



## Measuring the Audience

David Bunker addresses some of the diverse reasons for differences in consumption and perception of the BBC across the nations and regions of the UK. While it would be a mistake to assume they are



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driven solely by content (technical issues, social demographics, ethnicity and age are all factors) ultimately it is necessary to get down to the level of the programmes themselves to understand why the BBC is underperforming in particular nations and regions. However, the BBC must still concentrate on supplying high-quality, engaging television that appeals across the national and regional boundaries.

Traditionally, the BBC has been judged to perform better in the south of England than it has in the north of England and in the nations of Wales, Northern Ireland and Scotland. One of the challenges for audience researchers at the BBC has been to ascertain whether this underperformance is actually true or just a popular myth, and, if it is true, to examine the reasons behind the failures to see if there are ways of improving it in future.

Thinking specifically about television, the BARB viewing figures (the television industry standard currency for viewing) for each of the areas of the UK provide a useful guide for assessing accurately the BBC's viewing performance, that is whether people are *consuming* the television that we make and broadcast. However, they do not give the whole story – it is crucial also to delve further to discover how viewers rate

Opposite: The Apprentice

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the specific experience of watching the BBC in the different parts of the UK – do they value and appreciate what they are watching, and how does this vary by nation and region?

Turning first to consumption. A basic measure of the BBC’s performance in terms of consumption is how many people it reaches – that is, the percentage of the population that watches at least some of the BBC’s six channels output each week (the minimum bar we set for qualifying for this ‘weekly reach’ is that they have to have watched for at least 15 minutes, a higher bar than some in the industry). Our research shows that the average weekly reach for BBC television across the whole of the UK is around 85 per cent.

A look at how this level varies across the UK shows some geographical differences, but not many. In fact, only Northern Ireland and London (the latter bucking to some degree the perception that BBC TV does well in the south as a whole) lag behind the UK average.

However, how many people watch at all is not the only consideration. We also need to look at the BBC’s ‘share’ of viewing across the UK (essentially, how much of the audience’s overall amount of viewing is taken up by BBC TV alone), and this is where some of the discrepancies between the nations and regions begin to become more significant.

The BBC’s average share of all television viewing across the UK is around 33 per cent. Share is a bit higher in the south-west of England (at about 40 per cent) and is also fairly healthy in the south of England and the Midlands. However, in Scotland, Wales, Northern Ireland and the north of England, BBC TV’s share falls below this average – i.e., while audiences in these areas may watch some BBC output every week, it is making up a smaller portion of their overall viewing time than it is elsewhere in the UK.

Consumption is not all we need to know – it is also useful to look at people’s *perception* of BBC TV across the UK. In regular tracking of the audience we ask viewers to award BBC TV a mark out of 10 based on their approval or otherwise. The average figure for the UK as a whole is around 6.3, but it falls below this average in the north of England and in Scotland, and is actually *above* this average in Wales.

It’s far from simple to explain these differences in consumption and perception not least because of the diversity of reasons that may have caused them. For example, those who grew up in Lancashire, Yorkshire or the north-east were used to very strong independent local platforms – Granada, Yorkshire Television, Tyne Tees – that supplied memorable programming specific to their area and based in their part of the country. In comparison, the BBC perhaps appeared as a more remote entity, even with a southern or London bias, and such views once established can be fairly hard to shift. Indeed, approval levels in the north of England and in Scotland don’t appear to be worsening over time – the difference of approval levels that the BBC is grappling with today are probably not that different from those of 30 years ago.

It would be a mistake, however, to assume that different regional perceptions and performance are solely driven by the content that we put on screen. There may also be technical issues, such as the difficulties in receiving a good signal in parts of the country, or differences in the social demographic

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make-up of different parts of the UK, that influence their taste in programmes.

Another dimension to consider, beyond geography, is that the BBC fares less well among the ethnic minority population than it does among the white population. This may partly explain the underperformance in London where there is a relatively high proportion of people from ethnic minorities. Once again, improving this performance may be more complex than simply asserting that the BBC needs to do more to reflect and represent ethnic groups in its programming (although that may be a desirable aim). The ethnic population of the UK is much younger on the whole than the white population, and we know that the BBC tends to perform less well among younger people in general. Our research shows that among the older section of the audience, perception and enjoyment of BBC output varies much less between ethnic and white respondents – ethnic underperformance may have as much to do with age as with ethnicity.

Ultimately, though, you need to get down to the level of the programmes themselves to really understand some of the possible reasons why the BBC is underperforming in particular nations and regions or amongst different groups. This starts to show some interesting differences.

Contestant-based reality shows, such as *The X-Factor* and *Dancing on Ice* on ITV1 and *Any Dream Will Do* and *Strictly Come Dancing* on BBC One, have been big ratings winners for both channels, and popular across many demographics and geographical locations. But in 2007 both *The X-Factor* and *Any Dream Will Do* achieved a higher than average share in Scotland. With *The X-Factor* being won by Scottish singer Leon Jackson, and with his Scottish compatriot Keith Jack a close runner-up on *Any Dream Will Do*, it is reasonable to surmise that some of this specific Scottish interest in these series was a significant component in the increased audience share.

Opposite: *Any Dream Will Do*





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Similarly, in 2008 the share in Scotland for what might previously have been seen as a typically English event, the Wimbledon Tennis Championships, was high, quite possibly because Andy Murray is now one of the world’s best tennis players. And with no England at the Euro 2008 football tournament last summer, the share for many games was also higher in Scotland, because with no involvement from England, Scottish football fans could watch while safe in the knowledge they would not be subjected to the usual perceived over-concentration on England’s chances.

In contrast, programmes such as *The Apprentice*, *Robin Hood* and *Oliver Twist* all fared less well in Scotland, arguably because these productions may be seen as quintessentially English or, in the case of *The Apprentice*, a little too centred on London. Indeed, a portion of the BBC’s most popular shows that are not so popular in Scotland, including such things as *Top Gear* and *Ashes to Ashes*, could be judged by some to have a more southern or English tone to them in accent and attitude.

The popular northern soaps, *Coronation Street* and *Emmerdale*, boast a greater audience share in the north of England, as do some of the more specific ‘northern’ dramas of the recent past such as *Clocking Off*, *Fat Friends* and *Auf Wiedersehen Pet*. It’s not just drama – *Ant and Dec’s Saturday Night Takeaway* and the popular comedy series *Benidorm*, with their northern casts and characters, both over-perform in the north of England.

Another good example of differential national and regional appeal is BBC Three’s critically successful comedy, *Gavin and Stacey*. The series achieved above average performance in both Wales and Essex, which one can assume must be linked to the geographical origins of two main characters in the show. There can be no doubt, therefore, that local interest – whether it is a whole cast, a location, a marquee name or a hopeful contestant plucked from obscurity – can provide a viewing spike relative to the area in question.

With more programmes being made in more areas by a broader diversity of people from different backgrounds and locations, you would hope that this authenticity of portrayal on screen should improve fairly naturally, along with a reduction in the incidence of programme makers making what can be perceived as unfair assumptions about different populations. However, the BBC must still concentrate on supplying the sort of television that appeals across the national and regional boundaries, from entertainment like *Strictly Come Dancing*, to period dramas, to ground-breaking wildlife documentary series. High-quality, engaging television is recognised as such by all, regardless of where they live – and is the best insurance against becoming irrelevant to the audience in all parts of the UK. ■

David Bunker is currently Head of Research for BBC Vision – leading a team of audience researchers across the range of its channels and programme genres. He has been involved in media research for over 20 years, much of it at the BBC (on radio, in news, and latterly as Research Manager for BBC One and BBC Two and a period as Senior Adviser on Audiences to the BBC Trust), but also including spells at market research agencies, including a stint managing international TV research projects throughout Europe and the USA. He grew up in Preston, Lancashire, studied at the University of Leeds, and is currently living in Norfolk.