

International Broadcasting and Audience Research (IBRA) audience measurement

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**International Broadcasting And Audience Research (IBRA)
Audience Measurement**

By

Peter Herrmann

INTERNATIONAL BROADCASTING AND AUDIENCE RESEARCH (IBAR)

AUDIENCE MEASUREMENT

Sample Surveys

The only reliable method of finding out how many listen to the BBC or any other radio broadcaster is to commission sample surveys in target areas.

In Britain the BBC's Broadcast Research Department carries out a daily survey from which it can measure reliably the radio audience for the previous day. In External Services this is, of course, out of the question. We broadcast to the entire world. Many areas are closed to research for political reasons. Others are geographically inaccessible. Many countries, especially in the Third World, have widely dispersed populations making survey research prohibitively expensive and time-consuming. Where research is possible, surveys of the adult population are carried out and the size and demographic characteristics of the BBC audience and our competitors may be measured with some degree of confidence. Another difference between us and our domestic colleagues is that we are unable to measure audiences for specific individual programmes. This is because research cannot be conducted continuously. Thus, we are unable ever to say what the total audience on any particular day would be to, for example, a news bulletin in Hindi, a sports report in Hausa, or a new drama series in Arabic. Also, unlike our colleagues in domestic BBC audience research, we do not carry out this survey research directly ourselves. We commission market research agencies who are experienced in the areas concerned. Sometimes these agencies are local companies; sometimes they are international companies with local experience.

Sample surveys are carried out by research agencies experienced in the widely accepted and tested methods of market research. Interviewers receive training in the administration of questionnaires. They are briefed on the purposes of each survey. There is usually a system of checking their work afterwards for accuracy and reliability. Various methods of sampling the population are employed- each is designed to ensure that each member of the sampled population has a roughly equal chance of being interviewed. A strict methodology of sampling, using electoral lists, street or housing plans, or a random route whereby the interviewer is instructed to visit every tenth house, is used, and in the best ordered surveys the selection of interviewees is checked by supervisors. We have often been able to check on the spot that the proper methodology of sampling and interviewing is carried out. Interviews are usually conducted face-to-face between one trained interviewer and the selected interviewee. The only recent exception to this was our survey in the United States, where door-to-door survey techniques are becoming increasingly difficult. There the agency selected respondents by telephone, using a random digit dialling system. Naturally, though, the results of any sample survey, whatever the exact method, are subject to a margin of error. It is a vital part of IBAR's work to ensure that this falls within acceptable limits.

The "First" World

In the industrialised, developed, non-communist countries, there are few problems in finding suitable agencies. There is usually competition between a number of companies for our business. Market research companies in, for example, the United States, EEC countries and Japan, are able to offer surveys of randomly selected adults (we can usually choose the lower age limit ourselves) throughout the respective country. In most of these advanced countries, the agencies have a track record, which we may know ourselves, or which we can check with other research users. In these countries research is well enough developed for a project to be reasonably straightforward. There are not usually more than one or

two languages. People are not unfamiliar with being asked questions about themselves and their lives. Census data, street maps, electoral lists, telephones and adequate transport and postal services make the tasks of sampling and organising research relatively simple. Agencies usually have well-trained and experienced teams of interviewers as well as a reliable system of verification of their work. Thus, we have been able to carry out regular surveys in France and West Germany - on average every three or four years. In the less developed countries research presents more problems.

The "Third" World

Ironically, the first survey carried out on our behalf was in Bombay in 1944. Market research has shown a very uneven development in the less developed parts of the world. In those countries where there is substantial urbanisation, considerable development of an urban consumer economy, or the presence of competing political parties, or any combination of these, market research organisations exist. In India, Indonesia, Argentina, Brazil, Nigeria and, for example, the Ivory Coast there are competing agencies able to offer sample surveys to customers.

Some are limited in what they can do. Thus, for example, the agency we employed in two States in India in 1981 was able to survey both urban and rural areas, but found it difficult to obtain enough willing female interviewees. In Kenya the company covered most of the country for us, but for security reasons had to leave out the north-east and a few of the very rough and violent shanty areas of Nairobi. In much of Latin America, research agencies do not offer to do survey research in the rural areas. If one is aware of these and other restrictions, one can allow for them when making estimates of our audience size and characteristics.

The basic theory behind sample surveys is that one can, with a reasonable degree of certainty, say something about a whole population by finding out in detail from a representative sample of it. The extent to which a sample is representative is crucial. One problem in less developed countries is that market research has been sponsored or stimulated by the manufacturers and traders in consumer goods and services. Thus, surveys purporting to be representative of the adult population may in some cases turn out to be representative only of those in the cash economy - by no means the entire adult population in a Latin American, Asian or African country. We need, therefore, to brief ourselves thoroughly on the facilities and capabilities of research agencies in the field and, where possible, to encourage or demand the widest possible coverage of target areas and populations. In recent years we have increasingly sent researchers from IBAR to observe surveys taking place in different parts of the world. These visits have enabled us to see at first hand how the research is carried out and to gain a better understanding of research possibilities and difficulties in Third World countries. They have also improved the reliability of surveys by helping to avoid misunderstandings in the design of the actual questionnaire. A good example of this has just been provided by our current survey in Pakistan among the Pashto-speaking population of that country and the Afghan refugee camps. The IBAR researcher responsible for the design of the questionnaire and the negotiation with the research agency visited the research area with the agency for the trial or pilot project prior to the research proper in August. He was able not only to see how the agency selected respondents, but

also to spot some problems in the way certain questions were perceived by those interviewed. (It is important here to make the point that our surveys are never identified as being for the BBC and our staff do not identify themselves as BBC representatives. In either case it could "colour" responses.)

The high cost of overseas surveys means that often we have to "ride" on a market research "omnibus". These are regular surveys on which various customers can put their questions. It means that questions on radio listening and foreign stations may follow or be followed by questions on washing powder purchases or cigarette brand preferences. Where possible, we try to put our questions on omnibuses where there are other media questions, perhaps for some local newspaper chain or media advertising group. But often there is no choice and one takes the limited opportunities that may arise.

If we have a large number of questions to ask, an ad hoc survey may be justified. Sometimes it is inevitable anyway - no-one else may be interested in doing research in a particular area. Our present survey of listening among Pashto-speakers in Pakistan and the refugee camps is a typical example. This is the ideal way of carrying out research where the entire project is designed by us and the research agency to concentrate solely on matters relating to radio listening in general and to international broadcasting in particular.

Each year we draw up, in consultation with the respective Heads of Service, a list of countries or areas where we want to measure our audience or up-date measurements we already have. In all sample surveys the measurement of audience size and establishment of the audience profile is a major preoccupation. But we also seek other information as well. The engineers may want to know if there are problems with reception or the frequencies we use. The language sections usually want to ask questions about specific programmes and the preferences of their audiences. The newsroom may want to know the relative importance given by target audiences to local, regional, British or world news. We may also want to find out if our transmissions are at the most suitable times. A well-designed questionnaire among a properly selected sample of listeners should give us the information we require.

The "Second" World

There are many countries completely closed to outside researchers. These are mainly, although not exclusively, those with communist governments. We are unable to use the normal methods of sampling and interviewing. However, research of a different kind is possible for some of these countries. We do not carry out research directly ourselves, but avail ourselves of the work done, for instance, for Radio Free Europe and Radio Liberty. Thus, in Paris the Soviet Area Audience and Opinion Research office obtains audience data on the leading Western broadcasters in the Soviet Union for Radio Liberty. And in Munich the East European Area Audience and Opinion Research office measures audiences in most of the rest of communist Europe.

The methods used are now well established and, we believe, probably as reliable as they could be, given the special difficulties involved.

The sample base used for research into foreign radio listening by Romanians, Hungarians, Czechoslovaks, Poles and Bulgarians is the large number of people, as many as two million people each year, who visit Western Europe. About 7,000 of these visitors are interviewed each year by ten market research organisations

in Belgium, Austria, France, West Germany, Sweden, Switzerland and the United Kingdom. Very tight controls are maintained. Results are considered reliable only if the findings reported separately by all the research agencies agree. Thus, a number of separate samples are taken for each of the five nationalities. They are combined to form a single sample in each case only when the results agree.

But can samples of travellers be representative of the population at home? The demographic characteristics of the visitors can, of course, be checked against statistics available of the populations as a whole. A remarkably wide range of people do travel. There is a strong desire for travel and the restrictions on foreign currency mean that the individual's socio-economic status is not a major factor in determining who can travel, and, for instance, having relatives abroad often has a greater influence. It is, of course, possible statistically to correct for under- or over-sampling sections of the population in the final results produced and this is done. But it is still not possible to adjust for any 'privilege' factor which may be inherent in allowing certain people within Eastern European society, and not others, to travel.

As one would expect, such unorthodox research methodology has raised eyebrows and the methods have come under very close and critical scrutiny. Leading social scientists and statisticians have, however, been invited to examine the methodology and have come away with the view that, in the circumstances, the techniques employed are sound and that the results should prove reliable. It is also possible from time to time to compare some parts of the data obtained with similar information from official surveys carried out in the country concerned, and the comparisons add to one's confidence. Recently, also, the Head of IBAR has been able to confirm the reliability of data on foreign station listening in Poland in off-the-record conversations with media researchers there.

The same techniques, broadly speaking, apply also to the research conducted by the Paris-based Soviet Area Audience and Opinion Research office for Radio Liberty. The task of contacting Soviet visitors is also contracted out to independent research agencies. The main difference is that experience has shown that Soviet citizens respond negatively, or refuse altogether, if an interview is conducted in the traditional survey research manner. To put it crudely, they don't like being approached by people with a list of questions on a clip-board. Instead, a more informal conversational approach is employed. The interview takes place in the form of an open, but structured, discussion held in conditions of privacy. Questions about media in general and foreign radio in particular are discussed and the answers are recorded on a schedule immediately afterwards. It is the intention that the respondent should be unaware that he is taking part in a radio research project.

Close supervision of interviewers is maintained. Data gathered from different sampling points are compared to check reliability. However, travellers to the West from the Soviet Union are less representative of the general population than travellers from other East European countries are of theirs. To compensate for this a complex weighting method is used to adjust the sample to match the Soviet Union's population. The Soviet Union audience for various Western broadcasters is then computed. Even so, it is again impossible to allow for any 'privilege' factor which must be present amongst travellers from the Soviet Union.

Recently the Paris office has been improving both the size and the range of the sample interviewed. They are particularly concerned to increase the sample interviewed from the non-Russian republics like, for example, the Baltic and the Central Asian States. As a consequence about 5,000 interviews were successfully conducted last year - about twice the figure of previous years.

Scepticism has, of course, also been expressed about these methods. However, comparison of the findings of the Paris office with results from sociological surveys in the Soviet Union shows that their data has a high degree of validity on, for example, media consumption patterns. And recently the eminent former Soviet sociologist, Professor Vladimir Shlapentokh, who was the most experienced expert in the USSR in survey research before he went into exile, and who was himself a sceptic, reported that he found their work to be "interesting and valuable". He wrote that "under existing conditions we should all be grateful to Mr Parta's (the Head of the Paris research office) studies".

IBAR adds some of its own questions to those used by both these research departments and we receive research reports and data print-outs produced continuously by them. These reports and data give us audience estimates for the countries concerned as well as information about how our programmes are received.

Other Countries

No-one has yet found a way of reliably measuring audiences in the People's Republic of China or Vietnam. We are presently exploring the possibility, in conjunction with USIA Research, of mounting some similar research activity outside China to that conducted in Europe for Eastern Europe. Other closed societies for which we have no measurement whatever include Burma, Mozambique, Ethiopia, Angola and East Germany. In some cases we are able to send questionnaires ourselves by post to listeners who have written to us. The results of this research can tell us a lot of useful information about some of our regular and keen listeners, but they cannot, of course, give us any indication of audience size.

Research in closed or difficult areas does from time to time become possible. We are currently pursuing the possibility of a survey in Yugoslavia, using a local research agency. In Nicaragua we expect to be able shortly to obtain some fairly basic audience measurements through a commercial organisation carrying on some market research. We are continually on the look-out for these opportunities.

Other Data Sources

Through our membership of such organisations as the Group of European Audience Researchers, the International Association for Mass Communications Research and the European Society for Opinion and Marketing Research, as well as through other more informal contacts, we are often able to obtain audience surveys from other sources. For example, we regularly obtain audience research information from the CEO, the French domestic media research organisation. We maintain very cordial relations with audience research departments in many countries, including some in communist States. Recently, these contacts have proved very valuable in obtaining some detailed measurements of audiences for the BBC English by Television series, "Follow Me", being transmitted locally on their domestic television services. We are also now seeking to obtain audience measurements for some of our radio programmes on disc and tape which go to different stations around the world.

Audience research data and other useful information is obtained regularly from various sources which, although they may not give us any specific data about our own audiences, may nonetheless tell us a lot about local media consumption patterns - the growth of TV, peak listening and viewing times, the availability of short-wave, language comprehension and use and so on.

Research by Other International Broadcasters

The research carried out by Radio Liberty and Radio Free Europe has already been mentioned. Audience research for the Voice of America is carried out by the USIA Research Office. Deutsche Welle has its own research department as does Radio Nederland also. Radio Canada International and Radio Australia carry out some research using their domestic audience research departments.

We often co-operate in setting up overseas research by sample surveys and share costs. For example, the USIA and Deutsche Welle are contributing towards the cost of our survey among Pashto-speakers in Pakistan. Deutsche Welle will be organising the proposed survey in Yugoslavia and we shall have some questions of our own and make a financial contribution. Recently we have exchanged survey data with Radio Canada International. And we are contributing towards the cost of a Radio Nederland/Radio Canada study in the United States. Our relationship with the USIA Office of Research is one of the regular exchange of research data. We have received many research reports from them of surveys conducted in Latin America, the Caribbean and the gulf.

In the last year Radio France International has made money available for survey research. At present they join our surveys and we provide them with the data they require for a fee mutually agreed.

Financial contributions towards the cost of surveys have also been received, or are due, from Radio Australia, NHK of Japan, RNE of Spain, Radio Cairo, and HCJB, Ecuador. This inflow of funds makes it possible for us to conduct more research than would otherwise be the case.

Analysis of Data

IBAR has a team of experienced researchers who design questionnaires in consultation with the broadcasting departments, negotiate with research agencies, draw up our detailed research requirements and analyse and check the data. They produce detailed research reports which, among other things, provide audience measurements for the respective language services. A major asset in IBAR is the presence of language assistants whose knowledge of the countries concerned and mother-tongue familiarity with the language enable us to check translations thoroughly and avoid misunderstandings that can so easily creep in.

We do our own analysis of the data. Generally speaking, the agencies provide data print-outs that we can subject to further analysis. We also generally obtain the computer tape or disc which can be further analysed, if required.

Other Research by IBAR

If the word "measurement" can be used in the broader sense of assessing the impact of our broadcasts among our regular listeners, mention should also be made of the other research we carry out on a continuous basis. Survey research is expensive and time-consuming. We often need information quickly and inexpensively. Can listeners pick up a new transmission in a given area? What do they think of our ideas of a new programme series? Do they find it difficult to tune in? What did they make of our coverage of a particular news issue? Such research can be done by sending questionnaires to recent correspondents in selected areas and from different language groups. This is especially important in areas where survey research is always difficult or impossible. We have, for example, carried out postal research in China, Angola, Mozambique, Burma and Yugoslavia. It is also important for the World Service and Arabic Service which broadcast to so many different countries that sample surveys can never give enough detailed information about the impact of the service as a whole.

IBAR handles all listener mail - over 400,000 letters last year - and, while the size of the mailbag is not directly related to the popularity or otherwise of our services, letters are an invaluable form of feedback, particularly from the more inaccessible of our audiences. Listeners' letters can give us important pointers to problems for research and give both us and the broadcasters a useful qualitative "feel" of the impact of what we do.

Additionally, we may wish to conduct research into special problems that seem to require investigation. For example, we know that the audience for the BBC and other international broadcasters is very small among South African Blacks. We set up some discussion groups in South Africa last year to discover why this was so and what, if anything, we could do to reach a larger audience in that society. This research continues presently. Another concern at the moment is the problem of the choice of time of our transmissions. We may put questions into a general population survey designed to discover the best time for transmissions to avoid the times when people are watching television, are at work or asleep. We currently have some work under way in Brazil to see if there is an untapped potential there for Brazilian Portuguese transmissions were these to be broadcast at a different time. We also obtain detailed time-use studies from various countries giving us valuable information on the time people sleep, get up, go to work, watch television and listen to the radio, information invaluable in the planning of radio broadcasts, including international transmissions.

SPECIAL PROJECTS

The Special Projects section of BRD carries out tailor-made surveys for BBC management, programme departments and decision makers at all levels. A close liaison between Special Projects researchers and their clients ensures that problems can be clearly defined and the most appropriate research techniques used. The methods employed vary according to the nature of the problem and the resources available. They may be quantitative, involving interviews with a large number of viewers or listeners, or qualitative, when more in-depth information is collected from a smaller group of people.

The number of Special Projects carried out has increased dramatically over the past few years. As many as 60 separate studies may be under way at any one time.

Some important Special Projects undertaken recently include:

Daily Life in the 1980s

A large scale interview survey to examine, in detail, how people spend their time in a typical day. In this context the role of the broadcast media is of particular interest and the data is of use to both programme makers and schedulers.

Radio Sets and their Users

An audit of radio sets in a sample of 1,800 homes, carried out for Engineering and Radio management.

The Computer Programme

A long term project to help develop the objectives of the series and to evaluate its success in reaching the target audience.

Other projects are carried out to assess the needs of potential listeners prior to the opening of BBC Local Radio stations, to examine in detail reactions to specific series or programmes, to establish perceptions of bias in the broadcasting of major issues, and to assess viewer or listener reactions to possible programme or schedule changes.

WHAT IS AN AUDIENCE?

The audience for a particular TV or radio programme can be defined in several ways. This is what the different terms mean:

The **programme reach** is the number of people who saw or heard **any part** of the programme.

The **core audience** is the number of people who saw or heard **all** of the programme.

The **peak audience** is the greatest number of people who were watching **at any one time**.

The **average audience** is the number of people who watched the programme averaged over its transmission time. This is the figure that appears in the BARB TV weekly and radio monthly reports.

These terms can also be applied to series or serials. The reach of a series will always be considerably higher than the average audience for one particular episode.

The **average daily reach** (or patronage) for a TV channel or radio network is the number of people who watch or listen to that service at all in an average day.

The **average amount of viewing/listening** is the time spent watching/listening to the given service, on average, per head of the population per day.

The **audience share** for a TV or radio service is the average amount of viewing/listening for that service expressed as a percentage of all TV viewing or radio listening.

WHO TO CONTACT

The Department is located at:

The Langham,
Portland Place, London W1A 1AA.
Tel: 01-580 4468

Queries should be directed to the information desk on extension 8185.

Queries about broadcasting research in countries other than the United Kingdom should be directed to:

Head of International Broadcasting and Audience Research Tel: 01-257 2971.

A GUIDE TO BROADCASTING RESEARCH IN THE BBC

• WHO WATCHES?
• WHY?

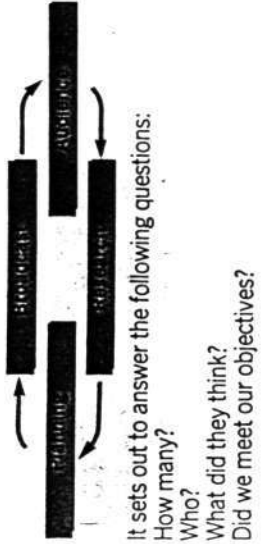
• WHAT DID THEY THINK?
• WHO IS IT FOR?
• HOW MANY?

• HOW OFTEN?
• DID THEY LIKE IT?
• DID THEY UNDERSTAND IT?

BBC

THE NEED FOR BROADCASTING RESEARCH BRD

Research is an aid to decision making for TV/radio management and programme makers. It has an important part to play in the planning process, and feedback is essential for a public service broadcasting organisation funded by the licence fee.



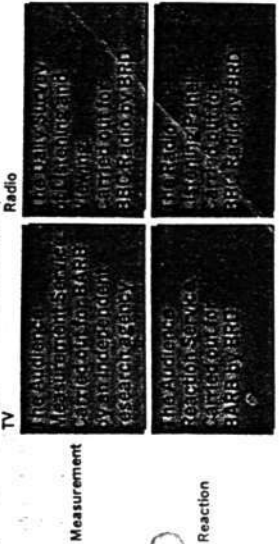
The BBC's Broadcasting Research Department (BRD) includes Continuous Services and Special Projects sections. These are supported by a range of data collection and analysis facilities. The Department maintains a fieldforce of over 1,000 part-time interviewers and has its own ICL minicomputer. It answers questions through its regular data collection methods or tackles ad hoc problems as they arise.

CONTINUOUS SERVICES

Introduction

There are four components to the continuous services arm of the department. These are the measurement of audience **size** for TV and radio and the assessment of audience **reaction** to TV and radio output.

Data on TV audience measurement and audience reaction is provided by BARB, the Broadcasters' Audience Research Board. This is a limited company jointly owned by the BBC and the ITCA.



AUDIENCE MEASUREMENT % Television - The Audience Measurement Service

This service is carried out for BARB by AGB, an independent market research agency.

A **panel** of 3,000 households is maintained. This is carefully selected to be nationally representative across a wide range of demographic and behavioural variables. Some 20,000 people are interviewed annually as part of AGB's establishment survey. This monitors changes in the population which are then reflected in the composition of the panel.

A **meter** is attached to each TV set in the panel household which records when the set is switched on and to which channel it is tuned.

Each household member aged 4+ records his viewing by pressing his personal button on a specially designed handset in the TV room.

The system also measures viewing outside the home. 'Time shift' viewing, via video recorders, is also accounted for.

Radio - The Daily Survey

This service is carried out for BBC Radio by BRD.

On the Department's Daily Survey a nationally representative sample of 1,000 individuals aged 4+ are interviewed every day of the year. Interviews are conducted in the home and respondents are asked about their listening 'yesterday'.

Twice a year local radio surveys are carried out to estimate audiences for BBC Local Radio services. On each occasion some 1,500 interviews are carried out in each local radio area among those aged 16+. Interviews are carried out in the street and, as with the Daily Survey, respondents are asked about yesterday's listening.

AUDIENCE REACTION AI Television - The Audience Reaction Service

This service is carried out for BARB by BRD.

Respondents aged 12+ on the Department's Daily Survey are asked to keep a self-completion diary of all the programmes they watch over the next five days. For each they are asked to indicate, using a six-point scale, 'how interesting and/or enjoyable' they found it. From the answers given an Appreciation Index (AI) is derived. For selected programmes or series there is the facility to ask more detailed questions.

The dual currency of achievement provided by a measure of audience reaction, as well as audience size, means that it is not only programmes with large audiences that are deemed successful. Programmes targeted at minority interest groups, for example, may be better judged by the AI they achieve. There is cause for concern, however, if a programme gets a low rating on both dimensions.

Daily Survey respondents are also asked if there was anything they 'strongly disapproved of' on TV yesterday. This is reported if a particular programme receives a significant level of adverse comment.

Radio - The Listening Panel

This service is carried out for BBC Radio by BRD.

The Department maintains a panel of 3,000 listeners who are sent weekly self-completion questionnaires. About 50 programmes are covered each week and respondents are asked to give their reactions to specific aspects of those they heard together with an overall evaluation.

The panel is recruited from among respondents interviewed on the Daily Survey and is structured to be representative of listeners to each radio network.