; (ii) who does not have a shareholding greater than 25% in a UK broadcaster; and (iii) which is not a company in which any one UK broadcaster has a shareholding greater than 25% or any two or more UK broadcasters have an aggregate shareholding greater than 50%.

<sup>122</sup> Ofcom Public Service Media (PSM) Tracker 2022. Webpage: [PSM-Tracker-2022-Data-Tables.pdf \(ofcom.org.uk\)](#).

<sup>123</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 60.

**C4C's linear news programming increased its viewing figures in 2022.** The weekday news bulletin<sup>124</sup> increased its share of viewing among all individuals from 3.2% to 3.7%, and for 16-24s from 2.1% to 2.6%.<sup>125</sup> In terms of absolute levels of viewing, its weekday evening news programme grew by 2.9% among all individuals, but declined by 8.6% for 16-24s. Other PSBs' news programmes, BBC One's *News At Six* and *News At Ten*, and ITV1's *ITV Evening News* and *ITV News at Ten* also declined in average individual audiences year-on-year.<sup>126</sup> We flagged in last year's report that C4C had been focusing on its strategy to drive digital engagement with news, and it has continued to enjoy success with this approach in 2022. There were 674m views of Channel 4's news content globally in 2022, of which 588m views related to news content uploaded in 2022.<sup>127</sup> Across YouTube, Facebook and Twitter, global online views were up by 88%, while engagement was up by 64%.<sup>128</sup> It is good to see that C4C is working hard to deliver high-quality, informative news content in innovative ways that audiences clearly engage with positively.

**The online delivery of *Channel 4 News* helped to attract younger viewers in 2022,** with more than 40% of its YouTube audience and 65% of its TikTok audience aged under 35.<sup>129</sup> The number of followers of *Channel 4 News* on TikTok grew tenfold in 2022 to over 300,000, which C4C says was driven mainly by its Ukraine war coverage and an increase in the timeliness, quantity and quality of its content.<sup>130</sup> C4C also delivers news via its podcasts. In 2022, it added video to its podcast, *The Fourcast*, and made it available on YouTube; the podcast now has nearly 12m followers, and averages over 60m monthly video views on social media platforms.

**C4C's news programming is popular among audiences in minority ethnic groups,** achieving an average viewing share of 6.3% among this audience.<sup>131</sup> 15% of *Channel 4 News*' audience was made up of viewers in minority ethnic groups, down by 3pp on the previous year, but higher than the proportion of minority ethnic viewers to the other PSBs' news programmes (*ITV News at Ten* was the second highest at 11%). Among 16-34 audiences, *Channel 4 News* has a 3.2% viewing share, and 16-34s make up 7% of the audience, making it the joint youngest-skewing long-form PSB news programme (with ITV's *News at Ten*).<sup>132</sup>

Ofcom's research found that *Channel 4 News*' audience rated it highly for being '*good for national news*' (70%) as well as being '*good for international news*' (69%).<sup>133</sup> In 2022, 68% of its audience rated it highly for being '*high-quality*', while 70% rated it highly for '*helping me to understand what's going on in the world today*'. This was on a par with ITV's equivalent audience rating, but below the BBC's score (78%). In terms of its trustworthiness, 66% rated it highly, and C4C's own research found that 88% of viewers trust Channel 4 to report news accurately and fairly (up 1pp on 2021).<sup>134</sup>

In 2022, C4C began presenting *Channel 4 News* from both London and Leeds.<sup>135</sup> This dual-location presentation is now permanent, and C4C has stated that the programme will be presented four

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<sup>124</sup> Barb, 28-day consolidated, excl. +1, Mon-Fri 18.30-19.30 start times, excl. Christmas period.

<sup>125</sup> C4C reported that share of viewing to C4C's weekday news bulletin grew by 15% amongst all individuals and 34% among 16-24-year-olds. Channel Four Television Corporation Report and Financial Statements 2022, p. 60.

<sup>126</sup> Barb, 28-day consolidated, excl. +1, Mon-Fri.

<sup>127</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 58.

<sup>128</sup> Ibid, p. 60.

<sup>129</sup> Ibid, p. 60.

<sup>130</sup> Ibid, p. 60.

<sup>131</sup> Barb, 28-day consolidated, excl. +1, Mon-Fri 18.30-19.30 start times, excl. Christmas period.

<sup>132</sup> Barb, 28-day consolidated, excl. +1, duration greater than 7'.

<sup>133</sup> Ofcom, [News consumption in the UK: 2022 report](#).

<sup>134</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 70.

<sup>135</sup> Ibid, p. 60.



nights a week from the purpose-built studio and newsroom in Leeds, increasing the number of employees based outside London and driving investment in the local production infrastructure.

C4C also has a duty to provide high-quality current affairs programming, which it mainly delivers through its titles *Unreported World* and *Dispatches*, and with the new youth-focused *Untold* strand. The *Dispatches* episode entitled *Cadbury Exposed* was the highest performing episode in 2022, attracting 903,000 viewers (4.7% viewing share) at the time of broadcast.<sup>136</sup> The international current affairs series *Unreported World* now has a dedicated YouTube channel, which, according to C4C, now has 1.4m subscribers.<sup>137</sup> C4C also notes that the programme won a number of awards throughout the year, including at the Docs Without Borders Film Festival. Average viewing figures for both series have declined, with *Dispatches* falling from 641,000 in 2021 to 505,000 in 2022, and *Unreported World* from 550,000 to 481,000 but remaining stable among the 16-34 age group. However, as highlighted earlier in this report, as part of its strategy to attract younger audiences to its current affairs programming, C4C this year launched its streaming-first current affairs strand, *Untold*. The episode *Inside the Shein Machine* attracted 360,000 viewers on linear and on-demand in 2022, with 25% of that audience being aged 16-34.<sup>138</sup> C4C told us that the episode performed particularly well on YouTube, gaining 510,000 views in 2022, with 23.2% of views (118,000) from 13–24-year-olds.

In 2022, C4C recommissioned *The Andrew Neil Show*, a political discussion programme covering a wide range of issues across the political spectrum. The first series, which aired from May to July, averaged 406,000 viewers and 4% share.<sup>139</sup> C4C has said that the programme's success led to it commissioning a second series and lengthening the run-time from 35 to 45 minutes.<sup>140</sup> Viewing increased for the second series, which aired in the autumn (September to November) and averaged 483,000 viewers and 3% share.<sup>141</sup> Other successful C4C programming in this genre includes the documentary *Children of the Taliban*, which won the Current Affairs BAFTA in 2023.<sup>142</sup>

## International programming

**C4C has a duty to support and stimulate well-informed debate on a wide range of issues, including by providing access to information and views from around the world.** C4C has told us that the number of first-run hours of international programming on the main channel was 52 (up from 43 the previous year), making up 1.9% of all first-run originated hours on the channel. The main genre was current affairs which contributed 47% of the total first-run hours of international programming, (down from 57% the previous year), with documentaries contributing 30%.

## Film4

**2022 was a year of continued success for Film4 Productions**, C4C's feature film division. It has an annual budget of £25m and is one of the three main sources of independent film financing in the UK, along with BBC Films and the British Film Institute (BFI). In fulfilling its remit to support a wide range of filmmakers through the stages of their development, Film4 has a direct impact on the UK's independent film sector.

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<sup>136</sup> 4<sup>th</sup> April 22, Barb 28-day consolidated.

<sup>137</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 60.

<sup>138</sup> Barb, As viewed, All devices.

<sup>139</sup> Barb, 28-day consolidated, individuals 4+, Channel 4 (excl. +1).

<sup>140</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 46.

<sup>141</sup> Barb, 28-day consolidated, individuals 4+, Channel 4 (excl. +1).

<sup>142</sup> Webpage: [Children of the Taliban – BAFTA wins](#).

In 2022, Film4 co-funded and produced a number of films which achieved critical acclaim at various awards ceremonies and international film festivals.<sup>143</sup> For example, *The Banshees of Inisherin* received nine Oscar nominations (and four BAFTA wins), while *Living* received two Oscar nominations. Film4 has continued to build partnerships with other organisations to support the UK film industry and encourage the development of new talent. In 2022, C4C partnered with the organisation We Are Parable to create the *Momentum* scheme, a mentoring and training programme for 60 Black TV, filmmakers and content creators across the UK, with the aim of creating new opportunities for Black people to progress in the film and TV sector.<sup>144</sup> In an effort to strengthen relationships outside London and connect with new regional talent, Film4 hosted a nationwide roadshow in 2022 in C4C's hubs in Leeds, Bristol and Glasgow. The events included creative round tables for emerging writers and directors, and a student Q&A panel.<sup>145</sup>

## Conclusion

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Our analysis in this report has shown that overall, C4C has performed strongly against its remit and media content duties in 2022, particularly given the continuing uncertainty that characterised this reporting period due to the ongoing debate about its ownership. C4C recorded its highest ever level of content investment and was able to deliver a range of content and new initiatives to better meet the needs of younger audiences. It also strengthened its commitment to commissioning content from the Nations and Regions and continued to improve its representation of the diversity of the UK both on and off-screen. Its work around skills and training continues to be an important part of the development of creative talent across the UK and we welcome its commitment to double its investment in 4Skills in the coming years.

C4C must now face up to the challenge of managing digital transformation for its audiences. Although it made reasonable progress against its Future4 targets in 2022, All4 views (which form one of its headline metrics) were down, so C4C needs to strengthen its efforts to bring audiences to the streaming platform to ensure that it meets its goal of achieving 2bn views by 2025. If C4C is to continue to deliver strongly against its remit and media content duties, we consider that it must now begin to articulate its plans beyond 2025. It is likely that C4C's audiences will continue to switch to (primarily) digital viewing. This ongoing shift in audience habits will require C4C to raise an increasingly large proportion of its revenues from digital advertising, hence the need for speed and transparency in setting out the next phase of its strategy. We look forward to continuing to engage closely with C4C on these issues and throughout the process of agreeing a new licence.

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<sup>143</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 93.

<sup>144</sup> Webpage: [Channel 4 and We Are Parable team up to support Black TV & Film Makers across the UK](#).

<sup>145</sup> Channel Four Television Corporation Report and Financial Statements 2022, p. 93.

## Annex 1

### Legal framework

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1. Section 198B of the Communications Act 2003 ('the Act') requires C4C to prepare an annual Statement of Media Content Policy, setting out how it will discharge its media content duties (see below) across all its services in the coming year and how it performed in discharging its duties in the previous year. In producing the Statement, C4C must have regard to guidance given by Ofcom, and consult Ofcom. In accordance with Ofcom's [guidance](#), C4C publishes a combined Statement of Programme and Media Content Policy which also covers delivery of its public service remit and quotas on its main channel, Channel 4.
2. Although the Act does not require it, we have responded to C4C's previous Statements setting out our views on its performance. This allows us to publicly hold C4C to account for the delivery of its remit and media content duties.
3. It is important to note that this is just one of the mechanisms through which we assess C4C's performance and hold it to account. We also:
  - relicense the main channel at the end of each licence period, setting the terms of that licence. The current licence runs to the end of 2024;
  - carry out an in-depth review of C4C's delivery of its media content duties every five years, alongside a PSB Review. This was last conducted in 2020; and
  - report on C4C's compliance with the Channel 4 quotas on an annual basis.

### C4C's public service remit and media content duties

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#### Public service remit (section 265(3) of the Act) – applies to main channel

The public service remit for Channel 4 is the provision of a broad range of high-quality and diverse programming which, in particular—

- a) demonstrates innovation, experiment and creativity in the form and content of programmes;
- b) appeals to the tastes and interests of a culturally diverse society;
- c) makes 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; and
- d) exhibits a distinctive character.

#### Media content duties (section 198A of the Act) – apply across a range of services

1. C4C must participate in -
  - a) 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;

- b) the making of high-quality films intended to be shown to the general public at the cinema in the United Kingdom; and
  - c) the broadcasting and distribution of such content and films.
2. C4C must, in particular, participate in -
- a) the making of relevant media content that consists of news and current affairs;
  - b) the making of relevant content that appeals to the tastes and interests of older children and young adults;
  - c) 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); and
  - d) the broadcasting or distribution of relevant media content by means of a range of different types of electronic communications networks.
3. In performing its duties under 1) and 2) C4C must:
- a) promote measures intended to secure that people are well-informed and motivated to participate in society in a variety of ways; and
  - b) contribute towards the fulfilment of the public service objectives (as defined in section 264A of the Act).
4. In performing their duties under 1) to 3) C4C must -
- a) support the development of people with creative talent, in particular –
    - i) people at the beginning of their careers in relevant media content or films; and
    - ii) people involved in the making of innovative content and films.
  - b) 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;
  - c) promote alternative views and new perspectives; and
  - d) provide access to material that is intended to inspire people to make changes in their lives.
5. In performing those duties C4C must have regard to the desirability of -
- a) working with cultural organisations;
  - b) encouraging innovation in the means by which relevant media content is broadcast or distributed; and
  - c) promoting access to and awareness of services provided in digital form.