

The Kantar logo, featuring the word "KANTAR" in a bold, white, sans-serif font. The letter "K" is stylized with a vertical yellow bar on its left side. The background of the slide is a golden-hour photograph of the London skyline, including Big Ben and the Houses of Parliament, with a bridge in the foreground. A large, thin yellow circle is overlaid on the right side of the image, framing the skyline and the event title.

KANTAR

Delivering on the Future4 strategy

Victoria Appleby

Head of Sales | Channel 4

Martin Greenbank

Head of Advertising Research & Development | C4

UNLOCKING
VALUE

The World Audiences Summit **2022**



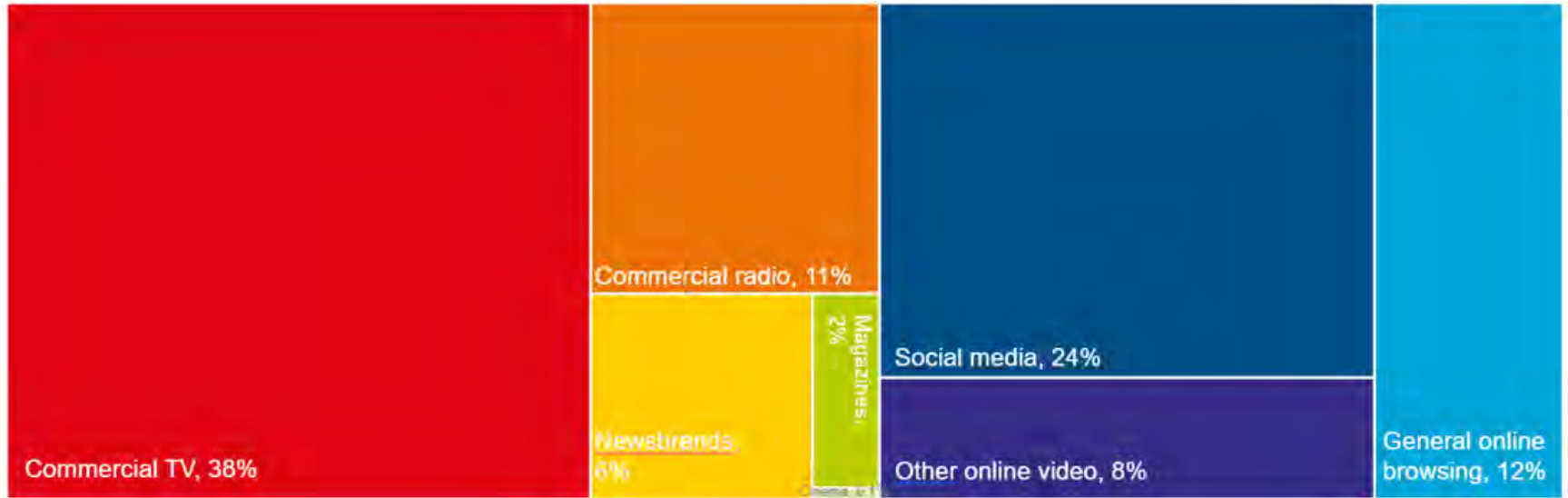
124 HONSEFERRY ROAD

124 HONSEFERRY ROAD

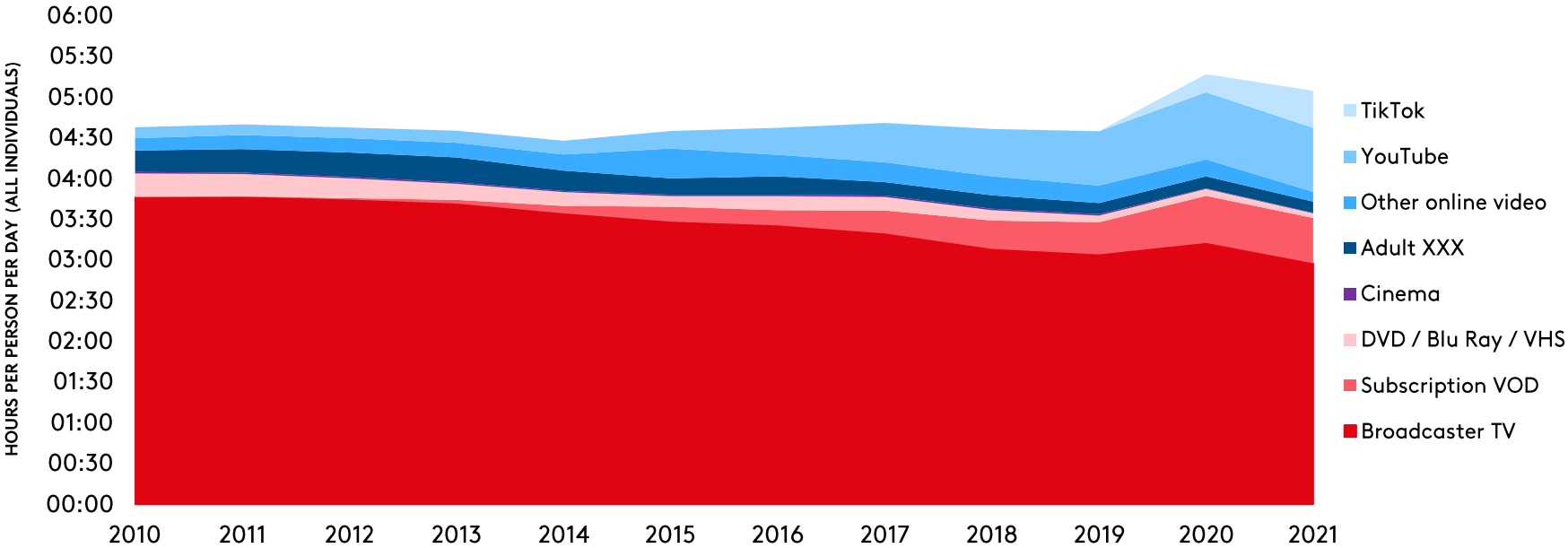
124 HONSEFERRY ROAD

Media consumption has fragmented, and traditional channels have become less dominant

ADULTS



Total video time has been going up, whilst 'TVs' share (and volume) has been reducing



Threats to our viewing or Opportunities to embrace?

NETFLIX

prime

Disney+



sky



britbox
CREATED BY BBC & ITV

NOW

FreeviewPlay



amazon fireTV



chromecast

ROKU

SAMSUNG

youview

iOS



Google TV



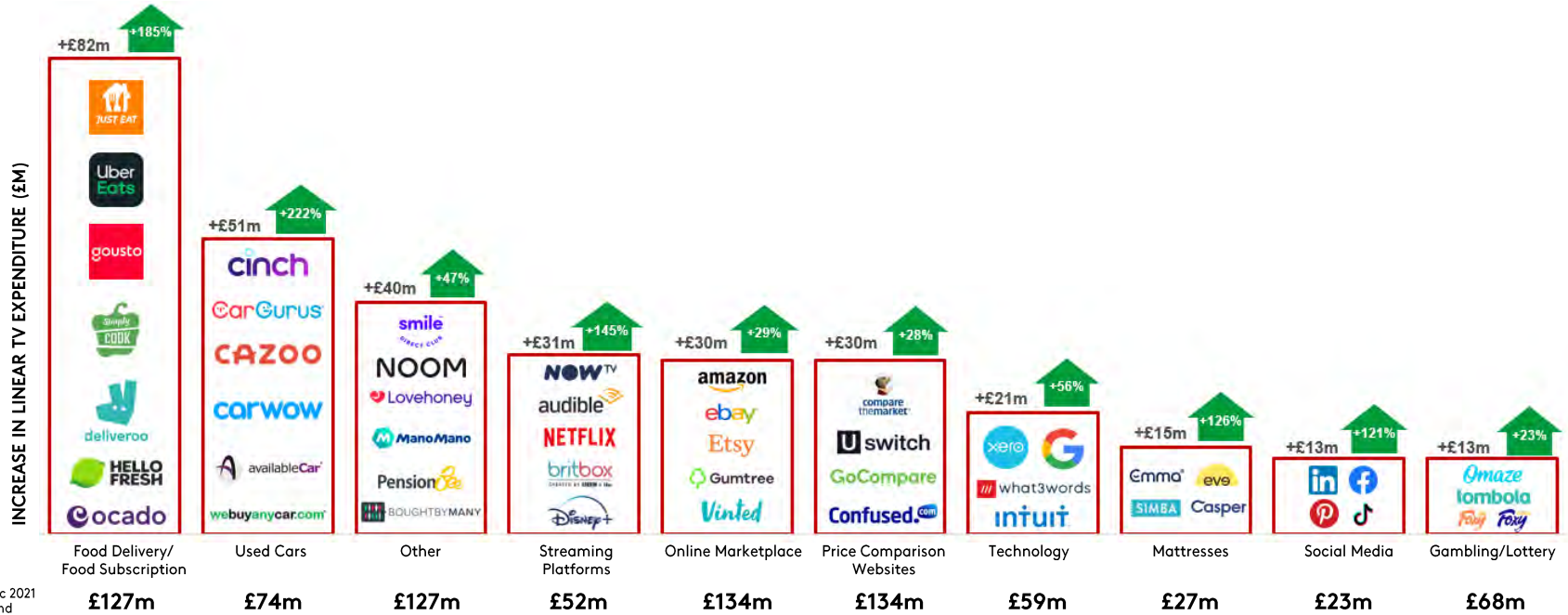
Meta

Platforms
Pucks
Sticks
Boxes
OS's
Interfaces
Apps
Consoles
Services...

All of which provide opportunities to reach viewers and/or deliver viewing

TV is experiencing a surge in spend from 'online-born' businesses

Increase in linear TV expenditure, Jan to Dec 2021 vs. Jan to Dec 2019



Jan to Dec 2021
Total spend



Alex Mahon
CEO

Jonathan Allan
COO



FUTURE



Strategic pillars

What we must focus on

1

Content

Prioritise **digital growth** over linear ratings

2

Viewers

Put **viewers at the heart** of our decision-making

3

Commercial

Diversify **new revenue** streams to underpin our sustainability

4

Partnerships

Focus on **strategic partnerships** to complete more effectively



All 4 is the UK's biggest free streaming service



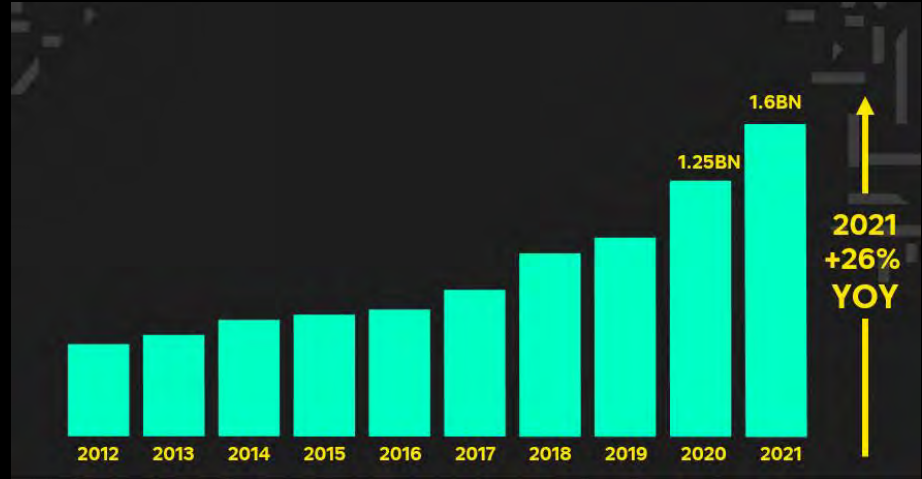
SCREW
Drama on the wings. Watch the full series.

24 HOURS IN POLICE CUSTODY
Get behind the scenes of a 2-part investigation

JIMMY CARR'S I LITERALLY JUST TOLD YOU
They have all the answers. What could go wrong?

THE LANGUAGE OF LOVE
Can Davina McCall help international daters find the one?

ALEX RIDER
Binge the first series of this big-budget spy drama



Prioritise digital growth

Investing in younger viewers

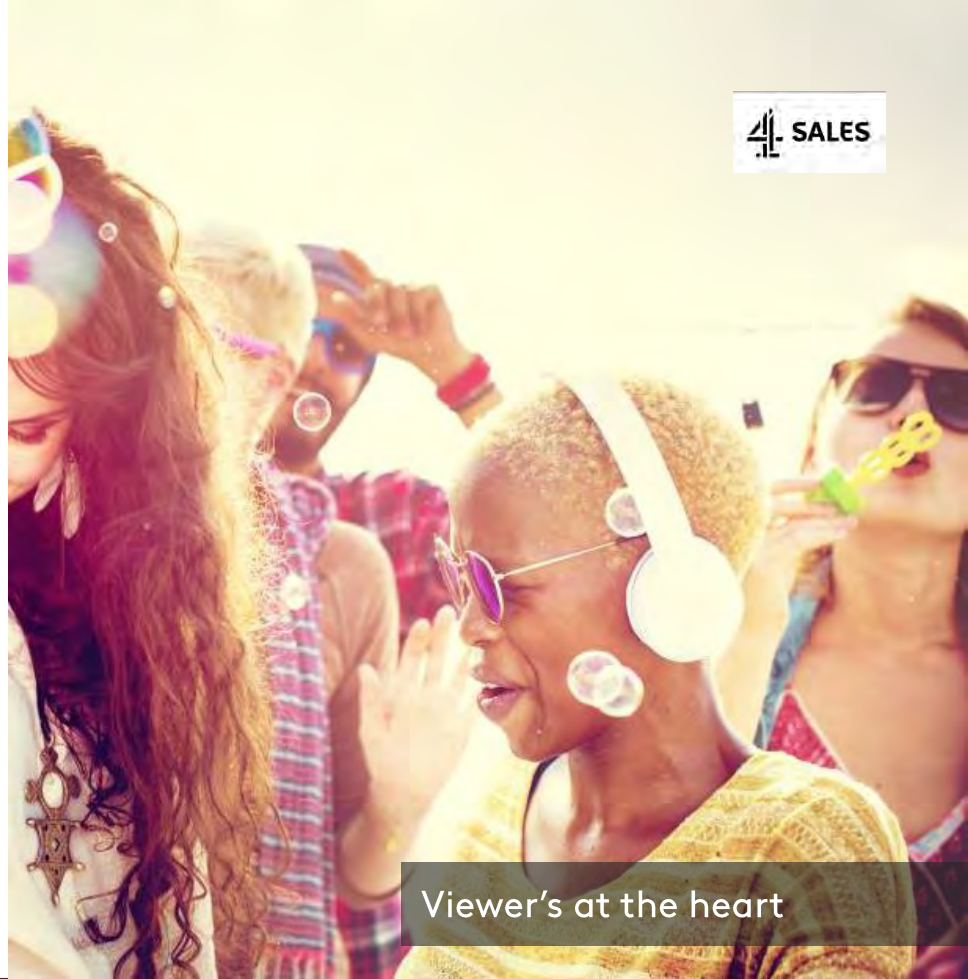
Commissioning with All 4 in mind

“Binding a new generation to strong public service media”

+£25m 2022

+£50m 2023

Tripling our Spend on 1624's.



Viewer's at the heart

With a clear commitment to serve the nation's needs



BREAKING NEWS

BREAKING NEWS

BREAKING NEWS

BREAKING NEWS

England's matches in the UEFA Nations League, European Qualifiers to UEFA EURO 2024 and International Friendlies will be shown live on Channel 4. In total Channel 4 will broadcast 20 live England matches between 2022 to 2024.

BREAKING NEWS

BREAKING NEWS

BREAKING NEWS

ENGLAND X CHANNEL 4 SPORT



EVENT TV | MUST SEE TV

THE BIGGEST TITLES ON TV ON C4
LOCKDOWN VALUE
RENEWED BAKE OFF DEAL
ON ALL YEAR – SPINE OF THE SCHEDULE
GOGGLEBOX OWNS FRIDAYS
MARRIED AT FIRST SIGHT GROWING
ENGLAND INTERNATIONALS LIVE
BRITISH GP LIVE
BRAND VALUE



BAKE OFF **MARRIED AT FIRST SIGHT**

GOGGLEBOX **24 HOURS IN POLICE CUSTODY** **ENGLAND INTERNATIONALS**

BREAKING NEWS

Viewer's at the heart



WE ARE

4STUDIO

Channel 4's digital content studio, set up to create and distribute content for 18-34's on social.

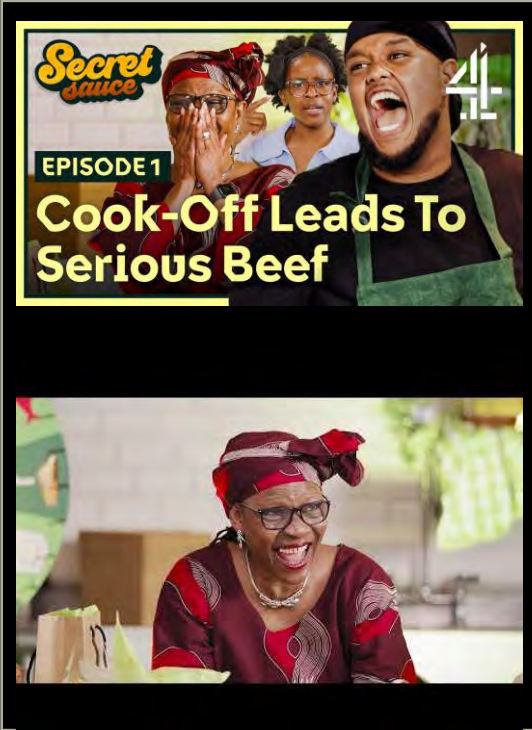
Our focus is on digital growth with youth audiences across the UK.

We work with like minded, bold brands and take them into youth culture and entertainment.

New revenue streams

With a unique Commissioning model

Our branded content is consumed just like our original content, which in turn drives more engagement and views for brands, through an entertainment first model.



Original



Branded

New revenue streams

And our most recent announcement

The screenshot shows the top of The Guardian website. The header includes the logo "The Guardian" with the tagline "News website of the year" and "UK edition". Navigation links for "News", "Opinion", "Sport", "Culture", "Lifestyle", and "More" are visible. The main article headline is "Channel 4 strikes deal to air 1,000 hours of hit shows for free on YouTube". Below the headline is a sub-headline: "Exclusive: agreement allows broadcaster to sell ads around programmes in potential new era of deals with Silicon Valley". The author is "Mark Sweney" and the date is "Wed 11 May 2022 07:00 BST". A photograph shows two people, Kirstie Allsopp and Phil Spencer, standing in a kitchen. To the right of the article is a pink advertisement for ThamesLink, featuring a pink inflatable swan with a "TV" logo and the text "are just a train away" and "Book now".

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The Guardian
News website of the year

News Opinion Sport Culture Lifestyle More

UK ► UK politics Education Media Society Law Scotland Wales Northern Ireland

Channel 4

Channel 4 strikes deal to air 1,000 hours of hit shows for free on YouTube

Exclusive: agreement allows broadcaster to sell ads around programmes in potential new era of deals with Silicon Valley

Mark Sweney
@marksweney
Wed 11 May 2022 07:00 BST

f t e



Channel 4's long-running Location, Location, Location, with presenters Kirstie Allsopp and Phil Spencer. Photograph: Fiona Murray/Channel 4 picture publicity

Channel 4 is to make available 1,000 hours of hit shows from Location, Location, Location to SAS: Who Dares Wins on YouTube in the widest-ranging commercial deal the Silicon Valley giant has struck with a UK

Advertisement

are just a train away

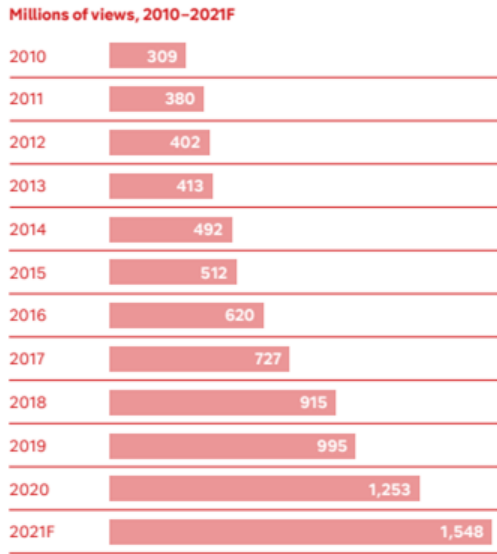
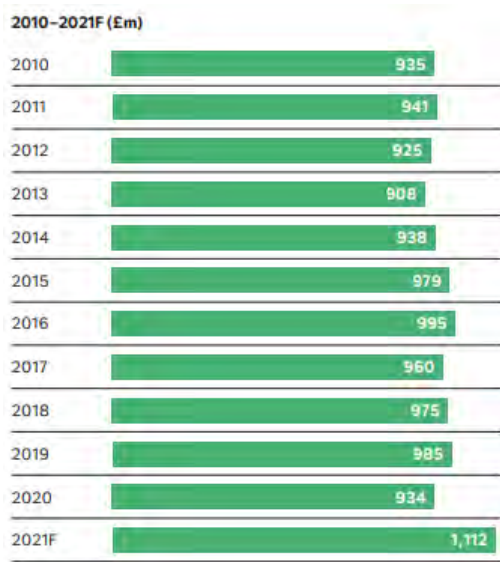


Book now

ThamesLink/
WE'RE WITH YOU

Strategic partnerships

Resilience is one thing, but the strategy is behind true growth



2010-2020
CAGR = 15%

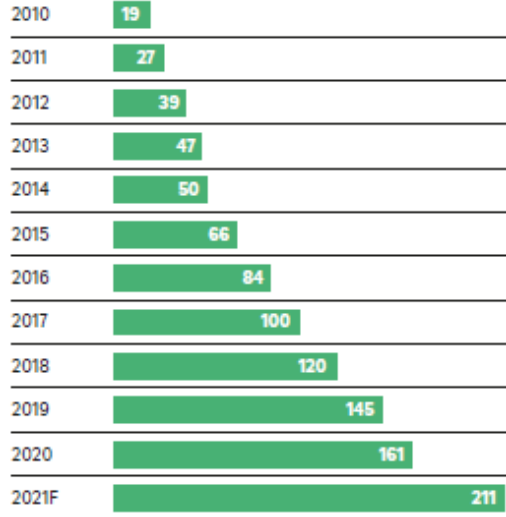
25m
registered users

72%
of 16-34s

Our digital sales (via All 4) are ahead of last year and the market

Figure 5: Channel 4 digital revenues


2010–2021F (Em)



2010–2020
CAGR = 24%

19%

of total revenue (£1.2Bn)

An aerial photograph of London, England, taken at sunset. The River Thames flows through the city, with the London Eye Ferris wheel prominently visible in the center. The sky is a mix of orange and blue, and the city lights are beginning to glow. Several yellow lines are overlaid on the image, forming a large, irregular shape that encompasses a significant portion of the city and the river. The lines appear to be part of a measurement or analysis tool.

Measurement 'Closing the Gap'

BARB closing the gap – Reducing Unmatched Viewing

% Unidentified

35%

30%

25%

20%

15%

10%

5%

0%

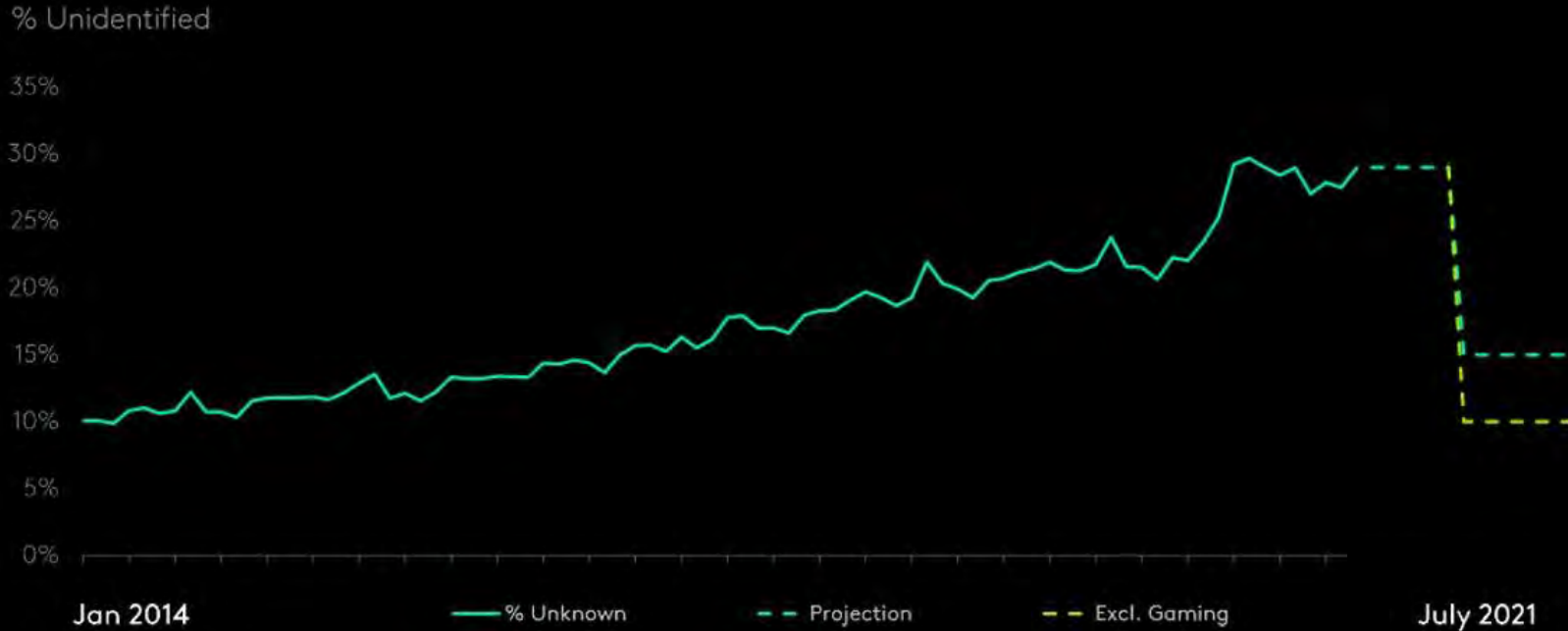
Jan 2014

% Unknown

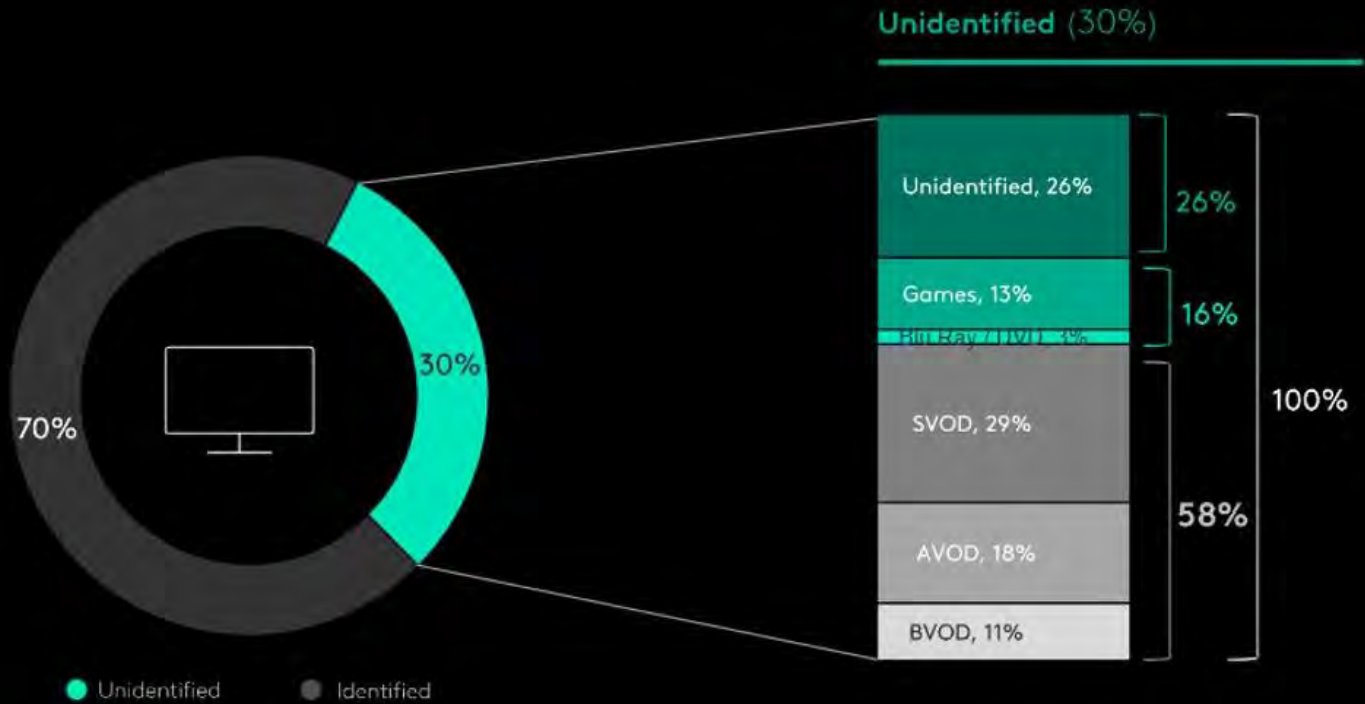
Projection

Excl. Gaming

July 2021



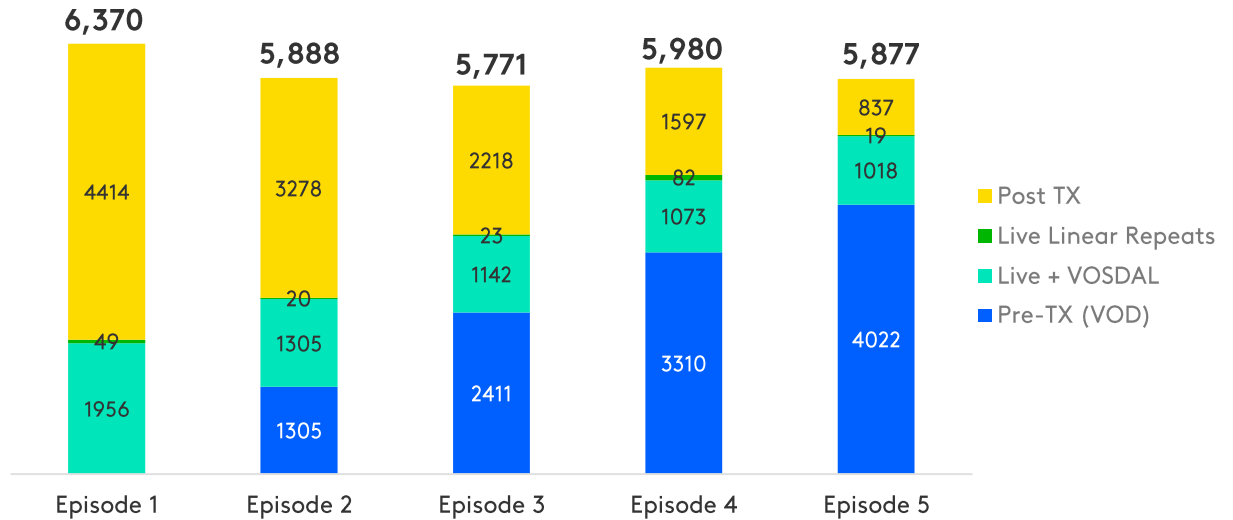
BARB closing the GAP - using new (Focal) metering



BARB Closing the Gap – And changing how we report



BARB measured viewing to "It's a Sin"



And the effect often goes beyond the screen

“ Never before in my lifetime has a TV show has such a profound effect. ”

Ian Green

Chief Executive



+200%
increase in
HIV testing

BARB: closing the gap – which helps us in the following ways



What we report

High rating drama with a strong young audience with >50% watching via All 4



How we commercialise

Understand our relative performance vs our Strategic aims



How we distribute and acquire content

New data on the new platforms



How we market and reach new audience

Where we can recruit, test, and learn

A decorative background featuring a golden rectangle on the left side, with a Fibonacci spiral (golden spiral) drawn within it. The spiral is composed of quarter-circles of decreasing radii, centered at the corners of the rectangle. The lines are thin and light-colored. The rest of the background is plain white.

Thank you!