



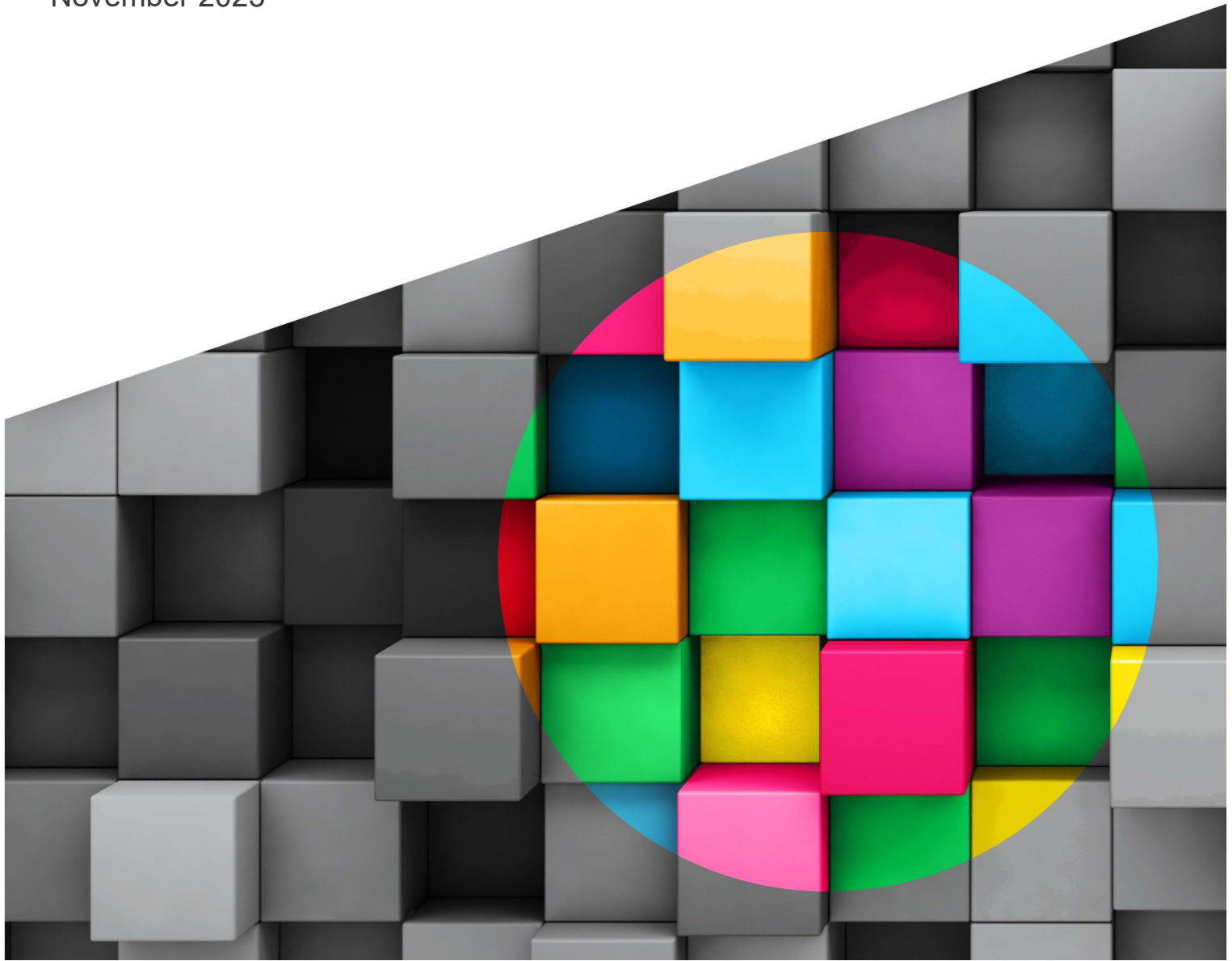
STRAT 7



Channel 4 Corporation Relicensing Research

Report of the findings

November 2023



Contents

1. Executive summary	3
Summary of key findings	3
2. Background	7
Research objectives	8
Approach and sample structure	8
Previous 2017 research summary	10
3. Changing media consumption habits and media brand relationships	11
4. Use of Channel 4 and its wider services	16
5. Attitudes and perceptions of the Channel 4 brand	22
6. Perceptions of Channel 4's delivery against current priorities	32
7. Perceptions of C4C services' future priorities	38
 Appendix I: Sample and methodological details	 42
1.1. Pre-tasks	42
1.2. Online workshop sessions	43
1.3. Online Family depths	43
1.4. Stimulus	44
1.5. Sample	44
Appendix II: Glossary of terms	49

1. Executive summary

Ofcom commissioned Jigsaw Research to update our understanding of audiences' perceptions of all C4C services. The research covered consumption of all C4C content and services in the context of audiences' general media habits, perceptions of the Channel 4 brand, understanding of Channel 4's purpose and role in society, and perceptions of Channel 4's role in the future. A range of qualitative methods were used including workshops, depth interviews and family interviews. A total of 113 people took part in the research. Where relevant, comparisons are made to the previous research undertaken in 2017.¹

Summary of key findings

Younger audiences were typically less engaged and had lower levels of awareness of the range of Channel 4's content

There have been significant changes in the broadcasting sector and in audience consumption habits since the last research in 2017. Our research found these changes have impacted the relationship younger adults aged 16-34 have with Channel 4 in particular – an age group that has traditionally been their core target audience. As these young adults typically had lower levels of awareness of Channel 4 and its content, there was less of an incentive to visit its streaming service to seek out content, or to watch on the broadcast channels.

A wide diversity of viewing habits means that there are variations in content associations/ understanding of C4C's content and services

Heavier users were viewing a broad range of content across multiple genres in order to satisfy multiple viewing needs (e.g. 'inform me', 'entertain me', 'educate me' etc.). Lighter users tended to only watch a small number of programmes or specific genres.

Audiences often misattribute content from Channel 4 and its portfolio channels to other streaming services

On prompting with a range of content from Channel 4 and its portfolio channels, many participants were in fact familiar with the range of current offer, but much of it was simply not front of mind. Some of this content had been seen and/or watched on Subscription Video on Demand (SVoD) services and was therefore misattributed to them, or only had weak associations with Channel 4.

Channel 4's streaming service is increasingly being used as a key platform to consume content. However, it was considered to be 'glitchy' and hard to navigate by some

Audiences reported they were increasingly watching more content using Channel 4's streaming service, in line with the general trend to watch more on demand across the board. However, even for heavier users of any of C4C's services more broadly, its use tended to be quite purposive and was more akin to a catch-up service, rather than a streaming service in which audiences go to browse content and be inspired.

¹ Ofcom, Channel 4 Corporation Remit research, 2017.

In terms of usability, the streaming service was seen by some as being harder to browse than some other platforms and criticised for being more 'glitchy'. This was sometimes felt to be off-putting, especially for younger audiences where it risked creating an outdated image.

Some audiences found the amount of advertising off-putting, particularly younger audiences

With the proliferation of streaming services, the SVoDs have set the expectation for on demand viewing to be ad free, which could make ads feel particularly jarring in an on demand context. Any irritation was exacerbated by what was reported to be 'repetitive' ads where the ads become overly familiar, as well as the regular frequency (every 15 minutes) and length of the ad breaks. While it was understood that this is how C4C funds its content, the way advertisements are currently delivered can be seen to disrupt the viewing experience.

Younger viewers appeared to have the least tolerance for advertising interrupting their TV viewing, probably because they had not grown up with commercial television in the way older audiences had.

There was low awareness and usage of Channel 4's YouTube channels and/or content among participants

Many younger audiences were unfamiliar with YouTube as a place to watch Channel 4 content (either full length programmes or content specifically produced for YouTube). The concept of using Channel 4 Entertainment as a destination within YouTube felt somewhat alien and largely reflected the way they were using YouTube and social media to view content at present: following people and/or the next recommendation rather than seeking out particular sites.

However, YouTube and social media clips were seen as a good way to watch or rewatch clips of favoured shows. Clips from favoured comedies and/or storylines in shows, such as *Educating Yorkshire* or *24 Hours in A&E* (or *Police Custody*) were seen to work well in this format. This type of content was seen to deliver easy to view, low effort, and low investment consumption.

The varying degree of usage of C4C services means that there is no consistent understanding of the brand and it is unclear for many who it is aimed at

Overall, participants typically believed that the target audience was 'younger' but not 'young' - for those in their mid-20s and above. Some of the youngest audiences even saw C4C content and services as more for their parents' generation or above, particularly as for their 'mum', largely because of media behaviours observed in their own homes.

Older audiences tended to see it as 'for everyone', recognising that it is probably aiming slightly younger but still feeling it works for and is also aiming at them. There was acknowledged to be a wide range of content across C4C services from more youth focused shows to long running staples such as *Location, Location, Location*, *Come Dine with Me* and *A Place in the Sun* which were believed to be aimed at older audiences.

The breadth of content from across Channel 4 and its portfolio channels is seen as both a strength and weakness

Although the 'something for everyone' feel of content from across Channel 4 and its portfolio channels was seen as a strength by some, the breadth of the content on offer confused participants about the positioning of the Channel 4 brand. It was also seen to risk making it harder to associate a particular genre of Channel 4 content when taken across the range of services. This weakness was particularly heightened in the context of the SVoDs and social media which delivered more targeted content and proliferation of TV channels that were focussed on particular types or genres.

The Channel 4 brand has less resonance with younger audiences

Due to lower levels of viewing, younger people tend to have lower spontaneous recall of specific Channel 4 content and often had little reason to go and seek it out, which reinforces their low levels of engagement with the brand. However, when prompted with specific programme titles, these younger participants tended to be aware of some comedies, light entertainment and long running dramas, although content was often misattributed to SVoDs.

However older audiences have a much clearer understanding of what Channel 4 and its portfolio channels represent

C4C services tended to be more of a trusted option for older audiences (i.e., those aged mid 30s+) where for some it had retained its 'challenger brand' image and there was greater awareness and usage of Channel 4 and its portfolio channels' content more generally. As result, they also used Channel 4's streaming service more often as they were more familiar with the content on there and so made the effort to seek it out.

C4C services are not typically associated with providing content aimed at younger children

C4C services were generally seen as better suited to older teens (15+). Among children aged 10-15, C4C services were typically simply not in their consideration set. Therefore, they were unlikely to proactively visit any of the C4C portfolio channels or services and typically found out about the occasional programme by picking up on those watched by their parents, friends or acquaintances on social media.

While Channel 4 is felt to be distinct from other PSBs, there was a sense that it was becoming more mainstream and less edgy

Channel 4 is seen as offering a genuine counterbalance to the 'more establishment' tone of the BBC, and the more mainstream, 'for everyone' content of ITV. Channel 4 was acknowledged to have traditionally been known as being more boundary pushing, risqué, progressive, and innovative in its content than the BBC. Channel 4 and its portfolio channels are still felt to be more diverse than other Public Service Broadcasters (PSBs) in their content related to race, gender identity, sexual orientation, and disability. The brand is considered light-hearted, and at the same time able to provide gritty, cutting-edge content.

However, with SVoDs providing content that was seen as innovative, boundary pushing and edgy it is becoming harder for Channel 4 content to stand out, especially among younger audiences who have not grown up with Channel 4.

Channel 4 was not understood by many to have a specific public purpose in the same way as the BBC

In large part this was because Channel 4 was not spontaneously understood to be a PSB and most participants were surprised when told that it was.

There was a marked difference in attitude towards the BBC and Channel 4 here. Audiences tended to feel they 'owned' the BBC, as their licence fee paid for it. Therefore, they were more critical if BBC programming conflicted with their own attitudes or expectations. Conversely, because Channel 4 was funded by advertising, this same sense of ownership didn't exist, and many participants were more ambivalent and/or permissive towards it.

There is, however, broad support for Channel 4's public service remit

When informed as part of the research process, audiences were positive towards Channel 4 having a PSB role, and there was general approval of its requirements for points such as delivering programming covering a wide range of subjects, being free to air and using independent production companies.

Channel 4's specific remit was also still felt to have value as an alternative to the BBC and ITV. Channel 4 was seen as having a different role from both these providers in that it can be more controversial, innovative, boundary pushing and for younger audiences. This position is being challenged by social media and SVoDs, who are seen as encroaching on what was once the territory of C4C services. However, audiences reflected that Channel 4 and the other C4C services provided authentically British content in a way that SVoDs could not. This was felt to be particularly important in enabling content that genuinely reflected the lives of people living in the UK and for certain types of content such as British humour.

C4C content would leave a gap in many people's viewing landscape if it disappeared and British content is seen as key point of differentiation against the SVoDs

Although there were some criticisms levelled at C4C services taken in totality, many participants (especially older and heavier users) did state that they would be missed if they no longer existed. Specific elements that were valued included the provision of a less establishment alternative to the BBC, championing diverse and challenging viewpoints, providing gritty and authentic news and documentaries, and providing a wide range of good quality programmes for free.

They also mentioned Britishness that the content in C4C programmes had (albeit often a more edgy, less mainstream one) that some competitors, particularly SVoDs, lacked. British comedies or documentaries were often mentioned in this context.

There were a number of differences compared to the previous research in 2017

The core differences related to the relationship younger audiences (those under 35 years of age) have with C4C content and services - which generally seems to have declined. Overall, 16–34-year-olds now having a less clear and distinct image of Channel 4 and its portfolio channels.

Satisfaction with the performance of Channel 4's streaming service also seems to have fallen more with younger audiences, who in 2017 found the service appealing and saw it as easy to use, modern, rounded, organised and helpful. This is, in part, a result of the increased use of SVoDs which are often considered easier to navigate.

In 2017, regular C4C content viewers aged 10-14 found C4C programming of strong appeal, offering programmes they liked, for people their age. However this was not the case in the most recent research, where most 10-14 year olds typically did not have C4C services in their repertoire and felt that it was not producing content for them and hence was not particularly relevant². Therefore, awareness was low and there was little reason to visit the Broadcaster Video on Demand (BVoD) service.

² The 10-14 year olds in this recent research were not exclusively regular or high C4C viewers so this is not a direct like-for-like comparison with the 2017 research findings. However, the recent findings indicate an overall weakening with the Channel 4 brand among this age group which was a result of significant changes in viewing habits since 2017.

2. Background

Ofcom is the UK regulator for television, radio and other communications services. On 11 March 2014, Ofcom announced that the Channel 4 licence, held by Channel 4 Television Corporation (C4C) would be renewed for a 10-year period. It is due to expire on 31 December 2024³. Ofcom is now undertaking its statutory process of renewing the Channel 4 licence whereby Ofcom will determine the appropriate conditions for a renewed licence and its duration. The current licence only applies to the main Channel 4 channel.

C4C has a unique model of being publicly owned but receiving no public funding. Instead, it is funded entirely by its own commercial activities and the main PSB channel, Channel 4, is currently required to commission all of its programmes from external producers. Channel 4's licence conditions require it to provide news and current affairs programming, original productions and schools programming and to commission content from independent producers and producers based outside of London and England.

Channel 4 also has a statutory public service remit to provide a broad range of high quality and diverse programming, which demonstrates specific characteristics such as innovation and distinctiveness, and appeals to a culturally diverse society. It has a set of additional 'media content duties', which it can deliver across all of its broadcast and online services including Channel 4 Streaming, its on demand service. Full details of these media content duties can be found in the appendix.

There has been a significant change in media habits over the last 10 years - the way audiences are watching content, who they are watching with and the devices they are watching on. This has made it harder for public service broadcasters (PSBs) to compete for audiences and maintain their current offering. Barb consumption data shows on average people are watching less broadcast TV, with this fall becoming more pronounced among younger audiences. In 2022, 16-24 year olds watched 39 minutes of TV a day, nearly two hours less than in 2012 (a 75% decline); while 25-34 year olds watched 73 minutes, just over two hours less (a 63% decline)⁴.

Looking at all C4C content specifically, in the first half of 2023 all audiences spent an average of 15 and a half minutes per day viewing C4C video services⁵, with 16-34s spending 8 minutes. Ofcom's analysis showed that time spent on All4 (since rebranded to Channel 4 Streaming) as a proportion of total time spent with C4C's video services had increased year on year both for all audiences and for 16-34s, while time spent viewing the broadcast TV channels had decreased accordingly⁶.

Another significant (and related) change is that the media landscape is now considerably more competitive, with companies such as Netflix, Amazon Prime, Disney+ and others challenging C4C and all its services for viewers' attention. Social media is now also more widely used by viewing audiences, especially among younger viewers.

The combination of the forthcoming relicensing and the new media landscape means that new research was therefore required to explore audiences' attitudes towards the services provided by

³ Ofcom, [Renewal of the Channel 4 licence – statement](#), 2014.

⁴ Barb, 28-day consolidated including catch-up and on demand, via TV sets only.

⁵ C4C content includes viewing to C4C's broadcast channels and Channel 4 streaming (previously All4). It excludes viewing time to C4C content on social media.

⁶ Barb as-viewed H1 2023 compared to H1 2022.

C4C, its purpose in society and whether their expectations about its purpose and role had changed since the current licence was issued.

Research objectives

A programme of qualitative research was commissioned to update Ofcom's understanding of audiences' consumption and perceptions of the services provided by C4C. The research was also intended to explore how both users and non-users among all age groups, including the core audiences, aged 16-34 and children (aged 10-15), view Channel 4's purpose and role in society, both now and in the future.

More specifically, the objectives of the research divide into three core areas, namely:

- Consumption of C4C's content in the context of audiences' general media habits:
 - Within this the research was looking to understand the audience's consumption of C4C content within the context of the wider media landscape, covering issues such as usage and perceptions/preferences for the platforms being used, use cases for C4C content viewing and the types of content being viewed.
- Understanding of C4C's purpose and role in society:
 - This included exploring any difference perceived between Channel 4 and other relevant media brands, and any differences in perception between the main channel, its portfolio of channels and its streaming service and social media offerings. The research also explored the perceived relevance of C4C services and content to consumers, and the benefits and limitations participants felt it brought to them personally and society as a whole.
- Perceptions of C4C services and content's role in the future:
 - This element of the research explored the direction that participants wanted C4C services to take in the future, covering what types of content it delivers well on currently, and where participants wanted it to prioritise its efforts going forward (this also included the delivery platforms).

Approach and sample structure

A combination of workshops, reconvened depth interviews and family interviews were used to achieve the above objectives. A total of 113 people took part in the research. A summary of the approach is detailed in the illustration below.

Summary of research approach

16 workshop sessions



Pre-tasks set for all participants to reflect on their media habits and ask them to seek out new content from across C4C services and the BBC (with the latter to avoid overly priming participants in advance).

16 (including pilot) x 2.5 hour online groups to discuss the issues from both a personal and an informed societal perspective.

Sample comprised of participants aged 16+. Skewed towards the 16-34 year old age group as the key audience for C4C.

16 reconvened depth interviews



A respondent was selected from each workshop session. Participants were asked to reflect on their usage and perceptions of Channel 4 and the / its portfolio channels from a more personal standpoint, having had time to process the focus group discussion. They were also asked to find new C4C content to watch in the interim to help stimulate discussion.

Findings were used to reinforce and build on the feedback from the workshops.

15 online family interviews



Pre task which involved a media reflection journal from mother/father of the household and a 'media highlights' collage from the child.

1.5 hour online depth interviews, with mother or father and a child to discuss current usage and perceptions of Channel 4 and the / its portfolio channels from an individual and family perspective.

Included a spread of children aged 10-15, recruited by school year.

1

All participants also took part in an individual pre-task prior to the fieldwork, which explored current media consumption, and initial impressions of Channel 4 and all C4C content and services.

Fieldwork was conducted in May and June 2023. The research was conducted across the four nations of the UK.

Full details of the research approach, including a description of the different components of the research, the stimulus material used, and full sample structure and locations, are provided in the appendix.

Research note: While within the research it refers to older and younger age groups, it is important to note that this simply refers to tendencies within different age groups rather than absolute differences by age. For example, there were some older audiences we spoke to who predominantly consumed media through SVoD services and some younger audiences who were more reliant on the broadcast channels. In addition, behaviour and attitudes are not necessarily fixed. This applies throughout this report.

Previous 2017 research summary

In 2017, Ofcom commissioned research which explored the extent to which audiences in the UK felt C4C content and services were meeting the remit requirements of the Corporation as a whole. Additionally, the research explored the extent to which UK audiences felt Channel 4, as a licensed public service channel, was meeting its specific remit⁷.

- The key qualitative findings highlighted:
 - The Channel 4 Corporation was considered to be performing well overall.
 - Channel 4 was recognised for having new ideas and its distinctive image was centred on it being seen as informative, challenging and controversial, and a risk-taking trailblazer among broadcasters. This image was most prominent among heavier viewers and participants aged over 25.
 - 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 was 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 appealed more to younger viewers, whilst More4 appealed more to a more mature audience. All 4 compared favourably with other free-to-air on-demand services, while 4Seven was the least familiar Channel 4 Corporation brand.
 - Younger audiences found the on-demand service appealing, and saw it as easy to use, modern, rounded, organised and helpful.
 - Channel 4 was perceived to provide unbiased news and current affairs coverage from a more human angle than other providers and representing a diverse range of people on screen was perceived as a strength.
 - Regarding the provision of content for older children (aged 10-14), parents in particular felt that while this was an important duty, provision was weak and there was a lack of bespoke content for this age group. These views contrasted with the opinions of regular C4C content viewers aged 10-14 themselves, the majority of whom found C4C services’ programming of strong appeal, offering programmes they like, for people their age.
 - Some of the younger adults discussed whether some of the programming watched by older children (aged 10-14) was entirely suitable for them (e.g. ‘*The Big Bang Theory*’ and ‘*Hollyoaks*’). This related to concerns around unsuitable themes or storylines.
- Where relevant, comparisons are drawn with this previous 2017 research within the current report.

⁷ Ofcom, [Channel 4 Corporation Remit research](#), 2017.

3. Changing media consumption habits and media brand relationships

Section key findings

Audiences' wider viewing habits inevitably impact audiences' use and perceptions of C4C's content and services. This section therefore highlights a number of relevant findings around changing media consumption habits and media brand relationships.

- Younger audiences have different expectations of content and media providers having grown up with streaming services and social media, where content is tailored, targeted and recommended to them by algorithms. As such they tend to have stronger relationships with SVoDs and social media brands than with BVoDs.
- They are watching less linear TV and this has led to lower levels of engagement with traditional broadcast media brands, such as the BBC, Channel 4 and ITV.
- In contrast, older audiences (34+) tended to have a mix of broadcast media brands and other providers in their repertoire, and as such, traditional broadcast media was of higher relevance.
- Social media has become an important means by which all audiences find programmes to watch on other platforms.

Younger audiences' consumption habits are driven by on demand viewing and personalisation

Since the publication of the previous research in 2017, not only had the level of SVoD usage among younger audiences (under 34) significantly increased, but also the range of SVoD services available. This expansion includes services such as Disney+ and Apple TV rising in prominence. Audiences in their mid-20s or younger do not recall a time where TV and other media content was not available on demand. This has shaped both their consumption and expectations of media services.

Participants from this younger audience reported that they were consuming much of their media on demand (generally either SVoD or social media, including YouTube) and using their own devices, which meant that expectations of convenience and control were high. They also noted that they were typically less prepared to compromise in their viewing choices and would watch a lot of their content on their own, away from the family/household TV set.

They have become used to content being served up to them via algorithms and recommendations. As a result, much of their viewing involved highly targeted content saved onto watch lists, selected from matches, or streaming service platform recommendations. For many, scheduled linear TV had become less relevant, being seen as more important to their parents' generation than themselves. It was not that broadcast content was being rejected, but that watching scheduled linear TV at the time of broadcast could seem inconvenient, and as such, traditional broadcast media brands tended to be less front of mind. There were exceptions to this, with some young people more regularly watching content from the broadcasters, however, this did not reflect the overall trend.

"Disney+ is where I watch most of my series and TikTok. If I ever have a free minute that's what I spend time scrolling on."

(Female, Belfast, 18-21, C2DE, light C4C user)

Where scheduled linear TV was watched by younger audiences it was often seen as more background TV — something to put on to accompany them while studying or doing something else. As a result, the TV content watched on scheduled linear TV for these audiences was often low effort, resulting in lower recall. However, there were exceptions to this, including ‘shared family viewing’ occasions (e.g. ‘family’ entertainment shows such as *Strictly Come Dancing* and soaps which were watched with older children) and popular ‘appointment to view’ programmes (e.g. *Love Island*) which are enjoyed ‘live’ in order to keep up with the social conversation.

Young audiences tend to have stronger relationships with SVoDs and social media brands than with BVoDs

In line with their media consumption patterns, SVoDs (in particular Netflix), as well as social media brands (such as TikTok, Snapchat and Instagram) and YouTube were considered more relevant.

BVoDs were typically considered less appealing to younger audiences and relationships towards BBC iPlayer, ITVX and the Channel 4 streaming services tended to be more ambivalent. Lack of familiarity of content and the challenges of navigating the BVoD platforms meant that younger audiences often assumed that the content on them wasn’t aimed at them. As such, the BVoDs were not typically their first port of call to browse. Whereas services such as Netflix which had the benefit of feeling more of a ‘one-stop-shop’ for the majority of their viewing needs.

Content consumption via social media is also high for younger audiences

The younger audiences also reported watching a considerable amount of content via social media or YouTube. The content viewed was often user generated content (e.g. from YouTubers or influencers) but sometimes this content was clips from TV programmes or linked to TV programmes. The latter included examples of audiences watching an entire programme, or a significant amount of a programme, back-to-back in separate clips (often on TikTok) or viewing longer form content such as documentaries. On occasion these programmes were sought out, but other times viewing was accidental and/or it was recommended to them based on what they were following. In these later instances, attribution to a particular channel, or even sometimes spontaneous recall of the programme title, was relatively low.

The benefits of watching via social media were seen to be the ease of viewing, with the shorter clips making for the ultimate low investment, low effort entertainment. In the current media environment where the level of choice could be overwhelming, having media ‘come to you’, where you already are, had high appeal. Media consumed in this way tended to be suited to easy watching, short attention, light entertainment viewing where comedy and light-hearted content work particularly well. However, video sharing platforms such as YouTube could also be used to consume more ‘lean in’ content that fulfilled a specific interest or style of content. Such examples included content about particular periods of history, drama or sports-based content.

Sometimes you are down a rabbit hole [with social media] and you watch a clip and then you are onto parts 2 and 3 and an hour or two has gone by. The Good Doctor I was watching it on Tik Tok and I watched Grey’s Anatomy on there.

(Female, Belfast, 18-21, C2DE, light C4C user)

Children aged 10-15 are digital natives and watch little linear TV by comparison to streamed and social media content

The family interviews revealed that children (aged 10-15) were often watching content on their own, using their own devices, including smartphones, tablets and TVs in their rooms. Less often they were watching the main or family TV. Therefore, SVoD providers such as Netflix and Disney+ are their first port of call when they want to watch something. They use broadcast TV (either on demand or watched as scheduled) much less often than other generations (including those in their mid-20s) and many associate it with their parents. This means that they're less likely to watch traditional programming, and what they watch can be orientated around gaming and social media activities. There was also a high degree of multi-screening, where they could be watching a show on their own TV, while also gaming or using social media on their smartphone.

*I watch most of the time on my own or could watch with my brother or sister.
Mostly I watch on my phone or my laptop...My mum sometimes recommends films
to watch and everyone watches them on the TV.*

(Girl aged 12, England)

Parents felt that viewing content together was important and seen as something that brought the family together: a wholesome activity that was good for bonding. Watching TV together was now seen as a safe space and a 'healthy' family activity. Parents were often, therefore, looking for content that the whole family can watch and enjoy together (especially at the weekend or a Friday night). Often this can be light entertainment, such as *I'm a Celebrity...Get Me Out of Here!* or *The Great British Bake Off*, or quizzes where the content can help facilitate conversation and interaction. Sports programmes were also seen as good for family viewing, though often sports had less universal appeal in the household. Films were also used for family viewing – for example, the latest Marvel blockbuster.

By contrast older (aged 34+) audiences tend to have a wider mix of services in their repertoire

When asked to name the media brands that were most relevant to them most of the older audiences (particularly the 40+ aged) tended to have at least one broadcast channel within their core media repertoire, either watched on demand and/or as broadcast. Preferences over which channel was preferred or felt the most relevant varied, with some people feeling closer to either the BBC, ITV or Channel 4. Channel 5 was less likely to be seen as among the most relevant media brands. For these older audiences, broadcast media brands were seen to offer a wide range of content that satisfied a range of their viewing needs.

Older audiences also reported that they were consuming increasing quantities of content from the SVoD services. However, these older audiences also tended to be using more of a mix of content providers in their repertoire, with SVoD use interspersed with scheduled linear TV and BVoD services. Unlike for younger audiences, BVoD services or scheduled linear TV were for some their first port of call, with SVoD content being available as an alternative option or for more scheduled, 'lean in' TV moments. This contrasts with younger audiences who were often turning to the SVoD services first.

For me it depends what you are talking about, on my phone I watch YouTube and stuff on Instagram and Facebook, from the TV it's mostly Sky, Netflix, BBC, ITV and a bit of Channel 4. It just depends on what's on.

(Male, Sutton Coldfield, 35-54, C2DE, light C4C user)

Another key difference with the older cohort was that they have grown up watching broadcast, scheduled linear TV. As a result, they tended to have a greater affection towards and familiarity with a range of different TV channels and brands. Older audiences (30s and over) indicated their preferences for different channel brands and had varying depths of engagement with them, though in general they tended to have a greater depth of understanding of these brands than the younger cohort, even if they were not regularly watching. This meant they were better able to discuss both the channel brands today as well as how they may have changed. They also tended to count at least one broadcast media brand as a key part of their viewing repertoire.

I think young people only watch Netflix...For me, TV now is just click, click, click until you find something you want

(Male, Belfast, 55+, C2DE, light C4C user)

In addition, at least one of the SVoDs tended to be mentioned as among the most relevant services, with Netflix and to a lesser extent Disney+ and Prime Video also appearing in the most relevant grouping. Disney+ was seen as particularly relevant for communal, family viewing.

Social media for media entertainment is not just the domain of the young

Older audiences were also using social media to view broadcast style content. However, unlike with the younger viewers, they tended to use social media video content as a filler to relieve boredom, or whilst doing or watching something else rather than replacing other forms of TV consumption. There was therefore less active or 'lean in' viewing of content and it was typically less purposive in the way it was being viewed.

I watch YouTube because it's easy, I can watch it in my gym, a lot of [video] podcasts get loaded up and I will put those on the telly when I'm doing other things.

(Female, Cardiff, 35-54, ABC1, Medium C4C user)

Social media brands such as Facebook, Instagram and, for some, TikTok, tended to be seen as relevant but not as much as the broadcast brands. The wider number of brands with relevance for this older audience was also indicative of the more varied media mix highlighted previously.

Social media can also be an important driver to watching programmes elsewhere

Most audiences, young and older, reported using the buzz around programmes that are seen on social media to help identify new content they might want to watch on other services – either on SVoD or BVoD. This was, however, particularly prevalent among younger audiences. There were also examples of clips of programmes being watched and enjoyed initially on social media, which prompted some to seek these out to watch them. Social media was therefore felt to act as an important promotional tool for streaming services and scheduled linear TV more generally.

So I watch the videos on Facebook before going to see if it's worth watching, if it looks good then I may well give it a go. I sometimes do this when I am behind with episodes of EastEnders as well but then find myself giving away the plot!

(Female, Leeds, 22-34, C2DE, medium C4C user)

I just think that Netflix has everything on it and it's very relevant... everyone will say 'you have to see this' and it's just one of the more popular ones. Everyone is talking about what's on there (on social media).

(Female, Newry, 16-17, ABC1, light C4C user)

I think that Channel 4 and what they put on has a lot of presence on social media. On my social media, people are discussing Handmaid's Tale, 24 Hours in police custody, Gogglebox gets discussed, Married at First Sight, a lot of things they show makes its way on to my social media feed.

(Male, Leeds, 35-54, C1C2, medium C4C user)

4. Use of Channel 4 and its wider services

Section key findings

While the previous section explored audiences' wider media consumption habits and media brand relationships, this section focuses solely on the use of Channel 4 and wider services⁸.

- Younger audiences are typically less engaged and have lower levels of awareness of the range of content available on Channel 4 and its associated channels and therefore there is less of an incentive to visit its streaming platform to seek content out.
- Only heavier users engaged with a wider breadth of all C4C content for a range of viewing needs and as such have a fuller knowledge of the breadth of the offer. Lighter users tended to only watch a small number of programmes or specific genres. This diversity of viewing habits means that there are wide variations in content associations/understanding of C4C content and services.
- Channel 4's streaming service is increasingly being used as a key platform to consume content, however its use tended to be quite purposive and often more akin to a catch-up service rather than a streaming service in which audiences go to browse content and be inspired. In terms of usability, the streaming service is seen by some as harder to browse than other platforms and criticised for being more 'glitchy'.
- Younger audiences appear to have the least tolerance for advertising interrupting their viewing and were the most critical of the amount of advertising on C4C services. Although this is not unique to C4C services, and instead applied to all commercial television channels and their associated streaming services.
- There is low awareness of Channel 4's YouTube channels and content in general among all audiences. Although many had seen clips of Channel 4 and its portfolio channel shows on YouTube, very few are aware of the specific channels. However, seeing that Channel 4 is producing 'made for' YouTube content with familiar YouTubers could cause reappraisal of the brand among younger audiences.

Younger audiences are less engaged with C4C content and services

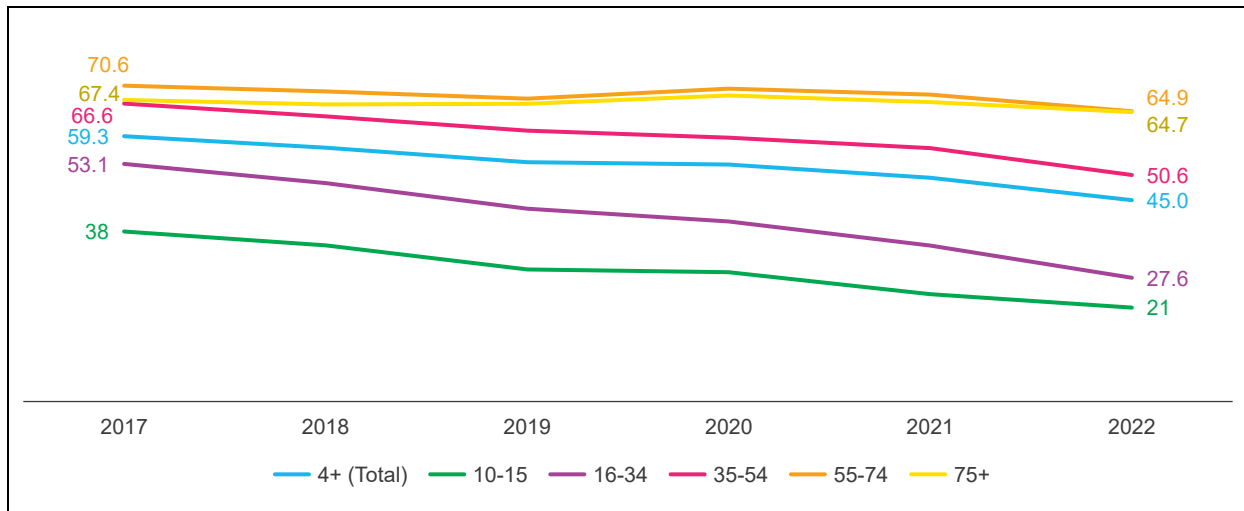
As noted previously, there have been significant changes in the broadcasting sector and in audience consumption habits since the last research in 2017. Our research found these changes have impacted the relationship that younger adults aged 16-34 have with C4C content and services in particular – an age group that has traditionally been their core target audience.

The decline in the number of younger audiences was also reflected in the Barb data. The chart below shows the average weekly reach of all C4C content and services: the percentage of each age group watching the same channel for a 15 minute or more consecutive period at least once a week, averaged across all the weeks of a year. The chart shows that while the reach of all C4C content and

⁸ Please note: It is not always possible to ascertain with certainty whether participants were referring to Channel 4 as a linear TV channel or were thinking of the whole range of content and services provided by C4C. We have used the terminology that best fits the context in which the brand was mentioned, on a case by case basis, throughout the report.

services has declined since 2017 across all audiences, this decline was notably more marked among the 16-34 age group.

Chart 1: C4C broadcast average weekly reach: 2017 – 2022



Source: Barb, 28-day consolidated, All Channel 4 channels including +1s, TV sets only. Reach criteria: 15+ consecutive minutes.

As younger adults typically had lower levels of awareness of C4C content and services overall, there was less of an incentive to visit its streaming service to seek content out or to watch on the broadcast channels. While there were exceptions to this, with some younger participants being more engaged with C4C content, others were not even aware that Channel 4 had an 'app' and so only associated C4C content with the scheduled broadcast TV channels. This is in contrast to the 2017 research which found that younger (16–34-year-olds) viewers tended to give more favourable ratings of C4C services and were more likely to engage with Channel 4's streaming service (known as All4 at the time) than older audiences.

Only heavier users engage with a wider breadth of C4C content and services for a range of different viewing needs

Only heavier Channel 4 and its portfolio channel users had fuller knowledge of the breadth of content and tended to be using C4C content and services for a range of different needs (e.g. 'inform me', 'entertain me', 'educate me' etc.) and types of content.

It is probably the channel we watch the most now. I've seen all that content it reminds me, it has mass appeal, there is something for everybody and it covers all areas.

(Male, Cardiff, 35-54, ABC1, heavy C4C user)

Lighter users were just watching a small number of programmes or a specific genre or type of content, with C4C services and content being associated with specific media needs. Some were using C4C services for more 'lean in' content, associating Channel 4 with documentaries, more youthful comedies as well as the occasional drama. Others were using C4C content for more 'lean-back' type viewing occasions, with it being seen as strong in providing content that is felt to be low effort to watch. This type of content was seen to work well when looking to unwind or when you don't have the headspace to engage fully. Examples of this type of content include US comedies, 'unscripted' real

life/reality type content, 'true crime' and game shows. Some of the more 'lean in' content on C4C services could also become more 'lean-back' type content, particularly if watching repeats of long running favourites, a good example being comedies such as *The Inbetweeners*.

The varying content associations and usage of C4C content impacted how the brand and associated services were then perceived. For some, C4C content represented unwinding and easy escapism. While this was an important TV need, as noted previously, this type of content is not as memorable as the more hero, 'lean-in' type content (which heavier users were more likely to watch). This has an impact therefore on audiences' recall of content associated with and watched on C4C services. This variation in range of opinions meant that the intended target audience for C4C content was not clear for many (this is explored further in section 5).

Audiences often misattribute content originating on Channel 4 and its portfolio channels to other streaming services

On prompting with a selection of C4C content (see appendix 1) many participants were in fact familiar with a range content available, but much of it was simply not front of mind. Some of this content had been seen and/or watched on SVoD services and was therefore misattributed to them or only had weak associations with Channel 4 as a brand.

Examples of programmes participants engaged with on prompting included comedies (e.g. *Derry Girls*, *The Inbetweeners*, *Friday Night Dinner*, *8 Out of 10 Cats*), light entertainment content (e.g. *Gogglebox*, *Naked Attraction*, *First Dates*, *Taskmaster*, *The Dog House*, *24 Hours in Police Custody*, *Celebrity Hunted/Hunted*) and long running dramas/soaps (e.g. *Hollyoaks* and *Ackley Bridge*). *Black Mirror* was also mentioned, with some aware this was no longer commissioned by C4C.

While there were younger participants who were heavier users of C4C services and engaged with a wider range of content including 'real life' light entertainment content as well as the more ground-breaking documentaries, the overall trend was that the youngest participants (aged 16-20) tended to be less familiar with C4C content and/or only watching infrequently rather than engaging regularly.

I would say it's got more of an older audience. I think more of the younger generations would be more into Netflix, Disney+ and Prime. Whereas my aunts and granny and stuff, they would watch normal TV and stuff like that more often just because it's there and it's easy

(Female, Newry, 17-18, ABC1, light C4C user)

Some were viewing the breadth of the Channel 4 offer – including its portfolio channels

Those watching Channel 4 and its portfolio channels' content more regularly tended to be in the older (mid 30s+) audiences rather than in C4C services' core target of 16-34. However, as in all aspects of viewing, there were exceptions to this.

More typically, however, audiences tended to stick to their familiar Channel 4 channels for viewing content, which means that awareness of the channels outside of C4, E4 and Film4 was quite low. The breadth of content available through Channel 4 and its portfolio channels could make it hard to know what is on at what time on some channels for the less frequent viewer, which can be a particular issue on Channel 4 where content is perhaps the most varied.

Watching as it is scheduled was seen to work particularly well for more 'lean back', lighter forms of entertainment, where the TV was on in the background or where audiences didn't have the headspace to concentrate. Having 'good enough' content served up rather than having to seek it out was seen as a benefit by some on these viewing occasions.

However, Channel 4's streaming service is increasingly used as a key platform to consume content

Adult audiences reported they were increasingly watching more content using Channel 4's streaming service, in line with the general trend to watch more on demand across the board. However, even for heavier users of C4C services, use of the streaming service tended to be quite purposive, and was often more akin to a catch-up service than a streaming service in that audiences reported typically going onto the app with something specific in mind, or at least a genre of content they were looking to watch, rather than simply heading there to browse and be inspired.

Lighter C4C services' users were particularly reliant on familiar programme titles and/or familiar celebrities to find something they wanted to watch and saw little reason to go and seek out content on the streaming service. There was also some confusion around the branding of Channel 4's streaming service, with some still calling it 4Od, others All4 and younger audiences tending to refer to it as 'the App'.

Things like Come Dine With Me and Four in a Bed- we tend to binge watch those on a Sunday when we're not doing a lot

(Female, Glasgow, C1C2, light C4C user)

If I watch Channel 4 nowadays it just tends to be All4. I don't watch much live nowadays

(Male, Dundee, ABC1, medium C4C user)

For younger audiences, as mentioned previously, the streaming service tended not to be on their radar as somewhere to go to browse more widely and seek something new. Instead, they were particularly reliant on needing a specific reason to engage. While there were exceptions to this, with some younger participants being more engaged with C4C content, others were not even aware that Channel 4 had an 'app' and so only associated C4C content with the scheduled broadcast TV channels.

Even when using the streaming service, it was felt to require more effort to consume than social media or YouTube content and to require more effort to find something new than on an SVoD. SVoDs were also felt to be able to deliver more targeted recommendations, have trailers of any new shows, and are perceived to have clearer descriptions alongside any content.

While valued for the wide range of content, Channel 4's streaming service is not always perceived to be as easy to use as some competitor services

The platform was applauded for having a wide variety and depth of content available for free. In the current cost of living climate, and with audiences becoming increasingly sensitive to the number of subscription services they are paying for, this was greatly appreciated.

The Channel 4 streaming platform was on occasion also criticised among all age groups for being more 'glitchy' than other streaming services, with the service buffering (despite their Wi-Fi working fine for other services) more frequently. This was sometimes felt to be off-putting, especially for younger audiences where it risked creating an old fashioned/behind the times image.

4oD is atrocious...honestly, it's slow, you can't fast forward from one segment to another, if you do then you've got to watch 3 minutes of adverts and if you want to watch a programme halfway through you've got to watch loads of adverts. It

crashes, it's not user friendly, you can't look at recently released by category - It's not user friendly it's old... it's like internet explorer before it was Edge.

(Female, London, 22-34, ABC1, medium C4C user)

What I do is I record it on Sky+, then when I watch it I can fast forward, skip forward so I don't have to sit through the adverts all the time

(Male, Dundee, 55+, ABC1, medium C4C user)

Some of the heavier/regular users of the Channel 4 streaming service claimed that the platform had improved recently, and they suspected some of these criticisms made by others could be out-of-date. This included the ability to watch programmes live through the app, though some still believed this feature didn't exist. However, any perceptions of a less user friendly streaming service platform still had the potential to be off-putting when audiences have such a wide variety of choice available.

Younger audiences in particular found the amount of advertising off-putting

Younger adult viewers (i.e. those in their mid-30s and younger) appeared to have the least tolerance for advertising interrupting their viewing as they have become used to the SVoD streaming services, where there are no ad interruptions. It is worth noting that this was not unique to Channel 4 and instead applied to all commercial television channels and their associated streaming services. This tolerance for advertising within programmes appears to have declined among this age group since 2017, where an irritation was mentioned but did not feel as prominent.

Ay irritation was exacerbated by what was reported to be 'repetitive' ads where the ads become overly familiar, as well as the regular frequency (every 15 minutes) and length of the ad breaks. Interestingly, there was very little awareness (and no usage) of Channel 4+ (the paid for ad free service) among participants but on the few occasions it was mentioned, there was often a reluctance to pay for another streaming service.

While it was understood that advertising is how C4C funds its content, the way advertisements are currently delivered can be seen to disrupt the viewing experience. Some more regular viewers were instead choosing to watch a given show on scheduled broadcast TV, but delay sitting down to watch so they could then rewind and fast-forward over the ads, or else were recording content and watching later.

A further irritation with advertising on the streaming service was that if a viewer wanted to rewind to a part of the programme that was before the ad-break, they would be forced to watch it again. The same was true if fast forwarding, although this seemed slightly less annoying to participants given that they hadn't watched that segment.

It puts you off watching if you know you've got adverts every 10 minutes or so... A lot of the time the ads are the same every single time and I don't pay attention.

(Female, Sutton Coldfield, 18-21, ABC1, light C4C user)

There is low awareness and usage of the Channel 4's YouTube channels or content

While the minority of typically younger adult audiences (i.e. those in their mid-30s and younger) recalled watching clips of C4C content on YouTube, many were unfamiliar with YouTube as a channel for C4C content. Where content had been viewed it tended to be that it had appeared in their feeds, or

they were following particular programme titles without necessarily being aware of the C4 Entertainment YouTube channel.

However, YouTube and social media clips were seen as a good way to watch or rewatch clips of favoured shows. Clips from favoured comedies and/or storylines in shows, such as *Educating Yorkshire* or *24 Hours in A&E (or Police Custody)* were seen to work well in this format. This type of content was seen to deliver easy to view, low effort, and low investment consumption.

The concept of using specific Channel 4 entertainment-based channels as a destination within YouTube could feel somewhat alien to younger audiences. This largely reflected the way they were using YouTube and social media to view content at present: following people and/or the next recommendation rather than seeking out particular sites. Clips which are viewed from broadcast TV shows were often watched after being shared by others as well as being recommended in their feeds in keeping with the more spontaneous and less scripted feel.

In addition, there was also little familiarity with YouTube as a platform for watching a mainstream TV channel. Younger audiences consumed the majority of YouTube content in a more purposive way which was felt to be fundamentally different in its approach from how they watch scheduled linear TV (which was more for background accompaniment). Content made specifically for YouTube and social media content was often liked for feeling more organic and 'bottom up', made by content creators and familiar YouTubers/influencers rather than (appearing) professionally scripted or produced.

People go to YouTube because it's less manicured and less produced [...] it's coming from a person specifically, so if you are watching a show on YouTube, it's a whole different thing, I think.

(Male, Glasgow, 22-34, C2DE, light C4C user)

However, on seeing programming content by known (and authentic) YouTubers such as Chunkz, it caused reappraisal among many younger participants. This type of content suggested to viewers that the C4C YouTube content might not just be clips of existing broadcast media shows, but had the potential to be content developed for video sharing and social media platforms. However, while this had the potential to pique younger audiences' interest, they also acknowledged that the challenge would be promoting any content to them so that they came across it or sought it out.

I'm pretty sure some of the content is great but I am just not aware of it, they don't seem relevant as I'm not even seeing snippets of things on social media...and ultimately that is where I do a lot of stuff on.

(Female, Glasgow, 22-34, C2DE, light C4C user)

I was not expecting that they had all their documentaries on YouTube and that is really good because I can watch YouTube when in the gym. I thought that was really innovative that they put the entire content out there rather than just teasers.

(Male, Cardiff, 35-54, ABC1, medium C4C user)

5. Attitudes and perceptions of the Channel 4 brand

Section key findings

This section focuses on audiences' perceptions of the Channel 4 brand, its brand positioning and its brand identity.

- The varying degree of usage of C4C content and services means that there is no consistent understanding of the Channel 4 brand and it is unclear for many who it was aimed at.
- The wide range of content available is seen both as a strength, in that it had 'something for everyone', and a weakness, in that it didn't seem to be associated with a particular genre.
- The Channel 4 brand has less resonance with younger audiences, due to lower levels of viewing. However, brand perceptions are much stronger and clearer among older audiences where there is greater awareness of C4C content. Older audiences have also grown up with the brand and see it as the 'challenger' channel of the past.
- Parents and children did not typically associate Channel 4 with providing content aimed at younger audiences. Parents see Channel 4 as a "15+" channel because it is associated with risqué or more adult content and children simply do not see it in their consideration set.
- C4C content and services are seen as offering a genuine counterbalance to the 'more establishment' tone of the BBC, and the more mainstream, 'for everyone' content of ITV. It is also felt to be more authentically diverse than other PSBs in its content related to race, gender identity, sexual orientation and disability.
- However, there is some sense that Channel 4 had become more mainstream over the years and its identity had become somewhat diluted as a result (often driven by perceptions of repeat programmes and formats).
- A key point of difference compared to SVoDs is recognised to be the Britishness of C4C's content, which many participants value.

There is little sense of a consistent brand identity which meant the intended target audience of Channel 4 is unclear for many

Overall, participants typically believed that the target audience was 'younger' but not 'young'. Some, particularly those aged in their early 20s or younger, saw it as for slightly older audiences. This was in part due to C4C's content and services being predominantly associated with scheduled linear TV channel(s) and a 'catch-up' service which are fundamentally felt to be aimed at, and the domain of, older audiences. The suggestion was therefore that it was aimed at those in their mid-20s and above. Some of the youngest audiences even saw Channel 4 as more for their parents' generation or above, particularly as for their 'mum', largely because of media behaviours observed in their own homes.

Others, particularly older audiences, tended to see it as 'for everyone', recognising that it is probably aiming slightly younger but still feeling it works for and is also aiming at them. There was acknowledged to be a wide range of content on Channel 4 and its portfolio channels from more youth focused shows to long running staples such as *Location, Location, Location*, *Come Dine With Me* and

A Place in the Sun which were believed to be aimed at older audiences. This was not necessarily seen as a bad thing, but it did make it harder to define a core target audience.

The perceived breadth of the content is seen as both a strength and a weakness

The 'something for everyone' feel of Channel 4 was seen as a strength by some in that everyone could find something they would enjoy if they knew where to look. However, it was also seen to risk making it harder to associate a particular type or genre of content with Channel 4. This was felt to be particularly true in the context of the SVoDs and social media that delivered more targeted content and the proliferation of TV channels on linear TV that were focused on particular types or genres of content. While C4C may have a stable of channels and services that offer specific types of content to different audiences, these were not well known. This breadth of offer combined with the lack of familiarity could dissipate the sense of a clear brand offer.

Those that were more familiar with C4C content and services talked about the two sides of Channel 4. On the one hand, it was felt to be known for comedy and easy watching/light-hearted – and sometimes boundary pushing – entertainment, whereas on the other it was also known for documentaries and hard hitting, grittier content. While many saw the lighter side of Channel 4's content as a strength, making it good for that more 'lean back' type of viewing occasion, there were those that felt it can at times stray into populist and somewhat voyeuristic content. These comments were often made about shows such as *Naked Attraction* or *Naked Education*. There was recognised to be a fine line at times, with audiences somewhat divided as to whether Channel 4 and its portfolio channels always remain on the right side of that line.

The lack of awareness and recall of content can risk diminishing the value of what the Channel 4 brand represents

The more diluted sense of Channel 4 as a brand was partly driven by the lack of knowledge and low recall of the content previously discussed. However, there was sometimes a perception among less heavy audiences that Channel 4 and its portfolio channels lack some of the more memorable, 'hero' content of other channels and services. This 'hero' content has the potential to create a halo effect around the wider brand. For example, while younger audiences were not typically watching large quantities of content on the BBC, some had started to build an impression of the BBC offering the occasional 'must watch', gritty drama. While, ITV was seen to have built a reputation among younger audiences for reality shows such as *Love Island* and *I'm a Celebrity Get Me Out of Here*.

I think it's more well known for its reality TV or documentaries. I wouldn't think of Channel 4 and think of a really good drama. I know they have started doing some – but for me, drama would be more BBC or ITV whereas C4 tends to be reality or documentaries.

(Female, Leeds 35-54, C1C2, medium C4C user)

These same strong associations did not necessarily exist among younger audiences for Channel 4 and even among lighter, older audiences, some of the 'hero' shows that were mentioned were ones that were long running and/or were aired some time ago. For example, *The Inbetweeners*, *Friday Night Dinners*, *Black Mirror*, *8 Out of 10 Cats*, *Shameless* or *Skins*.

In contrast, heavier users remembered more 'hero' content, including both the older shows mentioned above, and more recent shows such as *Derry Girls*. This also meant that their overall attitude was more positive towards the brand, in part driven by the halo effect that other audiences didn't experience.

Reminding audiences of the content that is shown across the C4C services today through prompting with examples could cause some reappraisal, with nearly all audiences (except the heavier users) having watched more current C4C content than they at first thought.

They need more high social media presence, making people aware of all the TV shows. Diverse range of TV shows that appeal to everyone.

(Male, Sutton Coldfield, 18-21, ABC1, Light C4C user)

The Channel 4 brand has less resonance with younger audiences

Given the viewing habits detailed in the previous section, it was not surprising that younger participants did not have a strong view of Channel 4 as a brand. That said, Channel 4 and its portfolio channels was noted as offering a wide variety of content and felt to deliver entertaining content, but there was a lack of any clear sense of the brand. Channel 4 was on occasion also associated with specific programme titles (such as *Gogglebox*, *The Inbetweeners* and *Hollyoaks*) or genres (such as films and documentaries), but there was less clarity around more specific strengths or weaknesses of the brand. This further reinforces that, for this age group, Channel 4 would not be rejected but would also not be a brand with strong relevance in their media lives. That said, a minority also felt that it was boring.

However, older audiences have a much clearer understanding of what Channel 4 and its portfolio channels represent

Those who had grown up with Channel 4 and remember it as the 'challenger' channel of the past tended to have stronger feelings of affection for, and a clearer sense of, the identity around Channel 4. For these audiences, Channel 4 was seen to have offered a genuine and much needed alternative to the established broadcast brands as they emerged into adulthood.

I'd say Channel 4 is for our age. Younger people aren't watching Channel 4 or (the) BBC – they're watching YouTube and Netflix.

(Male, Leeds, 35-54, C1C2, medium C4C user)

For slightly younger audiences (in their mid-20s+) C4C content was watched more heavily at a certain point in their lives, for example, in shared or student households or when relaxing after school. For these audiences, Channel 4 had retained a clear identity and affection.

Among the slightly older audiences who had watched more heavily in the past, even if they were lighter users of C4C services today, there was a tendency to have a clearer understanding of what Channel 4 represents as a brand. These audiences also had greater awareness of at least some of the content available, even if it was not always spontaneously recalled. Among the heavier users, Channel 4 was typically highly valued. This group were able to both recall and watched a wider range of programme titles and tend to be using a mix of platforms and channels to consume C4C content.

Channel 4 has never been afraid to put controversial programmes on there they have never been afraid like Euro Trash, Big Brother, Naked Attraction... This is England that was very close to the mark on some things, during the 80s

(Female, Cardiff, 35-54, ABC1, medium C4C user)

A programme like Naked Attraction another [TV] channel wouldn't show, it's more adult in its content I always think with Channel 4... Its comedies feel more raw and grass roots as well maybe.

(Male, Glasgow, 22-34, C2DE, medium C4C user)

C4C services are not typically associated with providing content aimed at younger children

While there was generally not a clear consensus about who was the target audience of Channel 4, there was general agreement that Channel 4 and its portfolio of channels was not aimed at younger children (i.e., those under 15 years of age). This lack of association was present among both parents and children.

Parents tended to see Channel 4 as a “15+” channel because it was associated with risqué or more adult content, where there was likely to be swearing, nudity and adult themes. This meant that some of the content was obviously unsuitable for younger children, and also that it was perceived to be easier to stumble across such content on Channel 4 and its portfolio channels than it would be on the BBC or ITV (because C4C content was generally considered more edgy whereas BBC content, for example, was generally considered less edgy – so if a viewer didn’t know what a show was about, then there was a higher probability that a C4C show would be unsuitable than a BBC show). It was noted that there were clearly exceptions to this but suitability of content for children was not assumed.

Occasionally, parents and younger children were watching shows like Lego Masters together. The junior versions of some adult programmes met with a variable response. Junior Bake Off was sometimes watched as a family but suffered from low awareness. Other shows, such as First Teen Dates also suffered from low awareness, and some parents were not comfortable with the content because they seemed to be encouraging dating/sexualisation at too early an age.

Parents did mention some shows they could watch with older, typically secondary school aged, children. These included *The Great British Bake Off*, *Lego Masters*, *The Simpsons*, *Derry Girls* (although this was often viewed on Netflix), *Gogglebox*, *Taskmaster* (bleeped version for under 15s), US comedies in general (*The Big Bang Theory*), *24 Hours in A&E/Police Custody*, *Ackley Bridge* and occasional Film 4 movies.

Children aged 14 and under also didn’t associate Channel 4 with content aimed at them. Most have low awareness of Channel 4 and its portfolio channels, and of those aware, the majority were not aware of any content designed specifically for children and tended to see it as something aimed more at their parents or older people in general.

There were some exceptions to this, and the research identified some children who were watching C4C content, but this was a minority. The growth in SVoDs such as Disney+ had also meant that on occasion children who used to watch certain content on Channel 4 or on Channel 4’s streaming service were now seeking out this same content/type of content on SVoDs. A good example of this being *The Simpsons*.

Those children who were aware of C4C content tended to be exposed to it through their parents (who would often find a show, then encourage or oblige the child to watch it with them) or hear about it from their friends or on social media. They rarely sought out new content Channel 4’s streaming service in the same way they did on Netflix or Disney+.

I’ve maybe heard of E4 – that’s probably about it. I don’t really watch anything on it. I think there are comedies or something on it... Probably my mum watches Channel 4, the dramas.

(Girl aged 14, England)

I used to watch this thing in a UK school [Ackley Bridge]. It was really good, my favourite thing ever, but then it ended.

(Girl aged 12, Scotland)

Compared to the 2017 research, C4C content seems to have less appeal to 10-14 year olds

The 2017 research similarly revealed that C4C content was not always seen as suitable for children by some parents. Additionally, provision of content for children this age was relatively weak, and this area was singled out as one in which the corporation was seen by audiences as underperforming. However, the 2017 research also identified regular Channel 4 and its portfolio channel viewers aged 10-14 who were very engaged with its content⁹. This contrasts to this recent research, where it was found that there was less engagement among this age group both with the channel and with its content brands. This suggests that C4C content may now be less relevant than it was to 10–14-year-olds six years ago.

Content on Channel 4 and its portfolio channels is recognised as distinct from other PSB channels

Those more familiar with its content were able to articulate that Channel 4 offers a genuine counterbalance to the ‘posher’ and ‘more establishment’ tone of the BBC, and the more mainstream, ‘for everyone’ content of ITV.

Channel 4 was acknowledged to have traditionally been known as being more risqué, progressive, and innovative in its content. It was also seen as prepared to push boundaries in a way that ITV and the BBC perhaps cannot get away with. Content could at its best be seen as more edgy, including airing more provocative and youthful comedies, several of which were seen to have developed cult status (as was mentioned in the 2017 research). On the other hand, some content on Channel 4 and its portfolio channels was liked for involving less cognitive effort than some BBC content, being easier to ‘dip in and out’ of and good for social and communal TV watching occasions where content could be discussed as you watched.

I think groundbreaking. I'd say so because, they tend to do something... like Gogglebox... nobody would have thought to watch people watching telly and it's obviously quite successful. And the different ways they do documentaries – like 24 hours in A&E and having the cameras there 24/7... it's quite different.

(Male, Leeds, 35-54, C1C2 heavy C4C user)

Channel 4 was also felt to be more genuinely diverse in its output than other PSB channels. Some were felt to be catching up, but Channel 4 was known to have championed diversity from the outset. As also seen in the 2017 research¹⁰, Channel 4 and its portfolio channels were felt to authentically represent diverse communities to the extent that it was sometimes taken for granted. This included representing audiences from different racial, gender identity, and sexual orientation groups as well as championing diversity through representation of disabilities. Interestingly, there were no complaints of tokenism or jumping on the diversity ‘bandwagon’ in relation to Channel 4 in the research. There were

⁹ The 10-14 year olds in this recent research were not exclusively regular or high C4C viewers so this is not a direct like-for-like comparison with the 2017 research findings. However, the recent findings indicate an overall weakening with the Channel 4 brand among this age group which was a result of significant changes in viewing habits since 2017.

¹⁰ Ofcom, Channel 4 Corporation Remit research, 2017.

occasional mentions of the *Paralympics* in this regard with some audiences positively associating Channel 4 with *Paralympic* coverage and others feeling this felt 'typically Channel 4', even if they were unaware of this before the research.

They do a lot for the LGBTQ community y'know with It's a Sin and Joe Lycett is a big advocate and he's on C4 and is quite prominent on social media. And going back to the documentaries, in Educating Yorkshire, I remember the kid with the stuttering. And the Paralympics, I feel like they do a lot for disabilities and so that's what I think they promote as a brand.

(Female, Belfast 55+, C2DE, medium C4C user)

I see the BBC as good for those big occasions and ITV good for popular entertainment, but C4 is a real all-rounder, it does big shows like Gogglebox but then niche documentaries that others won't touch and it's a bit of a rule breaker that pushes the boundaries, like the Prince Andrew thing they did during the (King's) Coronation and that reflects a large part of what the population is thinking.

(Female, Cardiff, 35-54, ABC1, medium C4C user)

Channel 4 was praised for being fun and light-hearted as a channel brand, as well as generally not taking itself too seriously. It was also seen as strong in terms of social commentary, being known for real life content which reflects 'our' lives in the UK and increases community understanding, as well as for shows involving social experiments. Channel 4 was also appreciated for its cutting-edge documentaries, which were prepared to challenge or take an alternative angle to other channels, shining a light on life and political issues in the UK.

While Channel 4 is felt to be distinct from other PSBs, there is a sense that it is becoming more mainstream and less edgy

Criticisms of Channel 4 and the portfolio channels' content tended to focus on repetition – too many programme repeats and repeated formats, with different variants of the similar shows – and as previously mentioned, too many repetitive adverts. Similarly, Channel 4's streaming service in particular was felt to rely heavily on long running shows. These shows were often highly valued, but it could make the offering feel somewhat similar and open Channel 4 up to the criticism that there was not enough new or distinct Channel 4 content. Audiences could sometimes recognise that there may be newer content than they were aware of, but this content struggled to cut through unlike the more familiar, long standing programme titles.

As a result Channel 4 output was sometimes felt to be less innovative and less edgy than in the past, with some viewers suggesting it is perhaps not as distinct in its identity from ITV and the BBC as it once was. It was also acknowledged, however, that this could, at least in part, reflect how the BBC and ITV have become more youth focused than they once were as all TV channels strive to compete with the youthful and boundary pushing content that can be found on the SVoDs. It was recognised to be harder than ever to stand out in the highly competitive media landscape where the viewer's choice overload is a bigger issue than in the earlier days of Channel 4.

The easy, light entertainment style content that some know the channel for could be seen as 'comfort' viewing rather than unmissable appointment viewing content. Channel 4 was also sometimes seen as not as strong on drama as other channels and services. However, some heavier viewers commented that they have noticed some more recent improvements in this area.

It's a mixed bag for me with Channel 4. I kind of think it's a bit all or nothing. When you highlight things like Big Breakfast, 24 Hours in Police Custody and there has been stuff in the past that I've watched and loved... things like The Handmaid's Tale, Married at First Sight and then it just sort of stops...

(Female, Leeds, 35-54, C2DE, medium C4C user)

Even among the slightly older and heavier viewers, there was sometimes a sense that Channel 4 had lost some of the edge it had in the past. More than just resulting from changes in the competitive landscape, they suspected that Channel 4 is not making as much clever or edgy content as they used to, particularly the ground-breaking British comedies it used to be known for.

These audiences could fondly recall the genuinely 'edgy' and distinctive comedies of the past. It was of note that many of the programme titles that were used to illustrate Channel 4's distinctive and edgy credentials were the same ones that were listed in the 2017 report into C4C's remit. There was a suspicion that Channel 4 is producing more content with a populist tone, including relying too heavily on reality style content. As alluded to previously, for a minority, Channel 4 could be criticised for straying into somewhat 'tacky' content, with occasional mentions that Channel 4 and the portfolio channels was becoming known for 'naked shows', perhaps as a means of boosting ratings.

It is the edgiest out of our terrestrial channels but not as edgy as it used to be. Our tastes are different now, you can get away with a lot more now than you used to, the BBC and ITV are quite happy to have swearing now whereas before they wouldn't do it.

(Male, Cardiff, 35-54, ABC1, heavy C4C user)

As a result, in terms of fulfilling the range of media need states, some believed there to be fewer current or new shows that provided social currency and 'exciting and challenging' content when compared to some of the Channel 4 shows of the past.

In an increasing competitive video-on-demand environment, Channel 4 and its portfolio channels' provision of authentically British content is still valued and seen as a key point of differentiation against the SVoDs

Services such as Netflix were felt to major on producing younger and edgier content and were seen as able to do this in volumes and with budgets that were perceived difficult for C4C services to compete with. These competitor services were sometimes seen as encroaching on C4C services' traditional territory.

However, a key point of differentiation when compared with the SVoDs remained the amount of authentically British content, discussions of British issues, and the quirky British humour that overseas comedies were seen as unable to replicate. While the Britishness of C4C content is perhaps not as marked as for other PSB channels such as the BBC and ITV (due to the high volume of imports), it was still seen as a relative strength of the channel. The issue of 'Britishness' seemed to be quite nuanced. The C4C content was seen to do a good job of portraying life in Britain (whether it was gritty or comedic) and producing programmes with British sensibilities and attitudes. However, Channel 4 as a brand and the content show across C4C's services was not seen as being as 'establishment' as the other PSBs in its content. Its coverage of the coronation of King Charles III was seen as an example of this.




C4 offers British TV like 24 hours in A&E or Police Custody, and reality TV shows, over other channels. I think the public would miss it, even things like Gogglebox, especially an older generation as they rely on TV and would miss it a lot more.




(Male, Sutton Coldfield, 18-21, ABC1, heavy C4C user)

In terms of the individual television channels, Channel 4, E4 and Film4 have the strongest identities

Channel 4 was seen to have the strongest identity among the channels, alongside E4 and Film4. The other service brands were lesser known. In general, there seems to have been a dilution in the clarity of the image of some of the Channel 4 portfolio channels since the previous research conducted in 2017. It is likely that the increase in on demand viewing has at least contributed to this, given that viewers claimed to be watching more via the Channel 4 streaming service, where the individual service brands were less apparent. Even in 2017, this trend was identified among the younger audiences, where it was reported that younger audiences tended to display a less detailed knowledge of linear channel brands, while older viewers were more guided by the long established 'main channels'.

The different perceptions by Channel 4 and its portfolio channels are summarised in the table below:

	<p>This was still seen as the 'main channel' and the showcase for the variety of C4C content. The breadth of content was felt to make it harder to know what to expect from the channel at any one time, outside of the 'heavy user' audiences who were more familiar with the schedule. This could make unplanned watching of the channel more difficult.</p> <p>Overall, the channel was felt to contain a mix of more 'lean in' and escapism/background content, including a good selection high quality, more challenging, documentaries.</p>
	<p>E4 was perceived to be good for reality/light entertainment style content. As a channel it was typically seen as fun and 'younger', although it tended to be seen as aimed at those in their mid-20s and above rather than 16–21-year-olds. Among those in their 20s, the channel sometimes had fond associations with student years. Overall, among all age groups, it was seen as good for escapism and background viewing.</p>
	<p>Film4 was respected for having some 'good films' on it; even though they were typically not the latest it was felt to be a reasonable selection. The occasional parent mentioned it could work well for early evening family viewing, rather than trying to negotiate what to watch with so much choice available from the SVoD services.</p> <p>The channel was felt to be hampered by the ads, as they could make watching a film feel disjointed and also overly long. There were examples of those in the research that were using Film4 for the occasional film that don't necessarily use other channels in depth and/or have a clear awareness of what C4C services offer more widely (including among those in their teens and early 20s). However,</p>

	it could be that the channel is more distinctive in terms of its content and more distinct from the other channels, and therefore easier to recall.
	There was generally low awareness of 4Extra and More4 as well as a degree of confusion between them. Heavier C4C content viewers tended to be more familiar. Overall, these service brand channels were suspected to include more repeats and easy watching content aimed at older audiences. For the majority that were not watching these channels there were only very vague associations if any.
	4seven offers content from the previous seven days as an alternative to watching online. No one in the research had heard of 4seven or knew enough about it to be able to comment.
	<p>There was very low awareness of 4 Entertainment, or any other C4C service on YouTube. The occasional participant recalled seeing this on YouTube on prompting, as well as occasional mentions from those participating in the research who had been asked to seek out C4C content using a platform they did not typically use.</p> <p>Those who had visited C4C's services on YouTube were sometimes surprised and impressed by the number of C4C services and sites that were available. There was felt to be a vast amount of content, clearly laid out. However, again, as a result, audiences tended to go for programme titles that were familiar (or familiar personalities/YouTubers) citing a sense that the channel could be overwhelming to navigate. Given the low recall, however, the research was unable to explore this in depth.</p>

Channel 4 News retains a distinct identity among its viewers but is not necessarily reaching the youngest audiences

Not everyone associated Channel 4 with the news in the way they did with the BBC, Sky or ITV. This was particularly true among the youngest audiences.

However, Channel 4 News had some loyal fans who felt that it delivered the news in a way that connected with them more than other broadcaster news services, making it their go to service for news. Among those watching the news on Channel 4, it was felt to be an unbiased and trustworthy source of news.

Overall, Channel 4 News was associated with over 30s audiences but that was more reflective of who was felt to be watching TV news than the delivery of the news itself. The TV format of the news was felt to be suited to slightly older audiences who would be prepared to sit down and engage in a way younger audiences were not. No one was actively watching or spoke about the news on YouTube, but younger audiences were tending to consume news (if at all) via social media or news apps.

The delivery of the news itself in terms of reporting style and format was seen to be younger and more progressive than on ITV or the BBC. The style was appreciated for being more informal and down to earth, and the reporters were praised for not being afraid to hold those seen to be in positions of power to account. It was felt that Channel 4 News was prepared to go where the BBC and ITV news would not (and maybe could not), for example, when interviewing politicians or talking about political

issues. Channel 4 News was welcomed for not seeming to need to toe the line to the same degree or be as formal as other TV news services.

Channel 4 is good for breaking hard hitting news, and not afraid about what the public think whereas the BBC is always thinking about what the public think.

(Male, Cardiff, 35-54, ABC1, medium C4C user)

Unlike the rest of C4C content, which was seen as more accessible from across the socio-economic and educational spectrum, Channel 4 News was seen as aimed at a more educated audience and for those that wanted to be intellectually challenged.

The high favourability of the Channel 4 News among its core audience was consistent with the findings from the previous 2017 research.

6. Perceptions of Channel 4's delivery against current priorities

Key section findings

Having explored perceptions of C4C services based on audiences' own viewing experience, the research then moved on to understand how the brand was seen in relation to its role as a public service broadcaster (PSB), and hence its wider role in society.

- Channel 4 was not spontaneously seen as a PSB, therefore most participants didn't see Channel 4 as having a specific role in society in the same way that the BBC does.
- Once Channel 4's role as a PSB was made clear to participants, they tended to be positive towards it having a role in society, although the strength of feeling varied considerably.
- When informed as part of the research process, there was general approval of the requirements of C4C's PSB role as noted below in relation to four statements that were used as stimulus in the research (highlighted in bold below):
 - **Delivering programmes and services covering a wide range of subjects and meeting the needs and interests of many different audiences** – having something for everyone was welcomed, though was also seen to run the risk of not fully meeting the needs of any one audience
 - **Owning a series of TV channels, a streaming service and a YouTube channel** – it was expected that any modern provider should be multi-platform, and provision of a YouTube channel was welcomed
 - **Free to air, with a free streaming service funded by advertising** – providing a free service was seen as important and altruistic, although ad-based funding was seen as frustrating within Channel 4's streaming service
 - **Programmes commissioned from independent production companies/using external producers in the UK** – those over 34 tended to be more positive towards this requirement, whilst younger audience were more ambivalent
- Channel 4's specific remit was also felt to have value in today's media landscape. At a broad level, it was still seen as valuable to have a broadcast alternative to the BBC and ITV even if this role was seen as less important than it once was given the increase in choice available.

Channel 4 was not understood to have a specific public purpose in the same way that the BBC was understood to have

Overall, most audiences didn't see Channel 4 as having a specific role in society in the same way that the BBC is felt to have. When asked this question, audiences often struggled to understand what was meant. In large part this was because Channel 4, similar to ITV, was not spontaneously seen as being a public service broadcaster (PSB) and was likened more to other commercial channels supported by advertising revenue. This seemed to be driven by the fact that the BBC does not have adverts and/or that it is funded directly through the licence fee, therefore there was a greater sense of public (and personal) ownership of the BBC.

I wouldn't see Channel 4 as having a 'role' – I just see it as one of the British TV channels...The big two channels, BBC, ITV, are known for news, Channel 4 is an entertainment channel or reality channel.

(Female, Sutton Coldfield, 18-21, ABC1, Medium C4C user)

Most participants were therefore surprised when informed that Channel 4 is a PSB. The lack of association of Channel 4 may contribute to the sometimes-ambivalent attitude that audiences had towards it. When audiences spoke about the BBC, there was generally a greater strength of feeling, either negatively or positively.

This kind of relationship did not exist with Channel 4 to the same degree. As Channel 4 is funded by advertising rather than publicly funded via the BBC licence fee audiences didn't feel the same sense of ownership. This meant participants saw the channel as having more leeway to produce shows which audiences may not like or agree with, however, the lack of 'ownership' could also mean that there was often less value placed on it as a channel.

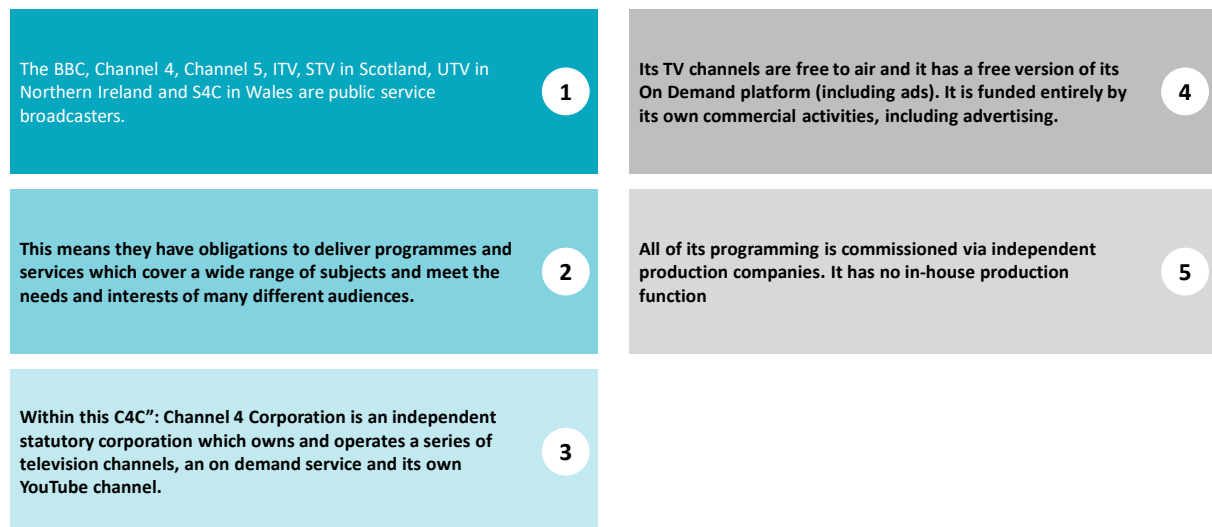
Given that Channel 4 was not seen as having a specific PSB role in society, it was difficult for participants to spontaneously judge whether it was achieving its media duties. This was exacerbated by the lack of knowledge that many had of its offering.

When informed, audiences were positive towards Channel 4 having a public service role

Once Channel 4's role as a PSB was made clear to participants, they tended to be positive towards it having a role in society, although the strength of feeling varied considerably. At one end of the spectrum were the heavier users who tended to be much stronger in their support for Channel 4's perceived public service role. At the other end were the lighter users, those in their early 20s and teens, where there was greater ambivalence towards Channel 4's role as a public service broadcaster.

Participants were shown a summary of Channel 4's requirements and duties as a PSB (see chart 2)¹¹.

¹¹ In point 5 below, for simplicity the stimulus referred to all of Channel 4's programming being commissioned via independent production companies in reality its programming is commissioned from external producers, but only 25% of (qualifying) programmes, on the main channel, are required to be independent productions as strictly defined.

Chart 2: Channel 4's requirements and duties as a Public Service Broadcaster

More specifically, there was approval of some of the specific areas associated with Channel 4's requirements and duties, again with different levels of enthusiasm and engagement as noted below.

Delivering programmes and services covering a wide range of subjects and meeting the needs and interests of many different audiences

Responses here also ranged from very positive through to ambivalence. In itself, the statement was difficult to disagree with, and audiences can appreciate a channel that provides something for everyone. This fits with their idea of what a PSB should do. For some, it also explained the disparate mix of content that Channel 4 produces.

Although set out in legislation for Channel 4 and therefore hard to avoid, the risk of having a wide range of subjects appealing to many different audiences was that Channel 4 can appear to be a 'jack of all trades' – without really appealing to or fully meeting the needs of any single audience.

Owning a series of TV channels, a streaming service and a YouTube channel

It was generally expected that a major, modern provider such as Channel 4 would be multi-platform. Audiences were less concerned about having a number of TV channels (especially younger audiences for whom scheduled linear TV is less valuable). On-demand was seen as vital by all audiences.

As noted earlier, there was general surprise that C4C had a YouTube channel, although this was welcomed, albeit at a low level (as people were not sure what content would be on it).

Free to air, with a free version of Channel 4's streaming service – funded by advertising

Providing a free service was seen as important and 'good' by some, and it was noted that this was especially important in the current economic climate. The fact that the service was funded by advertising was seen as bringing both benefits and drawbacks. On one hand, it enabled the service to be free and also gave Channel 4 more permission to be creative and controversial in the content it produced (because audiences were not paying for it). On the other hand, as discussed previously, advertising can be frustrating.

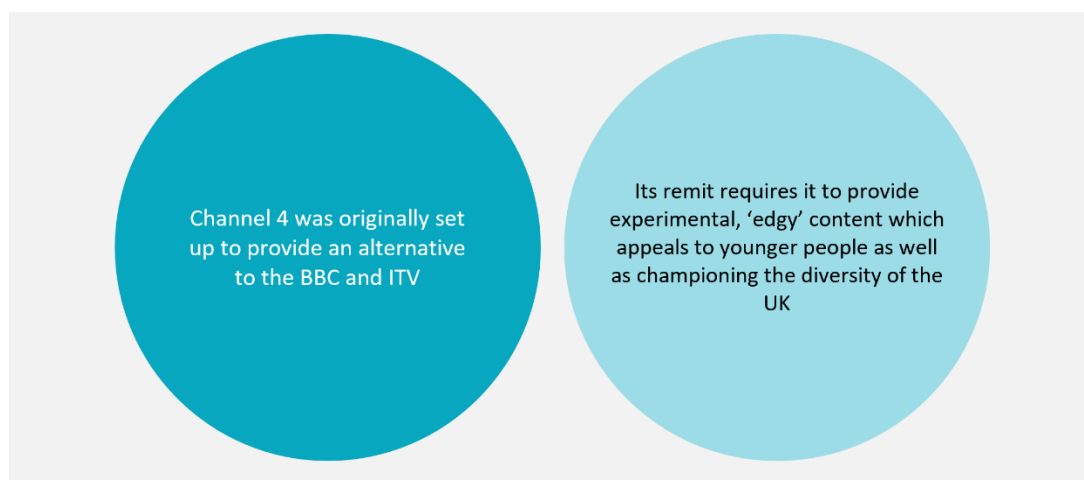
Programmes commissioned via independent production companies/ external producers in the UK

Some audiences, generally heavier users and those over 34 years of age, were positive towards the requirement for Channel 4 to use external producers/independent production companies rather than make its own content in-house. This was felt to show that Channel 4 was supporting the UK economy. Younger audiences were more ambivalent. However, it also raised the question of Channel 4's genuine creativity compared to other content providers, given it used other companies to make many of its programmes. It's very important to note here that audiences generally don't understand commissioning and how broadcasters/providers shape this.

Channel 4's specific remit is still seen as having a value in today's media landscape

Having discussed Channel 4's broad role as a PSB, the research then explored its remit, which has been paraphrased in the chart below. Overall, Channel 4's remit was still seen as having value to viewers.

Chart 3: Channel 4's role as a PSB



At an overall level, it was still seen as valuable to have a broadcast alternative to the BBC and ITV. Channel 4 was seen as having a different role from both these providers in that it can be more controversial, innovative and boundary pushing. Many examples were given of C4C content championing a minority viewpoint or including content that the other broadcasters would be too scared or 'establishment' to show. The fact that it was less 'establishment' was important to some participants, as that meant it was less tied to the accepted or mainstream news agenda, and therefore more accurate and less biased.

Many participants, including light users and younger viewers in general, believed that Channel 4's overall content remit as described here was still valid despite its market position having eroded somewhat due to the huge increase in choice of content available, including from SVoDs and social media. Having a channel that included more edgy content (which suggested something different or challenging) and appeals to youth specifically but without excluding other audiences was seen as positive. It was also seen as important to champion the diversity of the UK through authentically British content which brings us together and reflects us as a nation.

If Channel 4 are not doing that I am not sure who else would because as the BBC and ITV are quite straight-edged and other streaming services are privately owned so this is Channel 4's remit – this is where it should be.

(Female, Glasgow, 22-34, C2DE, medium C4C user)

Comparing it to Netflix C4 feels really relevant to British audiences and tailored to conversations that a British audience would have whereas Netflix really isn't. Doing topics that are really relevant to the UK or niche celebrities that are better known here.

(Female, Cardiff, 35-54, ABC1, heavy C4C user)

Some heavier users felt that Channel 4 was still consistently living up to this remit, whilst others felt that this was a description of Channel 4 only at its best.

Although this remit was seen as broadly positive, it should be remembered that many of those supporting it were not heavy users. And although they theoretically valued the fact that Channel 4 were fulfilling this, it hadn't translated into actual viewing.

If the alternatives are the BBC and ITV it definitely has a place and a role to play...if we are comparing it to the BBC and ITV I do think it is good that they are actively trying to produce content that is different because there is an audience for it whether or not people like me use it or not there is an audience for people that enjoy the content that is there and more often than not it is content that wouldn't be able to shown on the BBC and ITV.

(Male, Glasgow, 22-34, C2DE, medium C4C user)

It is challenging to retain conversations and perhaps it is a bit watered down but it is important to have a regulated broadcaster creating this kind of content so there is still a trusted place you can go to have these conversations and they are not just on YouTube.

(Male, Cardiff, 35-54, ABC1, medium C4C user)

Putting things out there like the negative part of the royal family, they cover gender, anxiety and things like that and are talking about subjects that aren't easy to talk about and they do that more than the BBC and ITV. They talk about things that need talking about, but others won't do that.

(Female, Belfast, 18-21, C2DE, medium C4C user)

Channel 4 would leave a gap for many if it no longer existed

Towards the end of the focus groups and depth interviews, participants were asked what they would miss if Channel 4 and all C4C content and services ceased to exist. This is a question used to help surface the elements that are really important and/or differentiating to participants.

The perceived gap that C4C content and services would leave depended on the level of engagement that audiences had with the brand.

Heavier users tended to talk about the gap that C4C content and services would leave in terms of what C4C services provided at their best. These users would talk about things that were often linked to Channel 4's remit. This included provision of a less establishment alternative to the BBC, championing diverse and challenging viewpoints, providing gritty, authentic, and truthful news and documentaries, and providing a wide range of good quality programmes for free. They would also mention the fact that many of the programmes were overlaid with a sense of Britishness (albeit often a more edgy, less mainstream one) that some competitors lacked. British comedies or documentaries were often mentioned in this context.

Unlike heavier users, lighter users tended only to talk about personal content favourites in terms of what they would miss – and often would mention one or two programmes (such as Taskmaster or Derry Girls), a specific genre (often British comedies, or unscripted UK focused content), or sometimes a specific viewing occasion (for example, lean-back comfort viewing of US comedies). They did not have the same sense of the overall role C4C content and services played in the media landscape, but they did feel that they would miss having this additional choice available for the content they valued.

[If C4C no longer existed] we'd lose the local representation from things like Derry Girls, and the variety of content.

(Female, Newry, 17-18 ABC1, light C4C user)

Something that opens your eyes and makes you see things differently... that is a bit different and that asks questions, and that is where I would go to for something a little bit different.

(Female, Belfast, 18-21, C2DE, medium C4C user)

C4 offers British TV like 24 Hours in A&E or Police Custody, and reality TV shows, over other channels. I think the public would miss it, even things like Gogglebox, especially an older generation as they rely on TV and would miss it a lot more.

(Male, Sutton Coldfield, 18-21, ABC1, heavy C4C user)

I'd miss all the quirky stuff like the Rise and Fall, The Circle, Scared of the Dark. They're all things that I've really enjoyed watching.

(Female, Leeds, 35-54, C1C2, medium C4C user)

7. Perceptions of C4C services' future priorities

Key section findings

Following on from the discussions around perceptions and use C4C content and services and Channel 4 as a PSB, participants were then required to consider what Channel 4's future priorities should be going forwards. They reviewed a list of potential priorities based on Channel 4's remit and PSB duties as well as considering if any additional factors needed to be considered by C4C in the content and services it provides.

- Channel 4's desired future priorities are driven by a combination of personal drivers (including brand affinity, genre preferences and political leaning) overlaid by life stage specific drivers.
- Three life stages can be identified, which broadly equate to participants aged 16-21, 22-34 and over 34. Differences by these life stages are:
 - **16–21-year-olds** see provision of escapist, exciting and challenging content as key priorities for C4C content. They tend to be more interested in international content than other age groups and are more likely to want C4C content to prioritise the types of content that appeal to older teens and young adults.
 - **22–34-year-olds** are more focused on ensuring that Channel 4 produces content that helps them understand the UK and the world, and their place within it, as well as reflecting the diversity of living in the UK.
 - **Over 34-year-olds** are more focused on provision of lean back content and supporting UK programme makers. This group also want content to help keep them informed about the UK and are the most interested in news content.
- Having relevant delivery platforms and being different to other providers are seen as priorities for all life stages.
- Satisfying a wide range of different sporting and other leisure activities is a low priority for all life stages, except for the Paralympic coverage which is very much associated with Channel 4.

C4C's future priorities for its content and services varied by life stage

During the discussions around the future direction of C4C's content and services it became apparent that priorities were driven by a combination of their own personal preferences, overlaid by certain issues or drivers that were common to their life stage.

In terms of the influence of life stage, the research identified three main life stages: 16-21-year-olds, 22–34-year-olds, and over 34-year-olds which appeared to have an impact on preferences. The life stages broadly equate to age, but 'life stage' is a better term as the age ranges sometimes overlap. For example, a 22-year-old who is still at university may be more similar to a 16-21-year-old than a 22-year-old who has been working for a year.

16–21-year-olds see provision of escapist, exciting and challenging international content as key priorities

People in this life stage tend to be more inward looking and are the least outward looking. They're emerging from childhood into adulthood and, as such, are looking to find their own identities and understand who they are as people. Young people in this life stage often have little personal responsibility and are often being cared for and supported by their parents or guardians.

Their main viewing platform is often social media in the shape of TikTok or Instagram, and much of their viewing is on smartphones. They are most likely to be 'on demand native', and streaming services tend to be their second most used platform.

This cohort wanted C4C services to prioritise content that entertained them and enable them to unwind and escape. When devoting the time to watching more 'lean in' content they tended to watch exciting, high production value content such as *Stranger Things*, *Squid Game* and *Money Heist* or other shows with social currency at the time.

They also tended to be more interested in international rather than UK or British content, partly because this was often seen as being the best in terms of plots, sensationalism, special effects, originality and so on but also because of their more international outlook.

They wanted C4C services to provide a wide range of programmes that appealed to different cultures and interests – this was often seen as a need to both produce more content that was relevant to them, and to promote it better.

They were also more likely than others to want C4C services to prioritise the production of content that appealed to older teens and young adults – effectively their own age group. It should be noted, however, that most thought they should focus on older teens (15+) rather than older children.

On the other hand, given this life stage's inward focus, it's not surprising that they were less interested in prioritising the provision of trustworthy and accurate news. Linked to this, they were also less interested in programmes that helped them understand what was going on in the UK and the world. In both instances, the issue was less about C4C content and services, and more about their lack of interest in these subject matters.

They were also least interested in supporting UK programme makers – again, it was simply an issue they didn't really care about.

22–34-year-olds are more focused on ensuring that CC services produce content that helps them understand the UK and the world, and their place within it

This life stage has transitioned from the inward self-focus of the under 22s to having a more societal and outward looking perspective. This is due in part to the fact that they now have more personal responsibilities as they enter the world of work and/or move away from home; things like inflation, the cost of living, and the wider economy become more important.

They tend to be using a mix of streaming and some social media, with limited use of scheduled linear TV for certain use cases (such as unscripted reality, background viewing or sports).

In terms of C4C services' priorities, this group was more likely to want to see people like them, and their values, reflected in front of the camera. They were also more likely than the younger participants to want C4C services to prioritise content that helped to keep them informed about the UK and the world, and their place within it, either through drama, comedy, or factual programming. The key thing they wanted here was the programming to be engaging and innovative.

They also wanted C4C services to prioritise content that reflected the diversity of the experience of living in the UK today – which meant covering all diverse groups in a way that was meaningful, rather than tokenistic. As with the younger life stage they also wanted C4C services to provide a wide range

of programmes that appealed to different cultures and interests. However, they were least interested in supporting UK programme makers compared to the other potential priorities shown, although did not reject this concept overall.

Over 34-year-olds are more focused on provision of news, lean back content – and supporting the UK economy

The over 34-year-old life stage tends to have the most responsibilities, such as dependent children, mortgages and bills. They tend to be the most societally focused. For example, the economic situation in the UK is more important to them.

This life stage is the most likely to be using scheduled broadcast TV more regularly as well as BVoD catch-up services. However, many have embraced SVoD as a major viewing platform, and some are using YouTube.

In terms of C4C services and content priorities, this age group was similar to the 22-34-year-olds in that they also wanted content that helped to keep them informed about the UK and the world, and their place within it, either through drama, comedy or factual programming. Linked to this they also wanted news that was trustworthy, accurate and accessible. The latter point was seen as a point of difference between Channel 4 and other broadcast TV news in that the news on Channel 4 was seen as more relatable and targeted to their age group, whereas BBC and ITV TV news was perceived to be aimed at an older audience.

Unlike others, this audience was more likely to want C4C services to continue to show content that was good for lean back or background accompaniment, as well as content that challenged or excited them and required active headspace.

More than any others, the over 34s were keen for Channel 4 in its role as a PSB to prioritise supporting UK programme makers throughout the regions of the UK.

They were least interested in Channel 4 and its portfolio channels prioritising content that specifically appealed to older teens and young adults. This seemed to be driven in part because content for this age group was seen to be provided in abundance by other providers, and also, simply, because such content was not relevant to them.

Having relevant delivery platforms and being different from other providers were priorities for all participants

Although there were some differences, most audiences saw the following as priorities for C4C content and services:

Delivering and promoting content across a range of platforms – including on its streaming service, YouTube and social media

This issue was seen as a priority by most participants. Effectively, they wanted content to be delivered to them on the platform or platforms that they preferred to use. Furthermore, they wanted C4C services to promote its content on those same platforms so that they would be made aware of programmes they might enjoy.

Generally, Channel 4's broadcast offering was seen as satisfactory, and simply needed to be sustained. However, many commented that they wanted Channel 4 to prioritise improvements to its streaming service. Social media was mentioned both in terms of watching short form content and being used to promote other C4C content. Many felt that that C4C services should continue to put content on YouTube, but needed to publicise it more, and also ensure that it includes a combination of both general content and content produced specifically for the YouTube environment.

Programming that has something different about it compared to other channels

From a viewer perspective, the above was a simple and logical pre-requisite – Channel 4 (or any other channel) must be doing something different compared to other channels to ensure that it continues to be seen as relevant and worth spending time on.

Less engaged viewers saw this as an area where Channel 4 needed to improve, as they had no real depth of knowledge of what it offered and therefore tended to see it as fairly similar to other broadcasters.

Satisfying a wide range of different sporting and other leisure activities was seen as a low priority by all life stages

As with the above points, most audiences saw the following as a low priority for C4C content and Channel 4 as a PSB:

Programmes that satisfy a wide range of different sporting and other leisure activities

Channel 4 sporting content was valued by some audiences from all life stages. However, Channel 4 was not seen as ‘best in class’ at covering sports events, and sports coverage in general was not seen as a particular strength of Channel 4. Furthermore, there were many other providers, ranging from the BBC and ITV through Sky Sports to Amazon Prime, who also covered the more mainstream sports. Therefore, if Channel 4 did not cover a certain sporting event, it was very likely that another provider would pick it up. The key exception to this was the more ‘niche’ sports which Channel 4 was seen to cover and were less likely to be available elsewhere. However, overall it was not seen as an area that Channel 4 should prioritise

The exception here was the Paralympics. This event seemed to transcend sports – and was very much associated with Channel 4’s and more widely C4C content’s perceived promotion of diversity and inclusion.

Most people struggled to recall any programmes covering leisure activities, with shows such as The Great British Bake Off being seen more as reality TV or light entertainment than leisure.

Appendix I: Sample and methodological details

1.1. Pre-tasks

1.1.1. Online workshop participants

Workshop participants were asked to complete a pre-task exercise prior to attending the online sessions. All tasks combined took between 6 and 7 days and consisted of three distinct parts. Responses from the pre-task were discussed during the workshop.

The first section of the task consisted of a 3-day media diary over WhatsApp in which participants recorded all the media they had consumed throughout the day prior to going to bed. Participants were asked to include any programmes watched on BVoD or SVoD services, which channels or services these were, as well as any social media viewing (such as YouTube, TikTok, and Snapchat). In addition, they were asked to mention which devices they had used, what time(s) during the day they were watching, who they had watched the programme with (if anyone), and if they had been partaking in any additional tasks during viewing (such as cooking, cleaning, or viewing other content). They ended by reflecting on why they had chosen this content.

The second section of the task began with a brief task in which participants recorded word associations with Channel 4 content. This was followed by 2 days of viewing content on a Channel 4 SVoD channel or the Channel 4 streaming service that the respondent had not previously watched between the hours of 17:00-24:00. The participant was then asked the same questions they had received in the first week, e.g. relating to devices, times of day, group viewing, and any additional tasks done during the viewing period. In addition to these, the participant was asked to review the content they had watched on how engaging it was, and on their feelings towards the choice of content available to them. Participants were also asked to review the BBC's choice of content, and to compare it with what they saw available on the C4C platforms.

The final section of the task consisted of a reflection on the previous 2 days of changed viewing behaviour. Participants detailed any changes to their viewing behaviour they had noticed, and whether they experienced any pleasant surprises or disappointments in relation to viewing the different Channel 4 content.

Participants in the reconvened depth interviews were asked to reflect on their previous thoughts and experiences, but were not tasked with any additional pre-task.

1.1.2. Family depth participants

Family depth participants were asked to complete a pre-task exercise prior to attending the in-home sessions. All tasks combined took 3 days and consisted of three distinct parts. Responses from the pre-task were discussed during the depth interviews.

The first part of the session took place over the first 2 days, and consisted of a similar media-diary as was prescribed to the workshop participants for the first 3 days. Family depth participants were required to record all the same media viewing habits as the workshop participants, and additionally to include any occurrence of viewing by and with their child.

For the third day, participants were asked to participate in two tasks. The first was a reflection on what the participants noticed about their and their child's viewing habits over the previous two days. The second was for their child to create a physical or digital collage depicting their favourite TV programmes, and to share this collage with researchers.

1.2. Online workshop sessions

The online workshop sessions were conducted across the UK from May 15th to June 5th, 2023.

The structure of the sessions differed depending on the age of the participants. For sessions with 16–18-year-olds, the duration was 90 minutes, with a target of 4 participants per session.

For older participants, the duration was 2.5 hours, with a target of 6 participants per session.

Precise details on each session are detailed in section 1.5. Participants were recruited to ensure a mix of C4C viewing habits (light to heavy C4C content consumption) and include those watching at least some linear TV as well as VoD/streaming services. All participants were smartphone users and non-rejectors of C4C content. Quotas were set on disability, life stage, gender, ethnicity, and socio-economic group. This ensured the research encompassed a wide range of participant demographics across the sessions.

The workshops were conducted with participants from a range of urban and more rural locations as follows:

- **England:** Leeds, London suburbs, Sutton Coldfield
- **Scotland:** Dundee suburbs, Glasgow,
- **Wales:** Aberystwyth, Cardiff
- **Northern Ireland:** Belfast, Newry

16 workshop participants were reconvened for a further online in-depth interview, lasting up to an hour, a week later, and asked to find new C4C content between participating in the workshop and the reconvened session. This gave them time to reflect on the topics discussed, share their more personal perspective, and explore any potential developments of thought. One participant was selected from each workshop to ensure a good spread by age, life stage and gender.

1.3. Online Family depths

In parallel with the workshops, 15 in-home family depth interviews, each lasting 1.5 hours, were conducted across the UK from May 24th to June 2nd, 2023. These interviews set out to explore media consumption in the family environment, including the role of C4C in their media lives.

Each session consisted of a mother or father and a child, precise details on each group are detailed in section 1.5. Participants were recruited to ensure a mix of C4C viewing habits (light to heavy C4C content consumption) and include those watching at least some linear TV as well as VoD/streaming services. All families were smartphone users and non-rejectors of C4C content. Quotas were set on gender, ethnicity, and socio-economic group, as well as by the child's age and school year, with children aged 10-15 eligible. This ensured the research encompassed a wide range of participant demographics across the sessions.

These interviews were carried out in either the same or nearby locations to the workshop sessions, with depths being spread across the locations as follows:

- **England:** Leeds, London suburbs, Sutton Coldfield
- **Scotland:** Dundee suburbs, Glasgow,
- **Wales:** Aberystwyth, Cardiff
- **Northern Ireland:** Belfast, Newry

1.4. Stimulus

In preparation for the sessions, the stimulus was developed in conjunction with Ofcom. The stimulus used in the sessions included:

- Images of brand logos for various SVoD, BVoD, and social media platforms, including (but not limited to) the BBC, iPlayer, Channel 4, Channel 5, Netflix, Disney+, Amazon Prime, HBO Max, TikTok, YouTube, Snapchat
- A word cloud amalgamated from each group's responses to the pre-task question, "What are the first 3 words that come to mind when you think of Channel 4/Channel 4 on demand?" which were then discussed as a group
- A list of positive and negative attributes of C4C as mentioned in the group's pre-task responses – which similar to the above were discussed as group
- A slide depicting the various C4C channel brands.
- A slide depicting images of various C4C content to serve as a reminder of the content available – content was selected based on the top Barb viewing figures for each age group.
- A showreel depicting clips of a variety of C4C content – based on a mix of Barb data and a spread of the different types of content available across C4C (with different shows shown to groups as relevant, e.g., by age range or nation).
- Slides depicting C4C's role as a PSB, a summary for the purposes of research of its remit and a list of potential priorities.

1.5. Sample

A total of 113 people took part in the research. Below is a detailed overview of the sample structure.

Face-to-face workshop sessions

Region	Location	Date	No of participants	Quotas
England	London Suburbs	25 May	4	16-18, female, year 12/13, AB, student, No kids
England	Sutton Coldfield	22 May	6	18-21, mixed, Uni – living away from home, ABC1 (parents), student, no kids

Region	Location	Date	No of participants	Quotas
England	London Suburbs	15 May	6	22-34, mixed, ABC1, full time workers, no kids, min half not living with parents
England	Sutton Coldfield	23 May	6	35-54, mixed, C2DE, full/part time workers, min 4 with kids
England	Leeds	25 May	6	35-54, mixed, C1C2, full/part time workers, min 4 with kids
England	Leeds	1 June	6	22-34, mixed, employed, C2DE, open, no kids, have own home
Scotland	Dundee & Rural	30 May	6	18-21, mixed, open, apprentice/employed, no kids
Scotland	Glasgow	25 May	6	22-34, mixed, C2DE, full/part time workers, no kids, min half not living with parents
Scotland	Dundee & Rural	22 May	5	55+, mixed, ABC1, full/part time workers, min 4 without kids or kids 18+
Scotland	Glasgow	31 May	3	16-18, female, year 12/13, C2DE, student, no kids
Wales	Cardiff	30 May	3	16-18, male, ABC1, C4 usage mix, student, no kids
Wales	Aberystwyth	31 May	6	22-34, mixed, employed, ABC1, with kids, have own home
Wales	Cardiff	5 June	6	35-54, mixed, employed, ABC1, full/part time worker, min 4 with kids
Northern Ireland	Newry	24 May	3	16-18, female, year 12/13, ABC1, student, no kids
Northern Ireland	Belfast	24 May	5	18-21, mixed, uni – living away from home. C2DE (parents), student, no kids
Northern Ireland	Belfast	30 May	6	55+, mixed, C2DE, full/part time workers, min 4 without kids or kids 18+

- Three to six participants per session
- Mixed gender sessions for older participants, single gender sessions for sessions with 16-18 year olds
- Overall disability/ sexual orientation/ religious profiles to reflect UK
- Ethnicity to reflect the areas we recruit in
- Mix of linear/VoD/ streaming use in each group
- All to have a smartphone
- Non-rejectors of C4C
- Mix usage of C4
- A mix of political leanings in each group

Reconvened online depths

Region	Location	Date	No of participants	Quotas
England	London Suburbs	16 June	1	16, female, year 12/13, AB, student, no kids
England	Sutton Coldfield	20 June	1	21, female, uni – living away from home, ABC1 (parents), student, no kids
England	London Suburbs	12 June	1	32, male, ABC1, full time worker, no kids, min half not living with parents
England	Sutton Coldfield	13 June	1	45, male, C2DE, full/part time worker, with kids
England	Leeds	16 June	1	42, male, C1C2, full/part time worker, with kids
England	Leeds	15 June	1	34, male, full/part time workers, C2DE, open, no kids, Have own home
Scotland	Dundee & Rural	7 June	1	20, male, open, apprentice/employed, no kids
Scotland	Glasgow	7 June	1	34, male, C2DE, full/part time worker, no kids, have own home
Scotland	Dundee & Rural	22 June	1	59, female, ABC1, full/part time worker, with kids 18+

Region	Location	Date	No of participants	Quotas
Scotland	Glasgow	15 June	1	18, female, year 12/13, female, c2de, student, no kids
Wales	Cardiff	19 June	1	18, male, ABC1, student, no kids
Wales	Aberystwyth	16 June	1	32, female, full/part time worker, mixed, ABC1, open, with kids, have own home
Wales	Cardiff	12 June	1	35, female, full/part time worker, ABC1, no kids
Northern Ireland	Newry	15 June	1	18, female, year 12/13, ABC1, student, no kids
Northern Ireland	Belfast	22 June	1	21, female, uni – living away from home. C2DE (Parents), student, no kids
Northern Ireland	Belfast	8 June	1	55, female, C2DE, full/part time worker, with kids 18+

Online Family depths

Region	Location	Date	Mix of participants	Quotas
England	Leeds	22 May	Mum, Boy	ABC1, C4 high/medium usage, child in year 5
England	Sutton Coldfield	1 June	Dad, Boy	ABC1, C4 high/medium usage, child in year 7
England	London Suburbs	25 May	Mum, Girl	ABC1, C4 low/no usage child in year 8
England	Leeds	30 May	Dad, Girl	ABC1, C4 low/no usage, child in year 10
Scotland	Glasgow	1 June	Dad, Girl	C2DE, C4 high/medium usage, child in year 5
Scotland	Dundee & Rural	1 June	Mum, Girl	C4 high/medium usage, child in year 6
Scotland	Dundee & Rural	1 June	Mum, Girl	C2DE, C4 high/medium usage, child in year 9

Region	Location	Date	Mix of participants	Quotas
Scotland	Glasgow	1 June	Dad, Boy	ABC1, C4 low/no usage, child in year 11
Wales	Cardiff	24 May	Mum, Boy	C2DE, C4 low/no usage, child in year 6
Wales	Aberystwyth	31 May	Dad, Girl,	C2DE C4 high/medium usage, child in year 7
Wales	Cardiff	30 May	Dad, Boy	ABC1, C4 high/medium usage, child in year 9
Wales	Aberystwyth	2 June	Mum, Girl	C2DE, C4 high/medium usage, child in year 11
Northern Ireland	Belfast	25 May	Dad, Girl	ABC1, C4 low/no usage, child in year 6
Northern Ireland	Belfast	31 May	Mum, Boy	C2DE, C4 low/no usage, child in year 8
Northern Ireland	Newry	1 June	Mum, Boy	C2DE, C4 low/no usage, child in year 10

- Mix of urban/ suburban locations.
- Mix of use of linear TV, VoD/Streaming
- All have a smartphone
- Mix of urban, suburban and rural
- Non rejectors of C4C

Appendix II: Glossary of terms

Outlined below is an explanation of some of the terms used within this report. It should be noted that these are not necessarily the language used by participants when describing these concepts. For the purposes of the discussion, we looked to reflect back the participants' own language wherever possible.

Broadcaster Video on Demand (BVoDs)	Broadcaster video on demand. These are video on demand services provided by broadcasters of linear TV channels. Examples of BVoD services include BBC iPlayer, My5 and ITVX. Such services are likely to include programmes previously broadcast on linear services and increasingly, programming that has not yet been broadcast or is only intended for the BVoD service.
Broadcast TV	Scheduled linear TV that is watched live as it is being broadcast, with scheduled times for each programme. Examples of linear TV channels include BBC One, ITV1, and Channel 4.
Subscription Video on Demand (SVoDs)	Subscription video on demand. These are video on demand services which require subscription. Examples include Netflix, Disney+ and Amazon Prime Video. For the purposes of this report, attitudes to advertising funded VoD services, other than BVoD's, (such as Pluto TV) were not specifically explored.
Video Sharing Platforms (VSPs)	These are online video services which allow users to upload and share videos with the public (e.g. YouTube or TikTok).
Light C4C user	In this report we refer to light C4C users, this is defined as participants who watch less than once a week
Medium C4C users	In this report we refer to medium C4C users, this is defined as participants who watch 1-2 times a week
Heavy C4C user	In this report we refer to heavy C4C users, this is defined as participants who watch 2-3 times a week or more
Media needs/'need states'	Media needs refers to the motivations and goals people have when they consume screen based media. These are often referred to as 'need states' and include needs such as 'entertain me', 'inform me', 'provide escapism', 'comfort me'. The states can be broadly divided into 'lean back' (where the content performs more of a background role) and 'lean in' (where the viewer is more actively engaged with the content).
'Lean In' Content	In this report we refer to 'lean in' content, this is a term to describe content that is watched in a more purposive and focused way e.g. the episode of a new series being viewed. It requires greater concentration and as such 'lean in' content is

<p>'Lean Back' Content</p>	<p>often more memorable for audiences and therefore spontaneous recall of programmes consumed in this way tends to be higher.</p> <p>In this report we refer to 'lean back' content, this is a term to describe content that is low effort consumption content that can be watched while doing other things, when too tired to fully concentrate on a given programme, or during shared viewing experiences where the conversation around what is being watched was part of the enjoyment.</p>
<p>Hero Content</p>	<p>Hero content is generally defined as shows that achieve a high level of cut-through, viewership and (sometime temporary) cultural relevance. Examples include <i>I'm a Celebrity</i>, <i>Get me out of here</i>, <i>The Inbetweeners</i>, <i>Squid Game</i>, <i>Line of Duty</i>, etc</p>



THANK YOU

STRAT7 Jigsaw,
a trading division of STRAT7 Limited
3rd Floor, 53 Parker Street
London WC2B 5PT
Tel: +44 (0)20 7291 0810
Web: www.jigsaw-research.co.uk
Email: info@jigsaw-research.co.uk

Registered in England no.: 7642707
Registered Address: 11 Soho Street
London W1D 3AD
VAT no.: 326 011 940

