



The Nation Station: Channel 4's brand image

April 2020

So what exactly is...



INSIGHT TOOLS



4Youth is an online community with over a thousand 16-24 year old members. We put your questions to them each and every week to get the insight you need on this hard to reach and rapidly evolving audience.

INSIGHT PROJECTS



At Channel 4 we have a heritage with the youth audience. For this project, we look into the relationships young people have with brands. This work looks at over 200 brands, across 12 product & service categories



An initiative taking a proactive approach in visiting 16-24s throughout the nation. We get the downlow on what young people think about Channel 4 & a whole host of subject areas, through running focus groups.

INSIGHT SEGMENTATIONS



AV:ID stands for Audio Visual Identities and is a segmentation that divides 16-24s into segments based on their video viewing preferences.

We found five key viewing preferences young people had in 2016, and refreshed this thinking in 2019. We've coded the segments into our 4Youth community so you can put your questions to them.



The UKTribes project began in 2005 and was based around the idea that not all young people are the same. We found 5 macro-segments young people were in - Mainstream, Leading Edge, Urban, Aspirant, Alternative. We've coded the segments into our 4Youth community so you can put your questions to them.



4 YOUTH METHODOLOGY

THIS REPORT WILL INCLUDE:

C4 INSIGHT PROJECTS



As part of the Nation Station project, we visited **The University of Bristol** and ran two focus groups with 16 students in November 2019. We asked students all about their perceptions of Channel 4's brand image.

C4 INSIGHT TOOLS



We also asked over 100 of our 4Youth community members additional questions about the brand image and type of content they were watching on Channel 4, E4 and All 4. This adds extra context to the findings we have found from our Nation Station stop.

EXTERNAL RESEARCH



Channel 4 portfolio Brand Image

An overview which looks at Channel 4's portfolio brand image.



The Channel 4 portfolio is favored by young people & resonates with them

Index of 16-24's that say one of their favourite channels is in the channel portfolio



Channel 4 portfolio

110



ITV portfolio

81



Sky portfolio

72



Channel 5 portfolio

56

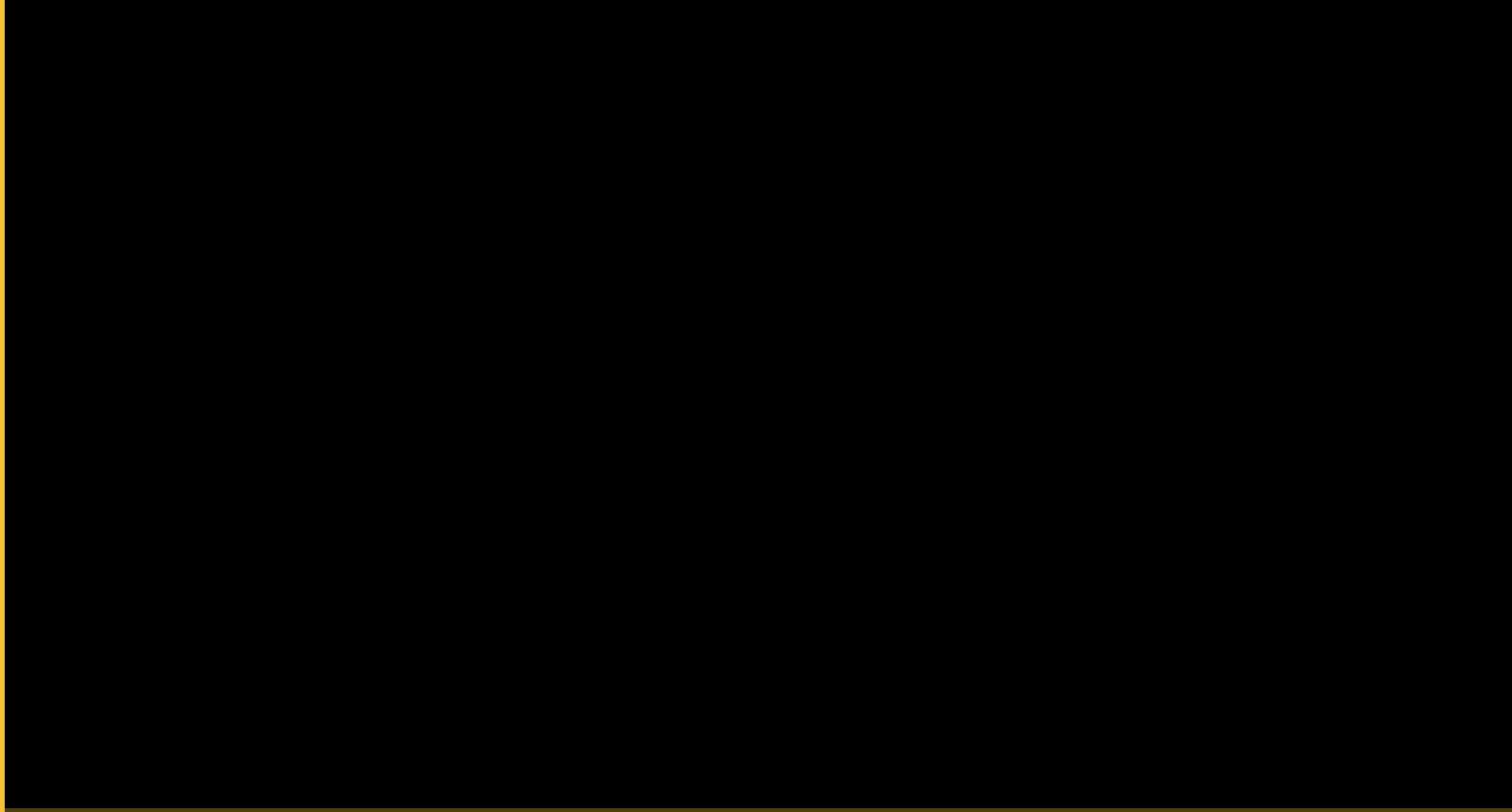
In the last 12 months, the 4Sales portfolio as a whole has reached...

97%

of 16-24s

Young people resonate with the Channel 4 brand image

VIDEO CLICK HERE



Describing C4 portfolio's brand image

We asked young people their perception of the Channel 4 portfolio brand. Many used words that showcased how Channel 4 bought something different when it came to content – making for a thought provoking, diverse & exciting viewing experience.

"They don't play it that safe... not as safe as the BBC would play it. I notice it most with the shift between The Great British Bake Off from BBC to Channel 4."



Words to describe Channel 4...

"Diverse"

"Thought provoking"

"Market leader"

"Interesting"

"Comedy"

"Exciting"

"Bold"

16-24s LIKE Channel 4 for 3 key reasons

VARIETY OF PROGRAMMING:

Many in the 4Youth community spoke about how they liked that Channel 4 had something for everyone and how they love that Channel 4 offered an extensive variation of programming. They felt Channel 4 offered content that was intriguing whilst entertaining too.

Speaking about genres specifically, they complimented Channel 4's drama, comedy and documentary offering.

"Channel 4 offers its followers a wide and variable programming both on TV and on its YouTube channel."

"There's usually good documentaries and comedy on channel 4 and also Bake Off. The comedies are unique and the documentaries are usually honest and thought provoking."

CHANNEL 4'S VALUES:

They spoke highly about how they liked what the Channels stood for. To them, Channel 4 offered something different to other broadcasters such as being inclusive, diverse and supporting new talent. This meant they perceived Channel 4 as innovative and risk taking.

"They really support the young talent of London. I love how they are."

"I like the variety of programmes and the fact that the channel tries to be diverse and inclusive. I like these values."

AIMED AT THEM:

Channel 4 was mentioned as being a Channel that was tailored and aimed at young people specifically. Meaning they acknowledge Channel 4 being a destination for like-minded young people, hence why they feel such a strong bond with the portfolio.

"...because of the variety of content you can find, and a lot of content is aimed at young people like me who like to watch."

"I like the fact that Channel 4 promotes diversity and celebrates individuals. Its the one channel I think relates the most to younger people because of its exploration of the taboo or controversial topics. Its an inclusive channel and I like the content it creates."



We gave both focus groups a selection of 40 images and asked them to place pictures they felt represented our channels best...

CHANNEL 4:



They focused on Channel 4's identity in the main. The block of flats was mentioned across both focus groups, speaking about how Channel 4 represented **diversity** in views. As well as this, they spoke about how Channel 4 had a **tongue in cheek sense of humor** mimicked in the content.

There was a focus on our content to, the magnifying glass showcased C4's documentaries, the sandwich resembled our cooking shows.

Did you know?

Channel 4 viewers are **33% more likely** to say they usually watch Food & Cookery TV shows.

E4:



When speaking about E4, students spoke about how they likened E4 to being a channel that was **humorous**, with a few referencing **American sitcoms** to thank for this. They also picked the rollercoaster as this reminded them of the old idents that were used across the channel portfolio, so automatically linked this to E4. Again, **pizza** was mentioned in relation to grabbing a pizza and enjoying an E4 show.

Did you know?

E4 viewers are **53% more likely** to say they usually watch Comedy TV shows.

ALL 4:



The pictures demonstrate the two ways the focus groups viewed All 4. The first picture demonstrated how they consume All 4, that they're able to view content in **flexible ways** e.g. iPad. The second picture, they felt resembled All 4's **quirky brand image**, exclaiming that All 4 hosts unexpected/investigative content that you can't find anywhere else.

Did you know?

All 4 viewers are **18% more likely** to say they usually watch Documentary TV shows.

TV PROGRAMMES YOUNG PEOPLE WOULD LIKE TO SEE MORE...

We asked the focus groups to come up with a TV programme idea in small groups. Very interestingly, despite not seeing what one another had put, there were two very clear topic ideas: a love & want for more of *The Secret Life Of...* format and more programming with a political subject matter.

THE SECRET LIFE OF... SHOW IDEAS



DAVID ATTENBOROUGH & FAMILY LIFE:

A show led by David Attenborough that explores family life but in the style of *The Secret Life Of...* series.



THE SECRET LIFE OF TWINS:

A documentary which explores what it's like to be a twin – they felt this would be a good format as this is accessible to any age group.



POLITICAL SHOW IDEAS



INTERACTIVE POLITICS:

A politics themed interactive TV show in the style of *Bandersnatch*. This would educate & entertain viewers by putting them in the position to make political decisions and see the repercussions of their actions.



POLITICAL COMEDY:

A satirical comedy all about politics, this would help make politics more accessible to young people.



CHANNEL 4 BRAND IMAGE

How Channel 4 specifically resonates with young people





Channel 4 has reached...

90%

of 16-24s
in the last 12 months



16-24 Channel 4 viewers are...

30%

more likely to say
*"I find TV advertising interesting and
quite often it gives me something to talk
about"*

TOP SHOWS THEY LOVE ON C4

When we asked the community their favorite show's on Channel 4, they were enjoying a real mix of reality, escapism and entertainment. With that in mind, it's no surprise that The Great British Bake Off took the top spot as this ticked all the boxes for young people. Whilst the majority mentioned shows that are still a staple of Channel 4's schedule, some are no longer on Channel 4. Interestingly, young people spoke about how these had influenced, resonated and impacted them. My Mad Fat Diary (despite being on E4!) was one of these, they loved that it portrayed awareness of mental health issues in a relatable and educational way – this was important to them. Other honorable shows young people spoke about were they're love for Come Dine With Me, End of the F***ng World, The Circle, The Inbetweeners and The Simpsons.

THE GREAT BRITISH BAKE OFF



1.

HOLLYOAKS



2.

FIRST DATES



3.

JOINT: GOGGLEBOX/ DERRY GIRLS/BLACK MIRROR/ MY MAD FAT DIARY



4.

FRIDAY NIGHT DINNER



5.

"The Great British Bake Off is amazing! So positive and full of energy, a great show to watch even with no baking experience. Love the presenters and judges!"

"I like new shows like Hollyoaks and Friday Night Dinner because they always have new ideas that are novel."

"I love the reality programmes Channel 4 produces, such as First Dates, Gogglebox and Five Guys in a Week. These provide an escapism."

"I like series like Derry Girls because they are the type of series that I like to watch on this channel, because it is an original and unique series that makes me laugh a lot"

"I like the style of humour Friday Night Dinner - like the cast and the humour."

If Channel 4 were a celebrity...

We asked the 4Youth community what Channel 4 would be like if it came alive as a celebrity. There were three key celebrity types they mentioned:

1.

WELL ESTABLISHED CELEBRITIES:

The community mentioned celebrities that were slightly older and well loved amongst many who had become staples of British culture, much like Channel 4. For example, celebrities like Hugh Grant, Jon Snow, Paul Hollywood, Phillip Scofield and Elton John.

2.

YOUNG & CONTROVERSIAL CELEBRITIES:

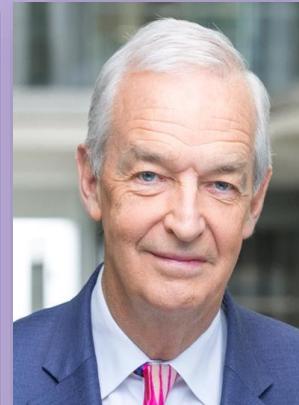
The community also mentioned celebrities that were young and had an edge which made them unique. For example Noel Fielding, Stacey Dooley and Emma Watson.

3.

CHANNEL 4 TALENT:

They likened Channel 4 to their own on-screen talent and felt this embodied the Channel 4 identity – Jon Snow was the most mentioned celebrity by the community. Other celebrities such as Noel Fielding, Paul Hollywood, Jimmy Carr, Katherine Ryan & Joe Lycett were mentioned too.

*"I would like this channel to be someone important, honest, and respected as the commentator **Jon Snow** because his personality is simply unique and admirable, so this is how I see channel 4."*



18-24s are...
33%
more likely
to say they like
Jon Snow

"Noel fielding. The content from the channel, and all the other channels from 4, it mirrors his manner, style is pretty similar too."



18-24s are...
53%
more likely
to say they like
Noel Fielding

E4 BRAND IMAGE

How E4 specifically resonates with young people





E4 has reached...

78%

of 16-24s
in the last 12 months



16-24 E4 viewers are...

52%

more likely to say
"Whilst watching TV, I search on the internet for products I see advertised"



What they like about E4

One of the biggest draws for young people to E4, was its comedy offering which they spoke highly off. In particular, they enjoyed the American acquisitions that were on E4 like Rick and Morty, Brooklyn 99 and The Big Bang Theory. They described how E4 had a fresh, youthful and fun brand image, which made E4 feel relatable to them. They praised E4 for being accessible to anyone, saying they liked that they could watch E4 shows with members of their family too – as it has something for everyone.

"I like it because it has a great variety of shows are both American series and the opportunity to see series made in the UK."

"I like the variety they have, different shows, films and series. It's a channel that takes into consideration the whole family and what they probably like to watch."

"I like the fun, fresh 'vibe' that E4 gives off, which fits with the top-quality programmes it shows, both its original shows and the US shows it has UK rights to."



TOP SHOWS THEY LOVE AND HAVE LOVED ON E4

When we asked the community their favorite show's on E4, it's very noticeable that comedy ranked very high amongst the community, adding to this they also liked entertainment/reality shows too. The Big Bang Theory was the most popular show amongst the 4Youth community, they liked the light hearted nature of the show – they loved the humor and the escapism it offered. Noticeably, older series such as Misfits, Inbetweeners and Skins were all held up in high regards from the community – they felt the storylines and characters were relatable to themselves which is why they still resonate with them now.

They especially liked that the shows did something different and look upon them fondly.

THE BIG BANG THEORY



1.

MISFITS



2.

BROOKLYN NINE-NINE



3.

JOINT: MADE IN CHELSEA/THE GOLDBERGS/ THE INBETWEENERS/ FRIENDS



4.

JOINT: CELEBS GO DATING/ YOUNG SHELDON/FRIDAY NIGHT DINNER/SKINS



5.

"I really enjoyed "The Big Bang Theory" as it is funny and light-hearted. It is always the perfect show to watch after a tough day as it allows you to kick back and relax."

"One of my favourite shows in the last decade is Misfits. It was relevant and so much fun to see indeed. I really liked it and of course recommended it."

"Brooklyn Nine Nine shares Misfits' focus on its characters and their development...(it) helps very much to keep me engaged with a series."

"Made in Chelsea is my binge show and guilty pleasure, I can get through a whole season in days."

"I love shows like Celebs go dating, because it is very original and a good comedy, this programming is made for people my age."

If E4 were a celebrity...

We asked the 4Youth community what E4 would be like if it came alive as a celebrity. There were two key celebrity types they mentioned:

1.

YOUNG COMEDIAN CELEBRITIES:

The community mentioned celebrities that were well known for being comedic much like how they perceived E4 to be, for example, the most referenced celebrity was Russell Howard. They also likened E4 to a variety of often fun, young, comedic male celebrities like James Buckley, Rob Beckett and Joey Essex – all of which have featured on shows on E4.

2.

WELL LIKED & PERSONABLE CELEBRITIES:

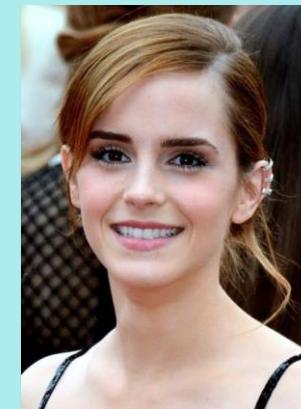
The community also likened E4 again to young celebrities that were popular amongst young people for their fun, alluring and care-free personalities. Likening E4 to celebrities such as Emma Watson, Adele, Jimmy Carr, Noel Fielding and Russel Brand.

*"I would have to say **Russell Howard**, He is Funny which is exactly E4. He is down to earth, easy to talk to and engage with as well as most people love watching him! He is always laid back and easy to listen too!"*

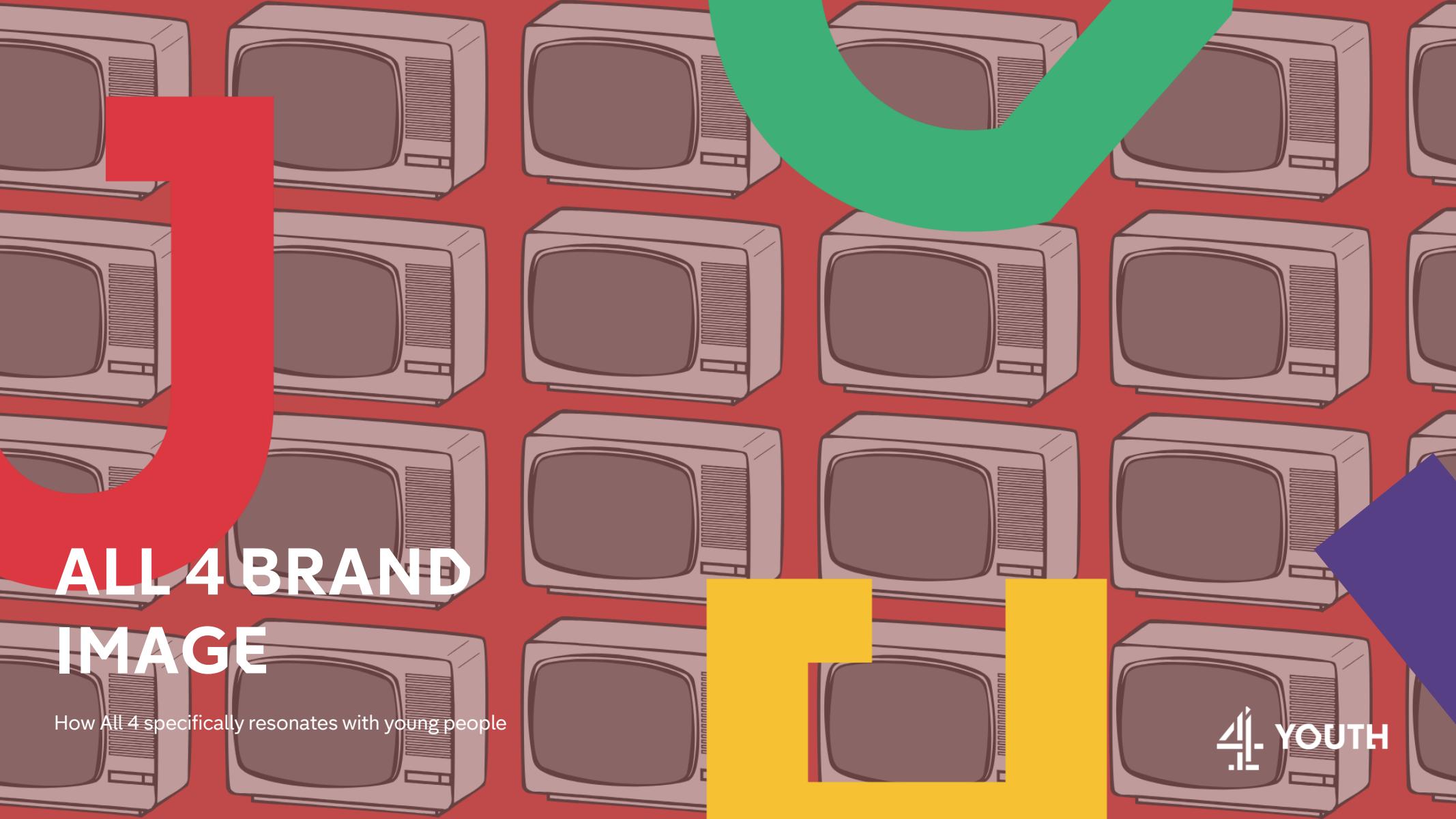


18-24s are...
48%
more likely
to say they like
Russell Howard

*"E4 is very similar to **Emma Watson**. Stylish, trendy and very attractive. The type of celebrity that makes you want to know her better."*



18-24s are...
4% more likely
to say they like
Emma Watson



ALL 4 BRAND IMAGE

How All 4 specifically resonates with young people





80%

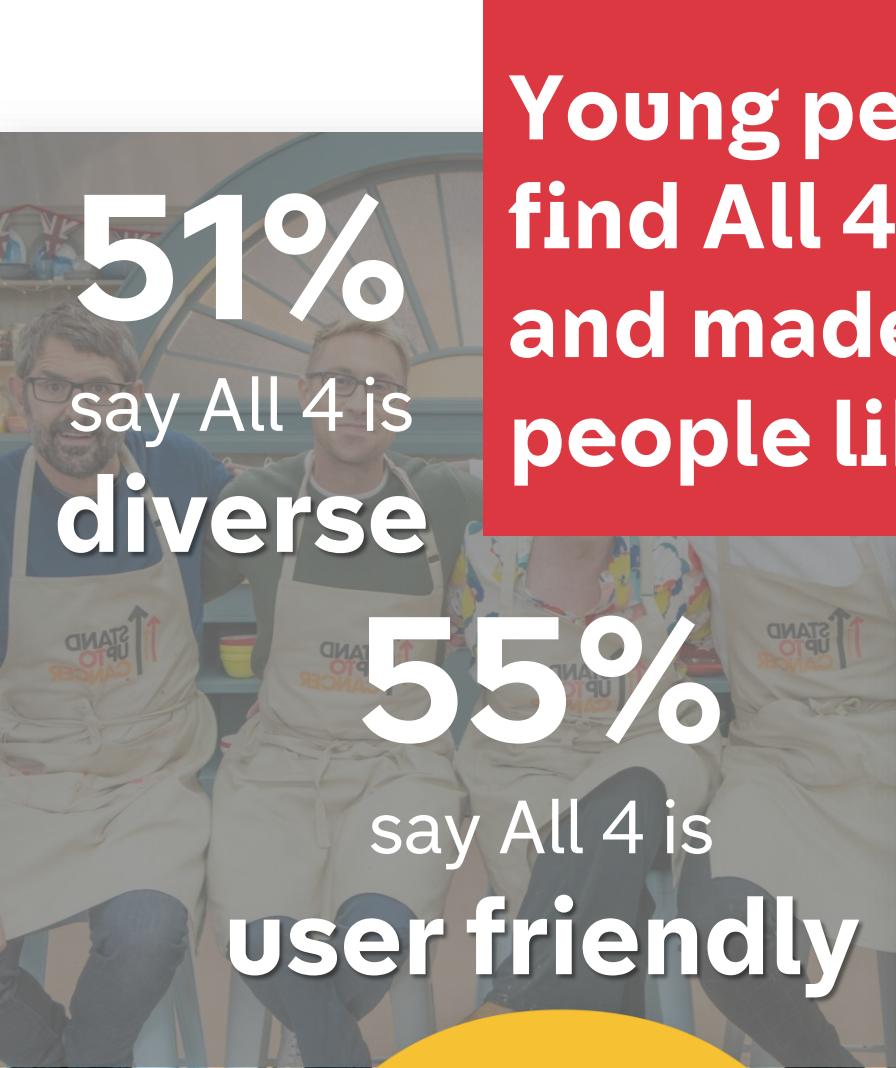
of all **16-34s**

are registered with All 4 in the
UK

16-24 All 4 viewers are...

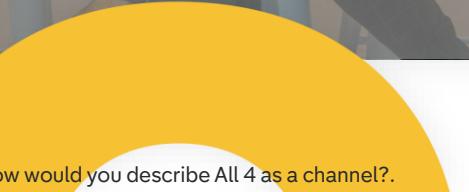
63%

more likely to say
*"I Often Notice the Brands / Products
That Sponsor Particular Programmes"*



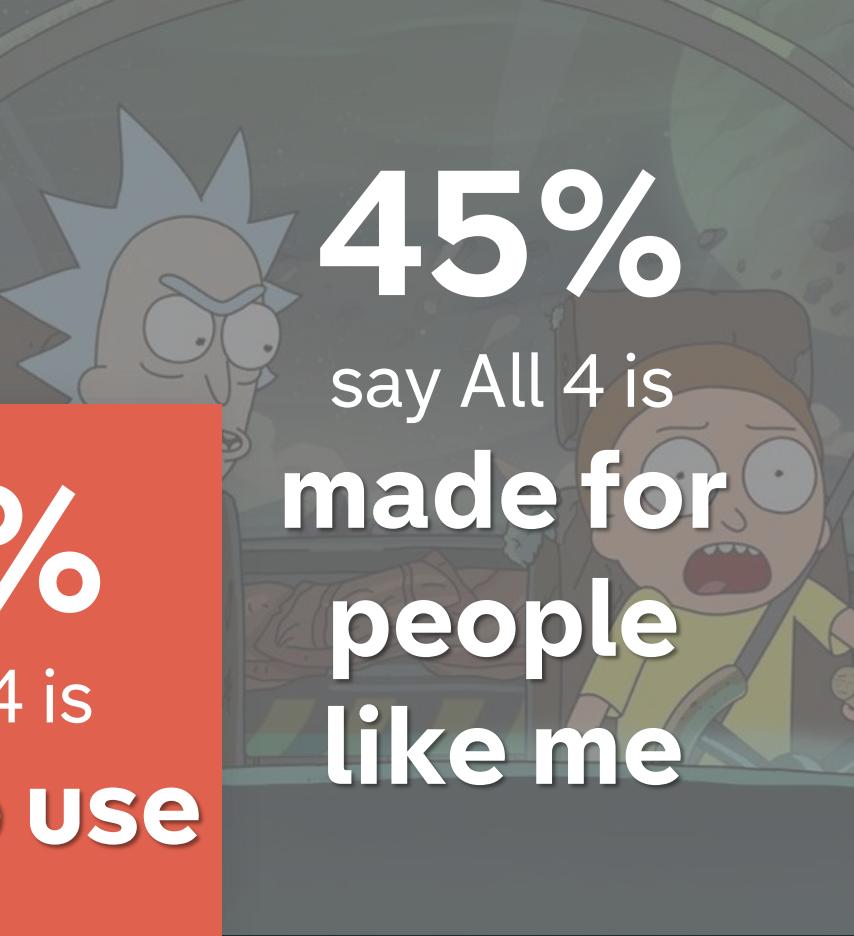
51%
say All 4 is
diverse

**Young people
find All 4 diverse
and made for
people like them**



55%
say All 4 is
user friendly

59%
say All 4 is
easy to use



45%
say All 4 is
**made for
people
like me**



Hello all!

What they like about All 4

They praised All 4 for the vast variety offered on the platform, speaking highly of the differing genres offered. As well as variety, young people liked that All 4 offered new, diverse and different content for example the Walter Presents and Vice sections on All 4. The flexible nature of All 4 was very important to them too, having the ability to watch the content when and where they want. Overall, they liked that they could access good quality content for free.

"Easy to use, loads of stuff to watch (like Walter Presents and Vice as well as Channel 4 originals), can catch up if I don't watch live."

"They include diversity, they are fresh and also they like to do things differently and present variety on every single show and Programme."

"I love how much content I'm able to watch, it also allows me to catch up on many shows I'm unable to watch when they air for various reasons.."



TOP SHOWS THEY LOVE ON ALL 4

When we asked the community their favorite show's on All 4, much of their favorite shows were the same on Channel 4 too. For example, shows such as The Great British Bake Off and My Mad Fat Diary. Whilst they're using All 4 as a destination to watch big shows on both Channel 4 and E4, they're using the platform as a way to binge and re-watch classic Channel 4 programming such as The Inbetweeners and My Mad Fat Diary. Young people did also mention that All 4 had been a destination for dating shows like Five Guys a Week, Naked Attraction, Celebs Go Dating and First Dates too.

1. JOINT: GOOGLEBOX/ MY MAD FAT DIARY



"Gogglebox, family friendly, feel-good, interesting..."

2. JOINT: MADE IN CHELSEA/THE GREAT BRITISH BAKE OFF



"I like watching celebrity bake off and building the dream. They are programmes that gives inspiration and ideas."

3. JOINT: THE INBETWEENERS & 90210



"The inbetweeners, it's relatable and I can identify with the sixth form elements of the show as I'm going through that process now."

4. THE ALL 4 COLLECTION: (VICE/ADULT SWIM/WALTER PRESENTS)



"I'm a massive fan of Walter Presents. Even though they're not made by 4, I appreciate that you're making German (especially Deutschland 83/86) and Scandinavian TV available in the UK. Similarly, I watch King of the Road on Channel 4 which I think Vice make, so I'm glad you're putting that up too!"

If All 4 were a celebrity...

We asked the 4Youth community what All 4 would be like if it came alive as a celebrity. There were two key celebrity types they mentioned:

1.

WELL ESTABLISHED ACTORS:

The community mentioned celebrities that had become well established despite starting from humble beginnings which they likened to All 4. They spoke about how All 4 resembled qualities such as being versatile, well liked and well respected, mentioning celebrities like, George Clooney, Michael Cane, Robert Pattison and Tom Hardy.

2.

YOUNG TV PERSONALITIES:

Again, one running theme amongst the majority of the celebrities that was likened to All 4 was being versatile and being talented in a variety of areas. This was something they spoke about in various young TV personalities who they felt were like All 4 because they were informative, topical and funny like Joe Lycett, Scarlett Moffatt and Ricky Gervais.

"A reality star. Scarlett Moffatt. All 4 I associate strongly with reality TV, and I feel like Scarlett Moffatt is perhaps the most well-known reality star at the minute."



18-24s are...
11% more likely
to say they like
Scarlett Moffatt

"Who could you use that has everything all in one place... I would go with Joe Lycett. He is an amazing comedian with a lot of style and laughter"



18-24s are...
18% more likely
to say they like
Joe Lycett



**Thank you, questions
please contact
ccory@channel4.co.uk**