

## **Audience research at the BBC World Service 1932-2010**

Graham Mytton

Volume 8, Issue 1 (May 2011)

### **Abstract**

This article examines the changing ways in which intelligence about the BBC's international audiences has been gathered and used since the advent of the Empire Service in 1932. It is written from the perspective of a former Head of Audience Research (1982-96) at the BBC World Service. In BBC domestic broadcasting, the appointment of Robert Silvey in 1936 led to the daily collection throughout the UK of the most comprehensive national audience data anywhere in the world. For international broadcasting such systematic detail and regularity was out of the question. The listeners were widely scattered and thinly spread. Survey research of any kind was difficult, expensive or impossible. Moreover, many parts of the world to which the BBC World Service (BBCWS) broadcast were closed to any systematic local research, either because no local facilities to do research existed or because of legal or governmental prohibitions. At the start of BBC Empire Service spontaneous feedback from listeners' letters was the main source of information. Research was also carried out using questionnaires sent by international mail to listeners who had written to the BBC. Face to face surveys in target areas were conducted from 1944, but coverage was patchy and limited by lack of resources. During the 1970s and 1980s it was conclusively shown that letter writers are unrepresentative of the whole audience. The need to have more representative data about audiences led to a massive increase in funding for quantitative research, especially under John Tusa, the Managing Director of the World Service from 1986 to 1992. Tusa increased the amount available to spend on research more than twenty-fold. As well as quantitative research using surveys of adult populations in all parts of the world (only a tiny number of countries today remain closed to all research) qualitative work is now also regularly commissioned. The global success of the BBC World Service is a result of the fact that it developed better intelligence about audiences than all other international broadcasters. The global audience is the largest and most diverse of any international broadcaster, and by quite a wide margin. The BBC's picture of its global audience is still only partial. There remain some parts of the world that are not well covered by research and some that are not covered

at all. The most serious examples of non-coverage are rural areas of the Arab world and rural areas of francophone and lusophone Africa. Recent financial cuts, the greatest cuts to occur in its 80 year history, threaten its ability to measure audiences, assess impact and achievements, and keep the BBC's information about its audiences up to date, comprehensive and accurate. The achievements and advances in audience research at the BBC, especially over the past 25 years, are now at risk of being lost.

**Keywords:** History of audience research methods; international broadcasting; BBC Empire Service, listeners' letters; BBC World Service; Short Wave radio; audience estimates; threats to audience research.

### **Introduction**

Very little has been written outside the BBC about international audience research. Reference is made to audience research in all the main books on international broadcasting. But publications of any kind specifically about international audience research are very few. A selected list of what has been published is in the bibliography (including one by the present author). This article is an attempt to fill a gap in the literature on international audiences at a time when massive changes are taking place in global communications. I was challenged to start this by a passage in the account of domestic audience research at the BBC written by its director for 32 years, Robert Silvey. He writes as follows in his own account of the history of audience research under his leadership:

I greatly admired the job which the External Broadcasting Services Audience Research Officer . . . Asher Lee did on a shoe-string for his polyglot clientele. That is a story in itself but I am not competent to tell it.<sup>1</sup>

This article is therefore a part of that story and will form part of what I hope will be a longer and more detailed study. Other sections have also appeared as articles elsewhere and these are included in the bibliography.

### **The Early Days: How to know what happened at the receiving end**

When I became head of audience research at Bush House in 1982, people in the department believed that audience research had begun during the Second World War. Carol Forrester, the department's archivist and librarian maintained a cupboard which she called 'The Shrine'. In it she compiled an immensely valuable archive of intelligence on international broadcasting, rebroadcasting of BBC programmes, media information about every country in the world and all kinds of related anecdotal information, press cuttings, transcripts of foreign radio output, statistics of radio and TV broadcasts and hours, and much more. It also included early BBC audience research reports, nearly all of them from quantitative surveys, which went back to early days. In that collection there was what is almost certainly the first ever survey done for

the international part of the BBC, a sample survey using face to face interviews in Bombay in 1944. We assumed that this was the beginning of audience research at the World Service and its predecessors, including the Empire Service and the External Services, but we were wrong, if by audience research we mean any kind of systematic way of finding out about the audience.

Research of a kind happened during the first year of broadcasting, between 1932 and 1933. Former Managing Director, Gerard Mansell's history of External Services which appeared as part of the celebrations of the 50<sup>th</sup> anniversary in 1982 shows that the first director of the Empire Service, Sir Cecil Graves, and the service's first Chief Engineer, Sir Noel Ashbridge, were in a way the first audience researchers.

Grave and Ashbridge were analysing the voluminous correspondence received from all over the world for indications of listeners' tastes and interests and to test the acceptability to the audience of the transmission pattern introduced at the start.<sup>2</sup>

However, even this was not the first attempt at audience research. Mansell notes that before the first official broadcast in 1932 the BBC had already been conducting shortwave experiments starting in November 1927 with the call sign G5SW, and which ran for the five years leading up to the official start of the Empire Service in December 1932, when transmissions began from Daventry.<sup>3</sup>

At this time, nobody had much idea what to expect. Would anyone be able to listen? Not much was known about who had shortwave radio sets, how many there were, nor how well these early receivers would pick up what was being transmitted. More than that, they had little idea of how shortwave worked. It was a long time before our present detailed knowledge of the ionosphere and how it bounces shortwave signals from the ground back to the ground again was established and understood. What times of day would people listen? What kinds of content would be most called for? Ashbridge's predecessor tasked with setting up the experimental broadcasts, the BBC's pioneering engineer, Captain Peter Eckersley, was worried that shortwave reception would not be reliable enough for any but radio enthusiasts and hobbyists to listen to. BBC Director General John Reith also held the view that only 'a handful of amateurs would listen'.<sup>4</sup> He thought that the main way of reaching listeners would be through rebroadcasts by dominion and colonial local stations which had better receiving equipment to do this satisfactorily. Eckersley worried about reception by people with ordinary sets and wrote to the *Times* with the opinion that shortwave could not be relied on to reach 'the lonely listener in the bush'.<sup>5</sup>

The research done during the five years of the experiment established several important facts that were crucial in what was to follow. Ashridge, Eckersley's successor, and Graves read the letters and other feedback. Mansell reviewed their research for his book and writes that by 1929, nearly two years into the experimental broadcasts, 'it had become clear from the response from overseas that 'the lonely listener in the bush' was far more important than had been imagined.<sup>6</sup> An internal and very important planning document was produced to outline what the research had shown and how this should guide subsequent policies:

Contrary to our original expectation, all correspondence and other evidence go to show that it is the direct listener who most needs, most profits by and most consistently follows the G5SW transmissions ... The principal function of G5SW, if and when stabilised as a programme station, must be to serve the individual direct listener, local relay being of course possible and occasions most desirable, but in no way the ruling consideration of the service.<sup>7</sup>

King George V made the first ever Christmas Day broadcast on the Empire Service and shortly afterwards the Palace asked the BBC for feedback. Reith and his colleagues compiled a bound volume of listeners' letters that was presented to the King. The impact was by any measure huge. The BBC not only collected and analysed the letters; they also scanned the world press and found some two thousand leading articles in newspapers about the broadcast.<sup>8</sup>

Letters were counted from the very beginning and this continued until the end of the century. Mansell notes the count for the first three years of official broadcasts. In 1932-3 11,250 letters were received, in 1934 the total was 13,500 and in 1935, 25,000. Mansell notes that most of the letters (more than 60%) came from the United States. This in itself was a very important fact. It meant that there were a lot of listeners in the US, even though the service had not actually been planned with them in mind. Shortwave broadcasting is a real scatter service: it goes anywhere and can be picked up in unexpected and unintended places. It was a vital lesson that was to be a major fact in much that followed.<sup>9</sup>

### **The Challenge for Broadcasting: Who is Listening?**

What is different about broadcasting and what makes it an unusual if not unique communication activity is that the transaction of receiving a broadcast is unmeasured. Nothing changes hands. You cannot count the number of papers, books or other items that have been sold or consumed. One can readily understand the curiosity of the broadcaster to try by whatever means may be available to find out what is happening at the receiving end.

The BBC was the first broadcaster in Europe to establish continuous research into its audience. It did so not for commercial reasons, as was already happening in the United States in a quite extensive way, but as a distinct and deliberate outcome from public service obligations and intentions that were outlined in the Royal Charter of 1927. As was noted at the time, the Charter intended the Corporation to 'act as a trustee and steward for the public in the maintenance and development of a new element in the national life of great social and economic value'.<sup>10</sup> Robert Silvey, who was the first professional market researcher employed by the BBC observed that the task of audience research in a public broadcaster arose from its obligation to serve 'the whole of its public'<sup>11</sup>. He took up his post in 1936 at the young age of 31, and remained in charge of all listener and later also viewer research until his retirement in 1968. He was hugely influential throughout Europe as well as within the UK.

Silvey gave an address to the Royal Statistical Society (RSS) on June 20<sup>th</sup> 1945. He began with a quotation from an essay by W. A. Robson entitled 'Public Enterprise' in which the writer discusses the relationship between the BBC and the public:

The BBC has only the vaguest and most remote contact with the world of listeners. It does not really know who they are, to what they listen, or what their views are. Its channels of communication are limited entirely to the press on one hand, to the active letter-writing correspondence on the other. The press is of little use for this purpose. . . chiefly because it is not in any closer touch with the listener than is the BBC itself. The letterbox as at present used is also an unsatisfactory instrument of contact. Most people do not write letters unasked in order to express their opinions to unknown officials; those who do write are seldom typical. 'Fan-mail', when it does occur, is notoriously untrustworthy.<sup>12</sup>

That last point will be returned to in relation to the BBC's global audience later. Silvey's address to this gathering of statisticians is a comprehensive guide to and outline of what Silvey had achieved in his first nine years, more than half of which was in war time. He commented that while Robson was right about the early years of the BBC it was no longer true by 1945. When Robson had made these observations, the audience research department had already been set up and he notes the date, October 1<sup>st</sup> 1936. In an interesting footnote at this point he writes:

The whole of this paper deals with listener research among the audience within Great Britain. Studies of the audience to the various BBC overseas services do not fall within the province of the Listener Research Department.<sup>13</sup>

By the time of this address, research had also begun for those services, but in a necessarily more limited way. Although this article is principally about the development of research for the external or overseas services, I am highlighting the work of Silvey because of the importance of what he achieved and the wide influence his work had in broadcasting and not only in the UK. His approach to the challenge of learning about the listeners was taken as a model for this kind of activity. The paper given by Silvey, although it was entirely about the domestic situation, is nonetheless in the External Services files in the BBC's archives, showing that it had been seen as relevant to the work being planned there also.

Silvey outlined the 'wide range of needs for listener research within the B.B.C.'. An adequate service had to build up and keep up to date 'a corpus of information on the basic tastes and habits of the listening public'<sup>14</sup>. This would mean setting up a continuous service by which a representative sample of the entire adult population would be interviewed. And that is what he did. The service was designed to provide accurate estimates 'within reasonable financial limits' of the following key measures:

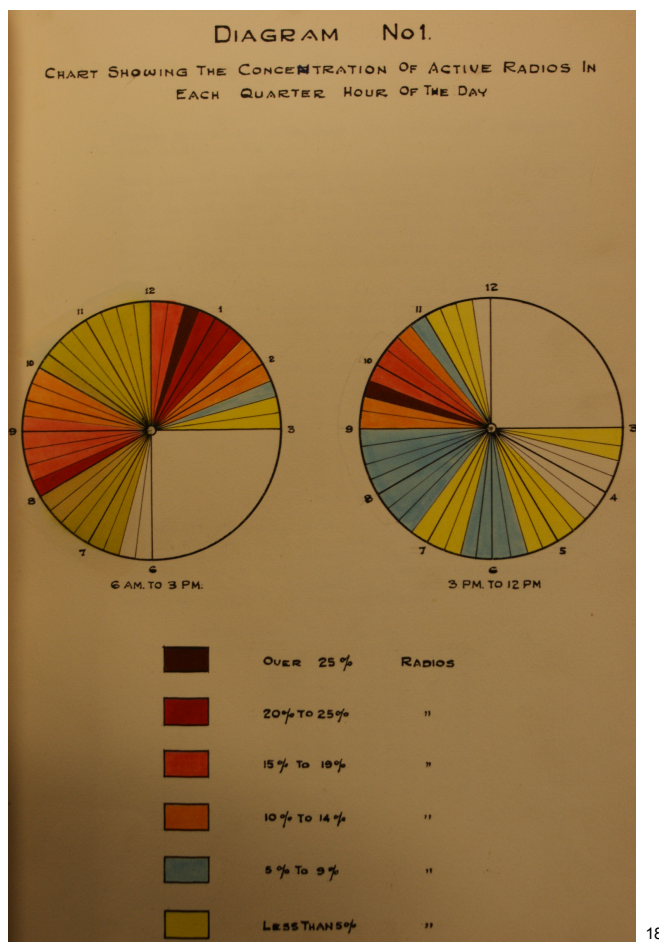
1. the quantity of listening to each broadcast;
2. the degree of popularity of individual programmes among those who hear them, and the causes of such popularity – or lack of it;
3. the reactions of the public to the B.B.C.'s policies and changes of policy;
4. the state of public opinion on matters with which the B.B.C. was concerned.<sup>15</sup>

He established three parallel systems of research supplemented by *ad hoc* studies. These were a daily survey to establish actual listening on the previous day. The Daily Survey, as it was known, continued from its establishment in the 1930s until 1992 when the BBC joined with commercial broadcasters and advertisers to create RAJAR (Radio Joint Audience Research) which continues today as the industry-wide and accepted currency for radio audience measurement in the UK. The second system was one of listener panels, listeners who were invited to report on a regular basis on selected programmes and genres. While these two methods continued, the third one did not. Local 'correspondents' were selected to 'report on the opinions of friends and acquaintances on questions of importance to the B.B.C.'<sup>16</sup>

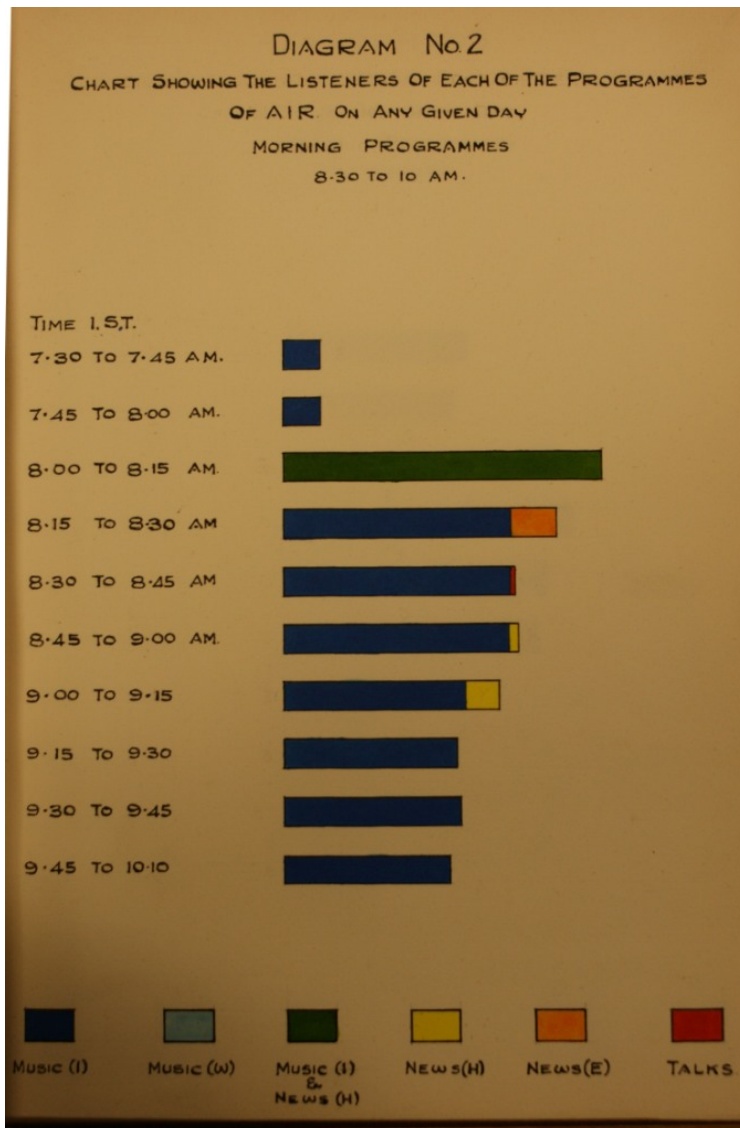
### **Sample surveys and external broadcasting**

The External Services had little opportunity at this point to conduct detailed survey or panel research work. The fact that listeners were in many different countries and territories and almost certainly very thinly spread, meant that survey work on the ground using face to face sample surveys of populations in receiving countries was for the most part out of the question. However, there was a survey of this kind shortly before Silvey's RSS address. It was in

Bombay, India, in 1944 and is the earliest known survey using face to face interviews among samples of a population that has taken place for the BBC outside the UK. It was not a fully representative survey of the population but of people in radio households identified by the fact that they had paid for a radio set licence. 600 Indians and 100 Europeans were interviewed. This was in the very early days of survey research, especially so in India. This treasured piece of media research history is not written in a way that would receive approval today, and not principally because of the way that the sample was taken. The data are difficult to understand and I have tried to work out what is meant by several charts and analyses. The charts, in these days long before computer graphics, were drawn and coloured by hand. These two particularly intrigue me:<sup>17</sup>



This is not the easiest way to show listening times! The other even more difficult chart to understand is this one, showing levels of listening to radio in the mornings.



19

There is no scale and so we don't know what the numbers or percentages are. All we know is the relative levels of listening and that the peak is between 0800 and 0815. The letters in brackets ('I' or 'W') refer to Indian or Western music, and news in Hindi or English. But what is meant by the way that the colours in each bar are divided remains a mystery.

However, some of the data are what we might expect to see in a similar study done anywhere today. Using the same yesterday-listening type of question that has been standard practice since the beginnings of broadcasting audience research, the following figures are given:



All India Radio (AIR)	62.3%
BBC	25.5%
Axis radio stations	2.5%
Other radio stations	1.3% <sup>20</sup>

It may be that the respondents understated the level of listening to 'Axis radio stations' – i.e. radio services from Germany and its allies. As the report noted, 'several informants viewed with suspicion the object of this particular enquiry'.<sup>21</sup>

This survey was an isolated example of something that did not happen regularly until several years later. After the end of the Second World War there were several surveys in European countries, but these were confined mainly to Western Europe – France, Italy, West Germany, Scandinavia and others that had not become part of the expanding Soviet empire. In these latter closed countries it is probable, if not certain, that audiences were and remained larger by the very fact of being under continuing totalitarian rule, whereas in the rest of liberated Europe demand for the BBC declined as local free media developed.<sup>22</sup> Surveys also took place in other areas of the world, albeit to a rather limited extent. The main barrier, aside from the costs involved, was the fact that market research remained until well into the 1960s and later, very under-developed. There were few agencies operating outside the industrialised countries. The few surveys that were commissioned by the BBC in other territories were usually done only in urban areas, or with otherwise very limited samples and coverage. This remained largely the case until the middle 1980s with very few exceptions.

### **Audience research from the beginnings of BBC international broadcasting**

Without the possibility of surveys, the focus at the Empire Service and in the various BBC international services that were to follow and eventually make up the BBC External Services and eventually the World Service, the focus had to be on whatever other evidence there was, and what was readily available – at this time the early letter writers. When someone writes a letter, the recipient is usually provided with a return postal address. The address can then be used to send questionnaires covering matters of interest to the broadcaster. Whereas a letter writer writes about what he or she wants to say, a questionnaire asks what the BBC wants to know. In a file entitled 'Summary of Correspondence relating to programmes' there is a reference from February 1933, only two months after the first broadcast, which shows that questionnaires were mailed to listeners from the very start of broadcasting:

The information included in this summary is taken from general correspondence and from replies to programme questions in the Empire questionnaire.<sup>23</sup>

If any documents from this project survive I have not yet been able to find them. They do not seem to have been preserved in the BBC archives.

In addition to feedback through diplomatic channels the BBC also looked out for press reaction to BBC broadcasts in receiving countries and territories. And because from the very beginning, BBC broadcasts were rebroadcast by many local radio stations in the Empire and also in the United States, these broadcasters did regularly get asked to pass on any feedback they received from their listeners in response to these rebroadcasts. One other source was from anecdotal evidence. BBC employees who travelled to other countries were routinely expected to bring back anecdotal evidence of listening. Everyone was expected to write a 'duty tour report' and one category that appears in many reports, and was evidently expected, was references to BBC listeners and local impact of BBC programmes and news bulletins. This requirement continued until well into recent times. But throughout this early period, the major source of information seems to have been the content of listeners' letters. From 1932 to the end of the century, letters have been a major source of information about listeners in most languages. Summaries of correspondence were produced from 1933 until very recently.<sup>24</sup>

There were two problems about this reliance, both inter-connected. The first is that in the absence of representative data, the letters – the volume of the mail received, where it came from and the proportions from each area or country, the views expressed, the relative level of apparent interest in different programme genres evinced by the relative numbers of letters referring to each of these – became used as a guide to broadcasting and programme policy. Broadcasters and their managers liked to have figures that went up, down or remained the same, as some kind of guide to the impact of what they were putting out. When you don't have anything like real audience ratings, those provided by the letters took on a wholly undeserved prominence and importance. The connected problem with listeners' letters is the conundrum: How representative are those who write of the majority who do not? Are letter writers different from those who don't write? Note the comment in the domestic UK arena from W. A. Robson who scorned listeners' letters as 'fan-mail' which, he said, is 'notoriously untrustworthy'<sup>25</sup> This was to become a crucial point in the argument about the development of audience research at Bush House in the late 1980s and early 1990s.

Aside from the matter of how representative letter writers were or were not, there was a common misconception that was, I believed, even more serious and misleading. Many people in the BBC and indeed in many other broadcasters also, believed that there must be some relationship between the size of the broadcaster's mailbag and the size of the audience. During the 1980s and 1990s there were sometimes references in literature and speeches made by international broadcasters claiming that some kind of statistical formula could even be applied. A particularly absurd example of this was provided in a speech made by Li Dan, then the Deputy Director of China Radio International (CRI) at an international broadcasting conference in Vancouver Canada in 1994. He announced with pride:

Ten years ago, CRI received an average of 78,000 letters from overseas [sic] listeners a year. ... In 1992 the number jumped to 328,000. Last year the number reached 550,000, a new record. And these letters came from 170 countries and regions. If we follow the commonly used letter-listener ratios where one letter represents 300 o 500 listeners, CRI now boasts nearly 200,000,000 listeners around the world.<sup>26</sup>

There is no 'commonly used letter-listener ratio'. The number of letters is governed by many factors including literacy levels, the cost of international postage, offers of gifts on air to those who write, the nature of the broadcast (news programmes receive relatively little mail while programmes that seek listener participation can receive a lot) the language and culture involved, the quality and availability of local postal services and more. At one time during the 1980s, the largest mail bag received by the BBC, broken down by the language services to which letters were written, was Tamil. It was then one of the BBC's smallest foreign language services. Audience measurements over many years showed that there was no relationship at all between the numbers of letters received and the figures for audiences calculated from representative sample surveys. By this time, we were able to build up something very near to a global picture of the BBC audience in terms of languages heard, location of audiences and audience size, entirely through sample surveys in receiving countries. It soon became very obvious that there was no relationship between the number of listeners letters received and the size of the actual audience.

As already noted, the analysis of correspondence began as soon as programmes went on the air and letters began to be received. The files at the BBC Written Archives Centre do not record the first letter received after the first broadcast on 19<sup>th</sup> December 1932. But they do record several early letters of interest. The first summary was produced in February 1933. The main points recorded were that listeners in Australia asked for later transmissions, a request that was answered by extending transmissions to the area. There are in this report and later ones several references to demands for more entertainment and programmes 'to relax to', rather than more serious and demanding content. Criticism of the news bulletins came from several listeners, especially in the Indian sub-continent. One passage from this first analysis of correspondence gives an intriguing insight into the concerns, interests and tastes of British expatriate listeners, but note the conjecture about the reasons given for the views expressed:

There is considerable criticism of the News Bulletins, presumably owing to the fact that India has a comparatively efficient news service for newspaper purposes. Newspapers probably do not reach isolated listeners, of whom there are many in the

zone, but correspondence does not show that the existing News Bulletins are appreciated by such listeners.<sup>27</sup>

The early experiment with questionnaires mailed to listeners who had written to the BBC was clearly deemed to have been successful. The practice continued but in an altered way. In a later, but frustratingly undated file entitled 'Empire Service Listener Research Scheme' there was the following explanation of a new venture:

Six months ago, as an experiment, it was agreed to send a questionnaire to a certain number of regular listeners to the Empire Service<sup>28</sup>

The three parts of the world selected were South Asia (India, Burma and Ceylon), British colonies in West Africa and the Middle East (Iran, Iraq, Palestine, Red Sea and Gulf areas). What was new about this was the way chosen to select the respondents. The names of 600 subscribers to the magazine *BBC Empire Broadcasting*, which first appeared in 1934, were selected at random and 200 questionnaires were sent to the selected listeners in each area. There then follows a rather important explanation which reflects part of the *raison d'être* of the service to link the Empire to the home country and to take account of the views of British expatriate listeners:

These areas were chosen because it was felt that listeners resident there, would almost entirely consist of British listeners resident abroad by virtue of their occupations, as apart from Dominion, foreign or native listeners. It was thus hoped that the views expressed in the replies to this questionnaire would represent those of the British 'exile', who is almost certainly the most regular listener to our Empire Service.<sup>29</sup>

The questions indicate to us now what the major concerns were about what was happening at the listening end. They covered, in order, subjects as follows:

- Hours per week listening to the service
- Reception quality of the six daily transmissions from the Daventry station
- The most convenient daily listening times
- Make or kind of receiver
- Reception of the BBC (Daventry) compared to other international broadcasts from Zeesen (Germany), Pontoise (France), Rome, Eindhoven (Netherlands) and the US).
- Programmes most liked and most disliked<sup>30</sup>

All the above activity related only to the English language Empire Service. Other languages were added before the war, first Arabic, then Spanish and Portuguese for Latin America, and German. Other languages were added over the next decade and especially during the war. The same approach to obtaining information about listening was adopted where this was possible. During the war, feedback through letters was not possible for any country occupied by Axis forces. But for all languages broadcast to countries from which it continued to be possible to write to London, mail was used for research purposes. Letters were read; some were translated and reports and summaries produced. For this the BBC employed several staff who were usually mother tongue speakers of the various languages in which letters were received.

### **Research or 'Intelligence' during the war**

During the war, audience research developed in ways that reflected the situation and the priority to find out as much as possible about listening in occupied countries, in the Axis powers and in the rest of the world, especially in the Empire and in countries not yet involved in the war but where there was great interest within the BBC in what listeners thought and how they reacted to programmes. Indeed, audience research and other ways of gathering information about what was happening at the target or receiving end, became conflated into an activity given the general title of 'intelligence'. Audience research was combined with analysis of the press in various countries. The departments involved – there were more than one – had titles that reflected wartime language and outlook. For example, for the global service in English, still called at this time, the Empire Service, there was an Empire Intelligence Service. It produced reports on coverage of the BBC in the press and on radio in the Empire and the United States. It is a kind of audience research in the sense that extracts quoted were entirely from writers, broadcasters or their readers and listeners who made reference to BBC broadcasts.

At this time and ever since many radio stations around the world rebroadcast BBC programmes at certain, usually fixed, daily times. This report in the Winnipeg Free Press indicates that many such rebroadcasts were appreciated:

By popular demand, the BBC's Radio Newsreel will be reinstated in the C.B.C.'s schedules at its regular time in this region, 9.30 p.m. Winnipeg time, on CKY. C.B.C. programme officials had no hint of the Newsreel's popularity, until it was moved to the later hour. ... The Newsreel will continue to be rebroadcast at 11.30 as before.<sup>31</sup>

Much of the report in which this extract is found is devoted to content in the press and broadcasting in the British dominions of Canada, Australia, New Zealand and South Africa as well as the USA. But a report was produced in August 1941 which referred to other parts of

the Empire, the colonies. It has an imperialist ring that is to be expected. But it is also surprisingly prophetic. The people being rather disparagingly referred to here would in a couple of decades form the majority of the audience for the BBC's global service:

*Democracy or Imperialism?* In practice the 'Empire' [sic] Service must cater almost exclusively for the Dominions (the Commonwealth) for India and the East, and incidentally for the United States. The dependent and often backward Colonies which make the greater part of the Empire, properly so called, are unimportant units in themselves and provide only a small listening audience. But our attitude to the lesser colonies is important. It is even judged to be the crucial test of our good faith. That we seem to keep the Colonies in political dependence is, on the face of it, a negation of the democratic principles we profess to defend in this war.<sup>32</sup>

The writer of this important internal BBC document, a Mr Macmillan, went on to argue that those working within the BBC (and by implication here, broadcasting a British view to the world) needed to be better informed about the colonies and British policies. The argument is in support of propaganda to support imperialism, albeit with some acknowledgement of its negative aspects.

A year later, a series of internal papers with the general title 'African Background' appeared and they seemed to be aimed at answering some of the calls of Macmillan to take the colonies more seriously and be better informed about them.

Monthly Reports and Intelligence Memoranda have, from time to time, analysed the audience served by the African Service of the B.B.C. None has yet attempted to consider, as a whole, the continent to which the service is mainly directed. One important part of our audience consists, in fact, of British and Dominion troops altogether outside Africa – in Gibraltar, Malta, Cyprus, Palestine and beyond – as well as those on African soil in Libya, Egypt and Abyssinia. Another section, the so-called (British) 'exiles' is made up of officials, missionaries, traders, also 'Settlers', scattered up and down the continent, whose speech is English and whose sentiments are still very largely British. But there is a larger, and in the long run more important body of people – many of them may be British born – for whom Africa is 'home,' people whose lives and interests are bound up with the welfare of the continent in which they live.<sup>33</sup>

Was this another prophetic insight? Perhaps it was, because the writer does focus some attention on the fact that there were some Africans in East, West and Central Africa who could understand broadcasts in English. But the main purpose of the paper was in support of

the war effort and the propaganda role of the BBC. Shortly before the war, the African Service began as a distinct sub-service of the Empire Service under the visionary leadership of its first head, John Grenfell Williams. In Gerard Mansell's book *Let Truth Be Told* the External Services Managing Director from 1971 to 1980 wrote:

Grenfell Williams was 'probably the first to grasp the opportunities which radio offered to the solution of colonial problems. He could 'see Africa being born' and a vast untapped audience coming up.<sup>34</sup>

Audience research continued during the war, although with some difficulty. The same department, Empire Intelligence, sent out questionnaires to listeners seeking to get specific feedback. It is not stated how the selected listeners were recruited – whether it was from the fact that they had been subscribers to *BBC Empire Broadcasting* or that they had been recent letter writers. It is clear however that those sent questionnaires were regular listeners. They became a global panel of BBC listeners who were called on to respond to questions on a range of topics. This panel method was also developed for some other languages. The English language version of it continued until some time in the late 1980s.

#### **Audience research in the post war years and to the end of the century**

During post war years, the services continued to rely on letters, postal questionnaires and other material rather than quantitative surveys in the target countries. There were exceptions to this and some surveys were commissioned. In an internal memorandum from Ian Jacob, then Director of Overseas Services, later to be Director General of the BBC, wrote to all Heads of the Overseas Services on 14<sup>th</sup> January 1949 about audience research reports for each output department or service. These reports would appear quarterly and would bring together as much as was known about the audiences for each language in the target areas. Each report would provide as much information as was available, including where possible estimates from what he called 'polls' as well as 'listener weeks' and local media trends. Looking through some of the hundreds of such reports that appeared over the next few years it is clear that letters and postal questionnaires provided most of what could be said.

When I became Head of International Broadcasting and Audience Research, IBAR as it was then known, in 1982 there were 56 people employed in the department. Leaving out the 6 who were engaged in overall management and the library, of the remaining 50, all but 5 were principally involved in dealing with and analysing listeners' letters and in sending out questionnaires to listeners to 19 of the 40 or so languages broadcast by the BBC at that time.<sup>35</sup> The budget of the department reflected this emphasis. The amount allocated for surveys in target area countries at that time was less than £100,000. It was officially set at around £60,000 when I arrived, although we often received extra funds at the end of the

financial year bringing the total figure to around £100,000. This remained more or less the situation until the arrival as Managing Director of External Services of John Tusa. Within three years of his arrival in 1986, annual funds for survey research had increased to around £2 million.

There were several stimuli to this major change in policy. One was that we had discovered through research that those who wrote letters were different in several important ways from those who listened taken as a whole. One of the most experienced researchers in the department, Colin Wilding, conducted a major and very influential study in 1981, which because of the colour of its cover, was known as the 'Canary Report'<sup>36</sup>. In this he added questions to a survey on the ground in India which asked respondents, identified as BBC listeners, if they had ever written to the BBC. Those who had written were compared to BBC listeners who had not and their listening habits, tastes, preferences, demographics and more were compared. Another similar piece of research at the time was done by the then head of audience research for the Canadian Broadcasting Corporation, the late Arthur Laird, who conducted a study among Radio Canada International listeners in Germany. Both Wilding and Laird showed that those who write are different in most respects from the generality of listeners. But Wilding did note one way in which letter writers and the listeners taken as a whole were more or less similar in the way that they listened to the BBC – whether by shortwave, or through local rebroadcasts, – and their views and experiences of reception quality and related matters. This was a very important finding in a project which we conducted in the late 1980s when we asked questions on air in all languages. The project was called 'Can You Hear Me'. Listeners were asked a few very simple questions. They were asked to write on a postcard their name, address, where they were listening, what they were listening to, and what frequency or source they were listening to. We received well over 100,000 responses and the results led to major savings in transmission costs, closing down those periods of transmitter use that were not being used by significant numbers. The exercise saved many hundreds of thousand pounds.<sup>37</sup>

Aside from this important and very valuable piece of research using mail we realised that we had been spending too much time, effort and money on activities and analysis that were probably, if not certainly, giving us misleading and incomplete information. While we continued to handle listener' letters, and indeed recruited even more people to handle letters written in languages that had not hitherto been fully dealt with, we moved all the staff who had been doing the mailed questionnaires over to doing surveys. The department was divided into two divisions – research and correspondence. It did not mean that letters were to be ignored. If a writer pointed out an error of fact, or, as very often happened, gave a reaction to something heard that showed an important and different perspective on what had been broadcast, we were interested and reported these in monthly correspondence reports for



nearly all the languages. And listeners' letters continued to provide valuable feedback on the ways in which some listeners reacted and responded to programmes and the reception and other conditions that they experienced.

An equally important factor was that on the ground research became possible in a rapidly increasing number of countries. Quantitative survey research in developing and newly independent countries in Africa and Asia, had been, well into the 1980s, very limited in coverage and capability. There were exceptions. In East Africa, during the 1960s, Marcos Surveys, with headquarters in Nairobi carried out market, opinion and media surveys from around 1960 for most of the following decade. Most of these surveys were almost or actually fully national in coverage in Uganda, Kenya and Tanganyika, later Tanzania.<sup>38</sup> But Marcos was an exception. Nothing like it existed anywhere else in Africa, Asia or indeed Latin America. In most of the developing world, nearly all survey work was confined to urban areas with occasional and usually very limited forays into the more easily accessible rural areas. What happened to change this? It was not commercial pressure. There were few, if any, commercial clients for market research who were interested in fully national surveys in developing countries. There were however some and survey research was growing in unexpected places.<sup>39</sup>

During the 1980s we were able to commission the first ever fully national surveys in Pakistan, Bangladesh, Nigeria, Ghana, and several Arab countries. Previously many surveys in these and other countries had been mostly confined to major urban areas and only a few rural parts. But this was not without problems. In India, the issue for us was always how to sample. Is India best treated as a series of states – 28 of them – or as a nation? We took the view that it was best treated at the state level. 16 states at this time had populations greater than 20 million, and therefore each of them larger than most countries in the world. Moreover, each of them was very different in linguistic and cultural ways. Later, the BBC became reliant to some extent on the India National Readership Survey (NRS), the largest ever annual media survey anywhere in the world at any time, with a sample during the 1980s of more than 100,000. NRS had a radio section and we added questions about listening to the BBC and other international broadcasters. My colleague, Colin Wilding used the data together with information from surveys in the separate states – West Bengal, Uttar Pradesh, Bihar, Tamil Nadu, Maharashtra, Andhra Pradesh, Madhya Pradesh, Rajasthan and others – to create a national picture.

We worried a lot about the fact that the agencies we were using had little or no experience in rural areas. Would their sampling be adequate? Would they be able to cover difficult and less accessible areas? Our principal concern was to have data that would reflect the full picture, leaving out no significant sections of the population. For Bangladesh as one example, we had

urban data only. Were rural samples possible? Would the agency we used cover them adequately? To find out, we sent Colin Wilding on a duty tour to find out. He did a detailed and important study which showed both us and the agency we chose that it could and should be done. This was a pivotal moment for the whole department. We began to realise that no area was closed to research, except for the steadily declining number of countries where the governments would not allow such research to take place. Prominent among these were all communist countries and a few dictatorships in the Arab world and Africa. But in the new areas opening up for field research, we soon found to our delight that people in even the remotest areas of any country liked to answer questions about their media access and use. Refusal rates were very much lower than in developed countries.<sup>40</sup> We began to think global research was possible and worth aiming for. By the 1990s the major activity of the research department was devoted to surveys. We built up a database of audiences in more than 100 countries from our own surveys and from data done by other international broadcasters, especially surveys conducted by the United States Information Agency (USIA) for the Voice of America (VOA) and the research done by Radio Free Europe and Radio Liberty among travellers from communist countries in East and Central Europe.<sup>41</sup>

The next major development was the end of communism in East and Central Europe. Surveys inside former communist countries became possible and we commissioned many.<sup>42</sup> Even in those countries which remained formally communist the authorities began to allow survey research, although not without difficulty. We commissioned surveys in China – the first one in, I believe, 1990. In Vietnam, through the roundabout route of cooperating with the Swedish development agency SIDA, which was working with some local radio stations in Hanoi and Hue, we were able to obtain data on listening to the BBC Vietnamese Service in 1993. Surveys continue to be conducted there.

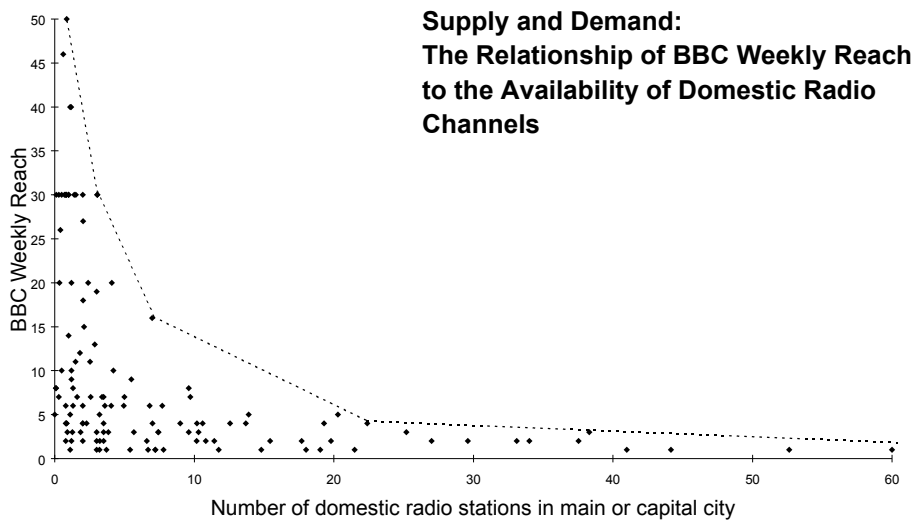
Another major change at the World Service was the realisation that research data were valuable for knowing the audience and changing programme content. It seems astonishing now to say this but at the time when I became head of audience research, the overwhelming view was that the services knew what they should broadcast. The BBC as a whole seemed to take the view that what it did was worthwhile and needed no justification. I well remember an encounter with the then Controller of Overseas Services, Mark Dodd. I suggested to him in, I think, 1986, that we should do a survey in Nepal. We had never done a survey there. The very small Nepali language service probably had some listeners. We received some letters! But we had no idea about how many listeners the BBC attracted in Nepal, what kinds of people they were or what they thought about what they heard. Moreover, we knew that many Nepali could understand Hindi which the BBC broadcast then and since for many more hours per week. Which language did BBC listeners hear and was the fact that it broadcast in Nepali an important addition to its reach in Nepal? Dodd told me that we did not need to do a survey

there because there was sufficient support in Parliament for the continuation of the service. Providing measurements to defend services from Government cuts was seen internally as a major reason for having audience research within the BBC External Services. One event illustrates this quite well. When Douglas Muggeridge became Managing Director of the External Services in 1981 he had the immediate task of looking for urgent savings. He instituted an internal enquiry into whether audience research was necessary at all, and what if any value it had to the services as a whole and whether the activity could be ended or reduced, thus saving useful amounts of money. What saved the department and the activity it carried out was the fact that it provided data to defend services from Foreign and Commonwealth Office (FCO) cuts.<sup>43</sup> Very little was said in the enquiry about the value or importance of audience research in knowing the audiences or in developing new services. Sometimes the obsession with saving services and using audience research as the main or major weapon reached absurd proportions and stretched the use of data beyond what some of us felt comfortable with. For example, a weekly audience of 0.2% in say a country of 100 million adults projects to 200,000 listeners. That can sound impressive if you omit to mention the fact that it is based on such a small figure as 0.2%. Anyone who has done survey research knows that you can get a 0.2% 'audience' or market for a product, service or indeed radio station, even if it does not exist. Surveys that show very small audiences are a poor use of the survey instrument. It may still be worth broadcasting to very small (in percentage terms) audiences, but general population surveys are not the best instrument to use to find out anything much of use about them.

The audience research department survived this review and went on to become a central part of BBC World Service's strategy and policy planning. It did this by showing that reliable facts about the audience enabled services to change what they broadcast, respond to demands of listeners and identify aspects that were lacking and which, when added to the service's output attracted new listeners. A good example of this was from early research for the Pashto Service broadcast to Afghanistan and northern Pakistan, started in the early 1980s after the Soviet invasion of Afghanistan. A major survey conducted in 1986 in the huge refugee camps in Pakistan showed that the service was reaching a very large audience – one of the largest in percentage terms that has ever been measured for the BBC anywhere, at least that is, among men. The audience among women was near to zero. As a result of this finding, the service began to run new programmes that would be attractive to women, including a drama series that has become famous and celebrated, *New Home, New Life*. As a result of this and other innovations the Pashto Service's audience among women grew and the gender gap is now very much lower today. Other services which benefitted from better, more reliable and actionable research included the Arabic, Swahili and Hausa services. Research was also used to identify additional languages that would attract new audiences and this led to the establishment of several new services including Ukrainian, Macedonian, Uzbek and Telugu.<sup>44</sup>

The other major change in audience research at the BBC was a growing interest in qualitative research using discussion groups and similar non-quantitative techniques. During the 1980s a series of seminars was held internally showing what qualitative research could do to inform BBC programme makers better about their audiences and the way in which the BBC and its output was viewed both by listeners and others. British market research companies led the world during the 1970s through to the 1990s in the use and development of qualitative research. Prominent among British researchers were Wendy Gordon and Mary Goodyear and both of them came to the BBC to promote the use of qualitative methods.<sup>45</sup> The changes in research activity and BBC policy, especially under John Tusa's directorship, put the department in a pivotal strategic position in World Service. In 1996 it became part of an expanded marketing department, bringing together audience research, publicity, marketing and audience relations.

One other major finding that we made during the 1990s was crucial to BBC planning and strategy. We were able to do statistical analyses that could help us to understand better what it was that drove people to become listeners. We set out to inquire whether there were any predictors or relationships that would help us to understand the motivation to listen. Taking the figures for weekly audiences to the BBC, we plotted these against several other variables. There were several positive correlations. Audiences tended to be larger in former British territories than others that had not been under British rule. There were also negative correlations with levels of political freedom; countries which enjoyed less freedom generally had larger audiences for the BBC and other international broadcasters like the Voice of America, Radio France International and the German Deutsche Welle than those that were more free (although of course in many of those countries with the least freedom, we were unable to carry out research and therefore had no data). But the strongest correlation was found to be with the degree to which there was local choice in radio broadcasting. The less choice there was of radio services locally, the more likely it was that the BBC would attract a significant audience. Taking the capital cities in surveyed countries, we counted the number of domestic radio services that a radio listener had to choose from locally. We plotted these against the most recent measured weekly audience figure (in %) for the BBC. The following chart shows the results of this analysis. It shows that while a lack of local choice was no guarantee of a large audience for the BBC, it demonstrates that it was only in countries where there was little choice that the BBC weekly audience was larger than a few percent.



46

Note that while large audiences were achieved in several countries where there was little choice, the fact of the lack of choice did not guarantee an audience of significant size for the BBC. But note also that nowhere was the BBC audience above 10% where the choice of local radio stations was more than 7. In most cases the BBC achieved large audiences (20% and more) only where the choice of local services was limited to 5 or fewer stations. As choice grows as the result of deregulation, so BBC audiences fall. Rebroadcasting through local FM relays and local radio broadcasters helps to sustain audiences in very many countries. But even so, listening to a foreign radio station is something that declines whatever platform it is available on when local media become freer and provide what local people most want to hear.

Audience research in the World Service has established itself as a crucial and indispensable tool for planning and strategy. It is now part of a much larger marketing department. Research is now carried out in all continents and the BBC has access to data which are collected systematically from many target areas for the first time in BBC history. It means that there is no longer any need to rely on letters or other similar contacts from listeners.

### **Conclusion**

In this article and others in the special issue it is clear that audience research did become an essential part of the fabric of the BBC World Service. However, this paper was originally prepared in 2010 before massive cuts resulting from the government's Comprehensive Spending Review were made to the World Service in early 2011. Many of these cuts fly in the face of the evidence about audiences provided by audience research, while others have been made despite a lack of sufficient knowledge about the effects on the audiences. The BBC's picture of its global audience is still only partial. There remain some parts of the world that are

not well covered by research and some that are not covered at all. The most serious examples of non-coverage are rural areas of the Arab world and rural areas of francophone and lusophone Africa. This pattern is repeated more generally with better coverage of the developed zones of particular territories and weaker or inadequate coverage of the poorer and more remote areas.

The 2011 cuts have closed the Portuguese service to Africa even though its audience has never been fully measured and the BBC had comprehensive data only from Mozambique. A great deal of shortwave delivery used for Africa, Asia and the Arab world has been cut, despite it being relied on heavily throughout most of these regions for listening to the BBC. The research department itself has been severely cut putting into question its ability to measure audiences, assess impact and achievements, and keep the BBC's information about its audiences up to date, comprehensive and accurate.

The achievements and advances in audience research at the BBC, especially over the past 25 years, are now at risk of being lost. I have no doubt that part of the great success of the BBC World Service is that it has developed better intelligence about audiences than all other international broadcasters. The global audience is the largest and most diverse of any international broadcaster, and by quite a wide margin. All this is now at risk from the greatest cuts to the World Service in its nearly 80 year history.

### **Biographical Note**

Graham Mytton was Head of International Broadcasting Audience Research and then Head of Research and Correspondence at the BBC World Service from 1982 until 1996. He then set up the World Service's first Marketing department and led this from 1996 to 1998 when he retired to become an independent media research trainer and consultant. He now carries out media research in many countries, most recently in Sierra Leone, Sudan, the Gambia, East Timor, Gibraltar and Nigeria. He is the author of a major training manual in audience research, *Handbook on Radio and Television Audience Research*, BBC World Service Trust, UNICEF and UNESCO, 1998. The book is also available in several other languages including French, Slovak, Bahasa Indonesia and Russian.

Graham Mytton was Head of International Broadcasting Audience Research and then Head of Research and Correspondence at the BBC World Service from 1982 until 1996. He then set up the World Service's first Marketing department and led this from 1996 to 1998 when he retired to become an independent media research trainer and consultant. He now carries out media research in many countries, most recently in Sierra Leone, Sudan, the Gambia, East Timor, Gibraltar and Nigeria. He is the author of a major training manual in audience research,

*Handbook on Radio and Television Audience Research*, BBC World Service Trust, UNICEF and UNESCO, 1998. The book is also available in several other languages including French, Slovak, Bahasa Indonesia and Russian.

## Select Bibliography

### 1. Audience Research for International Broadcasting

Very little has been published aside from internal BBC documents as well as similar internal documents at RFE/RL, VOA, Deutsche Welle, Radio France International and others. The following list represents most of what is available in published form:

Forrester, Carol and Mytton, Graham, 'Audiences for International Radio Broadcasts' *European Journal of Communication*, Vol. 3, No. 4 December 1988, pp. 457-81

Mytton, Graham, 'Audience Research at the BBC External Services during the Cold War: A view from the inside', *Cold War History*, Vol. 11, No. 1, February 2011, pp. 49-67

Mytton, Graham, 'From Saucepan to Dish: Radio and TV in Africa', in Richard Fardon and Graham Furniss (eds.) *African Broadcast Cultures*, Oxford: James Currey, 2000.

Mytton, Graham (ed), *Global Audiences: Research for Worldwide Broadcasting*, London: John Libbey, 1993

Mytton, Graham, 'Programming and Delivery for International Broadcasting' in Alan Hell (ed.) *Local Voices/Global Perspectives: Challenges Ahead for US International Media*, Washington DC: Public Diplomacy Council, 2009, pp.29-35

Mytton, Graham, 'Research in New Fields', *Journal of the Market Research Society*, Vol. 38, No 1, 1996, pp 19-33

Mytton, Graham, 'The BBC and its Cultural, Social and Political Framework', *Historical Journal of Film, Radio and Television*, Vol. 28, No. 4, October 2008, pp. 569-581

Parta, R. Eugene, *Discovering the Hidden Listener*, Stanford: Hoover Institution Press, 2007.

Zoellner, Oliver, (ed), Four books on the general topic of audience research for international broadcasting were edited by Oliver Zoellner, audience researcher at Deutsche Welle and one time chair of CIBAR, which appeared between 2002 and 2005. The three later editions were published by CIBAR, the Conference of International Broadcasters' Audience Research

services, while the first was published by the German international broadcaster Deutsche Welle. Each contain chapters by different researchers from most of the world's major international broadcasters

- *An Essential Link with Audiences Worldwide*, Berlin: Vistas, for Deutsche Welle, 2002
- *Reaching Audiences Worldwide: Perspectives of International Broadcasting and Audience Research*, Bonn: CIBAR, 2003
- *Beyond Borders: Research for International Broadcasting*, Bonn: CIBAR, 2004
- *Targeting International Audiences: Current and Future Approaches to International Broadcasting Audience Research*, Bonn: CIBAR, 2005

The CIBAR website can be a useful source. Go to <http://www.cibar.org/> CIBAR was created as a forum for the exchange of information and cooperation in research among international broadcasters in the 1980s. It has held annual meetings since 1985.

Additionally between 1990 and 2000 there was a series of conferences hosted by Radio Canada International. They were in Hamilton in 1990, Quebec City 1992, Vancouver 1994, St Johns 1996, Ottawa 1998 and Montreal 2000 each produced books and all have sections on audience research. The conferences brought together major international broadcasters as well as domestic broadcasters from Europe, Africa, Asia and Latin America.

Aster, Howard (ed.) *Challenges for International Broadcasting*, Oakville: Mosaic, 1991

Demers, Francois; Aster, Howard; and Olechowska, Elzbieta (eds.), *Challenges for International Broadcasting*, Quebec: Les Presses Inter Universitaire, 1993

Olechowska, Elzbieta; and Aster, Howard, *Challenges for International Broadcasting: Identity, Economics, Integration*, Oakville: Mosaic, 1995

Olechowska, Elzbieta; and Aster, Howard (eds.), *Challenges for International Broadcasting: The Audience First?*, Oakville: Mosaic, 1997

Olechowska, Elzbieta; and Aster, Howard (eds.), *Challenges for International Broadcasting: New Tools, New Skills, New Horizons*, Oakville: Mosaic, 1999

Olechowska, Elzbieta; and Aster, Howard (eds.), *Challenges for International Broadcasting V: New Tools, New Skills, New Horizons*, Oakville: Mosaic, 1999



Olechowska, Elzbieta; and Aster, Howard (eds.), *Challenges for International Broadcasting VI: Programming: The Heart of International Radio*, Oakville: Mosaic, 2001

## **2. Selected major books on the history of international radio broadcasting**

Heil, Alan, *Voice of America: A History*, New York: Columbia University Press, 2003

Mansell, Gerard, *Let Truth Be Told*, London: Weidenfeld and Nicholson, 1982

Mickelson, Sig., *America's Other Voice: The Story of Radio Free Europe and Radio Liberty*, New York: Praeger, 1983

Nelson, Michael, *War of the Black Heavens: The Battles of Western Broadcasting in the Cold War*, London: Brassey's, 1997

Olechowska, Elzbieta, *The Age of International Radio: Radio Canada International (1945-2007)*, Oakville: Mosaic Press, 2007

Partner, Peter, *Arab Voices: The BBC Arabic Service 1938-1988*, London: BBC 1988

Pirsein, Robert William, *The Voice of America: An History of the International Broadcasting Activities of the United States Government, 1942-1962*, New York: Arno Press, 1979

Short, K. R. M., *Western Broadcasting over the Iron Curtain*, London: Croom Helm, 1986

Shulman, Holly Cowan, *The Voice of America: Propaganda and Democracy 1941-45*,

Madison: University of Wisconsin Press, 1990

Siegel, Arthur, *Radio Canada International*, Oakville: Mosaic Press, 1996

Tusa, John, *A World in Your Ear*, London: Broadside, 1992

Walker, Andrew, *A Skyful of Freedom: 60 Years of the BBC World Service*, London: Broadside Books, 1992

Urban, George, *Radio Free Europe and the Pursuit of Democracy*, New Haven: Yale University Press, 1997

Wood, James, *History of International Broadcasting*, London: IEE, 2000

---

<sup>1</sup> Robert Silvey, *Who's Listening? The Story of BBC Audience Research*, London: George Allen and Unwin, 1974, p. 42.

<sup>2</sup> Gerard Mansell, *Let Truth Be Told*, London: Weidenfeld and Nicholson, 1982, p. 26

<sup>3</sup> Ibid, p.8.

<sup>4</sup> Ibid, p.10

<sup>5</sup> Ibid.

<sup>6</sup> Ibid, p.11

<sup>7</sup> Ibid. Mansell was quoting from a memorandum on Empire and World Broadcasting, June 1929.

<sup>8</sup> J.C.W. Reith, *Into the Wind*, London: Hodder and Stoughton, 1949, p169.

<sup>9</sup> At the time of going to press (April 2011) , the BBC World Service is cutting very large amounts of shortwave. The arguments put forward for this by the BBC and the debate both inside and outside the BBC has exhibited, in my opinion, a lot of ignorance about how shortwave works and why it is such a vital part of international radio. I wrote about this for the Parliamentary Foreign Affairs Committee's Enquiry into the 2011 BBC World Service cuts.

<http://www.publications.parliament.uk/pa/cm201011/cmselect/cmcaff/writev/849/ws33.htm>

I also had a letter in the Times on the same topic, *The Times*. February 15 2011.

<sup>10</sup> *The Economist*, 13<sup>th</sup> March 1926, quoted in Asa Briggs *The History of Broadcasting in the United Kingdom: Volume 1: The Birth of Broadcasting 1896-1927*, p.319.

<sup>11</sup> Silvey, op. cit. p19.

<sup>12</sup> BBC Written Archives Centre, hereafter referred to as WAC - E3/78: 'Methods of Research Employed by the British Broadcasting Corporation' by Robert Silvey, BBC Listener Research Director

<sup>13</sup> Ibid

<sup>14</sup> Ibid

<sup>15</sup> Ibid

<sup>16</sup> Ibid.

<sup>17</sup> WAC E3/1235/1 BBC Survey of Listening: Bombay, June 1944. The field work and the report were produced by the advertising agency, J Walter Thompson.

<sup>18</sup> Ibid. Between pages XI and XV

<sup>19</sup> Ibid. Between pages XVII and XVIII.

---

<sup>20</sup> Ibid. Page XVI.

<sup>21</sup> Ibid

<sup>22</sup> However, audiences remained quite high in many parts of non-communist Europe until well into the 1950s as successive annual BBC Handbooks show. For example, in the 1958 edition it was noted that the BBC had an estimated audience of five million who tuned to the BBC at least once a week in Western Europe. *BBC Handbook 1958*, p.44.

<sup>23</sup> WAC E4/37 Empire Correspondence: Summaries of Programme Correspondence 1933-1934.

<sup>24</sup> They seem to have stopped in the last few years, and since I left in 1998. The main reason for ending this practice seems to have been the fact that most communication from listeners now comes from SMS text messages and emails. These are not now counted or even reported on in the systematic way that letters were for seven decades.

<sup>25</sup> WAC - E3/78

<sup>26</sup> *Challenges for International Broadcasting: Identity, Economics, Integration*, edited by Elzbieta Olechovska and Howard Aster, Oakville, Ontario: Mosaic Press:1995, p 85. The book is a compilation of the conference proceedings from the third in a series of international broadcasting conferences organised by Radio Canada International starting in Hamilton in 1990 and ending with the 6<sup>th</sup> 'Challenges' conference in Montreal in 2000. To be fair to Li Dan it has to be said that international media are beset by bizarre and impossible claims of audience size based on no evidence of any kind, not even the counting of letters!

<sup>27</sup> WAC E4/37

<sup>28</sup> BBC WAC E4/42

<sup>29</sup> Ibid

<sup>30</sup> There is no date indicated. It cannot have been before 1937 because before then, the BBC magazine was not called *BBC Empire Broadcasting*. The practice of sending questionnaires from time to time to subscribers to the magazine, in its various forms, continued until publication ceased in 2004.

My conclusion is that the research referred to was carried out some time between January 1937 and September 1939.

<sup>31</sup> E4/40. Empire Intelligence Section reports, 1941-42. 18<sup>th</sup> June report. 'Weekly Extracts from Empire and American Press.

<sup>32</sup> Ibid. BBC Empire Service Papers: 'The Colonies in Propaganda', 15<sup>th</sup> August 1941.

<sup>33</sup> Ibid. 'African Background' 20<sup>th</sup> November 1942.

---

<sup>34</sup> Gerard Mansell, *Let Truth Be Told*, London: Weidenfeld and Nicholson, 1982, p.195.

<sup>35</sup> BBC Staff List April 1983. The 20 or so languages not then covered by correspondence assistants in the research department received too few letters to warrant a staff member. These were mainly language service to closed countries where few listeners dared to write. As these countries emerged in the 1980s from totalitarian rule, letters began to arrive in sufficiently large numbers to require the employment of suitable staff to read, translate and analyse them as required.

<sup>36</sup> 'Uttar Pradesh and Rajasthan, India: Correspondents – General Population Survey Comparisons, January to April 1981', BBC External Services, International Broadcasting and Audience Research, September 1983. In a face to face survey carried out in India in 1981, BBC listeners in two states covered by the survey were asked if they had ever written to the BBC.

<sup>37</sup> One of the department's senior managers, Alison John, ironically made redundant by the closing down of much of the correspondence and mailed questionnaire activities, came out of retirement to run this important and very successful study. Although it relied on self-selected responses, we were confident that in this case those who wrote were similar to those who did not. In other words, for the purposes of identifying how the broad mass of listeners to different languages and in different parts of the world listened, the letter or post card writers were a reliable source.

<sup>38</sup> I have been unable to find any contemporary reference to the valuable work that this company did throughout East Africa at this time apart from personal experience. They carried out extensive and very important surveys of the adult populations throughout the then East African Federation. I believe that Marcos were responsible for the first ever opinion surveys anywhere in Africa outside South Africa.

<sup>39</sup> One notable one was a French agency, Marcomer, run by Michel Hoffman who managed this market, media and opinion research agency from Paris, affiliated to Gallup International.

<sup>40</sup> In many developed countries refusals to be interviewed in both face to face and telephone surveys can be as high as 50%. In the newly surveyed countries refusal rates were typically below 10% and sometimes as low as 1% or 2%. This is probably due to the novelty of being interviewed and also because surveys in such countries do not lead as they do sometimes elsewhere to unwanted junk mail and the like, whether in reality or suspicion. ESOMAR rules and guidelines which most research agencies in the world abide by prevent the use of data collected in surveys from being used for marketing, but several 'surveys' are conducted not for the purpose of gleaning quantitative information but for the purpose of getting addresses for marketing purposes. This is one major factor in refusal rates being high for legitimate market, media and opinion surveys.

---

<sup>41</sup> I have written separately on the way that the BBC carried out research into audiences in communist Europe. See, 'Audience research at the BBC External Services during the Cold War: A view from the inside', *Journal of Cold War History* Vol.11, Number 1, February 2011, pp.49-67.

<sup>42</sup> Some survey research became possible even before the collapse of communism in Europe. In 1988 we commissioned the research department of Polish State Radio, OBOP, to do a national survey for the BBC in Poland and similar surveys were also commissioned at that time in both Slovenia and Croatia when they were still part of federal Yugoslavia.

<sup>43</sup> At this time and for many years the BBC World Service budget was a part of the FCO vote put to Parliament. In 2010 it was decided by the coalition government with the agreement of the BBC that the World Service grant from the FCO would be ended and instead funds would have to come from the general BBC domestic budget from 2014.

<sup>44</sup> Telugu, the main language of the Indian state of Andhra Pradesh, was broadcast for an experimental period in 1994. It was successful in reaching significant audiences but was not continued for lack of funds.

<sup>45</sup> Wendy Gordon is the author of a major work on the use of qualitative research for branding and marketing purposes – *Good Thinking*, Henley: Admap Publications, 1999, while Mary Goodyear and her husband John created and led the very successful market research agency, Market Behaviour Limited, (MBL) which pioneered qualitative research not only in Britain but also in Africa, Asia, Europe and elsewhere.

<sup>46</sup> This chart or variations on it appeared in several publications from 1993 to 1998 and it would always use the latest data available. Publications using this chart written by the author include 'How political and social circumstances determine listening to foreign radio stations' in F. Demers, H. Aster and E. Olechowska, *Challenges for International Broadcasting*, Quebec: Les Presses Inter Universitaire, 1993, pp. 257-262, p. 261, and 'International Radio Continues to Depend on Shortwave' in Oliver Zoellner (ed.), *Targeting International Audiences: Current and Future Approaches to International Broadcasting Research*, Bonn: CIBAR, 2005, pp.153-172, p.154. Variations between these and other sources arise from the fact that different data sets were used according to the date of the analysis. But the same broad pattern is revealed each time. The data in the chart used here are from the period approximately from 1990 to 1998.