

## 3 Audience and stakeholder expectations of Channel 4

### 3.1 Listening to audiences and stakeholders

- Channel 4 has undertaken the most extensive dialogue with audiences and stakeholders in its history

### 3.2 What audiences want from television and PSB

- Audiences enjoy television primarily for entertainment, but believe it also has an important role to inform and educate. They have clear views about the ways in which television should provide educational content: however serious their intent, programmes also need to be entertaining. And broadcasters should not tell viewers what to do or think
- Channel 4 is appreciated by viewers above all for being “different”, “controversial” and “real”. It is seen as having a distinct place in the PSB ecology

### 3.3 Politics and democracy

- British people believe strongly in democracy and freedom of speech. Television is the main source of news for most people. Debate on television and the provision of different viewpoints are seen as being very important
- Channel 4 News viewers welcome the programme’s depth of analysis and international focus

### 3.4 Social diversity

- People strongly support equal opportunities for all, but there are markedly varied perceptions towards different groups. Mainstream groups are more complacent than minority groups about the extent of inequality in society
- Television is seen as playing an important role in reflecting and portraying different groups and communities. Minority groups attach great importance to their representation and portrayal on television
- Channel 4 is perceived as having a particularly strong role in presenting different cultures and viewpoints and challenging prejudice

### 3.5 Personal interests

- Viewers look to television as a key source of information on a wide range of personal interests and concerns
- Viewers welcome the distinctively accessible approach Channel 4 takes in its programmes on personal interests and hobbies

### 3.6 Stakeholder expectations of Channel 4

- There is strong support for PSB and plurality of PSB supply. The competitive challenges facing public service broadcasters are well understood
- Channel 4 still has a vital role to play. Its principal strengths are its commitment to innovation, its willingness to take bold risks, and the overall quality and distinctiveness of its output. But it is accused at times of not always striking the right balance between public purposes and commercial imperatives
- As a prerequisite for continued support, Channel 4 should connect more closely with its public purposes. Stakeholders believe that Channel 4 should take more risks. It should adopt a pragmatic approach to public service delivery on digital media platforms. It should remain youthful but also keep its broad appeal. And it should formalise its off-screen role supporting independent production and nurturing creativity

### 3.1 Listening to audiences and stakeholders

#### ***Channel 4 has undertaken the most extensive dialogue with audiences and stakeholders in its history***

Channel 4 has undertaken what we believe to be the most in-depth and extensive process of dialogue in the organisation's history. This has given us a better understanding of people's outlook on the world around them, as well as their expectations regarding the public service responsibilities of television in general and Channel 4 in particular.

Channel 4 routinely conducts audience research to assess views on individual programmes and to track overall perceptions of the channel (both over time and in relation to other broadcasters) through quantitative surveys and qualitative research such as focus groups. Results from the quarterly tracking survey that we initiated in 2001 were presented in Chapter 1. We also monitor audience appreciation of individual programmes (through the Pulse survey, conducted with the BBC), and we commission research on specific areas of programming.

For example, Channel 4 conducted an important piece of qualitative work last year to help us understand, and respond to, viewers' concerns regarding trust in programmes, in the light of the series of "fakery" incidents that affected the broadcasting industry in 2007. The research showed that viewers have a clear sense of the gravity of different kinds of potential abuse of trust. Phone-in "scandals" are considered to be the most serious of all, as the people affected – who paid to enter competitions that they could not win – are left tangibly worse off. Issues of fakery in news, current affairs and documentaries are also taken seriously – people expect the highest standards of accuracy and fairness in serious factual genres. In more entertainment-focused genres, such as reality shows, audiences recognise that narratives might be shaped to make more compelling television but clearly resist attempts to deceive them.

To complement and expand the scope of our ongoing work, Channel 4 commissioned three new strands of research to inform the development of its vision:

- The centrepiece of the research was a questionnaire of more than 11,000 people, undertaken by **YouGov**. This represents the largest and most comprehensive survey that Channel 4 has ever conducted. Respondents were asked questions about political and democratic issues, social diversity and tolerance, their own personal interests, and what they perceive to be the role of television. As well as providing an overarching perspective of the views of British people, the survey allowed us to look at the responses of people from different demographic or minority groups
- **Panter Research** conducted 16 qualitative sessions around the country to consider audiences' overall perceptions of Channel 4. While we regularly conduct focus groups of this nature, this research was in greater depth than previous studies
- **Brand Democracy** conducted seven full-day deliberative workshops across the UK (in London, Bristol, Birmingham, Newcastle, Oldham, Belfast and Glasgow), looking in detail at Channel 4's public service role. Particular care was taken to ensure that each group was representative of the region in which it took place (in terms of age, gender, race, sexuality and disability). Brand Democracy supplemented these workshops with additional focus groups specifically covering individual minority audiences: black, Asian and minority ethnic (BAME) groups, gay men and lesbians, and people with disabilities (for which one-to-one interviews were used).

In addition to this programme of audience research, Channel 4 engaged key stakeholder groups – independent producers, opinion-formers, parliamentarians, specialists in key programming genres and advertisers – through a series of in-depth one-to-one interviews and round-table discussions focusing on the future role of Channel 4:

- **Independent producers.** In-depth one-to-one interviews were conducted (by a third party organisation, Tim Wilson & Associates) with 20 independent producers, selected to represent a wide variety of Channel 4 suppliers. In addition, three group

discussions (chaired by Brian McLaren of consultancy EKOS) were held with producers from the nations and regions, in Glasgow, Bristol and Manchester

- **Opinion-formers.** Interviews were conducted (again by Tim Wilson & Associates) with 18 individuals who hold senior positions within key stakeholder organisations and/or were individually in a position to deliver an informed view
- **Parliamentarians.** Ipsos-MORI interviewed a cross-party range of MPs and Members of the House of Lords with particular interests in television and the media. Channel 4 also hosted a series of lunches at which politicians discussed their views with Channel 4 executives
- **Genre specialists.** Channel 4 executives hosted nine group discussions with specialists (including programme-makers) in the fields of education, diversity, entertainment, the arts, drama and film, religion, news and current affairs, international development and industry training
- **Advertisers.** Channel 4 executives conducted nine interviews with representatives of key advertisers, along with group discussions with industry bodies ISBA and IPA.

Many stakeholders welcomed the opportunity to express their views, and some observed that this was the first time that their opinions had ever been sought by Channel 4. As part of the organisation's new public value framework (see Chapter 5), we will engage audiences and stakeholders in dialogue on an ongoing basis.

### **3.2 What audiences want from television and PSB**

People may watch television primarily to be entertained, but our research shows that they value its educational role just as highly. Channel 4's contribution to the PSB system is clearly understood and highly valued. Even with the proliferation of choice, it retains a strong brand, and is much-loved by audiences for being "different", "controversial", "real" and "fun".

#### ***Audiences enjoy television primarily for entertainment, but believe it also has an important role to inform and educate***

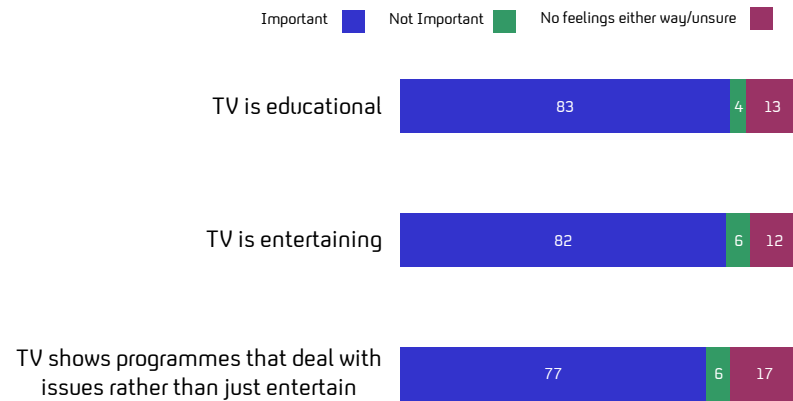
There is no surprise to discover that people watch television to be entertained. Panter Research and Brand Democracy both noted that television is primarily considered by viewers to be a source of entertainment and relaxation, over and above any other social purpose which it might serve.

Perhaps less expected was the very high value attached to television's educational role. Respondents to the YouGov survey believed television's educational role to be just as important as its entertainment role, both scoring over 80% (Figure 3.1).

Figure 3.1. The role of television

### Rating of TV as a whole

Importance to you



Base: total sample

#### Source: YouGov survey for Channel 4

Brand Democracy’s research found that “television was widely recognised as a key source of information in today’s Britain, particularly with reference to things that people might not come into contact with in the course of their daily lives”.

While the educative value of television was widely appreciated, the concept of “public service broadcasting” used in public policy spheres was little understood. Brand Democracy found that most people thought it referred to public information films or party political broadcasts. However, this was an issue of terminology – once PSB was explained to people, the concepts underpinning it were quickly recognised and strongly supported.

***Audiences have clear views about the ways in which television should provide educational content: however serious their intent, programmes also need to be entertaining. And broadcasters should not tell viewers what to do or think***

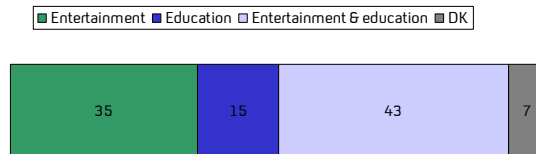
While audiences rely on television to learn things, they want those programmes to be as entertaining as possible. Brand Democracy reported that entertainment is seen as a central requirement for broadcasters to deliver on their social goals: “Participants were acutely aware that no one would watch an edifying but boring programme.”

This view was supported by respondents to the YouGov survey (Figure 3.2). Over 80% claimed that they derive educative value from factual or documentary programmes. But while 35% of respondents stated that they watch primarily to learn something, a larger proportion (46%) expect to be simultaneously educated and entertained.

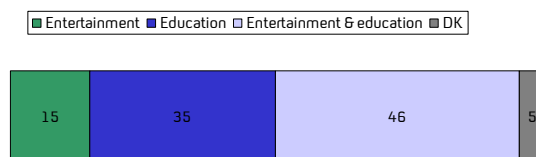
Figure 3.2. The value of lifestyle and factual programming

### Value of lifestyle and factual programming

Thinking about hobby or lifestyle programmes, would you say you watched them mainly for entertainment purposes or mainly to learn something?



Thinking about more factual or documentary programmes, would you say you watched them mainly for entertainment purposes or mainly to learn something?



#### Source: YouGov survey for Channel 4

Participants in Brand Democracy’s research expressed strong views about how television should go about influencing their behaviour. They want to be given the information and left to make up their own minds. They resent television trying to tell them what to do or what to think – they do not see this as television’s job. “Viewers were clearly uncomfortable with the idea that a television channel should take on the role of an authority within society [...] Ultimately, the viewer wants to be the arbiter of their own opinions [...] Telling people what to do or think is seen as undermining that autonomy.”

They also regard this as the most practical approach, “not only because it encourages independent thought and decision-making, but also because at a pragmatic level, telling people what to do rarely works as a means to get people to make positive changes”.

#### ***Channel 4 is appreciated by viewers above all for being “different”, “controversial” and “real”***

Participants in the focus groups conducted by Panter Research were asked which words they most closely associate with Channel 4.

While perceptions varied to some degree across demographic groups, the key recurring associations were “entertaining”, “varied”, “different”, “controversial” and “real”. Viewers in their teens and 20s thought Channel 4 was “for us” and “funny”. Viewers in their 30s and older were more drawn to Channel 4 for being “modern” and “willing to experiment”. Men especially welcomed its willingness to be “controversial” and sometimes “shocking”, while women appreciated programmes they could “relate to”, and valued the channel for being “unafraid” and “buzzy”.

Across all demographic groups, Panter Research identified two distinct categories of television viewers: “mainstream viewers” and “deep thinkers”. Channel 4 was described by the “mainstream” group as being primarily an entertainment channel. “Deep thinkers”

placed greater value on thought-provoking programmes, describing Channel 4 as “independent”, “informative” and “idiosyncratic”.<sup>1</sup>

When Panter Research examined what lay behind these main associations, a further range of positive associations emerged: participants appreciated Channel 4’s lightness and overall sense of humour, its non-patronising way of looking at “real people”, and the way in which its programmes were of-the-moment and contemporary. Channel 4 was seen as being different from other broadcasters in terms of subject matter, tone of voice and approach. Its remit to be experimental and innovative manifested itself through associations (generally intended positively) such as “quirky”, “weird” and “alternative”. Its willingness to be controversial and take risks was acknowledged by descriptions such as “edgy”, “shocking”, “independent” and – more critically – as “sensationalist”.

Panter Research found that the “mainstream” majority of viewers felt they were well served by Channel 4, while the “deep thinkers” claimed that there was less programming than in the past which stimulated and challenged them (although they also felt there was still plenty of enjoyable entertainment). A similar point was made by participants in Brand Democracy’s research, who offered as an explanation the fact that, while Channel 4 had a long and distinguished track record of “TV firsts” (such as the first lesbian kiss, on *Brookside*), progressive social change over the last 25 years meant that there now remain few taboos still to be broken.

### ***Channel 4 is seen as having a distinct place in the PSB ecology***

Brand Democracy’s research indicated low levels of awareness amongst the general public of Channel 4’s institutional status as a publicly-owned broadcaster funded by commercial activity but with a duty to fulfil its public service remit. There was even less awareness of its publisher-broadcaster status and its special relationship with the independent production sector. What mattered to viewers were the programmes.

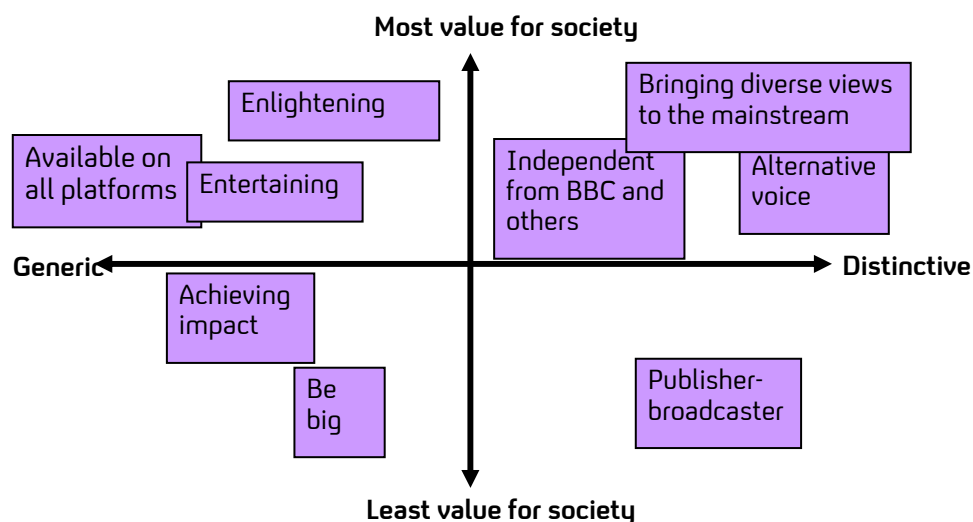
Participants in the research tended to place the BBC in a category of its own, as the sole recipient of licence fee funding, and the voice of the establishment. While they appreciated the distinctiveness of Channel 4’s output, they did not differentiate it structurally from other advertising-funded broadcasters.

Despite this lack of interest in Channel 4’s institutional status, all three strands of research highlighted that its independence of spirit (derived from its public ownership and remit) is widely recognised and highly valued. Participants in the Brand Democracy Research attributed Channel 4’s distinctiveness primarily to its independence, its alternative perspective and its ability to bring diverse views to the mainstream (Figure 3.3).

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<sup>1</sup> More precisely, there are two kinds of viewing behaviour. In practice, most people are “mainstream viewers” and “deep thinkers” at different times

**Figure 3.3. The distinctiveness and social value attached to Channel 4's approach**  
**Channel 4's distinctiveness**



Source: Brand Democracy

In Sections 3.3-3.5, we look in more detail at the role played by television beyond mere entertainment. Our audience research, in particular the YouGov survey, provides a picture of how British people view the world around them and television's place in their lives, covering three key areas: politics and democracy, social diversity and tolerance, and personal interests and hobbies. This research informed the articulation of Channel 4's public purposes covering each of these areas, which we present in the next chapter.

### 3.3 Politics and democracy

Television makes a critical contribution to our democratic society. Notwithstanding the proliferation of outlets in traditional and new media, it remains the main source of news for UK citizens. Channel 4 plays a distinctive role: its news coverage is regarded very highly by its viewers, who particularly appreciate the depth of coverage and international perspective. In a society where people value freedom of speech highly, Channel 4 is seen as being braver than other broadcasters in taking risks, questioning authority and challenging consensus.

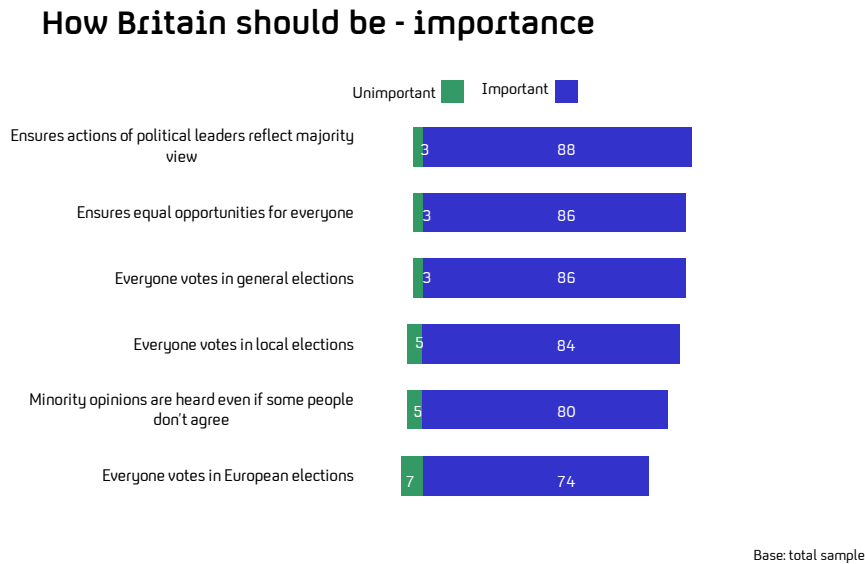
#### ***British people believe strongly in democracy and freedom of speech***

The YouGov survey revealed a high level of commitment to the ideals of democracy and freedom (Figure 3.4). 88% of respondents believed it was important that the "actions of political leaders reflect the majority view". 86% thought it was important that "everyone votes in general elections" (only slightly fewer thought the same about local elections, though the proportion fell to 74% for European elections). And 80% of the sample agreed that "we have to allow freedom of speech even at the risk of being offended". Support for these views tended to be universal across demographic groups.

But a smaller number felt these aspirations were being met in practice (Figure 3.5). Only 57% agreed that Britain was, in practice, a democratic society. There was also considerable scepticism by some towards the major institutions. 64% felt that power was too centralised in London. 62% *disagreed* with the statement that "in general the people in charge know

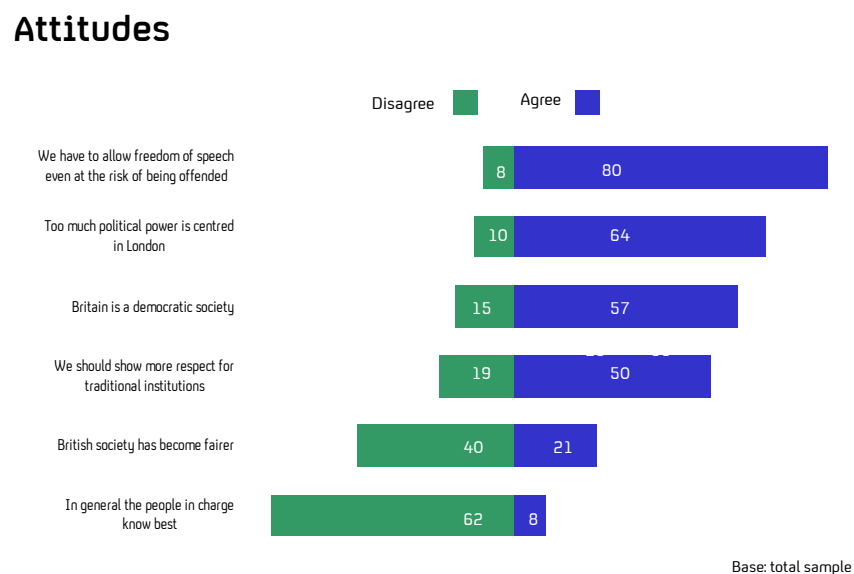
best". And only 50% agreed that "we should show more respect for traditional institutions", a figure that fell markedly amongst young people (to 42%) and Scottish people (37%).

**Figure 3.4. How people think Britain should be**



Source: YouGov survey for Channel 4

**Figure 3.5. Attitudes to statements about British society**



Source: YouGov survey for Channel 4

**Television is the main source of news for most people**

According to the YouGov survey, 82% of people regularly watch national news on television, nearly double the proportion of people who do so online or via radio, and also substantially higher than the 51% who read newspapers (Figure 3.6).

**Figure 3.6. Regular news consumption by media**

**TV is preferred for news**

	TV	Newspapers	On-line	Radio	None
National News	82	51	44	44	5
International News	76	42	34	29	11
Local News	70	48	21	27	11

Base: total sample

**Source: YouGov survey for Channel 4**

This finding was the result of an online survey and therefore, by definition, was of internet users. It puts into context the popular perception that people are increasingly turning to the internet for news. Online news was valued most highly by people in the 25-34 year old age group (Figure 3.7).

**Figure 3.7. Online news consumption by age**

**Online news usage by age**

	18 to 24	25 to 34	35 to 54	55+
National News	49	51	45	37
International News	36	41	34	29
Local News	21	24	22	17

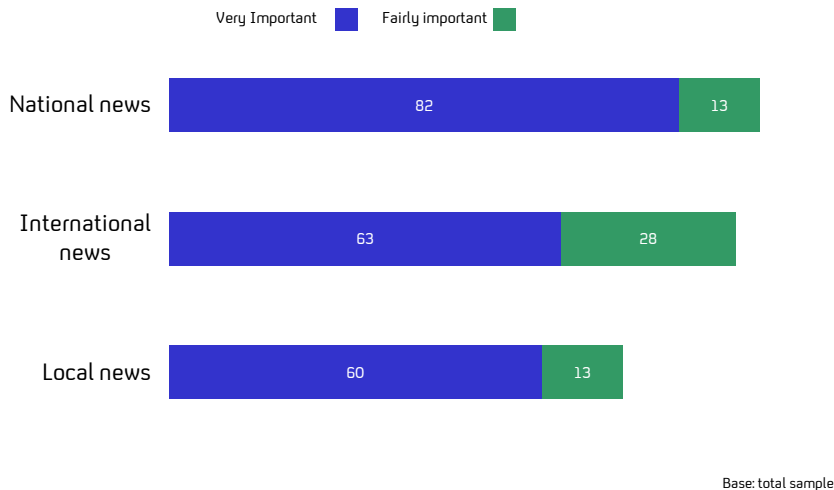
Base: total sample

**Source: YouGov survey for Channel 4**

Most people believe strongly that national news should be covered on television (82% of the YouGov sample). The figures were lower for international news (63%) and local news (60%), but still represented majorities of the population (Figure 3.8).

**Figure 3.8. Importance of different kinds of news coverage on TV**

### Importance of news coverage on TV



**Source: YouGov survey for Channel 4**

Of the various media, television news is regarded as being by far the most accurate, highest quality and most trusted, winning the support of about 50% of YouGov's sample (Figure 3.9). Newspapers, online and radio all attracted far lower scores. This is a striking result, in the context of the problems broadcasters faced regarding viewer trust over the course of 2007.

Television also scored significantly higher than other media in terms of being the least biased and having the most depth.

Figure 3.9. Levels of trust in news by media

**TV is most trusted news source**

	Highest quality	Most accurate	Trusted most	Best depth	Least biased
TV	54	50	49	41	34
On-line	13	13	14	24	17
Newspaper	11	10	11	19	13
Radio	10	8	9	6	5

Base: total sample

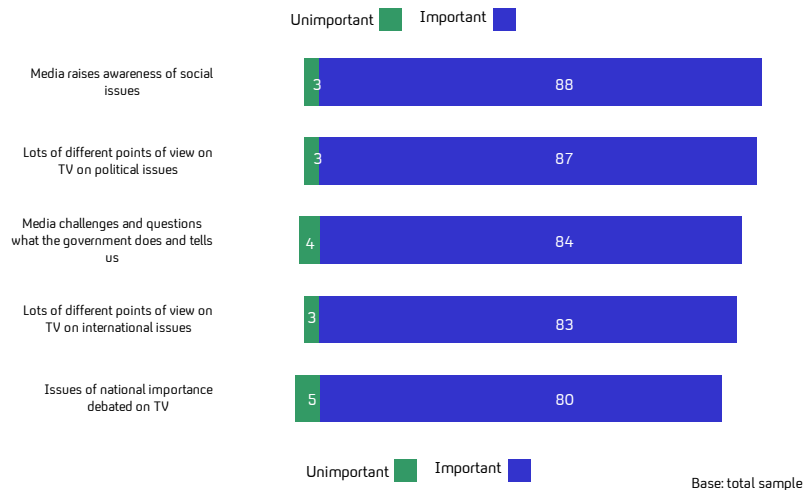
Source: YouGov survey for Channel 4

***Debate on television and the provision of different viewpoints are seen as being very important***

Television is seen by viewers as playing a very important role in the democratic process (Figure 3.10). According to YouGov's survey, 80% of people believe that *"issues of national importance should be debated on TV"*. Similar or higher proportions of the sample supported the views that there should be *"lots of different points of view on TV on political issues"* (87%) and specifically on international issues (83%); that the media should *"raise awareness of social issues"* (88%) and should *"challenge and question what the government does and tells us"* (84%).

**Figure 3.10. The role attached to television in democracy**

### TV and Democracy



**Source: YouGov survey for Channel 4**

#### ***Channel 4 News viewers welcome the programme’s depth of analysis and international focus***

Participants in the Brand Democracy research believed that one of Channel 4’s key public service roles was to help people increase their understanding of the world.

Participants in the Panter Research suggested that Channel 4’s approach was to show people what is going on in the world and make it relevant to their lives. Brand Democracy’s research showed that audiences appreciated the “alternative voice” that Channel 4 brought. Its edgy and challenging approach was contrasted with the “comfortable” or “establishment” perspectives that were perceived to be offered by the BBC and ITV.

The “mainstream” and “deep thinker” perspectives identified by Panter Research were also evident in the in-depth Brand Democracy groups. Regular viewers of *Channel 4 News* (corresponding to Panter’s “deep thinkers”) valued the level of detail and analysis in the programme, which they believed not to be offered by other news programmes, while the “mainstream” viewers dismissed *Channel 4 News* as “heavy” or “boring”. And while “deep thinkers” welcomed *Channel 4 News’* focus on international issues, “mainstream” viewers saw this as detracting from more relevant domestic issues.

The YouGov survey revealed high levels of trust in all broadcasters’ news programmes, with the BBC and Channel 4 generally marginally ahead of ITV and Sky (Figure 3.11).

**Figure 3.11. Perceptions of trust in TV news**

**Channel 4 News highly trusted**

	Channel 4 News Viewers	BBC News Viewers	ITV News Viewers	Sky News Viewers
Trusted to report fairly & accurately	93	94	91	90
Trusted for depth of coverage	92	93	89	87
Trusted to report without bias	84	84	82	80

Base: Viewers to each news programme only

**Source: YouGov survey for Channel 4**

Recognition of Channel 4’s independence emerged strongly in the YouGov survey. 84% of *Channel 4 News* viewers thought that its programmes were independent from Government, higher than the rankings given to the news programmes of the BBC, ITV and Sky. And the news programmes of the publicly-owned broadcasters, the BBC and Channel 4, were perceived to be significantly more independent from business interests than those of privately-owned ITV and Sky (Figure 3.12).

**Figure 3.12. Perceptions of independence of news on TV**

**News programmes – independent and trusted**

	Independent from Government	Independent from Business
BBC News	72	79
ITV News	74	62
Channel 4 News	84	71
Sky News	75	54

Base: Viewers to each programme

**Source: YouGov survey for Channel 4**

### 3.4 Social diversity

Our research shows that people believe very strongly in equal opportunities. But there are nonetheless significant differences between their perceptions of various minority groups. In an increasingly diverse society, television is uniquely powerful, as the dominant form of mass media, in its ability to show viewpoints and lifestyles that people might not otherwise come across in their lives. Channel 4 is recognised for having done more than any other channel to reflect and portray the diversity of Britain's cultures and lifestyles, particularly amongst gays and lesbians and some ethnic groups.

#### ***People strongly support equal opportunities for all, but there are markedly varied perceptions towards different groups***

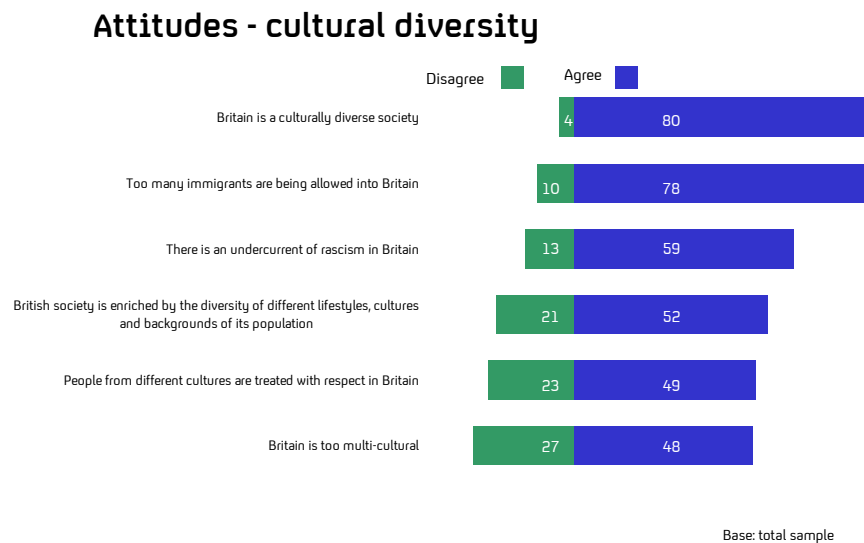
The YouGov survey revealed very strong support amongst the general population for equal opportunities for all. 86% of respondents agreed that Britain should "*ensure equal opportunities for everyone*". Moreover, 80% of people agreed that "*minority views should be heard even if some people don't agree*" (see Figure 3.4).

The survey showed huge disparities between what people want and the reality they feel they get. Only 34% of people agreed that "*there are equal opportunities for everyone in Britain*", while 44% disagreed. 40% of people *disagreed* with the statement that "British society has become fairer" over the last 10 years.

The issue of diversity highlighted tensions between people with different views and also, at times, contradictions in individuals' own opinions. Notwithstanding the overwhelming support for generic statements about fairness and equal opportunities, reactions to statements regarding people with different cultural, social or religious backgrounds were significantly more mixed (Figure 3.13).

80% of respondents agreed that "*Britain is a culturally diverse society*", but a significantly smaller majority (52%) felt that "*British society is enriched by the diversity of different lifestyles, cultures and backgrounds of its population*". Almost half of the respondents (48%) believed that "*Britain is too multicultural*", and a large majority (78%) felt "*too many immigrants are being allowed into Britain*". Perhaps not surprisingly, given these results, only half of the respondents believed that "*people from different cultures are treated with respect in Britain*", and a majority (59%) thought that "*there is an undercurrent of racism in Britain*".

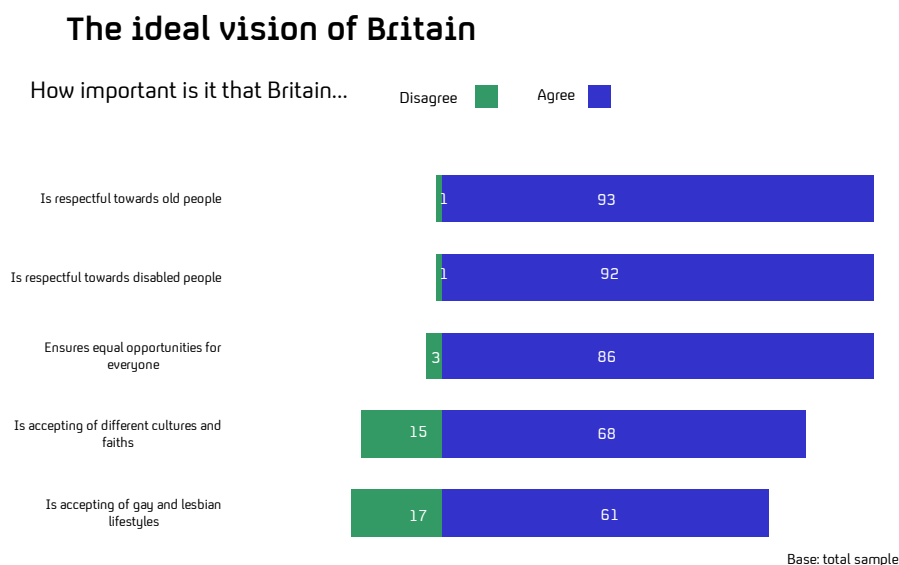
**Figure 3.13. Attitudes about cultural diversity in British society**



**Source: YouGov survey for Channel 4**

Levels of respect for other groups in society varied substantially depending on the group in question, suggesting that the belief in equal opportunities for all is often undercut by an admission that some are more equal than others (Figure 3.14). A belief in the need for respect towards the old and the disabled (93% and 92% respectively) was not matched by a belief in the need for acceptance of some other minority groups: only 68% agreed that Britain should be “accepting of different cultures and faiths”, and 61% that Britain should be “accepting of gay and lesbian lifestyles”.

**Figure 3.14. Attitudes towards different groups in society**



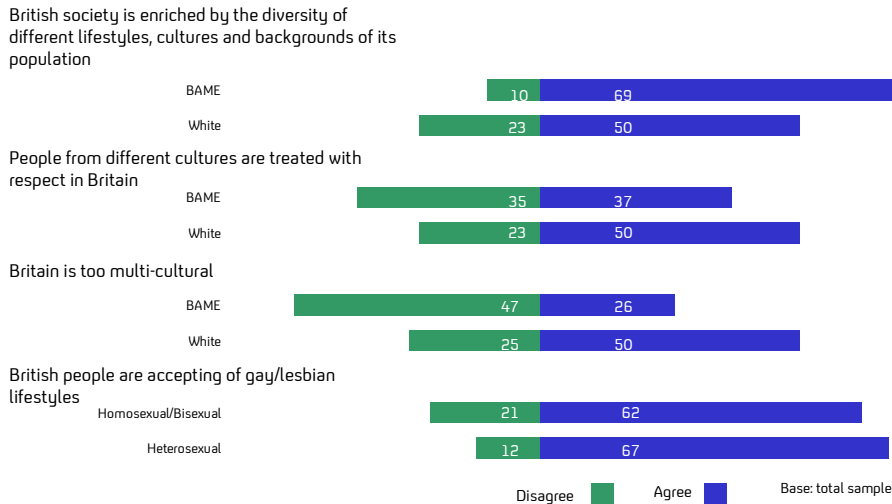
Source: YouGov survey for Channel 4

**Mainstream groups are more complacent than minority groups about the extent of inequality in society**

Analysis of the YouGov results for different groups indicates a degree of complacency in the mainstream – the proportions of minority groups who believe that British society is less tolerant and accepting tended to be significantly greater than the corresponding figures for the general population (Figure 3.15). For example, almost twice as many white people (50%) thought that “*Britain is too multicultural*” compared to non-white people (26%). There were similar differences in the responses to statements that “*British society is enriched by the diversity of different lifestyles, cultures and backgrounds*” and “*People from different cultures are treated with respect in Britain*”. And while only 12% of the population *disagreed* with the statement that “*British people are accepting of gay/lesbian lifestyles*”, this figure rose to 21% for homosexual respondents.

Figure 3.15. The differing perspectives of mainstream and minority groups

**Mainstream Complacency**

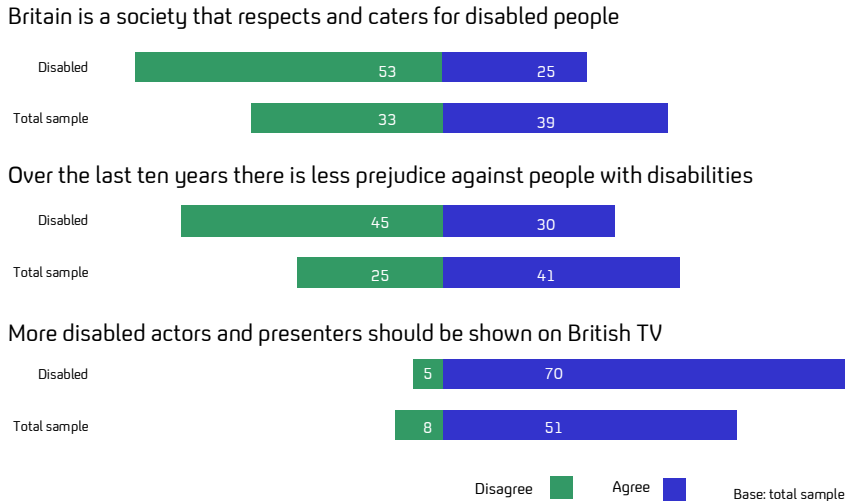


Source: YouGov survey for Channel 4

Similarly, there was clearly some feeling amongst disabled people that they were not treated with sufficient respect (Figure 3.16). The YouGov poll revealed a 53% majority *disagreeing* that Britain respected and catered for them, compared with 33% of the total sample. This was consistent with other findings regarding disabled people. Around 70% of the disabled YouGov respondents felt there should be more disabled issues and characters or presenters on-screen, compared with around 51% of the total sample. 45% of disabled respondents also *disagreed* that there was now less prejudice against them, compared with 25% of the total sample.

**Figure 3.16. Representation of, and attitudes towards, the disabled**

## Representation of and Attitudes Towards the Disabled



**Source: YouGov survey for Channel 4**

### ***Television is seen as playing an important role in reflecting and portraying different groups and communities***

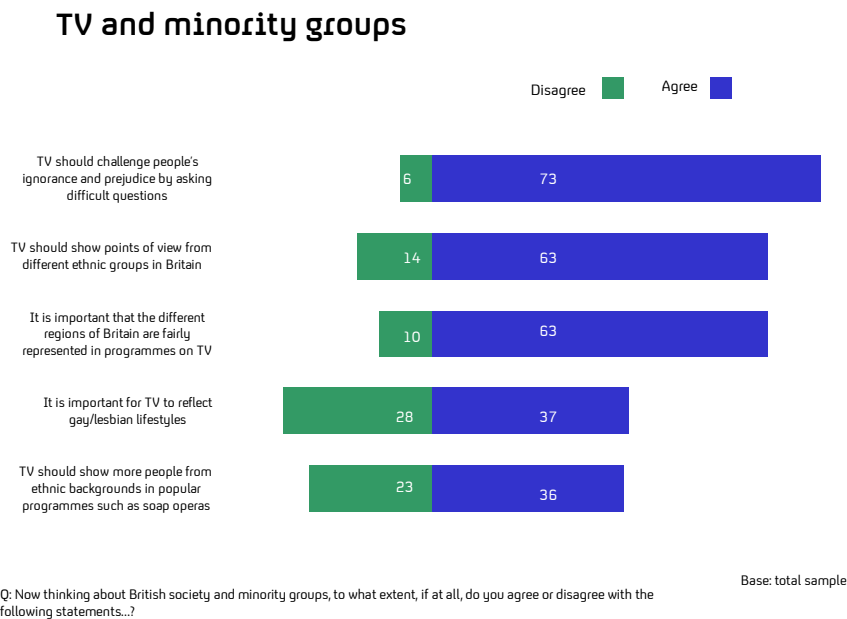
Brand Democracy reported that “participants felt that television has a unique power to lift the curtain on other people’s lives and lifestyles” and is “increasingly important in building an integrated and cohesive society”. Respondents thought that “television was perhaps their best hope of understanding different communities’ points of view”.

In a similar vein, 73% of respondents to the YouGov survey agreed that “TV should challenge people’s ignorance and prejudice by asking difficult questions” (Figure 3.17).

But responses to questions in the YouGov survey about television’s obligation to reflect the views of specific minority groups provoked more mixed responses, in contrast with the strong support for equal opportunities in society and for television’s role in showing different points of view.

Thus, 63% of people agreed both that “TV should show points of view from different ethnic groups in Britain”, and also that “the different regions of Britain should be fairly represented”. But, in one of the most popular genres of programming, in which it might be felt that the social mix of the cast should be representative of society more broadly, only 36% of people felt that “TV should show more people from ethnic backgrounds in popular programmes such as soap operas”, and a similarly small proportion thought that “it is important for TV to reflect gay and lesbian lifestyles”.

**Figure 3.17. Television’s role in reflecting and portraying minority groups**



**Source: YouGov survey for Channel 4**

In terms of the implications for television, there is no simple message from these results. Participants in the Brand Democracy workshops were strongly supportive of the value in showing the perspectives of different ethnic groups or communities on television, while the YouGov survey results indicated more ambivalent views. YouGov respondents showed support for some representation of minority groups and viewpoints on TV, but when asked about increased representation of minority groups, showed markedly less support for groups other than their own.

It is likely that these results were influenced by a number of factors. Respondents to the YouGov survey did not have the benefit of participating in the group discussions on topics relating to diversity and representation that formed part of the Brand Democracy workshops. So the survey results suggest that people might not be sufficiently sensitive to the degree of under-representation of some groups in society on television.

It may also be that they simply do not spend much time thinking about such issues, given the views that emerged from the Brand Democracy group discussions. Individual comments made by participants in the Brand Democracy workshops suggest some people are uncomfortable talking about diversity: participants did not always have the appropriate language to discuss issues of race or sexuality. And, inevitably, both strands of research reflect the views of those who are simply intolerant of other communities.

***Minority groups attach great importance to their representation and portrayal on television***

Minority groups expressed views that were significantly different from those of the general population but broadly consistent with those from other minorities, in particular those defined by race or sexuality. They all believed strongly that it was important for minorities to be represented on television, and mostly believed that they were currently under-represented (some more than others – for example, that there is less representation of lesbians than of gay men; and less representation of mental than of physical disabilities).

The differences between the views of minority and mainstream groups were often stark (Figure 3.18). 79% of gays and lesbians believed that TV should reflect their lifestyles, while only 32% of heterosexuals supported this statement. A similar, if less contrasting, range of views was expressed by white groups and by black, Asian and minority ethnic groups on whether there should be more people from ethnic backgrounds in TV soap operas.

**Figure 3.18. Attitudes to the representation of minority groups on TV**

### Attitudes to representation of minority groups on TV

	BAME group		White group	
	Agree	Disagree	Agree	Disagree
TV should show points of view from different ethnic groups in Britain	76	7	62	14
TV should show more people from ethnic backgrounds in popular programmes such as soap operas	61	11	34	24

	Gay/lesbian group		Heterosexual group	
	Agree	Disagree	Agree	Disagree
It is important for TV to reflect gay/lesbian lifestyles	79	4	32	30

Base: total sample

**Source: YouGov survey for Channel 4**

Brand Democracy’s research revealed that minority groups were very aware of and acutely sensitive to representation of their own communities on television. They attached great value to examples of positive portrayal, and were highly critical of what they saw as tokenistic and stereotypical portrayal, for example equating Asian people with terrorism, gay men with effeminate behaviour, or portraying disabled people as strong characters (typically wheelchair users) designed to elicit sympathy by valiantly overcoming obstacles.

A key priority for all minority groups was a desire to see people from minority groups in mainstream programmes, with a wide range of personality types that are neither tokenistic nor stereotypical (people wanted characters from their communities to be presented as “normal” people who just happen to be black, gay, disabled or whatever).

While there was also some desire for niche programming (i.e. programmes specifically targeted at individual minority groups), television’s role in bringing minority views and perspectives to mainstream audiences was seen as being of critical importance. Participants in the Brand Democracy groups talked about the role television could play in tackling prejudice, and even more in “building social cohesion by increasing mutual understanding”.

Specific areas in which television was seen as having a particular role included immigration and religion. British Indian and Pakistani groups attached particular importance to international news coverage (many having family in war-affected parts of the world), and were especially sensitive towards perceived bias in the reporting of international conflicts. Views on other priority areas differed between the various groups, and were often delineated by factors such as age. For example, younger Muslims welcomed the portrayal of gay Muslims, while older people from their community more often believed it was wrong for gay Muslims ever to be shown on television.

***Channel 4 is perceived as having a particularly strong role in presenting different cultures and viewpoints and challenging prejudice***

The public service objective of “making us aware of different cultures and viewpoints” is strongly associated with Channel 4. According to Brand Democracy, this “in particular chimed with Channel 4’s output, with many people feeling that it was the channel which is

most likely to give airtime to points of view which might not feature on television otherwise". Participants in the Panter Research also believed "diversity" and "offering different viewpoints" to be a particular strength of Channel 4's output.

In Brand Democracy's research, respondents saw "challenging prejudice" as a hallmark of Channel 4's output. Programmes such as *Desmonds* and *Queer as Folk*, and individual moments such as Nadia winning *Big Brother*, are widely seen as landmark moments in television history, which distinguish Channel 4 from other broadcasters. Participants readily identified a wide range of recent programmes that in different ways confronted issues relating to diversity, including characters from minority groups in *Hollyoaks*, *Shameless* and *Skins*; dramas such as *Britz* and *Ghosts*; and the range of subject matter in programmes such as *Dispatches* and *Unreported World*.

More than any other broadcaster, Channel 4 was seen to have consistently broken boundaries in its programming in the past. But there was also an understanding that it was difficult for Channel 4 to continue to do this, particularly in terms of sexuality – as noted above, a participant in the Brand Democracy research pointed out that there could only be one "first lesbian kiss" on TV.

Participants in the ethnic and gay/lesbian minority groups believed that television, and Channel 4 in particular, had a role to play in helping to reduce prejudice. Some people praised past programmes that had specifically served minority groups (such as *Out on Tuesday* or *Asian Eye*), and criticised Channel 4 for not continuing to show such programmes. However, most people believed that Channel 4's priority should be to ensure the presence of non-stereotypical characters in mainstream programmes.

Audiences also perceived a particular Channel 4 role in highlighting social tensions between different groups. *Skins* attracted praise not just from teenagers but older viewers on the grounds that it created a better understanding of teenagers' lifestyles. It also met with approval for the authenticity of its diverse cast. A participant in one of the Asian focus groups said of Anwar, a character who comes from a typically Pakistani family: "He wants to pray five times a day but he's very confused because he has white friends, it's portrayed remarkably accurately".

Some aspects of diversity were not seen as being particular strengths of Channel 4. Reflecting regional identity was associated more strongly with ITV and the BBC in the Panter Research, because of the regional opt-out programmes in their schedules. Although "reflecting the lives of other people" was seen to be a key Channel 4 strength, "bringing people together for shared experiences" was also associated far more strongly with ITV and the BBC.

### **3.5 Personal Interests**

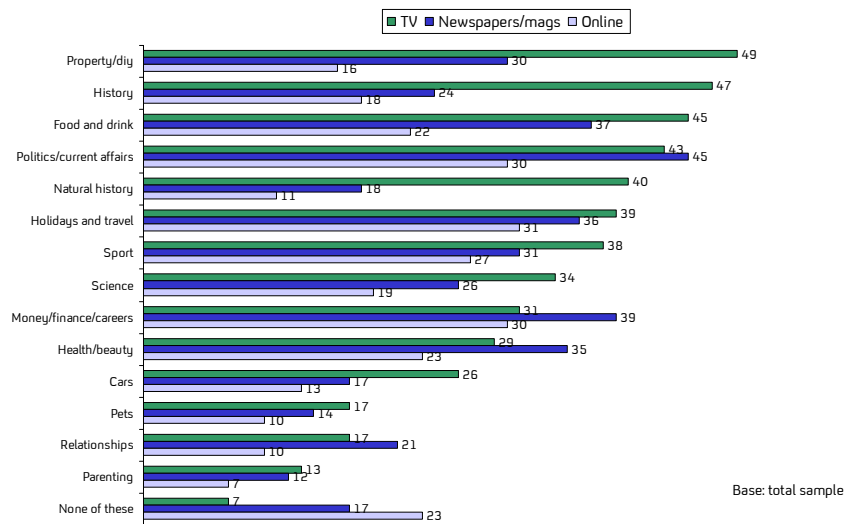
People look to television for information on a wide range of personal interests – families and relationships, health and nutrition, hobbies and cultural pastimes. Channel 4's accessible approach appeals to viewers who do not want television to tell them what to do, and who prefer to be given the relevant information and left to make up their own minds.

#### ***Viewers look to television as a key source of information on a wide range of personal interests and concerns***

Notwithstanding their emphasis on the wider social, cultural and political role of TV, respondents were keen to stress the importance of TV as being a source of information on domestic matters, hobbies and personal interests (Figure 3.19).

Figure 3.19. Sources of information on hobbies and personal interests

### Sources of information for personal interests



#### Source: YouGov survey for Channel 4

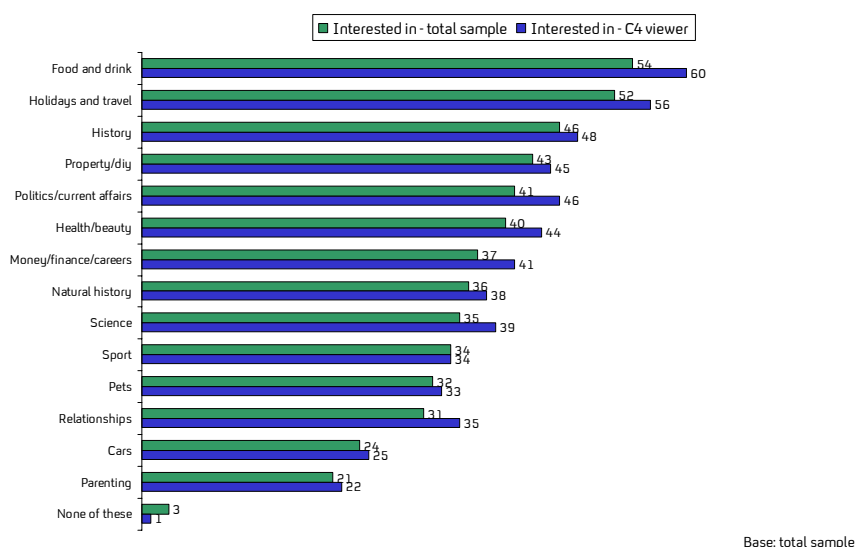
Brand Democracy’s research also showed that television was seen as having an important role in dealing with personal issues. People valued the information they pick up from programmes on topics such as health and diet, property and family issues. They welcome the opportunity to learn about how people from other generations (especially younger people) think from storylines in soap operas and dramas. And they thought television has a particularly strong role to play in helping people to manage transitions in their life or address difficult issues – for example, relating to illness, raising children, drugs or sexual behaviour.

#### ***Viewers welcome the distinctively accessible approach Channel 4 takes in its programmes on personal interests and hobbies***

The YouGov survey showed that Channel 4 viewers were more interested on average than the general public in virtually all of the personal interests and hobbies for which views were sought (Figure 3.20).

Figure 3.20. Levels of interest in hobbies and personal interests

### Personal interests and importance in life



#### Source: YouGov survey for Channel 4

Participants in the Brand Democracy research thought that Channel 4 “had a distinctive way of delivering advice, hints and tips, which revolves around the use of real-life examples from which viewers can draw comparison to their own life”. They identified a wide range of programmes that can help improve their daily life or help them through transitions, such as *Supernanny*, *How Clean is Your House?*, *Wife Swap*, *You Are What You Eat*, *Location, Location, Location* and *How To Look Good Naked*. They also valued the ability of programmes such as *Jamie’s School Dinners* and dramas and soaps to highlight important social issues (the anorexia storyline in *Hollyoaks* was cited as an example).

The Panter research showed that people immediately associate a more didactic approach with the BBC, using words such as “educational” and “learning”. Channel 4, by contrast, was seen as treating the viewer more as an equal, and showing things in accessible and relevant ways. This was also the view of participants in the Brand Democracy workshops, who strongly valued Channel 4’s “real life” approach, showing viewers the consequences of different actions and letting them make up their own minds, rather than telling them what to do. Such an approach was thought to be particularly effective for young viewers, for example regarding subjects such as recreational drug use or sex.

### 3.6 Stakeholder expectations of Channel 4

Channel 4 conducted a series of interviews and group discussions during the autumn of 2007 to ascertain the views of representatives drawn from various stakeholder groups – independent producers, opinion-formers, parliamentarians, genre specialists and advertisers (see Section 3.1 above). The interviews and discussions were wide-ranging and often detailed, with the topics covered grouped around the following themes:

- the future role of public service broadcasting in the UK
- Channel 4’s role in a changing media landscape
- expectations of Channel 4 in the future.

There was widespread agreement on many topics across the various groups, even if consensus was not reached on every issue. The key points that arose from the discussions – which in many cases mirror the views that emerged in our audience research – are summarised below.

### **3.6.1 The future role of public service broadcasting**

#### ***There is strong support for PSB and plurality of PSB supply***

Almost all respondents believed there to be a continuing role for public service broadcasting. There was a widespread view that, even with the proliferation of choice on digital channels and via the internet, there is still a need to provide the kinds of originated British public service programming that the market does not deliver.

Views on what that role should be varied only in degree. Politicians were firmly of the view that the traditional mantra to “inform, educate and entertain” remains the *raison d’être* of public service broadcasting. Opinion-formers took a wider societal view: they saw the role of PSB as reflecting the national story in the face of perceived fragmentation of communities, greater individualism and loss of social cohesion. Respondents also emphasised entertainment as an important element of PSB.

Many, particularly politicians and opinion-formers, stressed the importance of plurality in PSB provision and, in particular, the need for a strong and distinctive alternative to the BBC – for the benefit of the BBC and for the wider public. Independent producers also emphasised the benefits of plurality in the programme supply market to promote creativity and competitiveness. They were clear that Channel 4 has an important role to play, as we see below.

#### ***The competitive challenges facing public service broadcasters are well understood***

The challenges posed by the fragmentation of audiences across both established and emerging media platforms were widely acknowledged and understood. Stakeholders recognised that when programme budgets come under pressure, range and risk-taking tend to suffer. They also appreciated that increasing choice means that public service broadcasters have to work harder to attract and keep viewers, not only on their core services but on digital platforms too.

While there was general agreement on the need to support PSB in the future, there was no consensus on the level of intervention needed. Some stakeholders argued that it should remain at around the current level. Others thought that there might be justification for greater intervention in the future, for example in new media; while others still believed the need for intervention might fall with the increase in choice provided by other players in the market.

### **3.6.2 The role of Channel 4**

*“The beauty of Channel 4 is that it is in a unique position to do things and try out things that other people won’t. The BBC won’t because they are too conservative and the commercial sector won’t because it might not be financially viable.” Politician*

*“The important thing is that you have the ability to be distinctive, have edge, be innovative, be a quality alternative and effective competition to ITV and the BBC. That’s what we all want, however it’s delivered.” Advertiser*

#### ***Channel 4 still has a vital role to play***

The large majority of respondents believed that Channel 4 still has a valuable role in providing a public service alternative to the BBC. It is needed to fill the gaps left by other broadcasters – most notably in risk-taking, innovation and giving space for alternative, minority and regional voices. And it provides something distinctively different – referred to variously as a “cheeky irreverence”, a “youthful outlook”, and “a thinking voice with another viewpoint”.

The power and resilience of the Channel 4 brand means that it is regarded as a trusted guide and filter in a crowded media world: people still crave quality, surprise and inventiveness without having to hunt for it. Though the rise of new digital media platforms is seen as posing a stiff challenge to traditional broadcasters, the supposed demise of mainstream television networks was regarded by some to be overstated. They believed that the core channel can still deliver quality programmes and valuable audiences up to and beyond digital switchover, especially if it is part of an integrated multi-platform offer that remains valuable to viewers and advertisers.

Advertisers also wished to preserve the strength and distinctiveness of Channel 4's brand. Notwithstanding the difficulties in the current advertising market, they saw ongoing commercial value in Channel 4 and did not want it to disappear or change radically: they argued that it continues to deliver hard-to-reach viewers in larger numbers than other media.

***Channel 4's principal strengths are its commitment to innovation, its willingness to take bold risks, and the overall quality and distinctiveness of its output***

*"At its best, Channel 4 has stirred things up and shaken the comfortable attitude of the other PSBs." Opinion-former*

*"Channel 4 has been a sensational success story in terms of developing programming which uses creative ways of bringing together PSB and entertainment – at its best it is brave and bold." Independent producer*

There was little doubt among those consulted that Channel 4 enjoys a strong reputation for difference, risk, innovation and diversity, delivered with irreverence and humour. It is "reliably unreliable", sometimes shocking, often trouble-making, occasionally disappointing, but mainstream enough to be trusted to reflect a range of views and truths, even though these may be discomforting at times. Performing a role akin to a "court jester", Channel 4 entertains, amuses, and tells truths no-one else is prepared to tell.

All respondents recognised innovation and distinctiveness as among Channel 4's principal strengths, and many welcomed its capacity to challenge, provoke, and be controversial. People from all the stakeholder groups attached particular importance to its ability and willingness to take bold risks, to be different, and at times to offend people if necessary. The independence that created the conditions for these strengths, and thus provided a genuine alternative to the BBC, was also noted.

*Channel 4 News* was regarded by many, particularly MPs and opinion-formers, as the best news service on television, and the one with the most serious international agenda. In the news round-table discussion, Channel 4's news and current affairs output was also praised for being bold, challenging and opinionated. In the discussion on international development, respondents welcomed Channel 4's willingness to tackle subjects that other broadcasters would not (such as Aids in Africa), the bravery of its Iraq coverage, and programmes such as *Meet the Natives* that bring international stories to large mainstream audiences.

Channel 4's strengths elsewhere in its schedules were highlighted in other genre round-table discussions. In film and drama, participants – concerned about an increasingly risk-averse and conservative culture in the TV industry – identified Channel 4's "punk spirit" as a beacon of hope. Arts specialists welcomed Channel 4's initiatives to bring artforms out of their public service niches and to promote wider public engagement with them, citing examples such as *Ballet Hoo!* and the Castleford project. In entertainment, respondents cited "big, noisy, risky genre-busting" programmes that represent Channel 4 at its best.

MPs and opinion-formers identified serving minority audiences as a central part of Channel 4's role, and a key strength. Participants in the diversity round-table discussion agreed that Channel 4 has historically been cutting-edge in many areas, and argued that it remains well-placed to take a leadership role in the future on a new range of diversity issues.

Advertisers saw Channel 4 as the broadcast brand that is most recognised and valued by young people aged under 24 – a valuable link with the YouTube generation with whom other broadcasters struggle to connect.

Channel 4's off-screen contribution was also seen as being a significant strength of the organisation. Its support for the UK production sector (particularly in the nations and regions), and for discovering and growing talent, were seen as being critical to the health of British television and the UK creative industries by MPs and producers in particular. Perhaps inevitably, producers, especially those based in the nations and regions, most strongly valued this support. They argued that Channel 4 is easier to work with and more adept at forging effective creative partnerships than the BBC.

Overall, Channel 4 was seen as a successful public-private hybrid that performs a valuable public role while being funded by a source (advertising revenue) that gives it the freedom to comment, challenge and criticise. Its independence from both government and shareholders was perceived as a unique benefit and a prerequisite for Channel 4 to pursue its public purpose as an alternative voice. At the same time, respondents recognised that advertising income – while still the most important funding source – would be unlikely to stretch to provide adequate resources for the future, particularly after digital switchover. Most respondents were therefore open to Channel 4 receiving public funding, though views varied widely on what form this should take.

***Channel 4 is accused at times of not always striking the right balance between public purposes and commercial imperatives***

*“Channel 4 is always confusing challenging TV with sensationalist TV... the approach is too cynical at present... Channel 4 no longer has a clear and passionate purpose.”*  
*Opinion-former*

A strong emotional attachment to the idea of Channel 4 was evident across all stakeholder groups; many respondents had grown up with Channel 4 and felt proprietorial about it. Many recognised that Channel 4 has always had to strike a balance between its public service ambitions and commercial imperatives.

However, some participants felt that Channel 4 does not always get that balance right and is sometimes too commercial in its focus. Some believed that Channel 4 could at times be complacent, living off its historic brand credibility rather than moving it forward. Others cited “drift” from its original purposes, and a willingness to shock for its own sake. They argued that such cynicism risks corroding the traditional strength of the brand. Many people talked about *Big Brother*. Some of them loved it, and urged Channel 4 to defend the programme for its entertainment values. Others felt that the “noise” generated by each successive series tends to drown out Channel 4's other achievements, ultimately damaging the channel's public service reputation.

Most opinion-formers were united in a desire for Channel 4 to show more programmes that play to its enduring strengths – programmes that are innovative, intellectually challenging, and representative of the UK's diverse communities.

**3.6.3 Future expectations of Channel 4**

*“Brands will become increasingly important in a world with greater choice. Channel 4 needs to maintain a strong brand for promoting mischief, debate, and tackling important issues.”* Producer

Five overarching issues were raised by stakeholders when asked what they expected of Channel 4 in the future.

***As a prerequisite for continued support, Channel 4 should connect more closely with its public purposes***

*“Channel 4 needs to be true to itself, in terms of its role as being a window on the world; about high quality; and enhancing social living.”* Opinion-former

There was widespread belief in a positive public service future for Channel 4. At the same time, stakeholders felt strongly that this needs to be more carefully defined and clearly articulated as a distinctive and valuable proposition if the corporation is to retain public support.

Many stakeholders observed that 2007 had been a “difficult” year for Channel 4, leading some to raise doubts about the degree of its commitment to quality and innovation. They were clear that lessons had to be learnt. The present research and setting out of future strategy was welcomed as a vital opportunity for Channel 4 to re-engage with audiences and re-establish its remit credentials.

Stakeholders were for the most part broadly sympathetic to the principle of Channel 4 receiving some new kind of public support in the future – in some cases recognising that the organisation has always had some kind of public support – but politicians and opinion-formers in particular stressed that a clear restatement of the organisation’s purposes is central to making the case for support.

In summary, stakeholders did not call for a radically different remit – the core values of innovation, distinctiveness and diversity remain central to what they expect of Channel 4. Rather, they wished to see a refined and enhanced version of the original remit – one which evolves to meet the demands of a multi-media market, and which defines Channel 4’s role more clearly.

### **Stakeholders believe that Channel 4 should take more risks**

*“Channel 4 shouldn’t play safe – to do so would be the end of the road.” Opinion-former*

While recognising the competitive pressures facing all public service broadcasters, stakeholders encouraged Channel 4 to focus as sharply as possible on the delivery of its remit – in particular, risk-taking and innovation – within the necessary commercial parameters.

They recognised a tendency in the industry for commissioning editors to be market-driven and risk-averse, and urged Channel 4 to “dare to be different”, to “provide a real alternative” and to “rediscover its unique listening relationship with its audience” – reflecting a feeling that the organisation has a duty to inhabit spaces and tackle subjects that others cannot or will not.

### **Channel 4 should adopt a pragmatic approach to public service delivery on new media platforms**

Respondents believed Channel 4 must continue to develop services on other channels and platforms to keep pace with how people – in particular, younger age groups – use new digital media. At the same time, the view was often expressed that the core channel should remain at the heart of Channel 4’s activities. New services should enhance Channel 4’s delivery of its purposes where possible, and should never dilute the organisation’s public purpose or impact.

While stakeholders agreed that new services should broadly reflect the values of the Channel 4 brand, they did not believe it to be feasible or desirable to impose strict obligations on them, nor should ancillary services be constrained from raising revenues to support the main channel.

Most stakeholders acknowledged that some additional form of public funding would be necessary if Channel 4 is to deliver its remit in the digital age, given the growing tension between the commercial demands of the market and its public purposes.

### **Channel 4 should remain youthful but also keep its broad appeal**

*“Channel 4’s audience is not just defined by age, but also by attitude – viewers of all ages who want cheeky, fresh programming.” Independent producer*

Channel 4’s ability to attract audiences aged under 35 was recognised as a distinctive benefit. At the same time, stakeholders argued that this carries with it a responsibility for Channel 4 to engage young people with public purposes. Politicians in particular believed that Channel 4 has both the potential and the responsibility to engage young people with social and democratic issues and to encourage them to “participate more in the general civic life of the country”.

It was also suggested that there may be a role for Channel 4 in filling gaps in the existing provision of PSB content for young people, for example for older children and adolescents.

Notwithstanding these points, stakeholders did not argue that Channel 4 should focus exclusively on young audiences. Rather, they believed it should continue to appeal to all people some of the time, particularly with programming that is youthful in spirit if not explicitly targeted at younger demographics.

***Channel 4 should formalise its off-screen role supporting independent production and nurturing creativity***

*“It is by supporting the independent production sector that we get quality and innovation, that we get people prepared to take risks that other broadcasters don’t. They have a very, very important role to play.” Politician*

All constituencies recognised Channel 4’s importance to the UK’s creative economy. Commissioning programmes from many different suppliers is seen as essential to the creative and economic health of television and benefits the wider economy. It also ensures that Channel 4 fulfils its brief to reflect the diversity of modern British society and to balance the metropolitan bias in broadcasting. A thriving UK production sector was seen by many as being inconceivable without it.

Many stakeholders – and the majority of independent producers – believed that the public value of Channel 4’s work with the creative sector is insufficiently understood or acknowledged, and should be formally recognised as part of its public role. Independent producers went further, suggesting Channel 4 should play the same supportive role for talent and businesses in the emerging digital production sector.

Channel 4’s support for smaller and regional production companies was particularly highly valued, though some producers argued that Channel 4 should seek to strengthen further its commissioning processes to support out-of-London and emerging production companies.

## Conclusions

- It comes as little surprise that stakeholders such as independent producers, politicians and TV industry specialists attach great importance to public service broadcasting. But our research also shows that PSB remains just as important to British audiences, even if they use different language to describe it. Whilst people may watch television primarily to be entertained, they value its educational role just as highly
- Audiences and stakeholders also highlighted the distinctive role that Channel 4 plays, which they want to continue in the future. Its contribution to the PSB system is clearly understood and highly valued. Even with the proliferation of choice, Channel 4 retains a strong brand, and is much-loved by audiences for being “different”, “controversial”, “real” and “fun”. It is particularly valued by people who are young and open-minded, and who welcome an alternative take on the world
- In a democratic society which places great value on freedom of speech, more UK citizens rely on television for their news than any other outlet. *Channel 4 News* is regarded by many, including political stakeholders, as being the best news service on TV. They particularly recognise its independence, depth of coverage and international perspective. Channel 4 is seen as being braver than other broadcasters in taking risks, questioning authority and challenging consensus
- In an increasingly diverse society, with significant inequality between the treatment of different minority groups, television is uniquely powerful, as the dominant form of mass media, in its ability to show viewpoints and lifestyles that people might not otherwise come across in their lives. Channel 4 is recognised for having done more than any other channel to reflect and portray the diversity of Britain’s cultures and lifestyles, for example, amongst gays and lesbians and some ethnic groups
- Television is a key source of information on a wide range of personal interests – families and relationships, health and nutrition, hobbies and cultural pastimes. Channel 4’s accessible approach appeals to viewers who reject the notion that television should try to tell them what to do. They want to be given the relevant information and left to make up their own minds
- The themes summarised above emerged strongly and consistently across our research. For the most part, they confirm that people want Channel 4 to continue to do what it has always done best, and to extend its values into new media – but to do so in a pragmatic manner, enhancing public service delivery where possible within the relevant financial parameters
- Some people argued that Channel 4 does not always get the balance right between its public remit and commercial objectives. They want Channel 4 to strengthen its public role, and see this as being the best way for the organisation to succeed in the future. Their criticisms point to ways in which Channel 4 could improve in the future – being clearer about its public purpose, in particular around subject matter that is controversial or provocative; offering more space for the kinds of pioneering, intellectual and quirky content that established Channel 4’s reputation in the first place; and strengthening further its connections with audiences and stakeholders
- These research findings have informed the development by Channel 4 of its future role, and in particular the new public purposes, which we present in the next chapter.