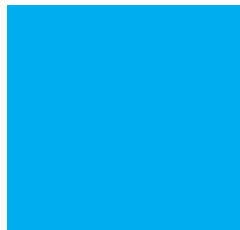


# Measuring the Audience: Why It Matters to Independent News Media and How It Can Contribute to Media Development

BY MICHELLE J. FOSTER

October 2014





## ABOUT CIMA

The **Center for International Media Assistance (CIMA)**, at the National Endowment for Democracy, works to strengthen the support, raise the visibility, and improve the effectiveness of independent media development throughout the world. The center provides information, builds networks, conducts research, and highlights the indispensable role independent media play in the creation and development of sustainable democracies. An important aspect of CIMA's work is to research ways to attract additional U.S. private sector interest in and support for international media development.

CIMA convenes working groups, discussions, and panels on a variety of topics in the field of media development and assistance. The center also issues reports and recommendations based on working group discussions and other investigations. These reports aim to provide policymakers, as well as donors and practitioners, with ideas for bolstering the effectiveness of media assistance.

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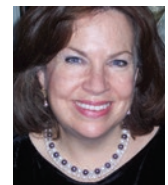
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## METHODOLOGY AND ACKNOWLEDGEMENTS

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## Introduction

**A**udience measurements, with their resulting influence on content and commercialization, are essential components of financially viable media and media markets. They help create marketplaces where diverse media can compete in viable niches; offer audience insights and thus increase the likelihood that media organizations will produce relevant, targeted content; and play an essential role in reducing corruption by exposing it.

From a media development perspective, audience measurements reveal whether people are engaging with the content that news media produce. They can also be used to gauge impact, as well as establish data sets across markets and regions that help media development practitioners make comparisons and establish best practices.

And as the environment shifts away from research that surveys how groups of people have used media at some point in the past, to actually measuring known users' consumption in real time and automatically serving targeted ads to individuals, it becomes essential for media organizations to have core strengths in understanding their audiences.

Yet despite these rich contributions, audience measurements are seldom included in media development initiatives. The experts who so generously shared their thoughts for this report found this gap to be both frustrating and concerning. While no one suggested that audience research alone provides a silver bullet, all agreed that it is an essential element for creating functioning media markets.

“Market research is an important piece that helps keep the other pieces in place,” notes Leon Morse of IREX. “You can achieve certain things with quality journalism and a good legal environment. But if you don't have good audience measurement and good market research, it's easier for the other pieces to slip backwards.”<sup>1</sup>

This paper highlights how the convergence of technology, media fragmentation, global advertising, entrepreneurial journalism, and programmatic advertising buying are reshaping audience measurements—and looks at the urgent implications for local news providers.



*“Market research is an important piece that helps keep the other pieces in place. You can achieve certain things with quality journalism and a good legal environment. But if you don't have good audience measurement and good market research, it's easier for the other pieces to slip backwards.”*

— LEON MORSE, IREX

Within that context, it examines how audience measurements are currently used, and could be used, among news organizations for business and audience development and for media development initiatives as well. Finally, it will point toward some of the larger questions and strategic issues the media development community faces in trying to build sustainable independent news media: What role does—or should—audience research play in media development? How does it contribute to developing media markets, providing relevant content to audiences, and evaluating the effectiveness of media development initiatives? How is it changing in an online world?

Gavin Anderson of the Springfield Center, who has years of experience in the field, notes. “This is part of a larger discussion that we need to come to grips with. It’s not just the program or content of the media that needs to improve; it’s the whole foundation of the media that needs to improve... The biggest message I have for donors is: If you’re not going to recognize that we exist in a world that needs media markets, and we’re not going to improve that side of it, we’re just throwing money away.”<sup>2</sup>



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# The Exposure Model of Audience Research

One of the primary purposes of audience measurement is to create media markets where advertising placements can be purchased based on data rather than persuasion or coercion.

For decades, media have been evaluated by advertisers based on the number of people who could potentially be exposed to their message. This "exposure model" is the basis of ratings systems, such as the Nielsen ratings, and is also applied to print audiences using intermittent audience surveys. Advertising placement schedules have long been designed to generate the greatest possible exposure in a cost-efficient manner through the combination of a medium's reach (the percentage of a target audience potentially exposed to the message) and the frequency with which they are exposed to the message.

While other factors do come into play, these measurements form the basis of advertising pricing. They are at the very heart of open, competitive, diverse media markets.

While there are substantial statistical methodologies underlying those techniques, they also have significant flaws. For example, media users remain unknown, and the impact of reaching them is only measured indirectly. They are costly to generate and analyze.

They are a look backward in time, rather than reporting in real time. They measure specific geographic areas that are defined by the primary reach of the medium's distribution system, whether it be the range of its broadcast signal or its print circulation distribution area, but they miss audiences outside that area. In areas with substantial rural/urban splits, which typify many developing countries, this is a serious gap.

Television advertising measurement systems, which often use peplemeters, can be corrupted. In China, advertisers complain that viewer samples are tainted by bribes and gifts. And on a much larger scale, New Delhi Television Limited filed a multi-billion dollar lawsuit against Nielsen Company and its partner in India, Kantar Media Research, alleging that they and company executives received bribes for rampant manipulation of television ratings and that similar practices occurred in other countries as well.<sup>3</sup>



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Technology can also undermine the data if not used with care. For example, peplemeters are expensive to deploy and need to be in homes with consistent electricity. In one example in Indonesia, Anderson observed that a TV station manager conceded that they didn't do any rural programming because the entire market was based on only 700 meters, and they were only in the largest cities. Why invest in rural programming when it would have either no or negative impact on ratings?<sup>4</sup>

Moreover, these are systems that favor large players over small ones. The cost to produce and participate in these systems is huge. A single market study to measure a newspaper audience can run into six figures; there are ongoing costs to participate in audit systems; and participation in ratings or syndicated data programs is a substantial cost of doing business. From a market development perspective, a failure of the system is that the organizations that subscribe to the data are the only ones who have detailed access to it.

And if governments are involved in the research and ratings processes, it can corrupt the entire system. "Putting government into that mix is quite potent," notes Anderson. "A good government might wish transparency. But a bad government, or a corrupt government, will not. So if they are in charge of the audience data, it's a problem."<sup>5</sup>

Perhaps more importantly, from a marketing perspective, is that these data merely reflect how many people might be *potentially* exposed to a message, but fail to show whether they are *actually* exposed to it; if that exposure yielded any engagement with the brand; or whether the person who viewed it did anything as a result (such as purchase a product). In the past, those insights were cost-prohibitive to obtain on any large-scale basis.

And yet, although flawed, these data have helped create and support vibrant media markets in many places around the globe. They have empowered the strategic growth of brands and helped build sustainable media organizations.

But this model is changing, and it is changing rapidly. While these types of audience research will continue to play important roles, there is a perfect storm occurring around the exposure model of audience measurement that has significant implications for independent news media in transitional countries. A metrics-based culture is emerging in the advertising community.

As Earl Wilkinson, CEO of the International News Media Association, said, "this is only going in one direction: transparent metrics."<sup>6</sup>



# Audience Data Move Directly into the Ad Buying Process

Media has become so fragmented that making rational, research-driven ad placements is increasingly impossible, particularly in less-developed countries, where exposure research might not exist or could be suspect when it does.

Fueled by the exponential growth of Internet and mobile platforms, even in less-developed countries, global advertisers—and the powerful agencies that represent them—are making wholesale shifts in their media placement strategies.

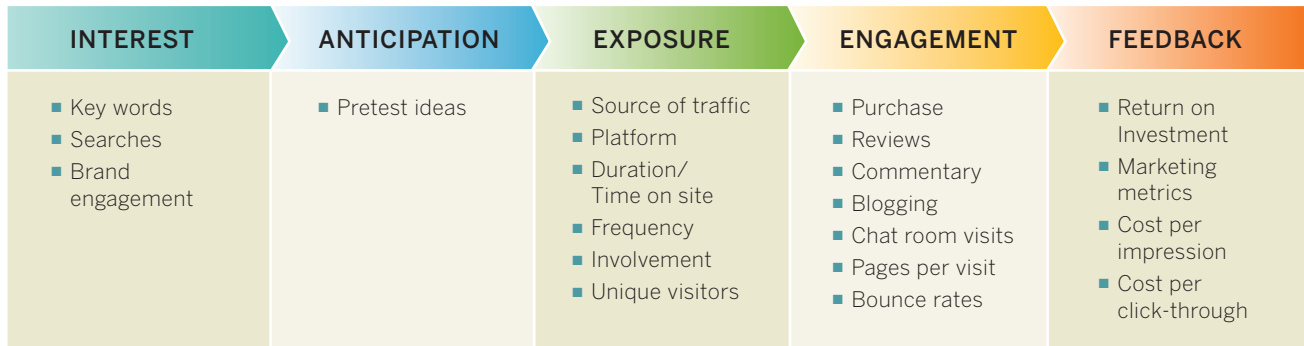
The environment is shifting from the exposure model to the “engagement model,” which is based on real-time audience measurements. Marketers can examine all aspects of audiences’ engagement with their messaging in real time, and make immediate changes to increase the effectiveness of their advertising investments. In fact, advertising investments have already moved away from traditional media, especially print, and that trend will accelerate. It is fueled by the rapid rise of programmatic ad buying, which inserts audience data directly into the ad purchasing process.

## Differences in How Media is Measured

	 <b>EXPOSURE MODEL</b>	 <b>ENGAGEMENT MODEL</b>
<b>GEOGRAPHY</b>	Media-defined geography	User-defined geography
<b>WHEN MEASURED</b>	Past	Present
<b>LEVEL OF REPORTING</b>	Demographic or other segments	User groups based on known behaviors
<b>MEDIA MARKETS</b>	Cohesive	Fragmented
<b>FREQUENCY</b>	Periodic	On-going and immediate
<b>BASE</b>	Statistical sampling	Measurement of users
<b>MEDIA IMPACTS</b>	Often inferred, measurement difficult	Measured

## Audience Measurement: Engagement Model

THE ENGAGEMENT MODEL CAPTURES INFORMATION AT ALL STAGES OF THE MARKETING PROCESS



Programmatic ad buying is the real-time, automated placement of advertising into online environments based on serving the right ad to the right person, at the right time, in a relevant context. It automates formerly manual processes such as ad insertion orders, making ad placements far more efficient. And it enables advertisers to cope with a media market that is spectacularly fragmented and where the line between audiences and content-producers is increasingly blurred.

This is well-established in the core markets of North America, the larger European economies, and parts of Asia. When “smart television” sets (essentially computer terminals) start hitting markets, enabling a full view into television viewing habits, the full impact of this shift will be felt, as television remains the largest channel for advertising distribution.

Although programmatic advertising is not yet prevalent in developing countries, it is increasingly becoming the global ad environment. It will arrive.

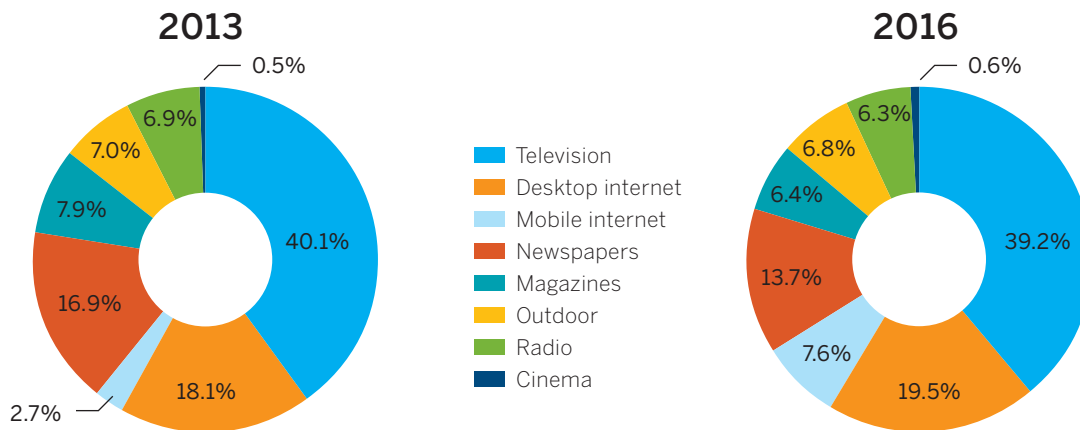
Jason Lambert, director of Diversity Ad, an organization that helps independent news media gain advertising revenue on their sites, puts this shift into context. “From an economics perspective, this makes perfect sense. It moves us towards a more perfect advertising market with absolute price elasticity. Programmatic ad buying enables making a perfect match between supply and demand and pricing. Media need to be organized and prepared for participating in this environment or risk being isolated from revenue sources.”

Advertisers agree. Sir Martin Sorrell, CEO of WPP, the world’s largest advertising, marketing, public relations, and research corporation, stated bluntly at a recent World Economic Forum that his company over invests in print and will be shifting significant funds into the online environment around the world.



## Substantial shifts in ad spending decisions

SHARE OF GLOBAL ADSPEND BY MEDIUM (%)



From 2013 to 2016, absolute advertising spending worldwide is expected to increase three-fold, with growth in both developed (U.S., Germany, UK) and rising (China, Argentina, Brazil, Indonesia) markets. Fueled by changes in audience metrics and internet technologies, experts predict a massive shift in emphasis in where advertising funds are spent. Mobile is expected to be the key contributor to ad spend growth during that period, accounting for 34 percent of new ad expenditures. While the changes in percentages are solid, the shifts in absolute spending they reflect are massive.

SOURCE: ZenithOptimedia <http://www.zenithoptimedia.com/wp-content/uploads/2014/04/Adspend-forecasts-April-2014-executive-summary.pdf>

In a later interview, he noted: "Our business will become more scientific and data-driven. It's certainly getting easier to define the target market, to know who's watching or listening or responding to whatever messages you're sending, and to measure the effectiveness. We invested in a company with 2,700 software engineers in Latin America. Ten years ago, if you had predicted we'd do that, I'd have said you needed your head examined. Research, plus direct marketing and digital—well over half of our business is scientific or science-related. The rest is what you might call pure art and big ideas."

Thus, embedding audience engagement measurements directly into the ad-buying process is shifting the landscape from one that favors a wide variety of local and regional ad markets, to a global marketplace that is both infinitely large and precisely targeted. It will not just widen the gap between data haves and have-nots. It will harden it.



*“Only by winning over, serving, and deeply knowing their customers, will publishers find the business models to sustain themselves.”*

— KEN DOCTOR

It also changes the paradigm of the iconoclastic, visionary, charismatic editor calling all the shots on content and perspective. In his book *Audience Evolution*, which explores this shifting landscape in detail, Philip Napoli observes: “The days of movie studio executives, or television, or radio station programmers, or magazine or newspaper editors, making decisions based on their own subjective assessments of what will succeed and what will fail have largely been replaced by a decision-making environment driven by a wide range of analyses and audience tastes, preferences, and historical behavioral patterns.”

The implications are profound. In the much-discussed *New York Times* report about innovation, a major section takes on the necessity of not only creating content but also ensuring that audiences engage with it in deep and personal ways. The report acknowledges that audience development must be a core competency of the organization.

Strong story-telling is important, but that hasn’t solved the company’s revenue problems. Management believes that stronger marketing and audience development practices will drive its revenue increases. Central to that is using technologies that combine audience knowledge and entrepreneurial thinking. The techniques discussed in that report—personalization, collections, commenting, and others—all seek to create deeper engagement with audiences.

That engagement, while building audiences, will also strengthen the ability to generate revenue through content. As online advertising matures, there are premium ad positions, just as there are in legacy media. And the stronger the known attributes of the audiences for a particular piece of content or site, the more likely it is that it will command price premiums rather than being commoditized.

Similarly, *The Guardian* has shared its “Known” strategy which is based on a registration system that deepens the company’s knowledge of individual audience members. According to media analyst Ken Doctor, in his column for the Nieman Lab, it “isn’t a blindingly new strategy—but in a single syllable, it brings a bracing clarity to what news publishers must do to compete in a world of data, analytics, and programmatic ad selling... Only by winning over, serving, and deeply knowing their customers, will publishers find the business models to sustain themselves.”

## Business Development

### CREATING MEDIA MARKETS

Audience research, as noted above, is a central element of competitive, diverse, and transparent media markets. It provides the platform for businesses to make neutral decisions about advertising placement that are based on reaching specific target audiences. And from the media's perspective, solid audience research can help identify a wide range of niche opportunities.

It also helps make media competition fairer. Having access to transparent measurements "can be one of the most effective ways of leveling the playing field without changing the overall legal environment," notes Morse. "Oftentimes, there are many different legal issues at play that are much harder to change. This can be done, in most cases, without ruffling the feathers of government, without getting kicked out, without forcing legislative change, and then enforcing that legislation once it's changed. Research is something that media, in most cases, have it within their own power to change."

Yet successful media markets do not emerge organically. They require the supporting infrastructures that typify mature media markets, including access to Web analytics, audit verifications of print publications' circulations, and audience research that establishes comparability among media channels. To get to that level requires the commitment of three important groups of stakeholders: advertisers, media leaders, and independent third-party research organizations (such as the Alliance for Audited Media or Nielsen).



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*“In Eastern Europe in the ‘90s, when there were no media markets, was when media companies agreed on a system to measure audiences. This was a big achievement. It allowed the markets to function properly, which is very important. The biggest problem there was not to introduce a system, and it was not even an issue of money... but the biggest issue was one of trust. Media companies couldn’t really understand how they could get together into a system as competitors, and then act in the system of market players that would create a place for them to report audiences and attract advertisers.... Media companies that were not part of the system finally recognized that they would not receive any advertising funds because they were not recognized by the advertisers.”*

— MARIUS DRAGOMIR,  
Senior Manager/Publications Editor, Open Society Foundations

Of those groups, advertisers have the greatest stake in the accuracy and timeliness of the data. Publishers or broadcasters sometimes wish to hide their numbers since they are linked to the pricing levels they can set. If their distribution systems, whether manual or technological, are constrained, their audience levels may indeed be low. Without professional selling skills or participation in ad networks, they can lose out. Governments can also use that data to promote advertising in state- or crony-held media over independent media outlets.

But audience measurement can also have the benefit of protecting pricing integrity. “In markets where there are no measurement systems, the only way to get ads is to be cheap,” said Ross Settles, senior advisor for digital media at the Media Development Investment Fund (MDIF), citing a deep lack of professional skills among those who sell advertising.

When audience data is present, it also establishes a way for advertisers to value media on a cost-per-thousand (cpm) basis. It links the price of an ad to the value it delivers: How much money does it cost to reach a thousand people in a target audience?

Thus audience data also helps counter corruption in media markets because, in the presence of cpm comparisons, anomalies jump out.

Without that data, media companies can face kick-back advertising, in which advertising buyers can go to a news organization and offer to place an ad buy with them for 10 percent or more of the total. Or

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*“The systems that force people to integrate these things, and change the structures of their organizations to produce or pay attention to good research, don’t exist in a lot of countries. On the advertising side, there’s a lot of corruption, especially when there’s no third-party data about audiences. There ends up being a lot of corruption, a lot of kick-backs...*

*For the vast majority of our countries, research isn’t used, or used in only a cursory way, so it never achieves full commercial effect. People aren’t selling themselves as well as they could to potential ad buyers. On the other hand, how much weight would those buyers put into the metrics if they aren’t measured by a professional, third-party entity? And so, on both sides, there can be limited incentives to engage in this process. [The absence of data] creates huge problems for our clients to grow and advance as businesses.”*

— EVAN TACHOVSKY,  
Impact Officer, Media Development Investment Fund (MDIF)

funds can be channeled to “friendly” media organizations or back to government officials through crony-held media. If there is no way to know how much an ad is worth, it can be worth whatever the parties agree on, even if that is breathtakingly out of scale with market prices.

Governments often control huge advertising budgets; transparent audience metrics help prevent them from being used to reward or to punish news media. By having international ad agencies and respected research companies providing third-party measurements, it ensures a greater level of credibility to all ad placements.

Yet that said, it is concerning to see international organizations forming partnerships with research and ratings organizations that are close to governments, sometimes as a prerequisite to market access.

In mature media markets, audience measurements can be gathered in a number of ways, both qualitative and quantitative. There is a wide variety of overlapping measures: surveys, databases overlaid with demographics, circulation audit data, focus groups, syndicated research services—all offering ways to examine how audiences interact with media.

However, in transitional markets, too often there is either no data, insufficient data, data that is not shared transparently, or even inaccurate data.

There are a number of reasons for this.

In countries emerging from conflict or from repression, NGOs or foreign government agencies often commission audience research before commercial services enter the market, but the data is top level and doesn’t typically provide opportunities for individual media houses to drill down into the data.

Once markets are commercialized, third-party data providers, syndicated services, and professional research companies are quick to arrive; for example, WPP took a strong first-mover strategy and arrived in Burma soon after Western business could legally conduct business.

But quality research is costly, and access by independent media can be limited. Proprietary market studies and focus groups can be prohibitively expensive. Syndicated data providers, which charge subscription fees, share data only with subscribing media partners and ad agencies. That data is not universally accessible and thus cannot function as a market leveler.

The quality of data provided by indigenous research organizations is inconsistent. Do-it-yourself methodologies have serious shortcomings and often lead to inaccurate data and flawed conclusions, which can be







misleading or self-serving. Very few organizations that seek support from the media development community have the internal resources to develop or analyze statistically valid data. Typically, this home-grown research plays no role in helping media houses participate in advertising markets.

Two other factors have tended to limit media organizations' use of audience measurements. One has been their fear that by participating, they enter into a "horse race," where the company with the largest audience is the winner and everyone else loses. The evidence suggests the contrary—that by having deep reach of a niche audience a media organization can build a substantial business model and that most markets offer niches that can be exploited.

But if the local mindset is that everyone wants to be number one, no one shares real numbers. "Because they are competing business people, they might want to see better results and just dismiss the findings," noted Morse. They also just deny the data outright, and lose the opportunity to look more closely at why audiences might be staying away and what they might need to change. Ultimately that can be self-defeating: "It doesn't really matter if the news media don't believe their audience numbers if the advertisers do," Anderson says.

### **USING RESEARCH TO "VALUE" THE MEDIA BUSINESS TO POTENTIAL FUNDERS AND INVESTORS**

Is there the potential for independent news media houses to be acquired by larger entities? Or to be bought and sold as businesses?

Realistically, perhaps not in fledgling markets, but in those where media houses have carved out viable roles and audiences, it's a possibility. For MDIF, finding other businesses or investors that might invest in their media partners could be positive.

"Prospects for growth, the possibility for acquisition—it would be really good for some of them to be in a position that was positive enough to be considered for acquisition by another company," said Evan Tachovsky MDIF impact officer. Yet when regional media companies enter, they want to know what the market is; who the big advertising companies are; will their content reach consumers. Typically, investors want information, and often it doesn't exist, or exist reliably. Third-party audience data demonstrating the business's ability to reach a specific market would help a potential investor understand the ultimate value of the organization.

## Audience Development

Gavin Anderson shared that in his experiences, “if you do great content, you can make good money at this. Great content attracts large audiences. Absolutely fundamental to that is audience research.”

Few donor-supported news organizations have consistent access to formal audience research. However, some exceptions exist. DVB, the Democratic Voice of Burma, recently conducted focus groups that uncovered powerful insights about their in-country audience. On a larger scale, Warsaw-based European Radio Belarus (ERB) routinely measures its audience, product, and brand acceptance. ERB has a clearly defined audience target and exerts management discipline in delivering innovative, compelling content that meets its needs. Although, as a media organization operating in exile, it cannot participate in Belarusian market ratings systems, ERB has developed a compelling brand and large audience.

“At the onset of the project,” says Andrzej Bielecki, editor-in-chief, “we analyzed the political situation in Belarus and its media environment.” That analysis revealed a significant gap in independent media reaching young adults, aged 15–35. Focus groups and survey research were initially used to develop and test content strategies and continue to help refine ERB’s efforts.

One of the gold standards of using audience research to support public service-oriented media is BBC Media Action’s approach. Pam Vallance, senior research manager in its Research and Learning Group, states that “audience is at the heart of what we do.” BBC Media Action conducts comprehensive, continuing research over the life of its projects to ensure it gets the entire “mix” right: the audience, the message, the way it’s delivered.

With strong financial support from a variety of funders, BBC Media Action has three “pillars” of its research efforts.

“The first pillar is ‘research taking form,’” Vallance says. “That would incorporate everything from doing a formative, qualitative study of our audiences, to really understand their values, beliefs, and attitudes. And it refers to identifying the relevant topics and content programs could cover in relation to an identified need. Really understanding... how we could make that program as appealing and relevant to people’s lives as possible.”

That might also include pretesting their outlets and distribution methods, as well as their programming, to ensure that the content both reaches the target audience and engages it. Throughout the life cycle of a project, BBC Media Action conducts audience feedback

### **BBC Media Action: “Audience is at the heart of what we do.”**

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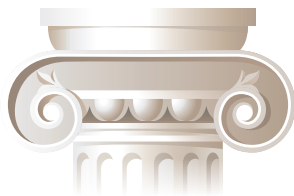
research. “What we really want to know is how people in their real lives are experiencing the content and the program. What, if anything, are they getting out of it? During the project’s life cycle, we’ll go out to our audience—rural, urban, men, women—and try to get a sense of how they perceive the program, what they get from it, and check what is appealing. And if they aren’t watching or listening to it, what are the reasons?”

The second pillar is “research to evaluate.” Through it, the organization seeks to understand what, if any, impact its programs are having on audiences. In a communications for development environment, donors expect to have impact on audiences. Using mixed methods (including quantitative surveys at the start, midway through, and at the conclusion of projects), BBC Media Action measures exposed and unexposed audiences to evaluate the intended—and unintended—impacts of their interventions. Further qualitative research explores the “hows” and “whys” of how that impact was created.

The third pillar is “research for evidence,” and it is designed to learn, at a higher level, from the data they have collected about the role media play, and don’t play, in development.

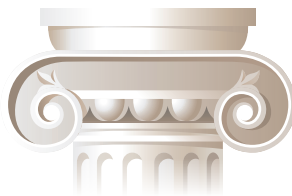
## BBC Media Action: Three Pillars of Media Research

### PILLAR ONE Research Taking Form



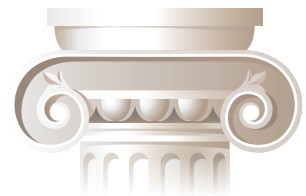
- Setting up
- Audience feedback research
- Listening groups

### PILLAR TWO Research to Evaluate



- Baselines, midlines, endline surveys
- Intended impact met?
- Unintended impacts?
- Differences in results: exposed vs. unexposed populations
- Quantitative: reach and impact
- Qualitative: the how and why of creating impact
- Content analysis

### PILLAR THREE Research for Evidence



- Learn from the data
- Evidence of contribution
- Evidence of attribution

Why don't more organizations use these tested, effective, formal research methods? Vallance, too, cites the cost factor as an obstacle. "Looking comparatively across markets, or even looking within one country and obtaining valid, representative, cross-sectional audience data, is hugely expensive."

There are low-cost techniques that media organizations could be using more effectively to gain audience insights, but those are more qualitative than quantitative. Media organizations could be trained to do much more effective in-house focus or listening group research. Audience panels could provide useful insights.

And they could certainly glean more from their website user analytics.

A number of the experts interviewed for this report were critical of their media partners' use, or lack of use, of Google Analytics and other audience insight tools. "So far," observed Josh Machleder, vice president at Internews, "people often are not using these types of data integrally into plans that achieve their key indicators."

There will soon be even deeper insights to be gleaned from these data. Google has now launched its "universal analytics platform," which claims to unify the viewing of content by individual users across many devices, including computers, phones, and tablets.

"Universal analytics, when implemented on a site, can allow a company to identify the behavior of an individual much more closely," notes Lambert. "This enriched behavioral data will be increasingly valuable to—and relied on—by companies placing ad buys. Yet many media houses that primarily operate online [as in the case of exiled media and certain start-ups] typically do not have access to expanded data; instead the core analytic data are often the only form of research they have available or choose to explore. Often, independent news media are bootstrapped organizations that operate without external sources of funding. As a result, they seldom have marketing staffers and have limited capacity to reflect on data, do further data mining, or implement recommendations."

## Informing and Evaluating Media Development Efforts

When funders underwrite projects that provide content to audiences, they should reasonably expect to see that it is connecting with people and getting results. In a business environment, that would typically mean that a request for proposals would include baseline metrics of

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— JASON LAMBERT,  
director of Diversity Ad

audience use of a media channel; its current content consumption; how accessing that data changes its behavior; and how it changes over the course of the intervention.

Again, larger organizations, such as BBC Media Action, do this well. Its “third pillar”—media for evidence—seeks to use statistical techniques to better understand the level of contribution of media to development. (A number of these are shared on its website, <http://www.bbc.co.uk/mediaaction/publicationsandpress/research.html>)

With strong support from the UK’s Department for International Development, BBC Media Action has a global grant spanning 14 countries delivering programming about health, governance, and resilience following disasters, through drama, political debate, and magazine shows. A strand of that grant is to collect evidence of the role of communications for development.

It is looking into evidence of media’s contribution to achieving progress towards goals, and evidence of *attribution* for that progress. While proving either is challenging, clearly media’s contribution to change is easier to prove than is attributing the causes of change. “It takes it to a whole different level to understand to what specifically you can attribute change” Vallance says. “Is there something about the drama format that is unique? Or debates, or magazines?” She cites donors such as the Bill and Melinda Gates Foundation as “being keen on evidence. They really want their projects to be evidence-based, and they’ve been very clear about the level of evidence they require. We’ve been quite lucky to have the opportunity to pursue some of those areas.”

However, these types of formal measurements are not consistently required in media development initiatives, nor are they typically well-funded. Even when they are, the people writing proposals might not be familiar with how business models function and request data that is out of synch with operations, or they underestimate the level of funding required to obtain the data they request. A bigger issue is how smaller organizations, lacking trained professional researchers, can provide evidence of impact.

Jane McElhone, senior project manager at OSF, observes, “Just because ‘audience research’ is being said a lot, or written a lot, doesn’t necessarily mean that we are collectively dealing with it in the most realistic and intelligent way.”

This view was validated by other interviewees, who concurred that among many media partners, there exists little in-house capacity to use research or metrics, understand their implications, or incorporate



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findings into projects. While a number of partners are trend-setters, others operate under the most basic of conditions, face significant risks, and subsist on threadbare budgets.

They are also often short-staffed, with most workers engaged directly in the journalism. Tension exists between the types of impact measurement donors want and the level of funding and internal resources needed to provide them.

McElhone suggested that rather than attempting to build sophisticated research capacity at ground level, external resources could be provided. Mentors, consultants, and research services could be employed as necessary.

Fojo Media Institute has done this in several programs. It has introduced audience research, supported by consultants, to four radio stations in Vietnam that are moving to become more public service oriented. During the three-year process, changes are being made in content, style, and reporting. Fojo organized focus groups in Africa that have helped measure a news organization's effectiveness in reaching rural audiences. And it provided business consultants to work, over a three-year period, with individual exiled media houses to help move them towards greater financial stability. A key component was helping partners understand their core website analytics to help maximize their online audiences and then working with them on ways to generate advertising revenue.

Fojo has also “baked” audience measurement and financial stability into its design for a long-term program in Somalia. Johan Romare, its international director, notes that this is unusual for a country currently in conflict. “We believe that since this needs to be there ten years down the road, it needs to be initiated now. It needs to be part of the discussions with the media community around three core areas: independence, freedom, and professionalism. Audience research is key to understanding your audiences and your markets. In my world, these two go together.”

Going forward, another important area of impact of audience measurement on media development may be as a source of benchmarking and providing a basis for comparability. Do certain organizations outperform others in certain circumstances? How does an individual website compare in audience reach and other metrics in comparison to a peer group? This is an emerging area where audience data can be used to help partners perform at a higher level and demand greater accountability.



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## Limits to Audience Research as a Tool of Media Development

Political, geographic, economic, cultural, linguistic, technological, and military factors all affect what types of research can be conducted.

The bottom line: Conducting audience research in developing countries is difficult. It can be influenced by many factors, each of which needs to be taken into consideration when designing a measurement system. Some have been alluded to earlier—access to Internet, phone systems, and consistent electricity; access to rural as well as urban areas.

Others include difficulties researching in the local vernacular; the market's level of sophistication with research and people's willingness to be interviewed; participants' sense of personal security in responding; the sensitivity of the issue being discussed.

Access can be limited by village headsmen, government representatives, or even family pressures. For example, in Burma, young adults were unwilling to agree to respond to a survey without consulting their parents.

And in war zones collecting data is nearly impossible.

Literacy levels are particularly important. Observed Vallance: "A lot of the challenges we have in both Asia and Africa include the literacy level of our audiences, particularly in rural locations. In Afghanistan, for instance, we realized we couldn't use projective or mapping techniques because respondents wouldn't be able to hold a pen and map it out themselves. It would be actually more intimidating for them to do so. Dealing with low literacy levels influences how you develop questions, whether qualitative or quantitative. It is a really big challenge for us for design questions that can be easily understood and we can get quality responses."

New research technologies using mobile and social media platforms, while offering the hope of quick, inexpensive qualitative data collection, need to be employed knowledgeably. In areas with high access rates across all demographic groups, its use is more reliable than in other places.

But in areas where that is not the norm, these techniques could yield seriously misleading results. For example, in a mobile household with only one phone, who uses it? Typically, it might be the male householder, making phone survey results unrepresentative. In countries with a technology split between urban and rural areas, neither mobile nor Internet research would yield projectable data.



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# Conclusions and Recommendations

Audience research in its many forms is the glue that helps create and hold together media markets and allows them to be commercialized. It empowers media organizations to understand their audiences, and their needs, and develop compelling content that addresses them.

But that audience research is moving from a descriptive measurement of the groups that have been exposed to media in the past, to audience data that is the backbone of the real-time online advertising environment. Measures of audience engagement are the engines driving programmatic advertising.

This has powerful attraction for businesses, which can implement and measure many disparate marketing processes quickly, cost-effectively, and efficiently. Programmatic advertising enables them to automatically identify and target potential customers, deliver ads to them, monitor their responses and subsequent influence on purchase decisions, and engage with them directly in brand-building activities. Thus, across the world, advertising dollars are moving quickly away from print and other legacy media. The world's largest ad agencies, in control of enormous amounts of advertising investments, are taking the lead in this shift.

Simultaneously, growth spending on mobile and on the Internet is expanding the overall global market for ad spending.

Independent news media, which often operate on the fringes of media markets, risk being left out completely if they are not participating whole-heartedly, and with solid knowledge and support, in these emerging arenas. They must embrace audience research as the foundation of both their business development—and audience development—practices.

From a market development perspective, best practices around audience research deserve greater focus and resourcing in order to support partner news organizations.

At the highest level, the interviewees who so generously shared their thoughts for this report called for a thorough review of how we, as a community, strengthen the ability of independent news media to succeed.

If there is a consensus that the shift of audiences and advertising to digital and mobile platforms has the potential to disrupt their ability to become self-supporting at some level, it behooves the media



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development community not only to increase their data savvy but also to connect them with the other elements that enable those platforms. Participation in ad networks and payment systems (like PayPal); aggregating their audiences with others' so that they form enough mass to attract revenue; representing them to international ad agencies; supporting them with expert advice—these are all parts of helping them engage more effectively.



## RECOMMENDATIONS

1. **Organize a working group** to map out more specifically how the media development community should assist its partners via audience research and measurement. Populate it with people who offer a 360° view of the subject: NGO workers, implementers, media owners, advertisers, academics, project managers, and ad agencies.
2. **Provide access to professional support in business planning and audience development.** Build reporting on these areas into media development projects and programs, and hold partners accountable for what the data show.
3. **Help partners advocate for creating trusted and measured media markets.** Identify best practices in implementing them among advertisers, media, and researchers.
4. **Build baseline research requirements into media development projects.** Partners should be held accountable for growing their audiences. If there's no audience, there's no impact.
5. **Improve the internal capacity** of mid-size and larger media organizations to analyze and apply research findings.
6. **Offer consultations to partners** about understanding their website metrics, then support them with guidance and tools that go beyond search engine optimization to actively engage with their audiences. Require that website metrics be included in project reporting.
7. **Develop benchmarking information.**

# Endnotes

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