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<th>What does a significant audience mean for a public broadcaster?</th>
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WHAT DOES A "SIGNIFICANT AUDIENCE" MEAN FOR A PUBLIC BROADCASTER?

The indispensable legitimacy. Public broadcasters have to be legitimate, that is to say they have to get recognition for the services they provide, both by the political deciders and by the large audience of viewers: their utility has to be clearly established both in the opinion of those allowing their financing (partially or totally) by the licence fee and in the opinion of those who pay the licence fee. Two conditions have to be fulfilled to first acquire, then keeps the legitimacy: the first condition is to get a significant audience, the second condition is to propose a distinctive programme offer both in terms of quality and in terms of complementarity. It is obvious that a channel which would attract only very few viewers would lose its credibility and would soon become insignificant and illegitimate. But one has to add the second condition which is that, for a public broadcaster, a significant audience can only be achieved through means that are unquestionable from the quality point of view. The argumentation of a public broadcaster has to be based both on audience and quality.

Numerous indicators. In this paper, I will show there is not only one audience indicator: several indicators can be used to measure audience. In other words, the argumentation of a public broadcaster may not rest only on the "audience share". I will try to show that some of those indicators are useful not only to measure how many viewers watch a programme, but also to analyse the viewers' reactions. One is thus coming to the notion of quality of programmes and one can use these indicators to legitimate a channel on the ground of its quality (see in annex list and definitions of main indicators).

Average rating and market share. At the moment, one single concept dominates the talk on audience measures: average rating translated into market share. One will say that a given programme has obtained a 10% rating, which means - in France - 5 million persons. Which also means the programme gets a 20% market share (if it is on air in a time slot when half French people watch television). One will say that, over a certain period of time, a channel gets a 18% market share. What does this mean? I think one can not get the real meaning of it without referring to the concept of "viewer-hours": that is to the addition of all hours spent in front of the TV set by the people composing the sample. The market share is the proportion of viewer-hours devoted to a given channel. On an average day, in France, the total amount of "viewer-hours" is about 150 million (3 hours per person on average): so, 18% corresponds to 27 million viewers-hours.
A significant market share? For public broadcasters, the market share result is considered to be "significant" when it reaches, comes next to or goes beyond an objective which is fixed by taking into account different elements such as competition, environment, history, and the channel's ambitions. As far as France is concerned, market shares of 24% to 26% for France 2, 14% to 16% for France 3 are considered to be "significant" and satisfactory. But, of course, France 2 and France 3 do not consider that those figures should be reached every week, neither that all programmes should reach this level. A higher result will be expected for a TV fiction or a quizz than for a programme on history or sciences. It will be assumed that higher competition in prime time slots obviously leads to lower results than those that can be obtained in daytime (in terms of market-share of course), etc. But whatever the objective being assigned by the responsible of the TV channel, the market share is an indicator they cannot neglect: it measures the percentage of total viewing time devoted to a particular channel, that is to say the channel's true position in the whole landscape. Part of the channel's legitimacy is ensured by the result of this indicator.

Audience reach. But the concept of audience is complex and other indicators help to approach it in a different manner. Let us start with one which is seldom used: audience reach. It seems to me that for a public broadcaster, it is important to demonstrate that it is useful and used by an important proportion of the population. For quite a long time, the BBC has published figures giving, each year, audience reach on a weekly average at a three minutes step: this calculated, taking into account both BBC 1 and BBC2, the number of people who had watched at least one of both channels for at least three consecutive minutes across the week. The responsible of the BBC have since adopted a tougher definition of weekly audience reach which puts the step at 15 consecutive minutes since they considered that a three minutes definition was too trivial, not "significant" enough. France Télévision uses the same definition (at least 15 consecutive minutes over the week).

The audiences or different components of the audience. Audience reach or market shares can obviously be calculated for targets of the population defined according to various demographic criteria (age, sexe, working status, education level, geographic area, etc.). It can be a good thing for a channel to show that it is used by a whole range of people and not only by an elitist group, for example. Commercial channels are often brought to ignore those viewers who are of no interest for advertisers (for example, old people with a low income): it is clear that the public broadcasters concern has to be quite different, and it is important to be able to show that the audience do acknowledge this concern.

Viewing time per viewer. Let us come back to the audience share in order to show that it can be analysed in a more subtle way than it is usually done. One must first remember that a given market share can be the result either of many persons watching for a very short period of time or of very few people watching for a long period of time (see, in annex, graph no 1 showing how a 1% market share corresponding to 1,5 million viewer-hours can range from 1
million people watching one hour and a half to 15 million people watching 6 minutes). Depending on the channel and the programme strategy, the objective will be to maximise either audience reach or, on the contrary, viewing time per viewer. For example a channel devoted to weather forecasts will seek to be used by as many people as possible without intending to keep them watching long. On the contrary, studies conducted in France among cabled households show that channels of general interest which broadcast in a foreign language have a very low weekly reach but a relatively high viewing time per viewer.

**Structure of viewing time.** Another approach : the structure of viewing time. In this case the question is : which proportion of the total viewing time is devoted to each category of programmes (variety, TV fiction, quizzes, documentaries, news magazines, etc.). An audience share relying mostly on videoclips and series ensures far less legitimacy than the same amount of "viewer-hours" relying mostly on documentaries and news programmes (for example, see in annex, table n° 1 and graph n° 2 which compare the structure of the viewing time of each of the six main italian TV channels, for the year 1990-1991, according to the *Atlante della Radio e della Televisione 1991*). This concept can also be expressed in "audience shares". One will then say for example : "Out of 100 million viewers-hours devoted to documentaries, x % goes to watching documentaries broadcast by a given channel".

**Regularity and loyalty.** Another way of measuring the audience is to look at its regularity. This means looking at which proportion of viewes of a given channel watch it one day out of 7 (low regularity), 2 days out of 7, etc., up to 7 days out of 7 (high regularity). One can also measure the size of the audience who is loyal to a daily or weekly news rendez-vous. Following the same idea, one can measure the "channels core audience", that is to say those viewers who watch a channel regularly and devote a high proportion of their viewing time to it. The question here is to set criteria of regularity and viewing duration : at France Télévision, definition for regularity is "at least fifteen consecutive minutes at least five days out of seven"; definition for viewing time is "at least four hours over the week". The evolution of such an indicator is of great interest (see, in annex, graph n° 3 which compares audience share and "core audience" for France 3 over a few months).

**An indicator of interest.** At France Télévision again, it appeared it was important to measure the ability of a programme to rouse sufficient interest to keep its viewer watching throughout its duration : the indicator used calculates which proportion of those viewing at the beginning of the programme do watch the programme in its entirety. A sort of interest index in a way (see, in annex, graph n° 4 which shows that there is not a perfect correlation between this index and the audience share).

**Different argumentations.** In other words, for public accountability needs, a TV station can use quite a number of different indicators in order to demonstrate that it gets a "significant" (in the meaning pointed out up to now) audience. To get a "good" audience, or a "significant" audience does not refer
to the sole "audience share" figure. Let us give a few examples of various arguments.

1 - In the case of a high audience reach. Quite a lot of people use our channel, they think our channel is "useful" : in spite of the great diversity of potential viewers and in spite of the high level of demand on behalf of those viewers, there is only a very low proportion of people who find nothing interesting on our channel over the week, which proves that our channel is truly "of general interest".

2 - In the case of a high viewing time per viewer. We may not have as many viewers as our competitors but those who watch us do find us very interesting : witness they spend most of their viewing time watching us.

3 - In our viewing time structure, programmes of the discovery, education and information type, take an important part : viewers thus show that they need our channel for this type of programmes that they can not find easily elsewhere (or at least more seldom and at late hours).

4 - Our audience share is high in a given group of the population, which might be ignored by commercial televisions, even though this group of viewers, for various reasons, rely a lot on television to provide them with information, entertainment and culture.

5 - The same argument can be developped with audience reach figures.

6 - For programmes which can be considered to be specific programmes in a public television (documentaries, news magazines...), our audience shares are higher than the average audience share : we can thus say that we are different.

7 - Our programmes do interest our viewers enough to keep them watching till their end.

Coming next to quality. You will see that the type of audience we have discussed in this paper introduces qualitative dimensions. Some of the indicators I have been presenting help us to get out of the trap of the "double bind" you all know. This mechanism - well analysed by the School of Palo Alto - consists in saying : "Do well whatever you wish, anyway it will be bad. If you get audience, it is bad : because you neglect the quest for quality and difference. If you get no audience, it is bad : the audience keeps away from what you consider to be quality programmes !" Several of these indicators, do not only measure audience, but they help to get a first appreciation of the programmes quality.

Michel Souchon
June 1995
ANNEX : DEFINITION OF AUDIENCE INDICATORS
TABLE AND GRAPHS

- The **instant audience** is all the people sitting in front of their televisions (or watching a certain channel) at a given moment.

- The **reach** or **cumulative audience** includes all the people who have seen at least part of a programme or have been watching for part of a time segment (the size of the fragments has to be defined : so many seconds or minutes).

- The **programme total audience** is all the people who have seen the whole of a programme.

- The **rating** or **average audience** is the average number of people present during a programme (or time segment).

- The **audience share** or **market share** is the number of people who have seen a programme (or were watching during a time segment) compared with the total number watching television at the same time.

- The **interest index** is the percentage of viewers present at the beginning of a programme who have watched it in its entirety. In technical terms, this indicator is the ratio of (A inter B)/A (A being the initial audience - the viewers present at the beginning -, B the "entire audience" - those who have viewed the whole length of the programme -).

- The **core audience** is characterised by the regularity and the importance of its viewing on a particular channel. At France Télévision, Michèle Périot has been following this indicator for several months using this definition: at least 15 consecutive minutes five days out of seven and at least 4 hours over the week.

- **Viewing time** is measured as the average time per viewer in minutes (average viewing time) or as the time spent by a given population, measured in viewers-hours, in the same way as the transport industry talks of passenger-miles (analogous to total viewing time): it is the time spent watching television in general or a specific channel in particular during a given time segment by an average individual or all the individuals in a given population group.
<table>
<thead>
<tr>
<th>NS</th>
<th>RAI 1</th>
<th>RAI 2</th>
<th>RAI 3</th>
<th>CANALE 5</th>
<th>ITALIA 1</th>
<th>RETE 4</th>
<th>6 TV</th>
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<tr>
<td>24.9%</td>
<td>18.0%</td>
<td>27.5%</td>
<td>-</td>
<td>-</td>
<td>4.4%</td>
<td>-</td>
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</tr>
<tr>
<td>ORMATION-CULTURE</td>
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<td>13.1%</td>
<td>41.6%</td>
<td>8.3%</td>
<td>2.1%</td>
<td>5.6%</td>
<td>14.4%</td>
</tr>
<tr>
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<td>13.5%</td>
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<td>69.6%</td>
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<td>12.1%</td>
<td>12.0%</td>
<td>26.1%</td>
</tr>
<tr>
<td>ORT</td>
<td>6.4%</td>
<td>8.5%</td>
<td>13.8%</td>
<td>0.1%</td>
<td>11.8%</td>
<td>0.2%</td>
<td>6.5%</td>
</tr>
<tr>
<td>WING TIME = 100 %</td>
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<td>133'</td>
<td>238'</td>
<td>147'</td>
<td>133'</td>
<td>1295'</td>
</tr>
</tbody>
</table>

Graph n° 2: Italy - Structure of viewing time (season 1990-1991)
Graph n° 4: Audience share and interest index of TV fiction, France 2, Oct.-Dec. 1994

INTEREST INDEX

NCE SHARE

Graph n° 4: Audience share and interest index of TV fiction, France 2, Oct.-Dec. 1994

INTEREST INDEX

NCE SHARE

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