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<th>Strategies to address changing audience preferences</th>
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<td><strong>Author(s)</strong></td>
<td>Mytton, Graham L.</td>
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STRATEGIES TO ADDRESS CHANGING
AUDIENCE PREFERENCES

By

GRAHAM MYTTON

Paper No. 15
THRIVING IN A DIVERSE BROADCASTING ENVIRONMENT

AMIC/CBA Conference, Singapore, February 1998

Strategies to Address Changing Audience Preferences

Graham Mytton
BBC World Service

What has brought you here to AMIC in Singapore for this conference? I am sure that there are many reasons. Everyone here is involved, presumably, in some aspect of radio or television broadcasting. The title of the conference and its prospectus speaks of change, new diversity, new challenges and new strategies. I presume therefore that we are all here to discuss and share ideas about the future of our business in changing circumstances. How do we view these changes? Let us just review what they are, so that we can think about them more clearly.

There are three areas of change, all of them interconnected.

1. Technological Change
2. Changing Regulation
3. Changing Consumer Behaviour

All three are happening everywhere in the world, at various speeds. They are inescapable. The only issue is how existing and established broadcasting organisations are to respond. All of these aspects of change have an impact on what we do now; all of them have implications for the future providing both threats to existing activities and opportunities for new ones, and they force us to review strategies and priorities.
1. Technological Change

Let us start with technology. Changes in technology are not, of course, new. The 20th century has seen virtually the entire development of radio from its primitive beginnings to its high degree of technical sophistication today. Technical progress has been continuous over the entire period. Most changes have an impact on the way in which radio and TV programmes and services are produced and distributed. Electronic recording, the invention fifty years ago last month of the transistor and FM transmission and the coming of stereo, changed radio. Television was much advanced by the introduction of colour, by lightweight portable recording and the introduction of home video recording. Both television and radio have benefited from the development of worldwide satellite links. These and other innovations have brought a steady stream of improvements to the way in which programmes were made, sent out and received.

But few technological changes have had an impact on the way in which TV and radio were organised, until now. The relatively recent dramatic spread of cable and satellite and, above all, the new technology of digitalisation have had effects way beyond that produced by the technology alone. Some we have seen already.

Satellite delivery, either directly to home or to cable systems, has already happened in most parts of the world. Now we are seeing a further and more fundamental revolution - the move from analogue to digital. This brings about changes which are potentially even more far reaching than the move from black and white to colour, and even perhaps greater than the replacement of valves by transistors or semi-conductors. Digitalisation makes compression possible, bringing the possibility of far more services squeezed into the same electro-magnetic spectrum. It makes possible what is usually referred to as convergence - the gradual ending of the distinction between broadcasting (radio and TV), telecommunications, computers, and other audio-visual technologies. I can now, or soon will be able to, use my computer to listen to the radio, watch TV, send a fax, play recordings, send voice messages, have
international conferences, and so on. Digitalisation is also having a major impact on the process of programme production. Not only can radio and TV programmes be made, put together and edited with computers, they make it possible for anyone with the technology, which can be based on a personal computer, to communicate using sound and vision. Digitalisation also means better quality and it means that all sorts of special visual and sound effects that were once expensive and complex are now inexpensive and simple to create.

Digitalisation also means new and very different kinds of broadcasting activity. (Perhaps broadcasting is not the word to use.) Interactive services become possible, with opportunities in many areas from education and health to home shopping and video on demand. Digital radio or TV can be linked with computers and be an alternative means of sending and receiving data. This could have important and exciting implications for remote communities.

The new technologies provide a range of opportunities in broadcasting. Not only do they make possible much more of what we have now. They also provide new possibilities and new forms of broadcasting. The response of existing broadcasters, especially those that have public service responsibilities, should be neither to embrace nor to reject everything but to seek benefit for their existing audiences. Those in public service broadcasting need to ask, what new services and delivery systems will assist you in meeting public service objectives? If you decide to remain outside certain technologies, what will the consequences be for the future? Will this mean that you become marginalised? Or will the adoption of all new technologies and possibilities dilute and weaken your ability to provide a mainstream broadcasting service for the majority?

2. Changing Regulation

Regulation is the second area of great change, and it is, as we have noticed already, a connected one. In recent years we have seen the gradual disappearance of state monopolies in broadcasting. Let us look at some of the
data and some predictions. In the charts on the following pages I have looked at the way in which broadcasting was organised in every country in the world in 1990 and then the change by 1996. I then try, using evidence of changes now under way or in prospect, to predict the situation in 2002. In the first set of charts I look at global data. Then I have separated out the Asia and Pacific region. I have categorised countries into three types; those with a state monopoly on broadcasting, which I have termed Monopolistic, those with a multiplicity of outlets which I have termed Pluralist, and those which are Transitional from one to the other. The trend is very clear. The few countries in the world, which are continuing to resist a move away from state monopolies, include a few communist countries and some Islamic states.

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1 I could have used the word "Deregulated".
The World's Radio and TV Markets:

1990

Pluralist: 60 countries
Monopolies: 98 countries
Transitional: 13 countries

1996

Pluralist: 90 countries
Monopolies: 49 countries
Transitional: 53 countries

2002

Pluralist: 143 countries
Monopolies: 22 countries
Transitional: 27 countries
Asia and Pacific Countries
The Radio and TV Market:

1990
- Pluralist: 13 countries
- Transitional: 1 country
- Monopolies: 24 countries

1996
- Pluralist: 15 countries
- Transitional: 11 countries
- Monopolies: 12 countries

2002
- Pluralist: 26 countries
- Transitional: 4 countries
- Monopolies: 8 countries

Strategies to Address Changing Audience Preferences
But even when monopolies still survive in law, the situation in reality will be different. The process of change does not happen solely as the result of changes in the law. The laws governing broadcasting may not in some cases change. The state or public service broadcaster may still be the only licensed operator within a country, but the new delivery systems mean that such a monopoly no longer exists in fact. National boundaries were always crossed by radio, since the very beginning. Now the new technologies sweep all the boundaries away.

One among the many arguments for broadcasting monopoly, state control or state supervision of broadcasting was always that the radio spectrum was a scarce resource which should be protected and used in the national interest. Soon that will be a valid argument no longer. Digitalisation will make many more TV and radio channels possible.

Broadcasting in much of the world has sat within the political arena. Broadcasting has been a state or public monopoly in most of Europe, Africa and Asia for most of the past 75 years of broadcasting. In the Americas things were differently organised.

Commercial operators have always occupied the main stream of broadcasting in most American countries. With a few exceptions, broadcasting was not something the state did. And in only a few countries was the idea of non-commercial public service broadcasting developed. But in most other parts of the world, broadcasting has been organised as a monopoly of the state, either as a department of the government, and broadcasters are civil servants, or as a public service corporation. This was so in most of Europe, and the European colonial powers bequeathed this way of organising broadcasting to their colonies. When independence was achieved by African and Asian countries, most of them retained the state broadcasting systems already in place. The Soviet empire also had state monopolies of radio and television. Now, in every part of the world, the monopolies are going. This process has been accelerated by the collapse of communism. But the process is to be seen everywhere from Austria to Zimbabwe. There are wide differences of
course - in some countries monopolies still operate and there is no sign of a change in the law yet. In others a single state broadcasting company now competes with several hundred private operators. The trend continues and by the year 2008, ten years from now, we can expect to see very few countries in the world without at least some private TV or radio. Even when governments keep control of the electronic media, we nonetheless see what can perhaps best be described as pluralisation. It is not an open market place, but situations of very limited choice, will give way to environments where listeners and viewers have a range of choices before them. In place of 2 or 3 radio or TV networks to choose from they soon have several. In the not too distant future there will be so many it may no longer be possible to count them. Not everyone will have this choice. Everyone will not have the same range of choice. Some will have no choice at all. But all this is rather different from what we have now.

3. Changing Consumer Behaviour

This brings us to the third area of change. Our customers are changing. It is the discovery or experience of choice that changes them. They find the networks, stations, strands or regular programmes that most appeal to them. They no longer have to watch or listen to the monopoly supplier. And they can shop around. New technologies also provide many of them with more choice of leisure activity.

In the early days of deregulation of TV in Western Europe, audiences migrated rapidly to the new commercial channels and away from the public service or state channels that continued with the same formula as before. In most cases the public stations were able to restore their position by learning how to be competitive. But some do not make this transition successfully. It is instructive to look at some recent data. The following table shows the share of all television viewing held by the public service stations in selected countries.
<table>
<thead>
<tr>
<th>Country</th>
<th>% share for public service TV</th>
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<tbody>
<tr>
<td>Greece</td>
<td>8.4</td>
</tr>
<tr>
<td>Canada (English speaking)</td>
<td>13.0</td>
</tr>
<tr>
<td>Australia</td>
<td>16.9</td>
</tr>
<tr>
<td>Canada (French speaking)</td>
<td>21.0</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>25.2</td>
</tr>
<tr>
<td>Germany</td>
<td>42.1</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>43.4</td>
</tr>
<tr>
<td>Italy</td>
<td>47.8</td>
</tr>
<tr>
<td>Austria</td>
<td>62.9</td>
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In Greece, the commercial TV channels have taken more than a 90% share of all TV viewing away from ERT, the national state channel. In Canada there is a marked difference between English and French speaking communities because of the fact that many more commercial channels are available in English. But the relatively low share for public CBC TV is also due to something I will explain later. In the Czech Republic the relatively low share for public TV arises from the relatively recent deregulation of broadcasting there. Public channels have performed better in the other countries. Austria was the last country in Europe to allow private broadcasting and this high share can be expected to fall. RAI in Italy continues to achieve about half of all viewing and listening, a remarkable achievement in a country that has more TV and radio channels than any other in Europe.

The increase in choice has a number of other consequences. It introduces market forces into the programme making area. Consumers can be attracted to services for which they have to pay. At the same time, the increase in the number of outlets may depress advertising rates on some channel, but the overall amount of money spent on television, and on radio also, increases. The revenue spent on television in the UK is, for example, expect to double over the next ten years. The rate of growth in some Asian markets will probably be greater than this. One consequence is inflation in talent costs.

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2 GEAR Factbook, 1997
the UK while overall inflation is just under 3%, the inflation rate in broadcasting talent - musicians, writers, actors, rights etc - is 11%. Inflation in sports rights in Britain and the rest of Europe is far greater than this. As this happens, fewer people get to see certain sports as the pay channels buy the exclusive rights to show them. These channels which buy the rights can be very profitable, while the BBC and the commercial free-to-air services are gradually priced out of rugby, football, motor racing and cricket.

As this process continues, we will find public service stations, in Asia as in Europe, with a declining share of all broadcasting revenue.

The point made earlier about choice is an obvious one to make, but it is also one that can be forgotten by broadcasters who have been accustomed to working in a monopoly. Listeners and viewers have choice; they exercise it and in most cases enjoy doing so. At this point, if not before, broadcasting becomes more like a market place or shopping centre where listeners and viewers, customers for entertainment, diversion or information, look to see what is on offer and choose that which most meets their needs or wishes. How should broadcasters respond? Their success or failure will always hinge on this question. The successful stations will be those which are best at understanding the markets, finding their place in those markets, and successfully filling it by attracting customers - or as we have always called them, listeners and viewers. How is this done?

Strategies for Existing Broadcasters

This is a very big subject and one far too complex for a morning's session at a conference like this. What I can do is map out the area of work that needs to be done by any broadcaster aiming for success in an expanding and diversifying broadcasting market.

You could argue, and you would be right, that in Asia, as in Europe, network, terrestrial traditional TV and radio will continue to account for the majority of both listening and viewing for several years to come, long after the arrival of
all those new technologies. So why, you may ask, should we change anything?

Whilst the reach of new services, especially those which have to be subscribed to, may be cumulatively low, they do demonstrate a major erosion of existing mass media. Perhaps the most important implication is economic or financial. The new services provide opportunities for income generation and profit. They will increase the amount of money spent in any economy on the radio and television industry. And that is not necessarily a bad thing. It can mean more money for the creative industry, more money for writers, actors, musicians, designers, sports events, and so on. But it also means, of course, competition for talent and price inflation in that field.

The success of independent channels, even if audiences may be relatively small in numbers, shows that sufficient numbers of people with adequate wealth will pay for this sport, or that film. And we see the result of that in the gradual move of many sports and films and other programme genres exclusively to subscription or pay-TV services.

The arrival of pay or subscription TV services will, if it has not already done so, fragment the TV market. The new services don't have the vast reach of the national terrestrial TV channels. But it is a mistake to dismiss them for this reason. They don't need to have this massive reach to succeed. It is not what they aim to do. Their aim is to make a profit. This they do. If they don't they soon disappear. They have more in common with magazines that you purchase from a shop than a "normal" TV channel in the way we have traditionally thought. They also disappear if they fail to attract sufficient advertising or purchasers.

What kinds of people will be lost to the new channels? This is a crucial question for existing channels, especially those whose purpose is public service with a remit to reach and serve all the people. The BBC, whose terrestrial TV and radio services in the United Kingdom are still funded by licence fees - there is no advertising - is presently concerned by the fact that,
while it provides 55% of all TV and radio consumption by those over 55 years old, it provides only 38% of the viewing and listening of those between 15 and 24. This is a dangerous situation for a public service channel to be in. There is also a bias towards the higher social classes. This is especially so for radio. A matter of great concern for all public service broadcasters has to be to identify any demographic “holes” in the audience and seek to fill them.

What is the first task? Actually, I don’t see this process as one with a beginning and an end, where you start with objectives and end with a broadcasting strategy and a communication strategy. Each component is influenced and affected by others. I think it is best seen as a circular process whereby the organisations’ objectives are influenced and guided by the conditions in the market place and by what is possible or achievable.

.1. Organisational Goals

What is the purpose of the broadcasting organisation? It could be profit for shareholders. It could be to provide a publicly funded public service channel of information. It could be to be the leading radio station for youth. It could be to provide educational television. It could be a mixture of these and, of course, other goals besides.

These goals have to be examined and refined in the context of the real world of broadcasting. What audiences can realistically be targeted and reached? What gaps in the market are presently not being served, or served inadequately. What needs are not presently being met?

.2. Market Analysis

For the commercial operator, an analysis of audience and market data might show what segments of the audience are available for new services or programmes. But the commercial broadcaster has to attract advertising sales. This will mean that because some potential audiences are more
attractive to advertisers, they are therefore more likely to be served than others are. People who spend money, especially those with surplus to spend on goods and services, are more interesting to advertisers than the poor or the unemployed, even though their needs for broadcasting may be as great, and probably greater!

.3. **Channel Differentiation**

As the markets develop and more choice becomes available, radio and TV channels begin to be differentiated by content or genre. Whereas previously TV and radio networks each tended to cover all, or most, programme genres - news, popular music, sport, education, entertainment, drama, traditional music and culture - when you have more channels, there is a tendency towards networks or channels taking on their own special identifying characteristics. This is especially so for radio. In a multi-channel environment, radio stations identify themselves with a particular target group whose musical or other tastes they seek to provide for.

Stations can become specialist in many ways. News and sport, classical music, popular music for the 40+ generation, or other programme types, become the defining characteristic of the station. General radio channels on which a range of different genres is found are dying out. This process is most advanced in the United States where there are more than 20 recognised and distinct formats of radio station, ranging from "70's Hits" through "Classical" and "Gospel" music formats to "News/Talk", "Sports" and "Educational". TV has moved rather less in this direction; most countries, even when there is a very large range of choice, still maintain some general channels successfully. However, specialist channels do emerge and are increasingly successful - one can think of some of the well-known American-based ones like MTV, Discovery, CNN or the Cartoon Network. Similarly defined channels are emerging in Asia. Typical thematic TV channels are defined by the genres of

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3 The United States' National Association of Broadcasters, Radio Information Database on the NAB Internet website.
film, sport, children's programmes, news, lifestyle, factual, entertainment and music.

4. **Audience Segmentation**

Part of any adequate understanding of the market will be some kind of analysis of audiences by segmentation. Everyone is different and no two people have precisely the same interests, life styles, media habits and choices, and so on. However, to make sense of the enormous variety that we find in people, we have to group or segment populations. We can do so in various ways.

Starting with age is the most obvious approach. Young, middle aged and old people each tend to have broadly different interests, tastes and outlook. Generally speaking, radio networks, which appeal to the young, do not appeal to the old, and vice versa. There is less differentiation thus far on TV but age is also an important predictor of audience choice and preference with television.

Sex is another important factor in audience segmentation. Women and men do differ in some of their media choices. In most markets, sport and news programmes tend to have audiences with more men than women. With audiences for drama, we tend quite often to find women in the majority. Programmes or services specifically targeted at women tend, not surprisingly, to be used by more women than men.

Social class or status, or level of educational achievement (different categories but often closely associated) provide another important form of segmentation. This is very often combined with the categories already mentioned. Radio or TV programmes can be targeted, for example, to reach

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4 Actually, there is an even more obvious starting point for segmentation: language. People tend to listen to radio or new TV in their own language where they have that choice. This segmentation is something that we can assume from the outset.
young, working class males, or middle income, middle aged women, and so on.

New kinds of segmentation are becoming attractive to broadcasters who want to reach more listeners or viewers. I will return to this point later.

5. Programme Production and Schedule Strategy

The pressure will increase on existing broadcasters to bring down costs, especially now that it is possible to make programmes in both radio and TV very much less expensively. Newcomers will exploit the advantage they have of not having to invest in the expensive equipment that the established broadcasters have and continue to use. Desktop editing, the great improvement in and reduced costs of outside broadcasting and recording equipment and the general trend away from the use of high cost studio and production centres will have a major effect on broadcasting businesses in all markets.

But the established broadcasters will find it difficult to win in this area of cost cutting. They also need to identify and build on their existing strengths. By this I mean especially those things that can give them, or could give them, market advantage. They need to identify those things they presently do well which meet popular demand. Putting effort and resources into such activities and scheduling them well ought to be a major strength.

One programme strategy in public broadcasting is to do what the ABC and CBC in Australia and Canada seem to have done. In effect they have left popular TV and radio to the commercial broadcasters, while maintaining responsibility for those quality cultural and minority programmes that commercial services cannot or will not supply.

The problem with this strategy is that sooner or later people will begin to ask why public money should be spent on broadcasting that serves only a
minority. The BBC view is that public service broadcasting should indeed guarantee access for all to programmes and services that the commercial market will never provide. But it also wants to continue to be at the centre of the nation and to reach everyone with programmes and services which all of them continue to use and value. Because the BBC's defining public service characteristics are to inform national debate, foster national culture as well as regional and ethnic cultural diversity, provide education and information as well as popular diversion and entertainment, and have a deserved reputation for programmes of very high quality and distinctiveness, it cannot and does not leave popular broadcasting genres for the commercial sector.

But I don't know what the programme and schedule strategies of Asian broadcasters should be. I am not advocating the BBC route. But I know that strategies for Asian broadcasters have to be meticulously and realistically created, managed and communicated. Broadcasters who have stuck with tried and tested formulae developed during the period of monopoly will fail. They will find themselves in terminal decline. Someone once said in this context, “If things are to remain the same, things will have to change”. If the established broadcasters are to survive and flourish, they have to change and some of the things which need to change will not be easy. I do not know what these things will be and it would be wrong for an outsider to suggest any particular route.

However, I will just spend a few minutes on a question that Joe Carlos put to me when he wrote back in November to invite me to Singapore. He wrote “In capturing bigger audience shares, should priority be given to imported or local programmes?” Here is one area where I think I can be certain of the correct strategy for most public service broadcasters represented here. Put local programming at the centre of your strategy. Imported programmes will no doubt have some part to play in your schedules, but it is in your local production and in all the skills you can bring to bear there, where you have the potential to defeat foreign competition. Local programmes of good quality will usually out-perform imported programmes of similar quality. When people say that imported programmes threaten local culture and production they are
actually referring to what is an economic problem. The problem is very often that the imported product is often a lot cheaper to buy than it is to make a production of similar quality locally. All too often a cheap import is better made than a more expensive local product. This is a serious problem and one that is as familiar to many European broadcasters as to Asian ones. The problem may get worse; it certainly will not go away. But the answer is not to resign you to more imported programmes. It is, instead, to invest more in local production, improve the quality and concentrate on gaining the best from the resources available. The results of such efforts can be seen to be successful. In Latin America and India there was anxiety about the impact of imported, mainly American, TV programmes. But the improvement of local production in a competitive environment has led not only to improvements in the quality and attractiveness of locally made programmes but also to the retention of audiences. Throughout Europe also, local programmes dominate the list of the most popular TV programmes in every country. Foreign competition is not a threat. It is an opportunity and challenge to build up the strength and quality of local production.

I feel I must make one further point about programme production. It is surely core business of broadcasting. It is what people buy TV or radio sets for. It is what radio and television stations exist for. But what a neglected subject it seems to be! We have conferences, seminars, workshops and courses on media planning and on broadcasting strategy. The same does not seem to be true of programmes. This seems strange because the making of programmes is going to become even more important.

All these new technologies are all very well, but they need content to show. There is a rapidly growing demand for programmes to fill the new and expanding range of services. This will have an effect in a number of ways, not least in the economies of the programmes themselves. Increasingly, TV production mangers have to think of the long-term value of what they create. There will be more, much more, international trading of TV content. Producers will increasingly have to consider the long-term value of their productions.
6. Communication Strategy

Whatever becomes the strategy of a station, it is vital to communicate the message to the public and to the station's staff. What do your listeners and viewers currently think of you? What associations in their mind do they have when your name is mentioned? What kinds of programmes and of what quality do they expect from you? If you do not know, and it has to be admitted that some stations in monopoly situations are not at all well informed about the views of their audiences, you are in a weak position. Research into attitudes and opinions of listeners and viewers is an essential prerequisite in this process of change and of meeting the challenge posed by a multi-channel environment. Stations need to know what the audience thinks. Then, having decided what changes to bring about in programming and scheduling, they then need to make sure that audiences know what is happening. Stations may need to shift opinion. If a station or network has a reputation for dull programming and poor presentation what has to be done to change perception? Clearly the problem needs to be put right. Then the changes that have been put into effect need to be communicated. If the opinions and expectations of the public have to be changed, you need a strategy and plan in order to bring this about.

7. “Smart” Demographics

I thought that it might be interesting to mention briefly some aspects of the BBC's present strategy for meeting the growing challenges from a diversified broadcasting market. How is the BBC facing the future? As a publicly owned broadcaster, it has to make sure that it reaches all parts of the population. It has also to be seen to be accountable to them. The British public - at last most households in Britain - fund the BBC through the annual licence fee paid by every household with a television set. The BBC therefore has no option but to understand its audiences and to have a thorough knowledge of who it is serving, and also who it is not serving.
I said earlier that while its overall reach is impressive the BBC does better among the 55+ and the higher social classes. But this segmentation by social class and age is insufficient. It does not tell us enough. There may be other indicators or demographics, which have a greater influence on the way people use radio and TV. The BBC is in the process of developing new ways of looking at its audiences to provide programme makers and planners with more depth in this analysis. Marital status, working status, household size, region of the country, social class or grade, age and sex, can be combined in various ways to produce new groupings. Here are just some of them:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
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<tbody>
<tr>
<td>Young Solos</td>
<td>individuals, living alone, aged 16 to 34</td>
</tr>
<tr>
<td>Students</td>
<td>individuals in full time education</td>
</tr>
<tr>
<td>Pre-settlers</td>
<td>individuals aged 16 to 34 living in a 3+ household</td>
</tr>
<tr>
<td>Young Parents</td>
<td>individuals, aged 16 to 34, living in a 2+ household, with children</td>
</tr>
<tr>
<td>Mature Partners</td>
<td>individuals aged 35 to 54 living in a 2-person household with no children present</td>
</tr>
<tr>
<td>Golden Agers</td>
<td>individuals aged 55 to 64</td>
</tr>
</tbody>
</table>

This is not the full list but merely illustrative of some of the categories. Analysis of audience research data shows that some of these groups are so well served as others. "Pre-settlers" and "young parents" use less BBC radio and TV than others. These groups can be further sub-divided to give extra analytical strength and focus. We then find that young mothers and fathers and older but less affluent mothers and fathers use the BBC less than the average. Among these groups cable and satellite television are particularly strong. The BBC is also concerned about lower use of its services among students, young partners and the group described as "pre-settlers".

Further analysis can then be used to show which programmes they favour and the times of the day they watch or listen to TV and radio. Analysis can
also be done usefully using data on lifestyle and leisure interests. The problem here is that such data are difficult to obtain. But combining the demographic data that are available can be a powerful tool for market analysis and programme planning. This is what the BBC has now embarked upon in its current Marketing initiative, designed to make the whole corporation much more focused on the need to serve all its stakeholders, the British public.  

.8. Persistent Poverty and the Communications Gap

It has to be admitted that not everyone has the range of choice. This is especially true in Asia where despite the great advances that have been made in broadcasting, there are still many people with no access at all to either television or radio. Until recently there was equality of choice. Everyone with radio or TV had more or less the same number and range of stations to listen to or view. Now there is a growing gap between the information “haves” and “have-nots”. Those who can afford radio or TV are increasingly well served in many countries. But there are many for whom the communications revolution I have been speaking about is making no difference. Recent extensive audience research in India shows that while television now reached more people in a week than radio, about half the population have neither a TV nor radio set where they live and as many as 40% neither watch TV nor listen to radio. In countries where there is widespread poverty there seems to be an irreducible minimum who are not able to enjoy any part of the modern world of media. The solution to this problem lies elsewhere, in the economic progress that needs to be made for them to be able to afford the hardware. We have seen very little growth in ownership of radios in many Asian countries in recent years. In some, radio ownership may even have declined. In some cases this is because many people who have purchased television sets do not seem to want to replace their radios when they wear out. Radio needs to address this problem by changing its programme offer to compete in those aspects where it has

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5 BBC, Defining and Describing the BBC’s Consumers, 1997
6 BBC World Service, Audience Research Surveys between 1993 and 1997
advantages over television. But as far as the very poor are concerned radio is not serving them as it might or should, largely because so many of them are out of its reach. Could the greater commercialisation of broadcasting assist in changing this situation? It is unlikely; commercial organisations have little or no interest in reaching the poor. In the early days of radio there was great optimism about what it could do to bridge the communications gap produced by illiteracy. It was seen as one way to educate and inform large numbers of people who otherwise would be out of reach. This optimism was not entirely misplaced but it has to be admitted that the fact that so many millions in Asia have no access to the modern mass media is profoundly disturbing. I have been speaking about ways to meet the challenges of increased choice and the increasingly varied audience preferences. A far greater challenge lies in bringing modern communications to all and not just to the privileged. But this is beyond the scope of this paper.

One cannot help feeling a mixture of awe and enthusiasm about the new world of communications, combined with a certain degree of depression about the uneven spread and availability of these sources of information, education and entertainment. There are many doubts, and these will be with us for some time to come. What will it mean for my broadcasting organisation? How will people actually use these new technologies? What will become commonplace and what will disappear and be remembered only as a footnote in technological history? Never, since broadcasting began has so much been dependent on vision as well as knowledge. Public broadcasters have a responsibility to ensure that the public interest is served and that they use their privileged position to ensure benefit for the public.