

Dame Melanie Dawes
Chief Executive
Email: ChiefExecutive@ofcom.org.uk

Alex Mahon
Channel Four Television Corporation
124 Horseferry Road
London, SW1P 2TX

8 October 2024

Dear Alex,

[Channel Four Television Corporation's Statement of Media Content Policy 2023](#)

Please find enclosed our annual review of Channel Four Television Corporation ('C4C')'s Statement of Media Content Policy (the 'Statement'). These annual reviews are an important way in which we hold C4C to account for its performance in delivering its public service remit and media content duties.

As a result of the General Election, this letter and our review are being published later than usual. Thank you to your team for your close engagement on this work. The later timescale does however give us a chance to acknowledge the success of Channel 4's Paralympics Games coverage. The summer's Games fell outside the reporting period of the Statement, but I wanted to acknowledge the significant steps that you took to bring the Paralympics to the widest possible audience both on Channel 4 and Channel 4 Streaming, and through your innovative approach to content distribution on YouTube.

'Fast Forward' is a positive step in driving forward C4C's digital transition

Turning to this year's assessment of Channel 4's performance, we welcome the fact that you have responded to our call in last year's review to renew your digital plans for 2025 and beyond. Channel 4 must compete harder than ever for audiences and advertising revenue as you accelerate the transition to become a digital-first public service streamer by 2030. As a whole, the linear advertising market declined sharply over the past year, impacting all commercial broadcasters, and while BVOD advertising spend continues to grow strongly, this is not currently offsetting continued decline in traditional linear TV spend.

The aspirations set out in your *Fast Forward* strategy are an important development on the previous *Future4* strategy. But given these commercial challenges, we are keen to see more detail on how you are proposing to deliver and implement the high-level aims that you have set out, and in particular how this strategy will deliver for audiences right across the UK.

Viewing of broadcast television continued to decline significantly last year, particularly among younger age groups, with audiences increasingly watching content on demand. We are pleased that Channel 4 Streaming continued to grow strongly in 2023 with its highest ever reported streaming views and time spent. You have recently announced changes to the streaming experience on Channel4.com which will focus on increasing engagement and providing a better, more personalised experience to appeal to younger audiences.

C4C performed well against its remit and content duties in 2023

Ofcom's and C4C's research shows that audiences continue to rate C4C content highly for delivering programming that demonstrates innovation, experimentation, creativity and distinctiveness.

Many of C4C's top performing series in 2023 were popular returning formats. *The Great British Bake Off* and *Gogglebox* continue to be among Channel 4's most-watched programmes of the year. Notable new programmes which performed well in 2023 included *Partypgate*, *Chris Packham: Is it Time to Break the Law*, new format *The Piano*, and the Channel 4 Streaming-first comedy *Big Boys*. As you transition to a new digital-first commissioning strategy through *Fast Forward*, striking the right balance between tried-and-tested formats and innovating and taking risks on new commissions and formats which can drive strong delivery of areas of the remit will be essential.

In recent years we have frequently challenged C4C to do more for older children and younger adults and we were encouraged last year that you had responded positively to this with new initiatives. It is promising to see Channel 4.0 and the *Untold* strand perform well in 2023.

Channel 4 News makes an important contribution to the UK news landscape. This was demonstrated again in 2023 with your coverage of major international stories including the wars in Ukraine and Gaza alongside UK domestic issues. Against a rising threat of mis- and disinformation, *Channel 4 News*, alongside the other PSBs, plays an important role in delivering trusted and accurate news. Ofcom will be exploring these issues in our new Public Service Media review.

Specifically, *Channel 4 News* continues to distinguish itself in a crowded news landscape by delivering award-winning journalism for audiences in the UK and globally. At the BAFTAs in May 2024, *Channel 4 News* won in the News Coverage category for *Inside Gaza: Israel and Hamas at War*. *Inside Gaza* also picked up an International Emmy in September 2024. At the Royal Television Society Awards in February 2024 Secunder Kermani won Network TV Journalist of the Year, and *Channel 4 News* won Network Daily News Programme of the Year. C4C also picked up two awards for its *Dispatches* investigation into allegations against Russell Brand. *Channel 4 News* now broadcasts from London and Leeds, and we are pleased to see your plans for further expansion of the Leeds newsroom in order to support data-led journalism.

C4C has a strong commitment to on-screen diversity and continues to perform well in reflecting the cultural diversity of the UK. Programmes broadcast in 2023 such as *The Piano*, *Wonders of the World I Can't See*, and *Rosie Jones: Am I a R*tard?* were good examples of this, and through the 'Fresh Faces of 4' strategy you are aiming to build a sustainable pipeline of new talent that reflects the changing face of Britain. We were also pleased to see that C4C recently published a new set of commitments on workforce representation.

Turning to C4C's activities in the nations and regions over the last year, the attached report shows that although the total content budget declined in 2023, C4C invested £193 million across its TV portfolio on content commissioned from production companies based outside of London. I must highlight that during the consultation process on a new licence for Channel 4, which we have undertaken alongside our review of the SMCP this year, many stakeholders have raised serious concerns with us about C4C's delivery in the nations, your engagement with the production sector outside England and your commitment to this agenda. It is important that C4C is much more open and transparent about its impact in the nations, publishes regular data on your approach to commissioning in future, and takes steps to rebuild relationships and ensure a strong and ongoing presence in each of the nations. This will be an important area which Ofcom will monitor closely in the coming years.

Finally, in relation to C4C's performance this year, I would also like to acknowledge the success of Film4 in 2023. This has been acknowledged with multiple awards, with *Poor Things* and *The Zone of Interest* – both co-funded and produced by Film4 – winning six Oscars, including Best International Feature Film for *The Zone of Interest*.

We have prepared this year's report alongside our work renewing the Channel 4 licence

Following an extensive consultation process, we will soon publish a statement setting out our final decisions on the new Channel 4 licence. We hope that this will reassure audiences that they can look forward to the continued delivery of high-quality public service media from Channel 4.

As you set out in *Fast Forward*, the next licence period will be one of significant change for Channel 4 as it transitions from being primarily a linear broadcaster to a "genuinely digital-first public service streamer". While this transition will present challenges, it also brings opportunities to attract new audiences to Channel 4's content and to serve existing audiences in new and innovative ways.

I welcome your thoughts on any of the issues raised in this letter and the accompanying review. I am copying this letter and review to the Secretary of State for Culture, Media and Sport and the Chairs of the House of Commons Select Committee for Culture, Media and Sport, and the House of Lords Select Committee for Communications and Digital. We will also publish both documents on Ofcom's website.

Yours sincerely,

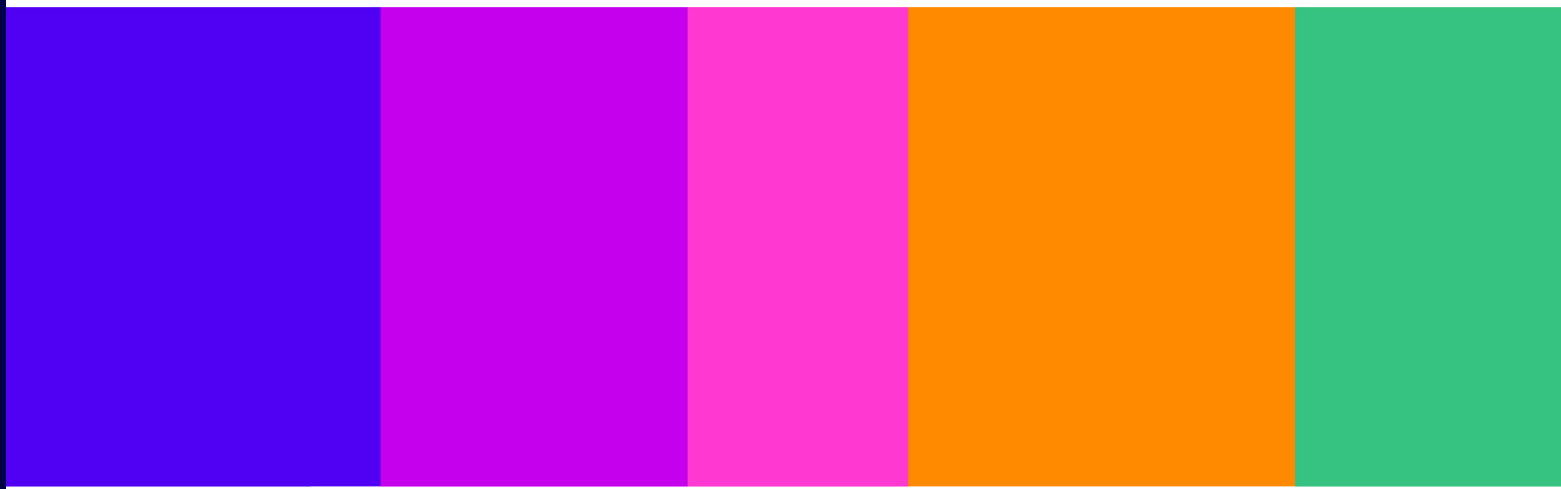
A handwritten signature in cursive script, appearing to read 'Melanie Dawes'.

Melanie Dawes

Channel 4 Television Corporation's performance in delivering its remit and content duties in 2023

Report

Published 8 October 2024



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1. Overview

What we have found – in brief

This document is Ofcom’s response to Channel Four Television Corporation’s (C4C) Statement of Media Content Policy (SMCP) setting out C4C’s plans for meeting its remit and media content duties in the coming year and reporting on its performance over the past year.

Overall, we have concluded that C4C performed well against its remit and media content duties in 2023, although we recognise that it has been a difficult year financially and the impact of this is likely to be felt into 2025 and beyond. In this year’s response we recognise in particular:

- The performance of C4C’s news and current affairs content. Viewers say they value C4C’s distinctive, trustworthy and accurate news. C4C had great success in 2023 with its hard-hitting *Dispatches* episode *Russell Brand: In Plain Sight*.
- The continued success of recent initiatives and content strands that C4C has brought in for younger audiences, for example the digital-first current affairs strand, *Untold*, and dedicated YouTube channel, Channel 4.0.
- The continued growth of Channel 4 Streaming, which reported a record year of viewing in 2023.
- The continued importance for C4C to ensure it is investing in commissioning and programming outside of London.

We said in our SMCP response [last year](#) that C4C must set out clearly how it will manage the ongoing transition to being a digital-first broadcaster, while continuing to deliver strongly against its remit and media content duties. Earlier this year C4C published its [Fast Forward](#) strategy, which sets out how it will continue its transition to becoming a digital-first public service streamer. Now that this strategy is in place, we expect to see more detail on how it will be implemented. We expect C4C to set itself targets as part of *Fast Forward*, as it did as part of its previous strategy [Future4](#), to hold itself to account for delivery.

2. About this review

Channel Four Television Corporation ('C4C') is a publicly owned, not-for-profit body, funded by commercial revenues. Its main channel, Channel 4, was launched in 1982 with the aim of extending the choice available to viewers, appealing to tastes and interests not generally catered for by other broadcasters and in doing so encouraging innovation and the development of the independent production sector. Over the years, C4C has launched a range of additional channels: E4, E4 Extra, More4 and Film4; the seven Box channels (The Box, Box Upfront, 4seven, 4Music, Kerrang, Kiss TV and Magic TV) and its on-demand streaming service formerly known as All4. In November 2022, C4C brought its portfolio together under the single brand of 'Channel 4'.¹

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

Under the Communications Act 2003, C4C must prepare an annual statement setting out its plans for meeting its media content duties in the coming year and reporting on its performance over the past year. C4C must consult with Ofcom in preparing the publication and have regard to Ofcom guidance. C4C must prepare a similar statement in relation to its delivery of Channel 4's public service remit and licence obligations. In our guidance, we ask C4C to combine the statements in a document which we refer to as C4C's Statement of Media Content Policy ('SMCP').

As part of the consultation process, C4C has shared draft copies of its 2023 Annual Report (which includes the SMCP) with Ofcom and has met with us to discuss its performance and strategies. This is an important mechanism in ensuring that C4C is effectively held to account for the delivery of its remit. In addition, C4C is required to lay its Annual Report and accounts before Parliament.

This review represents Ofcom's response to the 2023 SMCP, setting out our views on the delivery of C4C's duties and its future strategy.

¹ [Channel 4 transforms brand to help viewers navigate crowded digital world](#), November 2022.

C4C has recently set out a new digital strategy: *Fast Forward*

C4C, like all broadcasters, is managing the ongoing challenge of moving from a primarily linear model of delivery to a digital-first one. We have previously said that because C4C's core audience has been quick to adopt digital distribution methods, it needs to move quickly to ensure a successful digital transition. This is key to ensuring that C4C remains sustainable, continues to deliver its remit and media content duties, and continues to meet audience needs.

C4C launched its [Future4](#) strategy in late 2020, which set out a five-year plan for responding to the challenge of digital transition. It included plans to prioritise digital audience growth over linear, to diversify C4C's revenue streams away from linear advertising to support its future sustainability, and to generate strategic partnerships to help it compete more effectively.

We said in our response to C4C's 2022 Statement [last year](#) that we wanted C4C to start to outline the next phase of its digital transformation beyond 2025, whether through setting new, more ambitious targets for *Future4* beyond the existing ones, or by launching a new strategy for 2025 onwards. In response to this, C4C launched its [Fast Forward](#) strategy in January this year, which it says will "accelerate its plans to lead the industry into the digital age".

Fast Forward has three key pillars:

Digital growth and transformation: C4C has said it plans to shift to a "digital-first" commissioning strategy, focusing on content that drives streaming growth and remit delivery. It has also said that it will: concentrate on "fewer, stronger titles" that generate scale and impact and drive viewing to its streaming platform; continue to target younger viewers on platforms such as YouTube; improve the user experience of its streaming platform Channel 4 Streaming; and build new distribution partnerships to enhance visibility of Channel 4 content.

Diversified new businesses: C4C plans to reduce its reliance on advertising revenue by continuing to diversify revenue streams including exploring the potential of IP ownership, such as making and owning its programming within the context of the removal of the publisher-broadcaster restriction by the Media Act 2024 and building an ecommerce business by 2030.

Reengineering the business for a digital-first world: C4C plans to reduce its operational costs significantly by: selling its London offices at Horseferry Road; reducing headcount by 18%; and closing small linear channels (for example the Box channels) that it considers no longer deliver value for money.

We welcome the fact that C4C has engaged quickly with our previous recommendation that it should set out a new strategy post-2025. The specific individual elements of that strategy are for the C4C Board to determine. However, in broad terms, we consider that it is appropriate for C4C to be doubling down on an approach that focuses on meeting audience expectations by expanding its online and social media presence and that prioritises expanding digital revenues.

The [qualitative research](#) that we undertook in 2023 as part of our consultation on a new licence for Channel 4 underlined the challenges that the Channel 4 brand has in standing out within the context of Subscription Video on Demand services ('SVoDs') and social media, which are able to offer more targeted content, and the proliferation of TV channels focusing on particular types or genres of

content.² Our research found that delivering a strong and successful digital Channel 4 brand will be a particular challenge amongst younger audiences who have typically found other media services (such as SVoD services) to be more relevant to their generation.³

Whilst *Future4* set C4C's direction away from linear-first commissioning, C4C has said that *Fast Forward* will necessitate a change of commissioning strategy towards fewer, higher-impact programmes across a narrower range of genres. The direction that *Fast Forward* sets out for C4C's commissioning strategy is in line with the direction of travel of other broadcasters, most notably the BBC, in focusing on "fewer, bigger, better" productions that will draw viewers to Broadcast Video on Demand services ('BVoDs'). We will closely monitor the detail of its plans, and the progress of implementation in our annual SMCP reviews. As part of developing the underlying detail of *Fast Forward*, we would expect C4C to set itself new targets – as it did as part of *Future4* – to hold itself to account publicly for delivery.

Financial Performance

Linear advertising market conditions remain challenging, making C4C's successful digital transformation crucial

C4C's current operating model, where it is predominantly reliant on advertising funding, means that it is particularly exposed to fluctuations in the advertising market. Spend in the TV advertising market dropped 8.9% last year to £4.9 billion (from £5.38 billion in 2022). This was driven by a steep decline in spend on linear TV, which decreased 13.6% in 2023 to £3.9 billion (from £4.5 billion in 2022).⁴ BVoD advertising spend grew to £979.6 million, up 15.9% on 2022,⁵ continuing a trend of strong growth, but still not offsetting falls in linear TV spend. This has shown signs of change in Q1 2024 however, where BVoD drove a 1.3% increase in TV advertising spend – the market's first year-on-year growth in two years.

Online formats are growing as advertisers take advantage of their potential to target specific audience groups. Ofcom's research shows that younger audiences are more likely to spend their viewing time on video sharing platforms than on linear TV or BVoD.⁶ This has led to rapid growth in non-BVoD online video advertising in recent years, which reached approximately £6.0 billion in 2023.⁷

Overall, 2023 was a challenging year for C4C financially, with revenues down 10% year-on-year at £1.02 billion (down from £1.14 billion in 2022), and a £52 million pre-tax deficit (down from a £20 million surplus in 2022).⁸ C4C has attributed the year-on-year decline in revenue to difficult conditions in the advertising market.⁹

Linear advertising still makes up the bulk of C4C's revenue, but this fell 16.2% to £642 million in 2023, from £766 million in 2022. C4C has said that this steep drop is due to ongoing market

² Jigsaw, Channel 4 relicensing research (2023), p.4.

³ Jigsaw, Channel 4 relicensing research (2023), p.12.

⁴ AA/WARC and IAB UK.

⁵ AA/WARC and IAB UK.

⁶ E.g. 4-15s and 16-24s, in-home viewing. Media Nations 2024, p. 7-8.

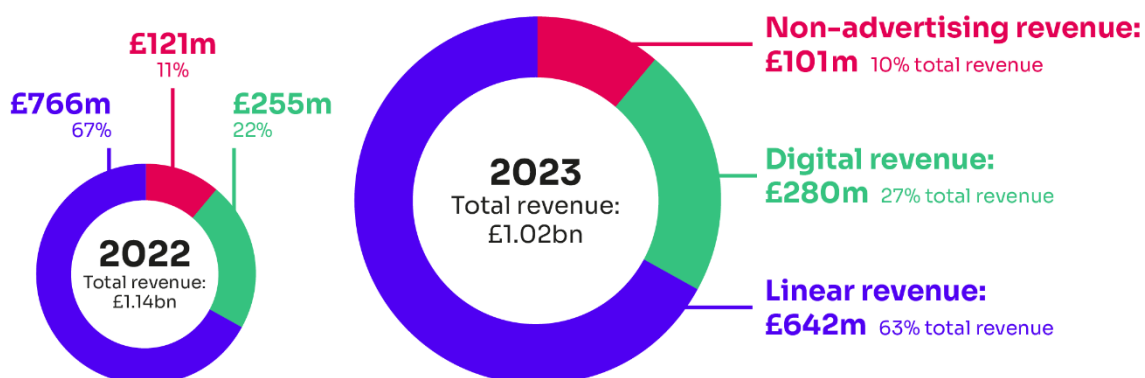
⁷ AA/WARC and IAB UK.

⁸ Pre-tax and exceptional items. Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.13.

⁹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.13.

correction after the post-Covid boom in television advertising, and the slump in the market has been deeper and more prolonged than was anticipated.¹⁰

Figure 1: Comparison of proportion of C4C’s revenue from linear, digital and non-advertising sources, 2023 and 2022.



Source: Channel 4 Annual report and accounts 2022 & 2023.

As part of its *Future4* and *Fast Forward* strategies, C4C has been clear that diversification of its revenue streams away from linear advertising revenue is key to its long-term sustainability.

This has included forming partnerships to make its BVoD service a more attractive destination for advertisers; in 2023 C4C announced that it would be the first UK broadcaster to offer brands the option of using Microsoft Advertising’s ad-buying platform, Xandr, which allows full automation of digital campaigns.¹¹

In its *Future4* strategy, C4C set itself a target to generate 30% of its total revenue from digital advertising by 2025. In 2023, digital advertising revenue increased almost 10% year-on-year (2023 £280 million; 2022 £255 million),¹² and comprised 27% of total revenue. *Future4* also included a target of 10% of total revenue coming from non-advertising sources by 2025. We note that non-advertising revenue fell to £101 million in 2023, from £121 million in 2022, although this figure remains above the target.¹³

C4C is evolving its advertising strategy to reflect changing audience habits and technology, however the need for it to accelerate its digital transformation is demonstrated by the relative performance of its linear and digital revenue streams.

Falling revenues have led to a reduction in content spend in 2023

It is vital that C4C continues to draw audiences in with its distinctive content. Total spend on content slipped in 2023 from the record level spent in 2022, however C4C reports that it was still able to invest £663 million on content across all its services in 2023 (down from £713 million in 2022). This

¹⁰ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.13.

¹¹ [Channel 4 to expand its digital ad-buying suite with Xandr.](#)

¹² Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.122.

¹³ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.122.

represents a 7% drop in spend between 2022 and 2023, but proportionally this is less than the overall drop in revenue.¹⁴

Of the total spend, £520 million was on originations¹⁵ (down from £570 million in 2022).¹⁶ While this fell 9% year-on-year, it is still the second-highest amount spent on originations in Channel 4's history. Looking at the breakdown of C4C's origination spend by channel, we can see that the fall in spend was less pronounced on the main channel. It spent £458 million on originations for the main channel in 2023 (down from £494 million in 2022).¹⁷ This represented a decrease of 7% year-on-year, slightly less than the percentage fall in total investment in original content. Conversely, in 2023 investment in original content on the portfolio TV channels fell significantly, to £53 million (a decline of 21% from 2022's £67 million).¹⁸ C4C has said that a reduction in spend on original content for E4 accounted for the majority of this decline.¹⁹

In 2023, the one area of content investment to increase year-on-year was total spend on digital media. Spend rose to £36 million (from £34 million in 2022), including £9 million on originated digital media content (level with 2022).²⁰ C4C says this reflects the importance of its strategy to drive viewing to its streaming services. It highlights a key element of this strategy is to offer more exclusive acquisitions to sit alongside commissioned content, helping it to carve out a distinctive reputation in the competitive market for streaming services.

Viewing Performance

Channel 4 Streaming continues to grow but the decline of viewing on the linear channels means overall time spent with C4C content has fallen slightly

In 2023, total time spent watching C4C content (linear and BVoD) declined slightly among all individuals to 16 minutes (from 17 minutes in 2022) a day. Channel 4 Streaming made up 16% of this time (up from 12% in 2022), with linear viewing (live and recorded) taking up the remaining 84%. Viewers aged 16-34 spent a total time of 8 minutes with C4C content a day, also a slight decline from 2022 (9 minutes). Channel 4 Streaming time made up a higher proportion of 16-34s' total C4C viewing than for all individuals (36%, up from 29% in 2022).²¹

Channel 4 Streaming performed well in 2023. In its own Annual Report, C4C reported a record year of viewing to Channel 4 Streaming, with 1.6 billion streaming views, up from 1.4 billion views last year and exceeding 2021's previous high of 1.5 billion views.²² The time spent with C4C's streaming service, Channel 4 Streaming, increased in 2023 by 25% to an average of just under 2.5 minutes per

¹⁴ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.13.

¹⁵ First run originations and repeats, across Channel 4's TV channels and online services.

¹⁶ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.12.

¹⁷ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.83.

¹⁸ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.83.

¹⁹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.83.

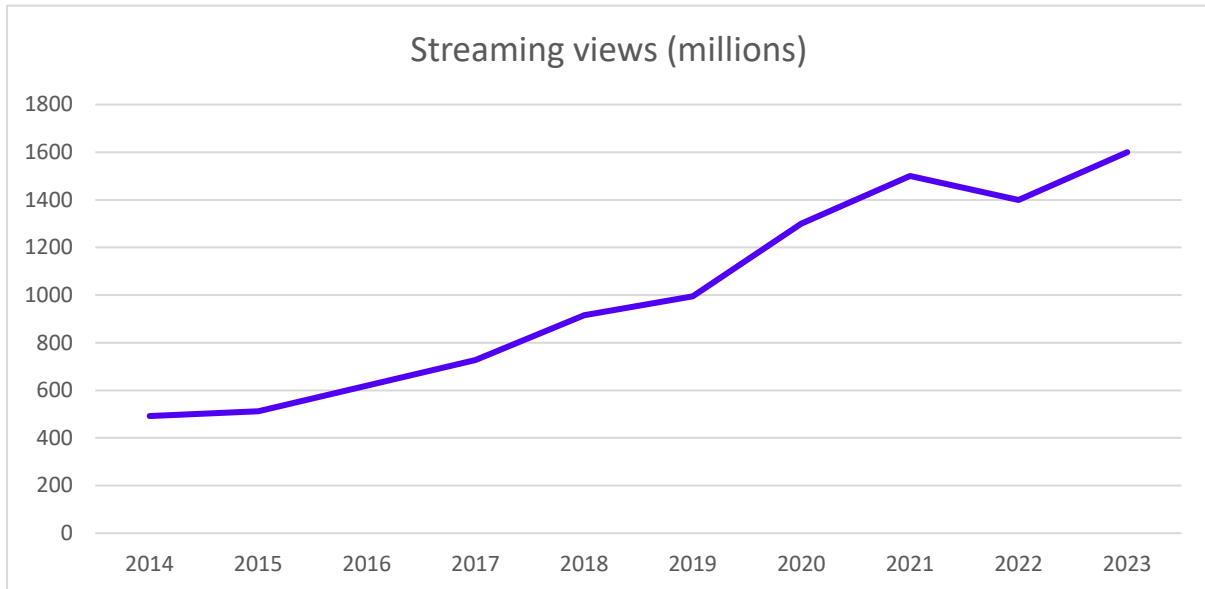
²⁰ C4C defines digital media content as "including websites and cross-platform content" and considers it distinct from content made specifically for the digital channels. Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.82.

²¹ Barb as-viewed.

²² For C4C, a view is counted when a user sees the first frame of a piece of content when streaming on the site or app. If a user leaves the site/ app but returns to view the same content within 30 minutes, then this is counted as a 'video resume' and not as a new streamed view. Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.68.

person per day from just under 2 minutes in 2022. People aged 16-34 watched Channel 4 Streaming for an average of just under 3 minutes a day in 2023.

Figure 2: Views to Channel 4’s streaming service (000s): 2014-2023



Source: Channel 4’s Annual report and accounts 2014-2023

In terms of average daily minutes viewed per person, Channel 4 Streaming was the fourth largest BVoD overall for the 16-34 age group, after BBC iPlayer, ITVX and Sky TV on demand. In 2022, Channel 4 Streaming had been the second largest BVoD overall for this age group, but the rebranded ITV player, ITVX, overtook Channel 4 Streaming in 2023.²³ However, using a slightly different age breakdown, Channel 4 Streaming in 2023 was the youngest-skewing PSB BVoD service in the UK, with 16-24s making up 7% of its users (compared to 6% for ITVX, 5% for BBC iPlayer and 4% for My5).²⁴

A key element of C4C’s strategy in recent years has been to improve the offering for younger audiences, who are more likely to watch C4C content on streaming and social channels. Last year, for the first time, C4C reported on the total time that audiences spent with its content on streaming and social channels combined. Looking at this metric again in 2023 shows that audiences spent a total of 59.3 billion minutes viewing Channel 4 content on streaming and social, up from 49.1 billion in 2022.²⁵

C4C has continued this strong growth in viewing to its content on social media into 2024. It reports that more and more viewers are watching full episodes of its programming on YouTube and its dedicated YouTube channel, Channel 4.0. C4C highlights *The Push: Murder on the Cliff* and *To Catch a Copper* and *Harry Pinero’s Worst in Class* as performing particularly well on YouTube. Overall, C4C reports that across all social platforms, views increased to 626 million in the first quarter of 2024.²⁶

C4C announced in May 2024 that it would partner with YouTube to widen access to its coverage of the 2024 Paralympic Games. It made all of its Paralympic coverage available on Channel 4 Sports’

²³ Source: Barb, As Viewed, 16-34 adults.

²⁴ Source: Barb, As Viewed, 16-24 adults profile (against individuals 4+).

²⁵ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.69.

²⁶ [Channel 4 trebles viewing of TV shows on YouTube and digital-first hits on Channel 4.0.](#)

YouTube channel, as well as making it available on Channel 4, More4, Channel 4 Streaming and its social channels.²⁷ We consider that continuing to strengthen such partnerships will better allow C4C to connect its brand and content with younger audiences.

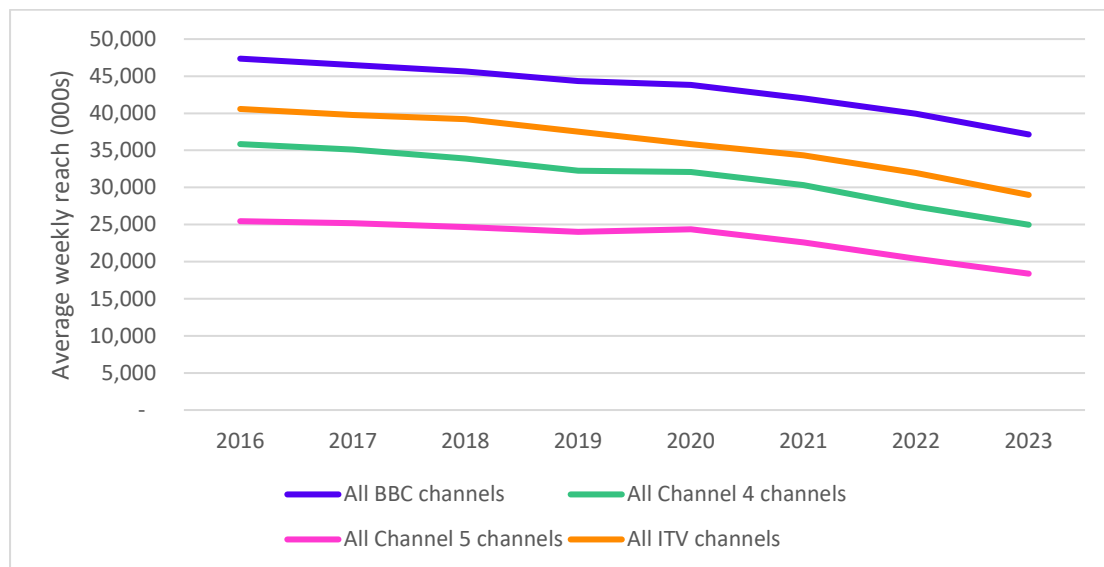
Given entrenched patterns of viewing behaviour, continuing to grow the performance of its streaming services, and broadening engagement with its content and brand through social media, will be crucial to the success of C4C’s *Fast Forward* strategy. In our view, C4C’s plans to shift to a digital-first commissioning strategy, with a focus on “fewer, bigger, better” titles, will be key to this.

Under the current regulatory framework C4C can only deliver its public service remit through its main channel, Channel 4, although this will change once the [Media Act is implemented](#). The Media Act gives broadcasters greater flexibility to meet their obligations in a way which serves audience interests. Despite these changes, C4C will be obligated to continue to serve audiences on its main channel, whilst also focusing on increasing viewing to Channel 4 Streaming. Additionally, despite diversification being key to C4C’s strategy, the majority of its revenues still come from linear advertising and therefore, like all other PSBs, C4C will have to continue to focus on reaching viewers on its linear and digital services for the foreseeable future.

Retaining viewers to its linear channels remains challenging for C4C

As with the other four main PSB channels, viewing to C4C’s main channel, Channel 4, continued to decline in 2023. Following a long-term overall trend, Channel 4’s average weekly reach declined again in 2023 to 29.7% from 33.7% in 2022. This decline is similar to that experienced by each of the main five PSB channels. Average weekly reach to the Channel 4 family of channels (which includes Channel 4+1, E4, More4, Film4, Box, E4 Extra, 4Music, Kiss TV, Kerrang and Magic TV) stood at 40.9% in 2023, down from 45% in 2022. The number of people watching the Channel 4 family of channels each week on average in 2023 was 9% lower than in 2022. This decline was similar to that for the ITV family of channels (9.2%), and slightly less stark than the year-on-year fall for the Channel 5 family (9.9%). The decline in average weekly reach for all BBC channels was 7%.²⁸

Figure 3: Average weekly reach in 000s by channel group: 2016 to 2023



²⁷ [Channel 4 and YouTube team bring Paris 2024 Paralympic Games coverage to even more viewers.](#)

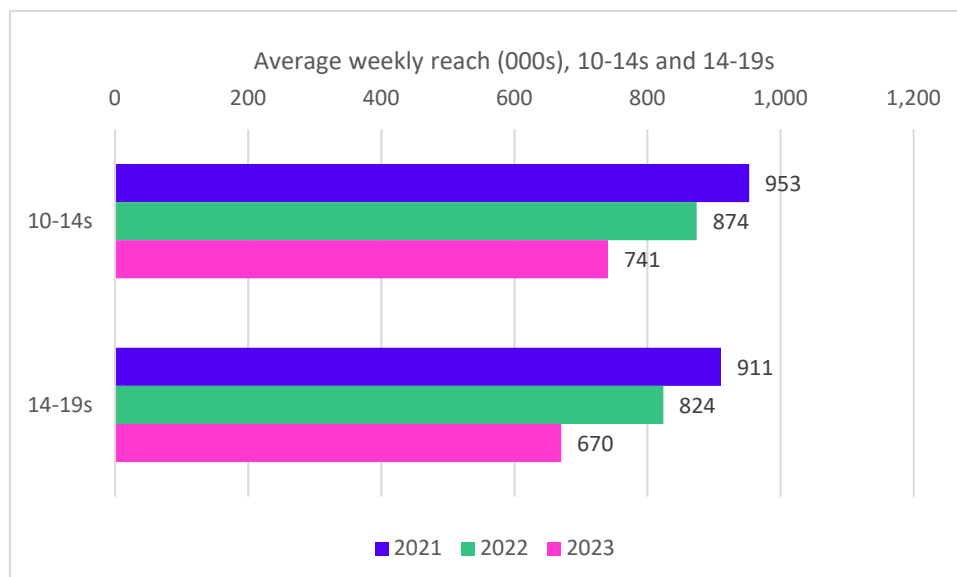
²⁸ Barb 28 day consolidated, via TV sets only, average weekly reach 15+ consecutive minutes.

Source: Barb 28-day consolidated, individuals 4+, TV sets only. Weekly reach is defined as the number in thousands of all individuals 4+ watching 15 consecutive minutes or more in an average week.

Channel 4's share of viewing among all viewers has remained reasonably constant, with only a slight drop year-on-year; from 5% in 2022, to 4.8% in 2023.²⁹

Younger and older children are watching Channel 4 and the Channel 4 family of channels less often. Reach to these audiences dropped again in 2023. For 10-14-year-olds, the main channel's all-time average weekly reach fell from 13.6% in 2022 to 11.1% in 2023, and for 14-19-year-olds it was a similar story, with a drop from 12.3% in 2022 to 9.3% in 2023. The Channel 4 family of channels' decline in all time average weekly reach among both 10-14s and 14-19s was sharper from 2022 to 2023 (3.4pp and 4.4pp) than from 2021 to 2022 (2.7pp and 2.5pp). Channel 4's share of viewing on the main channel during peak time³⁰ dropped slightly for both 10-14-year-olds (to 6.3% in 2023, from 6.7% in 2022) and 14-19-year-olds (to 6.4% in 2023 from 7.0% in 2022).³¹

Figure 4: Average weekly reach (000s) of C4C Channels, 10-14s and 14-19s: 2021-2023



Source: Barb 28-day consolidated, 10-14s and 14-19s, TV sets only. Weekly reach is defined as the number in thousands of all these audiences watching 15 consecutive minutes or more in an average week.

Viewers aged 16-34 are watching less broadcast TV than ever before. For this cohort of viewers, total broadcast television's average weekly reach fell steeply again in 2023, down by 5.6pp year-on-year. Among 16-34s, Channel 4's average weekly reach also declined in 2023, to 14.5% from 19% in 2022. The decline in the number of 16-34s watching all C4C channels each week on average in 2023 from the previous year was 17.4% (versus an 18.5% decline for all ITV channels and 23.1% for all Channel 5 channels, but only 14.2% for all BBC channels). For 16-34s, Channel 4 accounted for 5.8% of this group's share of viewing in 2023 (a drop of 0.8pp on 2022), behind BBC One (14.6%) and ITV1 (14.2%).³²

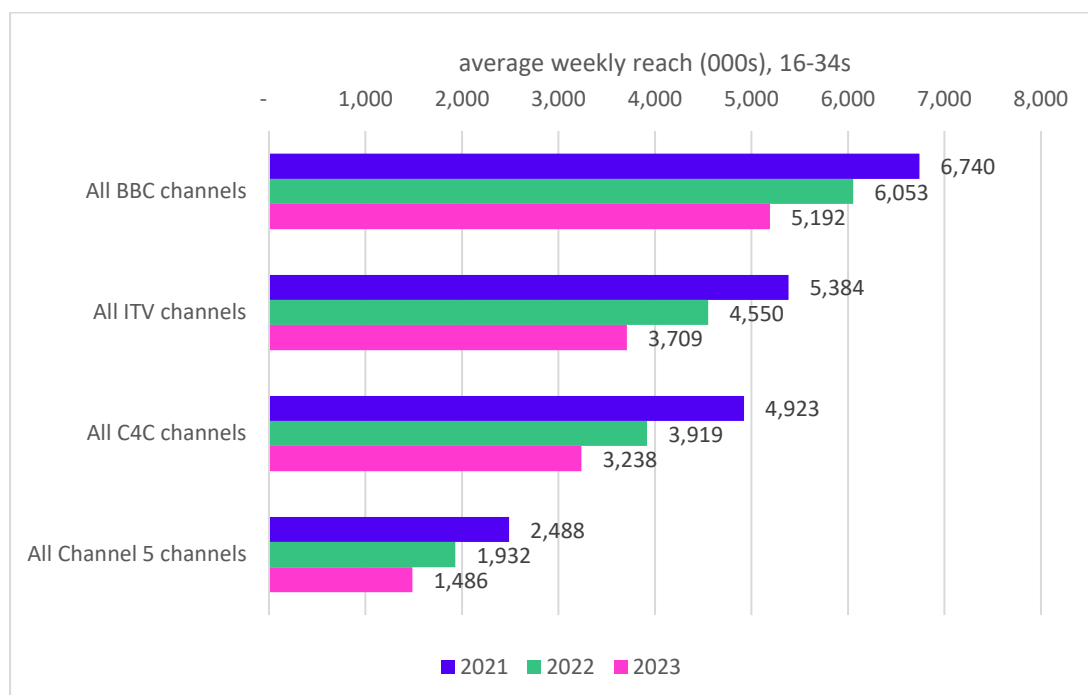
²⁹ Barb 28 day consolidated, via TV sets only, individuals 4+, excludes +1 channel.

³⁰ 'Peak' refers to the 1800-2229 daypart.

³¹ Barb 28 day consolidated, via TV sets only, Channel 4 (excluding +1 channel).

³² Barb 28 day consolidated, via TV sets only. Reach criteria: 15+ consecutive minutes. Reference to ITV1 and Channel 4 exclude +1 channels. All C4C channels, all ITV channels and all Channel 5 channels include their +1 channels.

Average weekly reach in 000s by channel group, 16-34s: 2021-2023



Source: Barb 28-day consolidated, 16-34s, TV sets only. Weekly reach is defined as the number in thousands of all individuals 4+ watching 15 consecutive minutes or more in an average week.

Among people in minority ethnic groups, the average weekly reach of Channel 4 fell again in 2023, to 17.1% (from 19.7% in 2022). However, the audience profile of the main channel continues to be one of the most representative of the total TV viewing population in terms of the proportion of viewers in minority ethnic groups. Of the main channel's total audience, 8% was accounted for by viewers in minority ethnic groups in 2023. This is more than any of the other four main PSB channels. The very slight year-on-year decrease in Channel 4's overall share of viewing was driven by a very small decrease among white viewers, while the channel's share of minority ethnic viewers remained more stable.³³

Channel 4 has said that as part of the *Fast Forward* strategy it plans to close some of its portfolio channels that no longer deliver revenues or public value. In July 2024, it closed the Box channels and has said it plans to close others at a later date.³⁴ Reach to the portfolio channels has been falling for a number of years, despite some rebranding. Overall, the C4C portfolio's average weekly reach among all viewers aged 4+ fell to 25.2% in 2023, down from 27.2% in 2022.³⁵

C4C's largest portfolio channel, youth-focused E4, faces a particular challenge in maintaining linear audiences because viewers in its target age group are increasingly likely to watch content online. In 2023, average weekly reach among all viewers aged 4+ fell to 10.3% in 2023, from 11% in 2022. The drop for 16-34s was slightly sharper, to 7.2% in 2023, from 8.5% in 2022.³⁶ As we highlighted last year, one of E4's top performing formats is *Married at First Sight*, with both the UK and Australian versions proving hugely popular with 16-34 audiences both on linear and on Channel 4 Streaming.

³³ Barb 28 day consolidated, via TV sets only, 15 or more consecutive minutes average weekly reach, +1 channels excluded, white individuals 4+ and minority ethnic individuals 4+.

³⁴ *'Fast Forward'*, 2024.

³⁵ *'Fast Forward'*, Barb 28 day consolidated, via TV sets only, this is all C4C channels excluding the main channel but including Channel 4 +1.

³⁶ Barb 28 day consolidated, via TV sets only, average weekly reach 15+ consecutive minutes. Includes E4+1.

Made in Chelsea and its various spinoffs have also proved popular on both the linear channel and on streaming. Acquisitions such as *Rick and Morty*, *The Big Bang Theory* and *Young Sheldon* have also performed well on the linear channel.³⁷

In its Annual Report, C4C says that a key pillar of both its *Future4* and *Fast Forward* strategies is to drive young viewers to watch more of its content via streaming, for example through box-setting content or watching programmes first on Channel 4 Streaming before they are shown on linear television. C4C has said that its strategy is designed to divert viewing by 16-34-year-olds from Channel 4's main channel to its streaming service and it is therefore comfortable with a reduction in the extent to which the main channel over-indexes viewing by 16-34-year-olds.³⁸

Remit Performance

Initiatives aimed at younger audiences performed strongly in 2023

One of C4C's media content duties is to make "relevant media content that appeals to the tastes and interests of older children and young adults".³⁹ In previous reports, we said that C4C needed to invest more in high-quality content for these audiences, and we challenged C4C to develop a strategy for how it would better serve these groups. [Last year](#), we commended C4C for the introduction of several new initiatives, including new services specifically targeted at better meeting the needs of younger audiences. These included the launch of Channel 4.0, a dedicated youth-focused YouTube channel, and E4 Extra, a sibling channel to E4. C4C also launched new formats and content strands aimed at younger audiences, notably the digital-first current affairs strand *Untold*.

Channel 4.0 was launched in October 2022. C4C reports that it has commissioned a slate of 29 shows since the launch, highlighting *Tapped Out* and *Harry Pinero's Worst in Class* as two shows that it feels exemplify the Channel 4.0 brand and that have helped to launch diverse new talent. C4C says that content for Channel 4.0 has been specifically developed to be distinct from programmes on the main linear channels. In terms of audience performance, its Annual Report notes that in 2023, content on Channel 4.0 generated 216 million global views across YouTube, TikTok, Instagram, and Snapchat, with 85% of its viewers on YouTube aged under 34.⁴⁰

Untold, C4C's youth-focused current affairs documentary series, continues to perform well since its launch in 2022. C4C reports that *Untold's* two seasons in 2023 achieved 2.2 million global views on YouTube across 14 episodes. On Channel 4 Streaming, *Untold* achieved 3.8 million views, of which 39% came from 16-34-year-olds.⁴¹ Top performing episodes of *Untold's* 2023 seasons⁴² include *The Secrets of UK Prisons*, which used footage filmed by inmates on contraband mobile phones to tell the story of life inside UK prisons, and *The Secret World of Fight Clubs*, in which C4C gained exclusive access to fight club fighters and their families. *Untold* has also offered opportunities for new presenters, for example C4C highlights that *Untold: My Big Boobs* was Jackie Adedeji's first presenting role, for which she was nominated for Best Debut Presenter at the New Voice Awards

³⁷ Barb. Measurement of the linear channel used 28 day consolidated, via TV sets only. Measurement of Channel 4 streaming used as-viewed on-demand only, via all devices.

³⁸ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.67.

³⁹ Communications Act 2003 s. 198A(2)(b).

⁴⁰ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.60.

⁴¹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.62.

⁴² Not all episodes of *Untold* are shown on linear television.

2024. This episode explored the rise in demand for privately funded breast reduction surgery among 16-24-year-old women.⁴³ The fourth season of *Untold* has recently [been announced](#).

C4C's Leeds-based 4Studio produces content for the main social platforms – YouTube, Facebook, Instagram, TikTok, Snapchat, X (formerly Twitter), and Threads. C4C's Annual Report states that in 2023, 4Studio made and published over 39,000 pieces of digital content. These generated 6.8 billion global views across 137 channels. In the UK, there were 2.3 billion views, up 10% year-on-year.⁴⁴

While the initiatives that C4C has launched to deliver content that appeals to the tastes and interests of older children and young adults has focused on digital services, in its Annual Report it draws out a programme called *Kids* as a particular success in terms of its performance on linear television. *Kids* followed young people in the care of Coventry Children's Services as they prepared to leave the care system. The series performed fairly well among 14-19-year-olds, with a 5.3% viewing share of those watching television at the time of broadcast. It also reached just over a million viewers overall across streaming and linear.⁴⁵ As set out in more detail below, C4C also had strong success this year with *Russell Brand: In Plain Sight* which generated a 16-34 viewing share of 52%, over twelve times the slot average.⁴⁶

Audiences continue to highly rate C4C's range of content

According to both Ofcom's and C4C's research, audiences continue to rate Channel 4 TV channels highly for delivering programming that demonstrates innovation, experimentation, creativity and distinctiveness.

The findings of Ofcom's 2023 Public Service Media ('PSM') Tracker demonstrated that whilst satisfaction with C4C's offering remains relatively high, many of the attributes we monitor year-on-year saw declines between 2022 and 2023.⁴⁷ This is largely consistent across all of the PSBs. Given that 2022 saw a number of nationally significant events such as the death of Queen Elizabeth II and a number of sporting events, is it possible that PSB channels benefited from improved public sentiment across the year as many of these statements saw significant increases in 2022.

Audiences continue to find Channel 4 TV channels distinctive. When asked how well Channel 4 TV channels deliver "*a wide range of different types of programmes, such as drama, comedy, entertainment or sport*", over half (54%) of viewers in the last six months said it was provided well, down from 2022 (58%), but in line with 2021 (55%).⁴⁸ Similarly, around half (51%) of viewers said it delivered "*programmes that are different in their approach to other providers*" - down from 2022 (54%) but in line with 2021 (50%). The same is true for "*programmes that help me see things from a different angle/perspective*" (2021 51%; 2022 54%; 2023 49%).

Viewers also felt Channel 4 provided distinctive content on its BVoD service, Channel 4 Streaming. Channel 4 Streaming performs well in key areas, particularly around distinctiveness. For example, around two-thirds (62%) of viewers in the last six months said Channel 4 Streaming provided "*programmes which feature people from different backgrounds*" well, in line with previous years

⁴³ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.54.

⁴⁴ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.61.

⁴⁵ Barb, 28-day consolidated, via TV sets only, new episodes only, Channel 4+1 excluded. Barb, as viewed, all devices, 15+ consecutive minute reach across 3 episodes.

⁴⁶ Barb, 28-day consolidated, excluding C4+1, via TV sets only.

⁴⁷ Please note: we only report on increases/decreases if they are statistically significant.

⁴⁸ Ofcom Public Service Media tracker 2023.

(63% in 2021; 65% in 2022⁴⁹). Over half (56%) felt that Channel 4 Streaming provided “programmes that are different in their approach to other providers” well (down from 60% in 2022, but in line with 56% in 2021).

In 2022, C4C introduced a new measurement framework, which includes tracker statements that are more closely aligned to elements of its public service remit while also aiming to assess performance across its full suite of services. C4C also now tracks its own performance relative to a wider competitor set, including Sky and the main SVoDs (including Netflix and Amazon Prime), alongside the PSBs.

Part of C4C’s remit is to be innovative, to inspire change and offer a platform for alternative views. In its most recent Annual Report, C4C reports that audiences associate its services with “always trying something new”, with 48% of respondents agreeing that C4C performs well on this measure (49% in 2022). Of its competitor set, C4C was second only to Netflix on this metric (50% in 2023, 51% in 2022) but considerably ahead of its nearest PSB competitor (the BBC with 35% in 2023).⁵⁰ C4C also found that 51% of respondents think that C4C “pushes boundaries” (down from 52% in 2022)⁵¹ and that 50% of respondents think C4C’s programmes make them think differently (level with 2022).⁵² Programmes that C4C feels contribute to its scores on these metrics include its highly-regarded weekday news bulletin *Channel 4 News* and its current affairs coverage, including the successful episodes of *Dispatches: Russell Brand: In Plain Sight* and *Undercover Ambulance: NHS Chaos*.⁵³

A further metric introduced as part of the new measurement framework is the proportion of content that features innovative elements. C4C defines this broadly as including new formats, new or surprising talent, or new filmmaking approaches. It states that it also innovates in terms of subject matter, making programmes that deal with issues not normally featured on TV. C4C reports that in 2023, 35% of the new programmes across its TV channels and online services included at least one element of innovation (up 1pp from 34% in 2022).⁵⁴ C4C reports that it has avoided doubling down on known hits and established talent in a bid to offer audiences something new.⁵⁵ Programmes that C4C feels contribute to its scores on these metrics include satirical docudrama *Partygate*, which dramatised events inside 10 Downing Street during the national lockdowns imposed in response to the Covid-19 pandemic⁵⁶ and *Chris Packham: Is it Time to Break the Law*, which asked whether the threat posed by climate change means that law-breaking can be ethically justified.⁵⁷

C4C delivered a range of high-performing programming in 2023. Its top performing drama series in 2023 was *Y Golau/The Light in the Hall* (with an average audience across the series of 2.3 million viewers, and a 10.4% programme share). It featured bilingual actors in the main roles and was filmed in dual versions in both English and Welsh. The opening episode averaged 3.4 million viewers, and a 16.6% share of all viewing. Other successes included one-off drama *Partygate* (which drew in 1.9 million viewers and 14% share of viewing), and *The Couple Next Door* (which averaged 1.6 million viewers across the series, with a programme share of 8.5%).⁵⁸

⁴⁹ Please note: while this looks like a decrease from 2022 to 2023, we apply significance testing to our data tables at 95% confidence interval.

⁵⁰ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.66.

⁵¹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.38.

⁵² Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.39.

⁵³ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.34.

⁵⁴ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.41.

⁵⁵ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.41.

⁵⁶ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.30.

⁵⁷ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.41.

⁵⁸ Barb, 28 day consolidated, via TV sets only, excludes C4+1, new episodes only.

Many of C4C's top performing series in 2023 were established returning formats. *The Great British Bake Off* returned for a fourteenth series, with the opening episode giving Channel 4 its most-watched single programme of the year, with 7.4 million viewers, and a 35.5% share of all viewing. The average audience figure across the series was 6.6 million, with an average audience share of 31.1%. Other audience favourites included *Gogglebox*, which averaged 3.2 million viewers across 2023, with a 17.9% share of viewing (with the third episode of series 21 capturing 4.4 million viewers, a 24% share of all viewing). On E4, *Married at First Sight UK* also performed well across the year, pulling in an average of 2.2 million viewers across the series, with an audience share of 11%.⁵⁹

Research we conducted as part of the Channel 4 relicensing process found that some viewers felt C4C's content was repetitive, in that it showed too many programme repeats, and also showed too many variants of the same format.⁶⁰ We are aware of the difficulties of creating popular new formats, and of financing the kinds of big-budget dramas and comedies that will play well on linear and on streaming, [particularly in such a competitive landscape](#). These "fewer, bigger, better" shows are foundational to the new *Fast Forward* strategy, and for that strategy to be a success it is imperative that C4C continues to innovate and take risks on new commissions.

Channel 4 continues to invest across the nations and regions of the UK but has more to do outside of London

In 2023, C4C spent £193 million across its TV portfolio on content commissioned from production companies based outside London. C4C said this represented a decline of 16% on the record investment level of £228 million in 2022.⁶¹ Production companies based in the nations and regions of the UK accounted for 33% of Channel 4's total supplier base in 2023, up from 29% in 2022.⁶²

C4C's TV portfolio spend on commissions from the English regions fell to £151 million in 2023 (down from £183 million in 2022). Spend fell in each of the English regions in 2023, with the highest spend in any of the regions in the North of England (£93.2 million). C4C has said that investment in the North was largely protected by the move of Formula 1 to the region.⁶³

C4C's spend on production in the nations outside England in 2023 was £42 million (down from £45 million in 2022).⁶⁴ C4C invested particularly heavily in Scotland in 2023, with a number of high-profile series returning to production. Of the total investment outside of England, £27 million was spent in Scotland⁶⁵ (up from £21.1 million in 2022),⁶⁶ £13.3m in Wales⁶⁷ (falling from £18.8 million in 2022),⁶⁸ and £1.8 million was spent in Northern Ireland⁶⁹ (falling from £5 million in 2022).⁷⁰

Alongside tracking C4C's investment in the nations and regions of the UK year-on-year, we also monitor compliance with Channel 4's licence conditions. C4C has quotas for production outside of London (35% of hours and spend), and outside of England (9% of hours and spend), which apply to

⁵⁹ Barb, 28 day consolidated, via TV sets only, excludes C4+1, E4 includes +1, new episodes only.

⁶⁰ Jigsaw, Channel 4 relicensing research (2023), p.27. An example of a format variant would be a celebrity edition of a popular format such as *Celebrity Gogglebox*.

⁶¹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.84.

⁶² Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.86.

⁶³ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.84.

⁶⁴ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.84.

⁶⁵ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.84.

⁶⁶ Channel 4 Television Corporation Annual Report and Financial Statements 2022, p.84.

⁶⁷ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.84.

⁶⁸ Channel 4 Television Corporation Annual Report and Financial Statements 2022, p.84.

⁶⁹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.84.

⁷⁰ Channel 4 Television Corporation Annual Report and Financial Statements 2022, p.84.

the main channel, Channel 4.⁷¹ C4C met and exceeded its quotas in 2023, with qualifying hours and spend outside of London at 67% of hours and 50.8% of spend, and outside of England both at 11%.⁷²

Channel 4's licence will expire at the end of 2024 and in December 2023 we consulted on proposals for a new licence for the channel. Many stakeholders felt that our initial proposal to retain Channel 4's Made outside England (MoE) quotas at 9% of hours and spend was not challenging enough. We considered what stakeholders told us about how C4C could better invest in the production sector outside of England and in July 2024 we consulted on new proposals for the MoE quotas. We plan to publish our Statement setting out our decisions on conditions for the new licence in the autumn.

Investment in content is not the only way that C4C contributes to the health of the production sector outside of London. An important part of C4C's remit is to support the development of talent and skills. C4C's Leeds-based 4Skills programme was launched in 2020, with the aim of providing training and development for people forging a career in the media sector, in particular those groups which are historically under-represented in the industry.

C4C reports that in 2023, 4Skills provided more than 57,000 training, development, and learning opportunities, more than double the figure for 2022 (around 28,000 opportunities). A significant element of the 4Skills programme is 4Schools, which involves working with schools to encourage young people (11-16-year-olds) to consider careers in TV and the creative and digital industries. Last year, 122 schools were part of the programme (almost twice as many as in 2022), enabling engagement with more than 40,000 pupils.⁷³

Audiences living in the nations and regions of the UK should be able to see themselves reflected and represented on screen. In recent years as part of *4 All the UK* and latterly, *Fast Forward*, [C4C has said](#) that it has sought to spread its investment, commissioning power, and training and support right across the UK. Ofcom's research has shown that around a third (32%) of viewers of Channel 4's TV channels said it performs well on providing "*programmes that feature my region/country*", remaining similar to previous years (33% in 2022; 29% in 2021). For BBC TV channels and ITV TV channels, around half of their viewers in the last six months say the same (50% and 49%, respectively).⁷⁴

We will continue to insist C4C does more to represent the different UK nations and regions in its programmes. C4C must challenge itself to ensure that audiences across the UK can see themselves reflected in its programming.

C4C continues to show a strong commitment to on and off-screen diversity

An important part of C4C's remit is to appeal to the tastes and interests of a culturally diverse society. C4C has said it aims to do this by including "representations of different types of lived experience, such as those defined by disability or gender, sexuality or ethnicity, or diversity of thought".⁷⁵

⁷¹ C4C has made a voluntary commitment to spend 50% of its budget for main channel commissions on programmes made outside London.

⁷² Ofcom/broadcasters.

⁷³ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.85.

⁷⁴ Note as above here we include 2021 results as a potentially a better comparator year than 2022. Ofcom public service media tracker 2023.

⁷⁵ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.45.

C4C's research shows that Channel 4 is the highest-scoring brand among its competitor set – which includes Sky, the main SVoDs and other PSB brands – when audiences are asked to what extent they associate each one with “showing different kinds of cultures and opinions in the UK”. In 2023, 56% of respondents agreed that Channel 4 performed strongly on this measure (down from 57% in 2022). Its nearest competitor in 2023 was the BBC, with 51%.⁷⁶

Our research also indicates that audiences feel C4C performs well in reflecting the diversity of the UK, with 55% of viewers saying Channel 4 TV channels perform well against the statement “programmes which feature people from different backgrounds”, down from 60% in 2022 but in line with 57% in 2021, and performs well in relation to other PSBs.⁷⁷

C4C says that ensuring that diverse voices are portrayed on screen, and in an authentic manner, is a key part of how it fulfils its public service remit.⁷⁸ *The Piano*, which performed well on linear and BVoD in 2023, is highlighted in C4C's Annual Report as an example of a successful new format that showcases the diversity of the UK in a positive light. Other examples include *Wonders of the World I Can't See*, *Is Cricket Racist?*, Bridget Christie's *The Change*, and *Rosie Jones: Am I a R*tard?*, all notable for their portrayals of people's diverse lived experiences from across the UK.⁷⁹

C4C uses data from the Diamond system,⁸⁰ operated by the Creative Diversity Network (CDN), to monitor the diversity of freelancers working on the programmes it commissions, either working off-screen (e.g. as directors, producers, set designers etc.) or appearing on-screen (e.g. as presenters or actors). In 2023, this data suggests that people from minority ethnic groups were represented on screen in line with the national population overall and people who identified as LGB represented 18% of on-screen contributions, well above the 3% figure from the 2021 Census.⁸¹ However, women were slightly under-represented on-screen compared to the national population average and disabled people only accounted for 9% of on-screen contributions, well below the 18% population figure. C4C notes that under-representation of disabled people remains concerning and highlights the steps it is taking to address this, aiming to drive change through its 'Engage & Enable' Disability Strategy (launched in 2021), new disability portrayal guidelines, and as part of CDN's Doubling Disability initiative.

Through its 'Fresh Faces of 4' strategy, C4C highlights how it is committed to building a sustainable pipeline of new talent that reflects the changing face of Britain. It states that working in close partnership with its TV and digital teams, the strategy has three strands: seeking new talent with little or no previous experience in the industry; developing emerging talent so they can build their profile and strengthen their reputation; and offering established talent new opportunities to diversify and reach even wider audiences.⁸²

C4C acknowledges that diverse portrayal on-screen requires diverse programme makers off-screen. It continues to make progress in terms of its workplace diversity, which is reflected in data from Ofcom's [Equity, diversity and inclusion in television and radio report 2022/23](#), which relates to C4C's employees. As with on-screen representation, the proportion of women (59% of those who disclosed data) and people from minority ethnic groups (21% of those who disclosed data) is in line

⁷⁶ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.45.

⁷⁷ Ofcom Public Service Media tracker 2023. Please note: while there looks like a decrease from 2021 vs 2023, there is not, as we apply significance testing to our data tables at 95% confidence interval.

⁷⁸ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.45.

⁷⁹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.45-6.

⁸⁰ For more information see the [Diamond website](#) and the [2022/23 Diamond report](#).

⁸¹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.53.

⁸² Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.54.

with (or above) working population averages (48% and 14% respectively). C4C also appears to have good representation of women (52%) and people from minority ethnic groups (21%) in senior roles. C4C leads industry in terms of off-screen representation of disabled people at 15% of those who responded.⁸³

However, C4C under-represents employees from working class backgrounds, though we found this under-representation ran throughout the broadcasting sector: across TV and radio, 28% of employees who provided data are from a working class background⁸⁴ compared to the population average of 39% from working class backgrounds.⁸⁵ C4C's proportion (29%) is broadly in line with the industry average, although data collection across the industry remains lower for this metric.

We are encouraged to see that C4C has set itself a new workforce target for 'non-professional' socio-economic background (of 40%) and that it plans to begin monitoring representation of those with caring responsibilities. We asked about caring responsibilities as a new question in our Equity, Diversity and Inclusion (EDI) monitoring last year and hope to see response rates start to improve.

Overall, C4C has engaged positively with our programme of work around EDI in broadcasting, including completion of our new self-assessment tool and provision of additional voluntary data including diversity by geographic region and other cross-sectional data, which we requested for the first time in 2023.

Ofcom's own off-screen data refers only to the C4C workforce. However, C4C reports that 13% of its suppliers are ethnically diverse and outlines in its Annual Report a range of initiatives it has undertaken to improve diversity of both employees and freelancers behind the camera, which it says are directed at under-represented groups in key roles. These include:

- RISE disability mentoring scheme;
- Indie Accelerator scheme;
- 4 Post Production (4PP) – aiming to improve off-screen diversity in the post-production sector;
- Partnership in TV Access Project and updated best practice guidelines to help producers and indies improve how they work with disabled talent; and
- 4Skills Paralympics Production Training Scheme in preparation for the 2024 Paralympic Games.

More generally, C4C reports annually on the [commitments to anti-racism](#) which it made in 2020 and says it uses its position as a public service broadcaster to inform and raise awareness among the audience about racial discrimination, via on- and off-screen representation and its commitment to commissioning relevant and authentic content.

Channel 4 News continues to offer something distinctive from other news providers

Channel 4 News remains a crucial contributor to the plurality of the UK's news landscape and in 2023, C4C again performed strongly against its duty to provide news and current affairs coverage to audiences in the UK. Notable and important coverage throughout 2023 included its ongoing coverage of the war in Ukraine, for which it won a BAFTA award in February 2023,⁸⁶ and more recently its coverage of the conflict in Gaza. Following Hamas's attack on Israel on 7 October 2023,

⁸³ This is in line with the population average for economically active people.

⁸⁴ As measured by occupation of main household earner when employee was aged 14.

⁸⁵ Social Mobility Commission's [employers' toolkit](#).

⁸⁶ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.32.

Channel 4 drew an average audience of 494,000 viewers to the evening bulletin on linear, making coverage of the October 7th attack and the subsequent Israel/Hamas conflict the programme's biggest news story of the year.⁸⁷

Channel 4's weekday evening news bulletin was watched by an average of 475,000 viewers across the whole of 2023. Whilst this represents a 15% decline year-on-year from 2022,⁸⁸ C4C attributes this to a combination of factors including the fact that 2022 was a particularly eventful year for domestic politics, with a particularly turbulent period in Westminster with three UK Prime Ministers, and the passing of Queen Elizabeth II, driving people to the evening bulletin.⁸⁹ Whilst in 2023 the 16-34 profile of Channel 4's evening news bulletin declined slightly (1pp) to 6%, the programme is now the youngest-skewing long-form weekday peak news programme of the main five PSBs. Channel 4's news offering also remains popular among audiences in minority ethnic groups. In 2023, the minority ethnic profile for Channel 4's weekday evening news bulletin has declined 1pp to 14% but it remains the highest proportion, on average, among all the weekday evening/nightly news programmes on the main five PSB channels.⁹⁰

According to Ofcom's ongoing research, audiences rated *Channel 4 News* highly for accuracy (68%) and trustworthiness (70%).⁹¹ In our latest News Consumption Survey research report, published September 2024, 70% of regular users also said *Channel 4 News* "is high quality" and 70% also said it "helps me understand what is going on in the world today".⁹² Apart from the trustworthiness metric, Channel 4's scores on all of the above metrics are below both the BBC and ITV.⁹³ The research that we commissioned to support the renewal of the Channel 4 licence found that *Channel 4 News* retained a distinct identity among its audiences. Audiences felt it provided unbiased, trustworthy news and was willing to challenge establishment thinking. It was also felt to have a younger and more progressive reporting style and format compared to ITV or the BBC.⁹⁴ Audiences thought that *Channel 4 News* was prepared to go where the BBC and ITV news would not, for example when interviewing politicians or talking about political issues.⁹⁵ C4C's own research shows that 87% of viewers trust Channel 4 to report the news "accurately and fairly", although this metric has also slipped slightly by 1pp from 2022.⁹⁶

We have previously highlighted C4C's success in developing its online news offering, broadening the availability of its news content which is crucial for engaging younger audiences in news content. In 2024, a majority (88%) of 16-24-year-olds consumed news online. This is primarily driven by use of social media for news (82%). In contrast, broadcast TV is used for news by four in ten (41%) of this age group, although this increases to 49% when on-demand viewing is included.⁹⁷ They also access

⁸⁷ Barb, 28-day consolidated, via TV sets only, excluding C4+1, weekday evening news average from 9th October to 22nd December 2023.

⁸⁸ Barb, 28-day consolidated, via TV sets only, excluding C4+1.

⁸⁹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.33.

⁹⁰ Barb 28-day consolidated viewing to TV sets only, excluding the +1 channels of ITV1, Channel 4 and Channel 5. Also excludes Channel 5's two- and three-minute bulletins in peak.

⁹¹ Jigsaw, [News Consumption in the UK 2024 supporting data slides](#), p.28. Regular users of Channel 4.

⁹² Jigsaw, [News Consumption in the UK 2024 supporting data slides](#), p.28. Regular users of Channel 4.

⁹³ Jigsaw, [News Consumption in the UK 2024 supporting data slides](#), p.28 Regular users of BBC TV rated its accuracy (70%), trustworthiness (68%), high quality (75%) and helps me understand what is going on in the world today (76%). Regular users of ITV rated its accuracy (70%), trustworthiness (68%), high quality (73%) and helps me understand what is going on in the world today (71%).

⁹⁴ Jigsaw, [Channel 4 Corporation Relicensing research](#), November 2023, p.30.

⁹⁵ Jigsaw, [Channel 4 Corporation Relicensing research](#), November 2023, p.30-31.

⁹⁶ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.40.

⁹⁷ Ofcom, [News consumption in the UK report](#), p.6.

news online in a different way to older adults. Far fewer 16-24s go direct to websites for their news; they are more likely to go via social media.⁹⁸ C4C said, in its submission to us as part of the relicensing process, that of *Channel 4 News*' young audience (16-34s), almost a third (27%) have recently started watching longer-form *Channel 4 News* on TV or streaming after following *Channel 4 News* on social video platforms.⁹⁹

C4C's online news continued to attract younger viewers in 2023. C4C has said that, in 2023, TikTok was a particular area of focus, as it sought to bring more younger-skewing audiences to its news output. There were 474 million views of *Channel 4 News* content on the platform in 2023, more than five times the 2022 figure. On YouTube, there were 394 million views of *Channel 4 News* content. C4C says that 61% of its audience on TikTok is under 35, while 43% of its audience on YouTube is aged under 35.¹⁰⁰

The role that C4C plays in the provision of trusted and accurate news, alongside other UK public service broadcasters, is one of the main areas of focus for Ofcom's upcoming PSM Review.¹⁰¹ As part of this work, we will be looking into the challenges and opportunities that the shift to online presents for broadcasters' news provision.

C4C launched its new purpose-built digital newsroom in Leeds in 2023, and *Channel 4 News* is now presented from both London and Leeds. C4C highlights in its Annual Report that it is expanding its data team in Leeds in order to support data-led journalism and creating bespoke digital news content alongside the evening bulletin.¹⁰² In 2024 *Channel 4 News* won a number of awards at the Royal Television Society Journalism awards, including Network TV Journalist of the Year and Network Daily News Programme of the Year.¹⁰³

Alongside its news coverage, C4C has a duty to provide high-quality current affairs programming. This is primarily delivered through its flagship programmes *Dispatches* and *Unreported World*, and its newer, youth-focused documentary series *Untold* (see above). Overall, average viewing figures for both *Dispatches* and *Unreported World* fell year-on-year. For *Dispatches*, average viewing figures slipped 18% year-on-year, while *Unreported World* saw a 3% decline.¹⁰⁴

Russell Brand: In Plain Sight was the highest-performing episode of *Dispatches* in 2023 by a considerable margin with a 22% share of overall viewing and a 52% share among 16-34s. This extended episode drove large numbers of viewers to the linear channel, hugely overperforming for its time slot on Channel 4, and generating a 16-34 viewing share over twelve times the average for that slot on Channel 4.¹⁰⁵ *In Plain Sight* reached 4 million viewers across linear and streaming overall¹⁰⁶ and won Best Current Affairs programme and Scoop of the Year at the Royal Television Society Journalism awards in February 2024.¹⁰⁷

⁹⁸ Ofcom, [News consumption in the UK 2023 supporting data slides](#), p.44.

⁹⁹ Channel 4 Licence Renewal: Submission to Ofcom, May 2023.

¹⁰⁰ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.32.

¹⁰¹ Ofcom, [Review of Public Service Media: Terms of Reference, 2024](#).

¹⁰² Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.33.

¹⁰³ [Royal Television Society Journalism Awards](#) 2024.

¹⁰⁴ Barb, 28-day consolidated, via TV sets only, excluding C4+1. Note for the purposes of this calculation we have excluded the extended 90-minute episode *Russell Brand: In Plain Sight*, because it skews the average figures significantly. Additionally, it must be noted that fewer episodes of each programme were aired in 2023 compared to 2022.

¹⁰⁵ Barb, 28-day consolidated, via TV sets only, excluding C4+1.

¹⁰⁶ Barb, as viewed, all devices, 15+ consecutive minute reach.

¹⁰⁷ [Royal Television Society Journalism Awards](#) 2024.

Film4 had a hugely successful year in 2023

In fulfilling its remit to support the development of UK-based filmmakers, Film4 has a direct and significant impact on the UK's film sector. In November 2023, Screen International awarded Film4 a special recognition award for its outstanding contribution to UK film.

Film4 co-produced Martin McDonough's *The Banshees of Inisherin*, which had its UK theatrical release in late 2022. *The Banshees of Inisherin* performed strongly at the UK box office, grossing £10 million in ticket sales.¹⁰⁸ The film also received nine Oscar nominations in the 2023 awards season and won four BAFTA awards. Oliver Hermanus's film *Living*, which was also released in late 2022, received two Oscar nominations and three BAFTA nominations.

Film4 co-funded and produced a number of films which achieved critical acclaim at various international film festivals in 2023. C4C's Annual Report notes that in October 2023, a record ten Film4-backed films premiered at the London Film Festival, including Yorgos Lanthimos's *Poor Things*, Jonathan Glazer's *The Zone of Interest*, Andrew Haigh's *All of Us Strangers*, and Kibwe Tavares and Daniel Kaluuya's *The Kitchen*, as well as a series of short films from deaf, disabled, and neurodivergent filmmakers.¹⁰⁹ In March 2024, Film4-backed titles had another hugely successful awards season, with *Poor Things* winning four Oscars and five BAFTAs. *The Zone of Interest* won Best International Feature Film at the Oscars, as well as two awards at the BAFTAs and the Grand Prix prize at Cannes.

Summary

2023 was a challenging year for C4C financially, which C4C has said is in part due to the continued slump in the advertising market. C4C is evolving its advertising strategy to adapt to changing audience habits and technology, however the need for it to accelerate its digital transformation is demonstrated by the relative performance of its linear and digital revenue streams in 2023. C4C's *Fast Forward* strategy outlines how it will continue its transition to digital-first. Setting out more detail on how it plans to implement this strategy should be a priority for C4C going forward.

C4C's performance this year demonstrates that its digital-first strategy is bearing fruit, and we have seen innovations in content and content delivery. In particular we are pleased to note the performance of Channel 4 Streaming, which reported a record year of viewing in 2023. It is also positive to see the continued success of recent initiatives that C4C has brought in for younger audiences. We look forward to seeing how *Fast Forward* enables C4C to continue to deliver for all audiences, right across the UK.

¹⁰⁸ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.75.

¹⁰⁹ Channel 4 Television Corporation Annual Report and Financial Statements 2023, p.75.

3. Annex 1

Legal framework

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

C4C's public service remit and media content duties

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

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

- a) demonstrates innovation, experiment and creativity in the form and content of programmes;
- b) appeals to the tastes and interests of a culturally diverse society;
- c) makes a significant contribution to meeting the need for the licensed public service channels to include programmes of an educational nature and other programmes of educative value; and
- d) exhibits a distinctive character.

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

1. C4C must participate in:

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