BBC Global Audience Measure – a quick guide

What exactly is the GAM?
The Global Audience Measure is an annual update of **how many people** are consuming the BBC **weekly** for ALL services in ALL countries across ALL platforms (TV, Radio, website and social media).

The GAM builds 240 single customer view models, one for every country in the world, each year. We do this by combining measurement data for BBC radio, TV, websites and social media:

- **TV and radio data** counts people through either surveys that we run in market, or through ratings data (like BARB in the UK, or Arbitron Nielsen in the USA). As surveys are extremely expensive to run continuously, we select particular markets to update each year.

- **Digital data** (social media and web analytics) is a continuous measurement that we can access whenever we want. However, it does not count people – but rather browsers or impressions. The GAM process converts digital data to represent people.

- These individual sources are brought together, and **converted into individual adult weekly reach**.

    - The reach is de-duplicated- that is people using multiple platforms to access our content (i.e. TV & radio or tablet and mobile, say) or multiple services (World Service English radio and World News TV channel) or languages (say, English and Swahili in Kenya) are counted only once.
    - For example, if Nafisa listens to BBC World Service English on radio AND watches BBC News Arabic on TV AND accesses bbc.com on mobile, she counts as just one person who consumes BBC News.
    - This has the net effect of lowering – and thereby making more accurate- our topline reach figure for each country, and therefore for the global reach figure.

How is the global reach figure calculated?
The GAM is built up as a single customer view, every country is refreshed every year, given that every year there is at least new analytics and social data for every country; and for many countries there is new survey or ratings data as well.

Are there any core principles that you subscribe to when doing this?

There are three core principles underpinning the GAM:

- **Be conservative:** We don't measure to get reach; we measure to get an accurate picture of audiences. So, we aim for accuracy and ensure that there is no inflation of figures. We treat with scepticism external provider reach measures that seem inflated to tell a better story (Facebook's own reach figures being a case in point, which is why we use 'engaged reach' rather than 'reach' for Facebook – those that have interacted with BBC rather than simply had the opportunity to see on their newsfeed).

- **Don't project in places you have not measured:** Every data point in the GAM comes from actual measured regions/ locations. That is, if we have managed to only measure TV and radio in a part of India, we don't project for the rest of India, even if there are sound enough statistical techniques to allow one to do so.

- **Platform usage data over survey for digital reach:** While survey data is very reliable for TV and radio, we have seen that people have more difficulty recalling content that they have seen on digital platforms. So, for digital media, we use platform usage data to get reach.

How accurate is the GAM data?

On an individual component level, i.e. digital, TV or radio, the room for error in the data is extremely low:

- For social and analytics reach any error in reach is null as the analytics tools count everyone.
- For TV and radio reach figures at the top level the margin of error is less than +/- 3%. This means that if the measurement were carried out 100 times, 95 out of the 100 times the audience reach would fall within +/- 3% of the figures that we present. In addition, Market Research Society who we brought in to audit our GAM process, has called our surveys 'gold standard'

What's new in 2018?

This year we surveyed or purchased data for a record number of markets:

- **Asia**: Afghanistan, Uzbekistan, Pakistan and Singapore
- **Middle East & North Africa**: Jordan, Morocco, Mauritania
- **Sub Saharan Africa**:Nigeria, Liberia, Senegal
- **Europe:** Russia, Denmark, France, Germany, Ireland, Italy, Netherlands, Poland, Spain, Sweden, Switzerland
- **Australasia**: Australia, New Zealand
- **North America:** USA, Canada
- **BBC World Service English developed market online study:** Australia, Canada, Denmark, France, Germany, Ireland, Italy, Netherlands, New Zealand, Poland, Singapore and Spain.
- **BBC World Service English radio ratings:** USA, UK, Philippines and South Africa

- **Ipsos affluent survey in Europe and Asia**: Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Luxembourg, Netherlands, Norway, Poland, Portugal, Spain, Sweden, Switzerland, UK, Thailand, Hong Kong, Malaysia, Philippines, Singapore, Taiwan, Korea and China.
- **BBC Studios TV reach ratings**: Australia, Austria, Belgium, Ireland, Korea, Netherlands, New Zealand, Norway, Poland, Romania, Singapore, South Africa, Sweden, Switzerland, USA

In 2017 we added new platforms:

- Instagram
- Telegram
- Viber
- Podcasts
- Apple News

In 2018 we also added Ok.ru.

We're also measuring the new W2020 services:

- Pidgin
- Igbo
- Yoruba
- Marathi
- Gujarati
- Punjabi
- Telugu
- Serbian
- Korean
- Tigrinya
- Amharic
- Afaan Oromoo

What are the challenges of measuring people reach for third party digital platforms?

For digital platforms, getting data from platforms' own analytics system on a person level, split by country, is usually very complex, if not impossible with analytics. The ideal case scenario for digital third party platforms would be to have our own tags/cookies on all third party digital platforms. In the absence of this, we usually have to commission bespoke pieces of research and help build a model to be able to get person level data split by country for that specific platform.

The data

What are your various sources for getting reach?

- For website/apps and social media it is *always* platform usage data, using the ComScore Analytics system.

- **For TV/ radio in markets with more established media measurement systems,** it is usually ratings data. These would be the equivalent of BARB in the UK, or Nielsen in the USA. While it is straightforward to buy this data, and it is measured on the person level, we still have to deduplicate these sources with other ways that these same people may be consuming BBC in the market.

- **For TV/radio in most of the World Service markets, which do not have established media measurement systems**, or do not cover enough of the markets, it is surveys. The way that we ask questions ensures that we are getting an accurate read of the last week of BBC consumption in the market. These surveys are always large sample, nationally representative and use stratified random sampling, to ensure we get as accurate a read of reach as possible.

How frequently are surveys conducted?
Surveys are extremely expensive to run. For example, conducting a survey in a moderately difficult market can cost £60k or more – this makes it impossible to measure TV and radio reach in every market, every year.

Despite budget constraints, we manage to conduct about 10-15 surveys every year. We survey our biggest markets (India, Nigeria, and USA) every year, and we have been able to do a record number of surveys in 2018.

Is reach data about the BBC the only data you have in GAM?
Not at all. The GAM surveys are extensive surveys which go deep into our audiences' news attitudes and behaviours. More than that, our surveys tell us about media behaviour and how audiences are using platforms in the market – and in many cases, our surveys are the best sources of data about those markets. So we know about our reach, but crucially, we also know about who we are reaching, and we know about our performance vis a vis competition.
In fact, we use a lot of the data in GAM surveys to inform the more strategic pieces of work that we do.

Do you measure every country every year?
Every country is updated with data, to varying degrees, every year.

All countries will always get updated with digital data – as this comes from analytics systems, it means that we have access to continuous measurement. TV and Radio reach will be updated with new surveys, or new ratings data.

Over 80% of the top 40 WSG markets have been surveyed in the last 5 years, many repeatedly. Over the last six years we have done a total of 93 surveys, an average of more than a survey a month.

The methods

Do your methods change every year?

The way that we put together GAM, as a single customer view per country, stays consistent every year. But every year, as we learn more about audience behaviour and as audience behaviour changes, we make improvements to the data. For example, in 2017 we recognised that with the growing importance of social media across the BBC, we needed to get a robust understanding of the overlap in usage between our social media accounts and our websites, in order to accurately report at a "total digital people reach" level. This study was repeated and further refined in 2018.

Unfortunately this is not something existing web and social analytics tools can answer, so we fielded a global research project amongst people who consumed BBC content in the past week on Facebook and asked them to keep a diary of all of their consumption of BBC content. This enabled us to quantify the portion of social reach that overlaps with website reach and conversely the portion of it that is amongst new audiences.

In addition to helping us calculate digital reach at a person level, this project is helping us understand the role of social media for news consumption. For example, in 2018 auto-played videos to 30 seconds have been added into the Facebook engaged user definition.

How is the deduplication done in practice?

To be able to present our data at a person level, there are two types of deduplication to consider:

- Deduplication across services (i.e. those consuming BBC Swahili as well as BBC World News)
- Deduplication across platforms (i.e. those using the BBC on digital platforms as well as on radio, or TV)

The way that we deduplicate audiences stays the same every year, and we always deduplicate across services, and platforms; but our understanding of audience behaviour is constantly improving, and so the overlap factors that we use each year take into account the latest research on how audiences are using different platforms, and different services.

The data we use to deduplicate comes from these following:

- In our surveys we ask questions about consumption across every one of our services. This gives us the proportions of people using multiple platforms (say, radio and online) or multiple services (say, Swahili and English). We apply those proportions to the analytics reach data to ensure we are only adding the *incremental* online users (i.e. those not using radio) or the incremental English users (i.e. those not using Swahili).

- We use Krux, a web tracking tool, to work out the overlap between our website audiences across different services, for example between BBC Studios websites and BBC.com.

- In 2017 and 2018, we fielded a study to understand crossover usage between BBC websites and social media. "Social media" refers to Facebook, Twitter, YouTube, Instagram, WhatsApp, Snapchat and other locally-relevant networks. In 2017 markets included Russia, India, Thailand, Egypt, Saudi Arabia, UAE, Nigeria, Mexico and USA. In 2018, due to market conditions Russia was not surveyed but new markets Brazil and Turkey were added.

How do you get from Podcast downloads to people?

While we've collected data on podcast download figures for a long time, this is the first year that we've been able to convert these downloads into actual people. This is because of an improved access to metrics on one of our online radio partners, Stitcher.

Stitcher provides us with download figures, but crucially also provide us an "active listener" metric. This tracks the number of people who either stream a podcast, or click play *after* a download – giving us a reasonable way to convert the number of downloads to people.

We take this factor and apply it to the number of podcasts downloads tracked by our central iStats system; so the podcast figure takes into account ALL of our podcast downloads, not just the ones we're getting from Stitcher.

We know that podcast behaviour isn't the same the world over – and over the coming years we hope to be able to adjust this factor by market.

How do you get from Social Media Accounts usage to people reached?

Each social media platform provides different types of metrics on their analytics systems, but we use consistent methods to bring social media metrics down to engaged, person level reach, by country.

For example, for our largest analytics platform Facebook, there are several steps we have to go through to get engaged, person level reach.

While we get a global figure for weekly engaged users, we do not get engaged users by country. We do get country level information from the "impressions" metric, and we can figure out the proportions of "impressions" coming from each country. So, we apply the proportion of unique impressions per country to the global engaged users number.

Similar steps are taken for reporting on other social media platforms – including Twitter, VK, Weibo and Instagram

How do you get from browsers to people?

We know that browsers do not represent people; a person can go onto the BBC Sinhala website on their mobile phone, but then also check back on an English news story on BBC.COM from their laptop. ComScore- or any other digital analytics system- would thus capture this as two separate browsers – though they represent the same person. So, to bring down the browser figure from a browser to a person level, we use findings from the Global Web Index study, a 34 country study with 500-1000 sampled in each market.

The Global Web Index study looks at the use of multiple devices, and gives us a proportion, by country, of those who are using multiple devices. This proportion is generally quite low: for example, in one of our largest digital markets, the United States, the proportion of those using multiple devices to access the BBC online is 5%. This means that all web browsers coming from the US are factored down by 5%.

The Global Web Index study is conducted in 34 markets, so where possible, we use specific data from each country. When we do not have data available for a country, we use the "best fit" country as a proxy. We determine best fit by evaluating which measured country is most similar in news behaviour to the country that we are applying the data to. This means we don't just use a regional proxy, but find the best possible fit in terms of what platforms audiences have access to, and how they are using them.

How do we measure reach gained through Facebook's Auto Play video?

GAM 2018 is the first time we've measured the reach of auto-played video activity on Facebook. For GAM 2018 we used minimum 30 second auto-play videos, because this is level at which we can be reasonably confident of value and attribution. Data from the overlaps study, a diary study measuring social usage over the course of a week, was used to calculate the incremental reach of auto-played videos, which was then incorporated into the total digital reach figures.