

# **SURVEYING INTERNATIONAL PUBLIC RADIO: SOME PRACTICAL INSIGHTS**

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In September 2016, the Media Intelligence Service of the European Broadcasting Union (EBU) published a report on the distribution of international broadcasting services by public service media. This chapter examines the methodology of that research, only made available to EBU Members as part of the competitive advantage they obtain for their membership of the organization.

The research project provides practical insights for its recipients, broadcasters belonging to the EBU community. In the moment the survey was circulated, a total of 64 international radio services were broadcast in 31 out of the 56 countries in which the EBU has members, most of them full service and news and current affairs stations. The insights obtained during the research derive from an analysis of various sources, particularly an ad-hoc survey. Surveys are the most common way in which the Media Intelligence Service gathers information from EBU members, given their flexibility and the shared understanding they provide.

The main areas addressed in the following pages are the methodology decisions taken when defining the object of study, the survey design, and strategies to increase the response rate. Although the research included both radio and television services, and most of the design was identical for both media types, the examples provided here refer exclusively to radio.

## **MARKET-ORIENTED RESEARCH**

The origin of this research project was the need to gain a deeper understanding of the international services proposed by public broadcasters in the EBU. The focus was on the distribution networks used for international services and the strategy behind those choices. While the information on the distribution networks is more descriptive, the strategy provides the opportunity for a more analytical approach.

In any case, the project was designed as a piece of market research, aimed at setting an international benchmark for the respondents' activities to help them understand how other broadcasters with similar characteristics and aims are tackling the same kinds of challenges. By offering best practices in tackling similar challenges, the EBU wanted to inspire other international broadcasters in their quest to expand their footprint, find better ways to distribute their content or fine-tune their strategy. In short, this was a way to serve the members of its International Broadcasting Assembly.

## PROBLEMS DEFINING THE OBJECT OF STUDY

Defining what international services are, and are not, is not straightforward. While our first approach relied on the public service media organizations' own declaration what their own broadcasting international services were, a closer look revealed that they did not always adhere to identical definitions. For example, two organizations declared that their international services only targeted foreigners in their country, including migrants and tourists, and did not broadcast beyond their national borders. Metaphorically, these organizations are bringing internationality to their own country. The evolution of these two previously international broadcasters in the classical sense makes them similar to national radio services that target those same audiences but which are not considered international services by their organizations. This is an example that makes it clear how difficult it is to define what international services actually are. In this sense, the option taken in this project was to highlight this evolution as a trend within international services while reporting only on those that considered themselves to be offering an international service.

Additional issues arose and decisions had to be taken. For example, when there were different signals from the same station, with specific content and often in different languages, we took the option to count them as separate services. This is why there may be several services under the umbrella of the same brand, such as in the cases of Radio Vaticana, which operates 15 different feeds worldwide, or TRT Voice of Turkey and Radio Poland, each of which operates three services with different content and in different languages.

These two examples highlight the fact that international radio is not easy to define and that researchers must seriously consider this issue when defining the scope of their projects. Certainly, our understanding of international services should not be taken for granted. In some cases, these differences also need to be taken into account when analyzing the results. For example, some broadcasters included in the project far from adhere to the traditional image of an international service, including different language desks, an editor-in-chief for each language and a dedicated engineering team. While this might

be true for some major international broadcasters, others are merely a one-man operation, or even less in the case of services that only relay programs from the national services to diaspora communities. And researchers need to accommodate all those different realities into their research project.

## METHODOLOGY OPTIONS

Methodologically, the decision was taken to triangulate various sources. These included media monitoring, an ad-hoc survey and desk research. The starting point for collecting data was the list of services maintained by the Media Intelligence Service. This is an on-going monitoring exercise that identifies the various linear services offered at any one time by EBU Members and related information, including the technical networks used for distribution. Members validate it once a year, confirming or amending the data. This is a basic tool for the EBU to understand the activities of its Members, and is later used to feed various research projects and requests from EBU Members and internal departments.

An ad-hoc *survey* was designed to collect data not available in the list of services, as detailed in the next section. This survey was sent out to the respondents and data collected from March to May 2016.

The two previous collection methods were complemented by *desk research*, to cross-check the data and information gathered with third-party sources that track market developments, from press trade to academic journals and other specialized publications. The information provided in the questionnaires was systematically cross-checked with the broadcasters' own websites. Specialized websites were also used, such as Lyngsat for satellite transmissions. The 2016 edition of the *World Radio TV Handbook* (WRTH, 2016) was used to cross-check data about distribution networks.

## SURVEY DESIGN

The questionnaire was designed in Microsoft Excel and circulated among the previously identified contacts. Although this software tends to involve additional data processing time compared with online solutions, our experience is also that it increases both the response rate and data accuracy and reliability, probably thanks to respondents' familiarity with the format. It also dramatically reduces the number of technical problems faced by the respondents, which ultimately results in a higher response rate.

The questionnaire comprised three sections: a description of services (e.g. genres, targets, languages), information about distribution networks, and the

distribution strategy. As more than one contact might be providing the responses, the questions for each section were included in different tabs, making internal circulation of the survey easier.

The two first sections were mainly quantitative, while the section on strategy was predominantly qualitative. All the sections included 5-year forecast questions, usually with 5-point Likert scales. This helped the researchers to quantify this forecast and make it more comparable. The qualitative insights then complemented and added granularity to the figures.

## STRATEGIES TO INCREASE RESPONSE RATE

For radio, the survey achieved a response rate of 72.7% (24 out of 33 organizations), nearly 10 points ahead of TV, which had a response rate of 63.3%. For radio, the contact rate was even higher, at 90.9%, as six additional organizations replied but for various reasons did not complete the questionnaire.

As always in survey research, one of the main challenges was to maximize the response rate. To achieve a high response rate, it is essential to identify the most appropriate respondents. As previously mentioned, for this survey we took special care to find the people directly involved in distributing international services. Not only does this guarantee that the person who receives the questionnaire is the one involved in the issues we are dealing with but also enables us to presume that that person will be the most interested in answering the questionnaire, as (s)he can have a better sense of the value that can be received in return and will have more opportunities to make use of the project's findings.

At this stage, communicating with the respondents about the value they can expect in return takes center stage. This value was distilled into four key elements:

- A specific study providing an international benchmark in a field where little research is available.
- Fact-based arguments to make the case for public service media, in some cases even showing how international services contribute to fulfilling their organization's remit.
- Fact-based arguments to make the case for international radio, a worthwhile resource in the light of some recent closures (for example, Radio Vlaanderen International and RAI Radio Internazionale in 2011) or dramatic downsizing (Radio Canada International in 2012 or Radio Netherlands Worldwide in 2012).
- A unique opportunity to highlight the position of international services within public service media organizations and within the EBU community. Unlike the two previous elements, this one is useful in house. In this sense,

we partnered with the International Broadcasting Assembly, the group that brings together the EBU's international broadcasters. This is the EBU's newest Assembly, set up in June 2015 from the former Bruges Group, which comprised mostly EBU Members plus additional participants such as RT. This did not involve a major change but allowed international broadcasters to benefit from the permanent structure of the EBU and its corporate services, such as this research. At research level, this is undoubtedly a way to increase their profile and obtain arguments to showcase their value in a context where opposition increasingly comes from the lack of metrics for measuring their performance.

Besides highlighting the value of the research, the communication was carefully planned. The questionnaires were sent out on Monday 29 February with a deadline on Friday 18 March, i.e. three working weeks. Reminders were sent every two weeks if no response had been received. If contact had been established, the waiting time for a follow-up e-mail was extended to 3 to 4 weeks depending on the case. In the e-mail to respondents, a final hook was added: mentioning the EBU's first International Broadcasting Assembly, to be held on 19 and 20 May 2016, where the results were scheduled to be presented. As many of the respondents were their corporations' delegates at that Assembly, this was a way to showcase the value of their answers and an immediate return on the effort of completing the questionnaire. The reference to the Assembly was maintained in the reminders.

## SOME FINAL LESSONS

The challenges raised in this chapter are illustrative of the difficulties in researching international radio using surveys. The first challenge arose before any methodological design. There was a clash between a purely scientific categorization of international broadcasters based on theoretical models and a practical categorization based on actual practice that would enable the recipients of the survey to recognize themselves in the study. In this sense, a compromise was needed, a typical constraint of market-oriented research. This compromise tried to combine the maximum level of rigor with the pragmatism of applied research, driven by the aim of generating immediate and useful research insights.

The second challenge was usual in survey design, notably cross-cultural issues, such as different interpretations of the questions or a different level of acquiescence depending on the country. Once again, pre-testing the survey became the better strategy to fine-tune the final questionnaire. A third major challenge was the goal to have a high response rate. The higher-than-expect-

ed response rate shows that our strategy was quite successful. Detecting the appropriate respondents and clarifying the value they will receive thanks to their cooperation seems to work; however, this strategy obviously depends on the perception of the actual value that the survey will deliver, which may vary according to the needs of the organization and their own available research, among other things.

Despite the challenges, the results of the survey demonstrate the usefulness of the method chosen. It is a unique tool to gain insights from the inside. Otherwise, these data and information are difficult to obtain as they do not tend to be publicly available because they are often considered sensitive.

The part of the survey in which the quantity and the quality of the results was less high was the forecast, to the extent that in some cases we decided not to use the results. There may be two reasons for this: first, a possible clash between the personal opinion of the respondents as practitioners, which was what they were actually asked, and the position of their organization; second, a clear lack of previous research insights, both in-house and external, that makes it difficult for them to make informed prognoses, which might be why they refused to answer those questions. In this sense, contacts with peers in other public organizations seem to be the main sources of information for many of our respondents.

As an initial piece of research within the EBU's international radio community, this survey enabled the research team to gain an understanding of the current trends in the market but also of how to handle research in this specific field and its related community. Hopefully, this first exercise will help us to improve the procedures and streamline the processes in future research projects.

## REFERENCES

- WRTH (2016): *World Radio TV Handbook. The Directory of Global Broadcasting*, Oxford: WRTH Publications.