

A quick guide

What exactly is the Global Audience Measure (GAM)?

The Global Audience Measure is an annual update of **how many people** are consuming the BBC **weekly** for ALL international services excluding the BBC's output aimed at the UK market 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 (BARB in the UK, or Arbitron in the USA, generally industry currencies in key developed markets). 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 (ie TV and radio or tablet and mobile) or multiple services (World Service English radio and World News TV channel) or languages (say, English and Swahili in Kenya) are counted only once. This has the net effect of lowering – and thereby making more accurate- our top level 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, country by country, and each year the total for each country is refreshed to incorporate new data. 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 the maximum 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 caution third party 'reach' measures that are often a proxy for the opportunity to see content rather than actual reach (eg reach figures for social media provided by platform providers such as Facebook. We therefore use 'engaged reach' for those platforms – defined as those who have interacted with BBC content rather than simply had the opportunity to see the content in their feeds.
- **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 us to do so.
- **Use 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 only use platform usage analytics 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 review our GAM process, has described our surveys as 'gold standard'.

What's new in 2017?

This year we surveyed a record number of markets:

- **Asia:** India (×10 Hindi states: Bihar, Chhattisgarh, Delhi, Haryana, Himachal Pradesh, Rajasthan, Uttar Pradesh, Uttarakhand, Jharkhand and Madhya Pradesh), Bangladesh, Indonesia
- **Middle East & North Africa:** Egypt
- **Sub Saharan Africa:** DRC, Southern Nigeria, Zambia, North Sudan
- **Europe:** Ukraine
- **North America:** USA
- **BBC World Service English developed market online study:** Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Netherlands, Norway, Poland, Spain, Sweden, Switzerland, Australia, Canada, Hong Kong, New Zealand and Singapore
- **BBC World Service English radio ratings:** USA, UK
- **GfK TV reach from TGI Latina and 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, Argentina, Brazil, Chile, Colombia, Ecuador, Mexico and Peru
- **BBC Worldwide TV reach ratings:** Australia, Austria, Belgium, Denmark, Ireland, Mexico, Netherlands, New Zealand, Norway, Poland, Romania, Singapore, South Africa, South Korea, Sweden, Switzerland, USA

We also added new platforms:

- Instagram
- Telegram
- Viber
- Podcasts
- Apple News

The BBC Thai Service launched a full website in October, so this is also included in the figure in 2017.

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. 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 from an analytics system, currently comScore Digital Analytics (run by Adobe Technologies).
- **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 Arbitron in the USA. While it is straightforward to buy this data, and it is measured on the person level, we still have to de-duplicate 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 weekly BBC reach 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 conduct 10-15 surveys every year. We survey our biggest markets (India, Nigeria, USA) every year, and we have been able to do a record number of surveys in 2017.

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, we have access to the continuous measurement. TV and Radio reach will be updated with new surveys, or new ratings data.

33 out 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, this year 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.

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 people level, this project is helping us understand the role of social media for news consumption.

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 de-duplicate audiences stays the same every year, and we always de-duplicate across services, and platforms. As with other component parts of the GAM calculations, the deduplication is always evidence based. That is, if there is no direct way to understand duplicated or overlapping audiences (say for example between site and social), we will field a separate large scale quantitative research project to scientifically do so and unearth overlap ratios. We will then use this evidence to update our understanding of duplicated or overlapped audiences between two platforms. Any time we change any of these ratios, it will only be because of an improvement in our understanding of audience behaviour, and only basis a new quantitative study.

Here are some of the sources from which we get the information to de-duplicate:

- 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 (ie those not using radio) or the incremental English users (ie 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 Worldwide websites and BBC.com
- In 2017, we fielded a study that sought to understand the overlap within our digital audiences i.e. how many of those coming to BBC on social media platforms were also coming to BBC websites. This factor, applicable by region, is applied to the total social audience as it is added to BBC websites to give BBC total digital reach.

To be absolutely clear: reach data is available at every level without the deduplication done. When we add up the constituent parts of a lower level (say, SW, MW, FM) to get to the higher level (say, radio) we make sure that deduplication is done before reporting a reach number for the higher level.

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 will improve this factor, and indeed significantly improve the podcast reach calculations, especially as the likes of Apple open up their podcast analytics to podcast creators.

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 calculate 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. As with all other social media, for these too we use 'engaged reach'.

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.