



OUTSIDE THE BOX

HOW UK BROADCASTERS PORTRAYED THE WIDER WORLD IN 2010 AND HOW INTERNATIONAL CONTENT CAN ACHIEVE GREATER IMPACT WITH AUDIENCES
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FOREWORD

2010 was a year in which UK broadcasters produced some remarkable international programmes. There were superb documentaries like *The Lost Girls of South Africa* (Channel 4), *Mugabe and the White African* (More4) and *Women, Weddings, War and Me* (BBC3). There were memorable current affairs programmes, for example *This World – Hostage in the Jungle* (BBC2), *Dispatches – Africa’s Last Taboo* (Channel 4) and *Panorama – Chocolate, the Bitter Truth* (BBC1). There was innovation with *Welcome to Lagos* (BBC2). And there were brilliant dramas like *I am Slave* (Channel 4) and *Blood and Oil* (BBC2).

All these programmes were striking reminders of the extraordinary power of television to engage audiences with important international issues and to shed light on how people live their lives in other countries.

And yet the future of international content on UK television is far from certain.

In chapter 1 we present the latest findings from a unique study which we have been undertaking since 1989. It examines in detail how much international coverage there is on which channels, covering what topics, through which genres, in what countries and how this has changed over time. This latest research looks at 2010. Some of the findings are cause for celebration and others raise serious concerns for the future.

In chapter 2 we look at how international content can achieve greater impact with audiences, given the rapidly changing media environment, specifically in relation to marketing, time-shift television and social and online media. Whilst these changes bring significant opportunities, they also present huge challenges for international programming.

The aim of this research is to encourage broadcasters, producers and those who collaborate with them to think more strategically about ways in which international content can reach and engage a range of audiences, now and in the future.

Once you have read this report, please take the time to give us your feedback.

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KEY FINDINGS

CHAPTER 1

Since 1989, IBT has been conducting a longitudinal study of international factual programming to establish how much international coverage there is on which channels, covering what topics, through which genres, in what countries and how this has changed over time. The research presented in this chapter represents the continuation of this study for the year 2010.

The most striking finding is the extent of the decline in new international factual programming on terrestrial channels. In 2010 the main UK terrestrial channels broadcast fewer hours of new international factual programming than at any time since the study began in 1989. International content is in decline on every terrestrial channel except Channel 4, and BBC1 has now replaced ITV1 as the channel with the least amount of new factual coverage of developing countries.

Although international content is declining on terrestrial channels, it is increasing on some digital channels. In 2010, BBC3, BBC4 and More4 all had record amounts of new international factual programming.

This migration of international content to digital channels matters because audiences for digital channels are usually much smaller than for terrestrial channels and, since one of the main purposes of the BBC is to 'bring the world to the UK', it is important that all audiences have access to international content regardless of which channels they usually watch.

But the quantity of international content is just one indicator. As BBC3 has demonstrated, despite having less new international factual programming than most other channels, programmes like *Women*, *Weddings*, *War and Me* can have a major impact when they successfully engage their target audience. Equally significant is Channel 4's continuing commitment to its peak time international strand *Unreported World*.

This research also looks in detail at the nature of international content. Despite the growth of factual entertainment formats, international factual programming tends to adopt a documentary approach and is dominated by 'softer' topics, such as travel. The regions of the world which receive the most coverage are North America (28%) and Europe (25%). The Middle East and North Africa (5%) and Latin America and the Caribbean (6%) receive the least coverage. While this concentration of international coverage on certain regions of the world may be of concern to some people, it should not come as a surprise because it is almost identical to the pattern of coverage noted in previous research. North America, Europe, Latin America and the Caribbean, the Middle East and North Africa all received exactly the same percentage of international factual coverage in 2007 as they did in 2010.

Given the recent dramatic political changes in the region, perhaps the most significant lack of coverage is for countries in North Africa and the Middle East. Egypt and Tunisia did receive some coverage but Algeria, Bahrain, Lebanon, Libya, Saudi Arabia and Yemen were not the main focus of a single factual programme.

This research reveals how the nature of international factual coverage has remained remarkably static over time. Although individual producers and commissioners do not set out to reproduce the same view of the world on television each year, this study reveals that the combined result of all of those individual commissioning decisions, amongst all broadcasters, is to produce factual programmes that cover broadly the same topics, in the same formats, featuring the same parts of the world, every year.

This study has also, for the first time, looked at international drama and entertainment. Both are dominated by the USA. In 2010, 63% of all programme hours of new international drama were set in the USA, while another 29% were set in Australia. The remaining 8% of new international drama covered just 12 other countries.

CHAPTER 2

The narrowing of television's international horizons has coincided with what has arguably been the most dynamic period of change the UK media landscape has ever seen. In this chapter we look at how international content can achieve greater impact with audiences, given the rapidly changing media environment, specifically in relation to marketing, time-shift television and social and online media.

Whilst these changes bring significant opportunities, they also present huge challenges for international programming. With so much content available from so many different sources it is increasingly difficult, particularly for content that is often marginalized in the schedules, to 'stand out from the crowd'.

Our findings are based on interviews with broadcasters, programme makers, marketers and social media experts, an analysis of audience and web traffic data, and a review of IBT's previous research in this area.

Since international content is frequently found on 'niche' channels or late at night, marketing plays an important role in encouraging audiences to watch such content. Marketing is one of the main reasons given by UK audiences for watching programmes set in developing countries.

Many of our interviewees argued that one of the most effective means of promoting international programming is to target relevant opinion leaders through social media, and that this form of personal recommendation can be more effective than conventional marketing.

Much of the content that is being shared on social media is being quoted from a relatively small range of sources such as news websites, blogs or content sharing platforms, so if programme makers or broadcasters can find ways of having their content featured on the right blog or news site, the visibility of that content can be increased.

Social and online media also allow the process of marketing and promotion to begin much earlier. Involving audiences early on is a key feature of successful marketing for entertainment programmes such as the Channel 4 youth drama, *Skins*. Another way of generating interest is by giving potential viewers the



Mugabe and The White African, Channel 4

opportunity to become involved in the production process.

Video on Demand (VOD) and time-shift television present significant opportunities for international content by extending the life of a programme so that audiences can catch up with something they miss or only hear about through word of mouth after the initial broadcast.

The different strategies used by broadcasters for featuring programmes have important consequences for international content. If broadcasters choose, as the BBC does, to use catch up services like the BBC iPlayer to encourage audiences to view public service content, the number of people watching international programmes can be significantly boosted.

Social and online media also have a crucial role to play in helping to increase the impact of international content after broadcast, by providing viewers with more information about the issues featured and suggestions for further action. Some international programmes have developed very successful microsites featuring live web chats and Q and A's. The website for the Channel 4 drama *The Promise* received more than 750,000 hits.

RECOMMENDATIONS

Given the migration of international content from terrestrial to digital channels, broadcasters need to consider ways in which they can continue to commission international programmes which appeal to a range of audiences watching both mainstream and niche channels.

Producers and broadcasters need to be more imaginative and willing to take risks so that international coverage does not feature the same issues and stories using the same formats year after year.

Broadcasters should build on their successes. BBC3, with its *Blood, Sweat and Luxuries* strand has demonstrated that new types of international content can be successfully developed with specific audiences in mind. Channel 4, with *The Promise*, has shown that international drama can draw audiences and create genuine impact.

Producers of international content need to think about how they can make full use of social and online media to market and promote their programmes in advance of transmission and to build audiences by using established networks and by creating new networks.

Public service broadcasters should continue to develop ways in which catch up services like the BBC iPlayer and 4oD can be used to encourage audiences to watch programmes they might not otherwise find.

Producers need to consider how they can learn lessons from other genres, such as youth drama, which have achieved a great deal as a result of their innovative use of social and online media.

Social and online media could be used more effectively by focusing on some of the unique selling points of international content. For example, by allowing audiences to travel virtually and experience places which they are unlikely to visit in person, and enabling viewers to interact with people from a range of different countries they will never otherwise have the opportunity to meet or talk to.

Producers could also use online media to challenge the assumption that many viewers have that 'there is nothing they can do' to address global issues like poverty by offering clear options so that audiences feel that they can undertake action that will make a difference.





CHAPTER 1
**THE QUANTITY AND NATURE
OF NON-NEWS INTERNATIONAL
PROGRAMMING ON UK
TELEVISION IN 2010**



INTRODUCTION

Since 1989 the International Broadcasting Trust (IBT) has been conducting a longitudinal study of international factual programming. This unique and often cited research has tracked the changing nature of international programming on UK television for more than twenty years. It is designed to establish how much international coverage there is on which channels, covering what topics, through which genres, in what countries and how this has changed over time. The research presented in this chapter represents the continuation of this study for the year 2010. For the first time, this research has been expanded to include not only factual coverage, but also the international dimension of two other key genres on UK television: drama and entertainment.

This quantitative study gives us an invaluable insight into the sort of international programmes which broadcasters are commissioning today and how that has changed over time. It provides not only an illustration of the way the world looks to UK television audiences, but also identifies a number of worrying trends for those who value the role that television plays in bringing the world to the UK.

International factual programming is continuing to migrate towards digital channels, leaving terrestrial channels with record low levels of international coverage. Indeed, international factual programming is in decline on every terrestrial channel except for Channel 4 and BBC1 has now replaced ITV1 as the channel with the least amount of new factual coverage of developing

countries. This matters because audiences for digital channels are usually much smaller than for terrestrial channels. Since one of the main purposes of the BBC is to 'bring the world to the UK' it is important that all audiences have access to international content regardless of which channels they usually watch.

This research also reveals the extent to which some topics and some parts of the world receive little or no new coverage through factual, drama or entertainment programming. Most notably, new factual programming relating to the Middle East and North Africa was found to be almost entirely absent from UK television in 2010. Algeria, Bahrain, Lebanon, Libya, Oman, Qatar, Saudi Arabia and Yemen were not the principal subject of any factual programme in 2010. So, when popular uprisings took place in this region in 2011, the lack of previous television coverage meant that many people in the UK had little information about this part of the world.

Finally, this research reveals how the nature of international factual coverage has remained remarkably static over time with audiences being presented with programmes which cover the same regions of the world, in the same topics and through the same formats every year. Previous IBT research has found that one of the main reasons UK audiences are often 'turned off' from international factual programming is that they feel they already know what it's going to be about (Scott, 2009). The evidence presented here suggests that, in general terms at least, they are right.

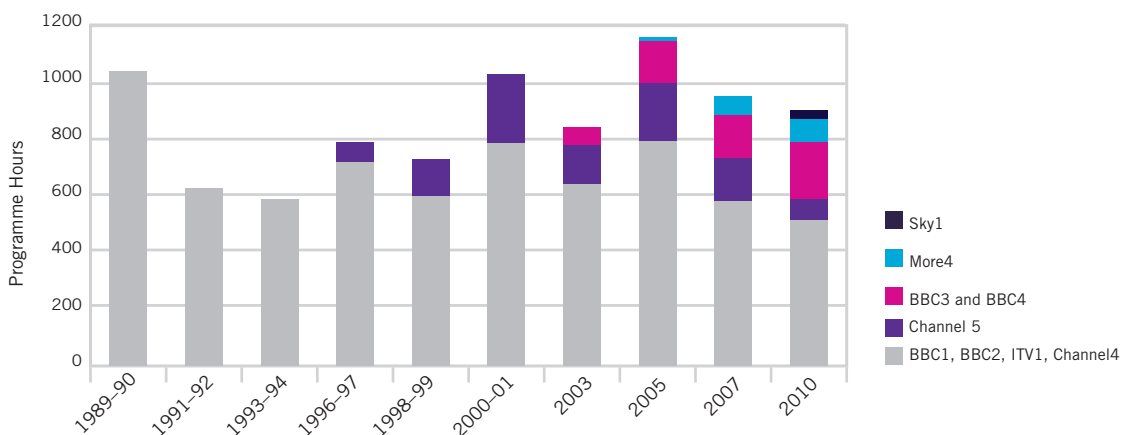


Figure 1: Total hours of new international factual programming since 1989-90



RESULTS Down and out?

The most striking finding in this research is the extent of the decline in new international factual programming on terrestrial channels. Figure 1 shows that in 2010 the main UK terrestrial channels broadcast fewer hours of new international factual programming than at any other time since IBT's quantitative study began in 1989. In 2010 there were 514 hours of new international factual programming on BBC1, BBC2, ITV1 and Channel 4, or 590 hours if Channel 5 is included. This is equivalent to an average of 19 minutes of new international factual programming each day on each of these five channels over the year. By comparison, there were nearly 1,000 hours of new international factual on these five channels in 2005. This represents a decline of 41% in five years. At a time when the relevance of global affairs to people's lives in the UK has arguably never been more apparent, the amount of new international factual television programming on the terrestrial channels has never been lower.

While first-run originated output on the terrestrial channels has been declining across all programme genres, it appears that international programming has borne the brunt of this since it has declined at a much faster rate over the last 5 years (41%) than originations on terrestrial channels in general, which have declined by 12% (Ofcom, 2010).

Although new international factual programming is declining on terrestrial channels, Figure 1 also reveals that it is increasing on some digital channels. In 2010, BBC3, BBC4 and More4 all had record amounts of new international factual programming. Together they accounted for 36% of all new international factual programming in this study, up from 23% in 2007 and 14% in 2005.

This combination of a decline in new international factual programming on terrestrial channels and a simultaneous increase in such programming on digital channels signals the continuing migration of such content away from 'mainstream' channels and towards 'niche' channels with lower viewing figures. Whilst the increase in new international content on digital channels may be welcome, if this is achieved at the expense of showing new international coverage on terrestrial channels, then international programming is increasingly likely to be reaching smaller and smaller audiences.

Figure 2 reveals a similar pattern to Figure 1. It shows that the amount of new factual programming specifically about developing countries on terrestrial channels has declined by 34% in the last 5 years and is now at its lowest point since this study began 20 years ago. The 196 hours of new developing country factual programming on terrestrial channels in 2010 is half the amount that was shown on terrestrial channels in 1989-90.

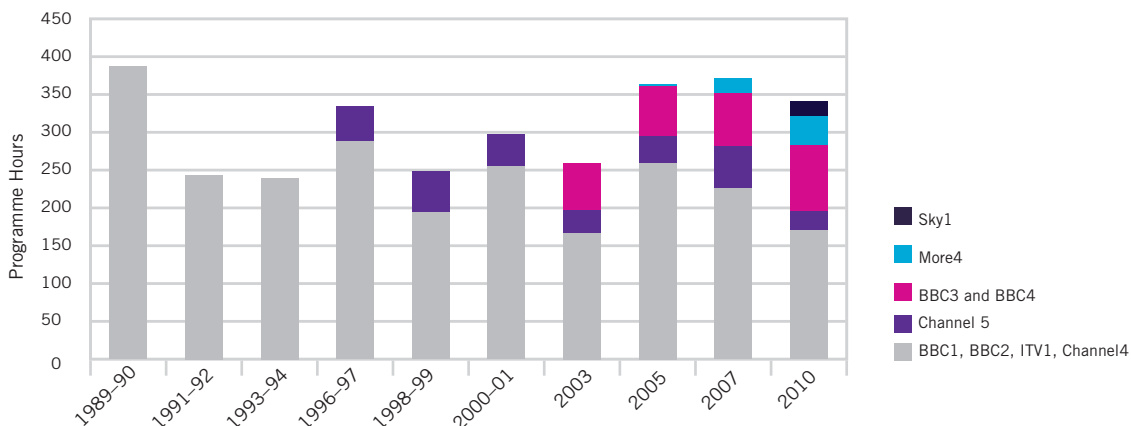


Figure 2: Total hours of new developing country factual programming since 1989-90

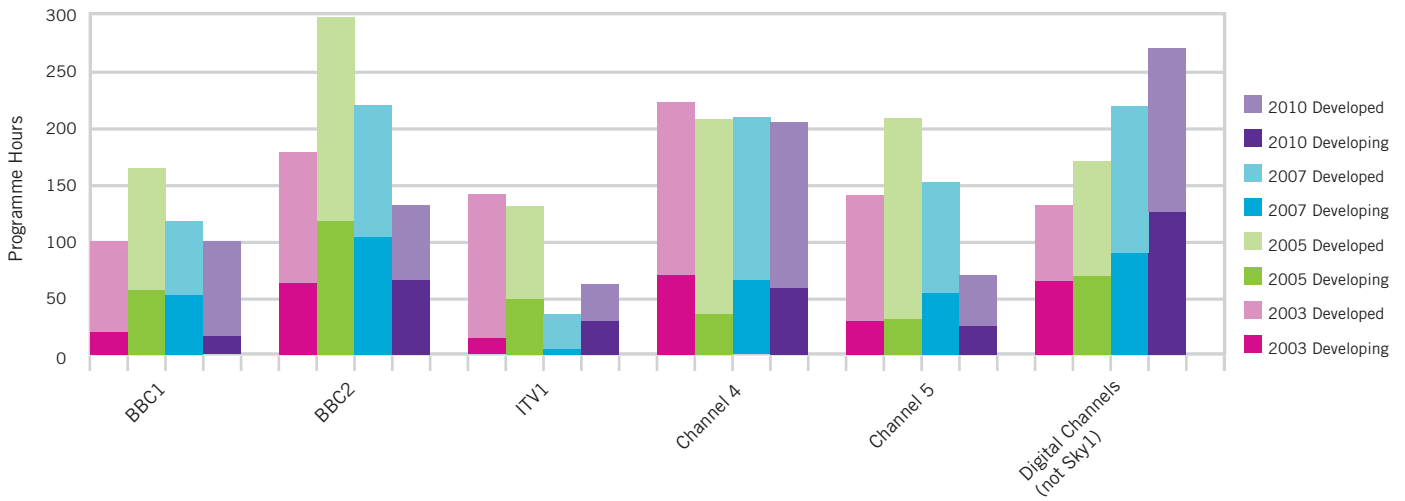


Figure 3: Total hours of new international factual programming on various channels over the past 7 years

However, Figure 2 also shows that new developing country factual programming on the digital channels BBC3, BBC4 and More4 continues to increase, with more on these digital channels in 2010 than in any previous year. New developing country factual programming on BBC3, BBC4 and More4 now accounts for 39% of all such programming in this sample.

These results strongly suggest that, in line with international programming, content about developing countries is also migrating towards digital channels, leaving terrestrial channels with record low levels of new developing country factual programming.

Figure 3 gives a more detailed picture of the way in which international content is migrating towards digital channels. International factual coverage on BBC2, for example, has declined by 56% in 5 years, from a high of almost 300 hours in 2005 to just 131 hours in 2010. By contrast, international factual programming on the three digital channels in the sample has more than doubled since 2003, from 130 hours in 2003 to 270 hours in 2010.

Channel 5 has seen the most dramatic reduction with a 66% decrease since 2005. This is partly due to international factual series and strands, such as *Banged up Abroad*, being replaced by American dramas such as *The Mentalist*.

Although ITV1's international factual coverage declined dramatically in 2007, it has seen an increase in 2010. However, ITV1 still has the lowest amount of new

international factual output of any terrestrial channel and in 2010 broadcast less than half the amount it did in 2005. The one terrestrial channel which has not seen a significant decrease over the last decade is Channel 4. International factual coverage on Channel 4 has remained fairly constant at just above 200 hours. In 2010 the *India Season*, strands such as *Unreported World* and *Dispatches* and series such as *Coach Trip* and *My Family's Crazy Gap Year* helped Channel 4 to achieve significantly more international factual coverage than any other channel.

Figure 3 also reveals important changes in the way broadcasters cover developing countries. Coverage on ITV1 is increasing, after almost completely disappearing in 2007, due to new programmes such as *River Monsters* and *Joanna Lumley's Nile*. As a result, BBC1 now replaces ITV1 as the channel with the least amount of new factual coverage of developing countries. *The Man who Cycled the Americas* and a small number of episodes of *Panorama*, were rare examples of factual programmes on BBC1 set in developing countries in 2010. BBC1's output is now almost exclusively domestic outside news and current affairs.

To assist in making comparisons between channels, Figure 4 separates out the amount of new international factual coverage on the nine different channels in this sample. In the past, BBC2 always had a similar amount of international factual coverage to Channel 4, but now there is a significant gap between them. The relatively large figure for BBC4 includes its international

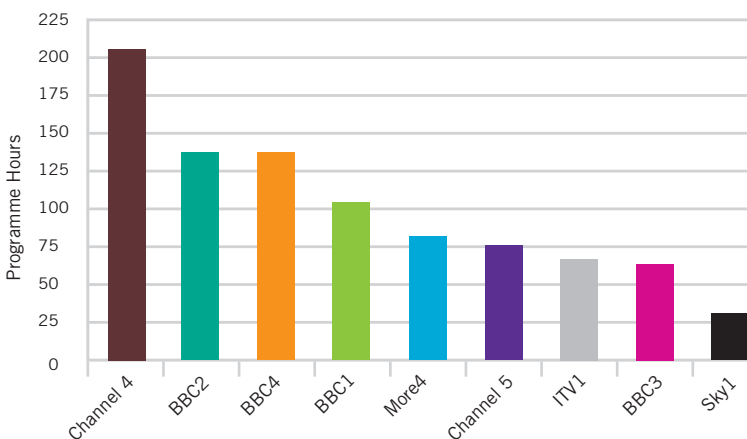


Figure 4: Total hours of new international factual programming in 2010 for 9 different channels



documentary strand *Storyville* and a number of international series including *The Tutu Talks* and *Lost Kingdoms of Africa*.

Although BBC3 has less new international factual programming than most other channels, it still has many acclaimed international series and individual programmes, such as *Women, Weddings, War and Me* and *Stacey Dooley Investigates*. Also, its international coverage has increased by 62% since 2007.

On More4, the majority of its international factual programming comes from its True Stories strand, which has helped it to have more international coverage than Channel 5, ITV1, BBC3 and Sky1. Sky1 was included in this study for the first time to take account of the important role Sky plays in the UK television industry and the contribution it makes to broadcasting new international factual programming. In 2010, Sky 1 broadcast a number of factual series with an international dimension such as *The World Wild Vet*, *Ross Kemp: Battle for the Amazon* and *An Idiot Abroad*.

The same old story?

Having considered the changes over time in the quantity of new international factual programming on UK television, we now turn to examine the nature of that coverage.

Sub-genre

In this research we publish, for the first time, the results of an analysis of the sub-genre of international factual programming in both 2010 and in 2007. The purpose of this

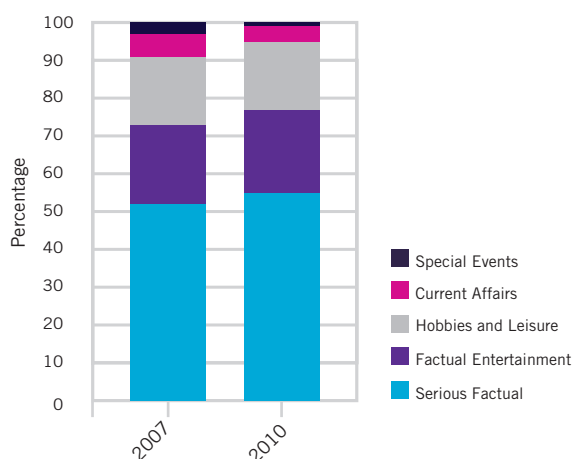


Figure 5: International factual programming by sub-genre in 2007 and 2010

is to give an indication of the type of programming used to cover international events. The results, shown in Figure 5, reveal that international factual programming is dominated by serious factual programming, both in 2007 (52%) and in 2010 (55%). This includes documentaries, such as *Welcome to Lagos* (BBC2) and *The Miracle Baby of Haiti* (Channel 4).

Factual entertainment includes reality shows such as BBC3's *The World's Strictest Parents*, while hobbies and leisure includes gardening, home, DIY, travel and cookery programmes such as Channel 4's *A Place in the Sun*. Together, these two sub-genres account for 40% of all new international factual coverage in 2010. Although it is often assumed that these more formatted shows are a growing phenomenon in international programming, a comparison with the data from 2007 shows that there has only been a 1% increase in these sub-genres over the last 3 years.

Although international current affairs includes long established programmes like *Unreported World* and *Panorama*, in 2010 this genre only accounted for 4% of all international factual content. In 2007, international current affairs programming fared slightly better but still only constituted 6% of all international factual coverage.

What Figure 5 makes clear is that international factual programming is both dominated by one particular sub-genre – serious factual – and that the types of programming used to cover international events is changing little over time.



TOPIC	2003	2005	2007	2010
Travel	29%	27%	18%	24%
Miscellaneous	15%	23%	21%	23%
History	17%	12%	15%	15%
Wildlife	11%	13%	12%	11%
Development, Environment and Human Rights	4%	4%	4%	7%
Religion, Culture and Arts	8%	12%	15%	7%
Conflict and Disaster	6%	4%	5%	6%
Crime	8%	3%	7%	4%
Politics	2%	2%	3%	3%

Table 1: Percentage of international coverage addressing different topics since 2003

Alongside the genre of each factual programme, the topic addressed in each programme was also recorded. The results, given in Table 1, reveal the dominance of what might be loosely classified as ‘softer’ topics, such as travel and miscellaneous, which together account for almost half of all international factual programming in 2010. Travel includes all adventure, holiday and travel programmes, such as *The Secret Tourist* (BBC1), while those coded as miscellaneous refer to light human interest topics and other, less easily classifiable programmes. By comparison, what might be termed ‘harder’ topics, such as development, environment and human rights, conflict and disaster, crime and politics, together comprise just 20% of all international coverage in 2010.

This dominance of ‘softer’ topics is nothing new and can be found, to a varying degree, in all previous IBT studies in this series. In 2005, for example, travel and miscellaneous constituted 50% of all international factual programming. In fact, the percentage each topic receives is remarkably similar each year. Table 1 shows that coverage of conflict and disaster, for example, has only fluctuated between 4% and 6% over the last 7 years whilst coverage of wildlife has only ranged from 11% to 13%. Similarly, politics has remained persistently low at 2% in 2003 and 2005 and 3% in 2007 and 2010. We can conclude from this that not only does the form of international programming change little each year, but the topics addressed also change very little.

Countries and regions of the world

Table 2 reveals that international factual programming in 2010 was dominated by North America (28%) and Europe (25%). Indeed, programmes covering the USA, such as *Undercover Boss*

REGION	2007	2010
North America	28%	28%
Europe	25%	25%
Asia	18%	15%
Africa	13%	14%
Oceania	5%	7%
Latin America and Caribbean	6%	6%
Middle East and North Africa	5%	5%

Table 2: Distribution of international factual television coverage in 2007 and 2010



Paul Merton in Europe, Channel 5

USA (Channel 4) and *Louis Theroux: America's Medicated Kids* (BBC2) constituted 23% of all international factual coverage. By contrast the Middle East and North Africa (5%) and Latin America and the Caribbean (6%) were the regions of the world which received the least coverage. *Ross Kemp: Battle for the Amazon* (Sky 1) and *Panorama: Orphans of Haiti* (BBC1) were rare examples of programmes set in countries south of the USA. While this concentration of international coverage on certain regions of the world may cause concern for some, it should not come as a surprise because it is almost identical to the pattern of coverage noted in previous research. North America, Europe, Latin America and the Caribbean, the Middle East and North Africa all received exactly the same percentage of international factual coverage in 2007 as they did in 2010. As Table 2 shows, the only differences between the geographical distribution of international programming in 2007 and 2010 are that Asia received 3% less coverage in 2010, Oceania 2% more and Africa just 1% more. These results illustrate both the continuing disparity in coverage received by different regions of the world but also the predictability of this disparity.

Such consistency in the nature of international factual coverage can be found, not just in the amount of coverage received by different regions of the world, but also, to some degree, in the topics used to cover them. Figure 6 reveals that coverage of North America, for example, is dominated by miscellaneous programming (44%), such as *Ramsay's Kitchen Nightmares USA* (Channel 4), just as it was in 2007 (37%). Similarly, in 2010 coverage of Europe was once again dominated by travel shows (42%) almost entirely set in Central and Southern Europe, such as *A Place in the Sun* (Channel



Tropic of Cancer, BBC2

4) and *Paul Merton in Europe* (Channel 5), as was the case in 2007.

One of the most striking findings in the last IBT research in this series (Scott, 2008) was the extent to which factual programming of Africa was dominated by wildlife (40%). While this is not true to quite the same degree in 2010, wildlife is still the most common topic in coverage of Africa (34%) as a result of programmes such as *River Monsters* and *Cheetah Kingdom*, both on ITV1.

The most common topic for Latin America and the Caribbean in 2010 was miscellaneous (30%) just as it was in 2007 (21%). Similarly, conflict and disaster was again prominent in coverage of the Middle East and North Africa in 2010 (25%) as it was in 2007 (37%).

In 2010, factual coverage of Oceania was dominated by travel (64%) to an even greater degree than in 2007 (60%), largely as a result of programmes such as *Wanted Down Under* (BBC1) and *Phil Down Under* (Channel 4). The only other topics used to cover Oceania were history, miscellaneous and wildlife.

Coverage of Asia has perhaps changed the most since 2007 as content is now more evenly spread over a range of topics, although wildlife (16%) and development, environment and human rights (20%) still feature prominently as they did in 2007. 29% of all coverage of Asia was on Channel 4 with its *India Season* and many programmes in the *Unreported World* and *Dispatches* strands.

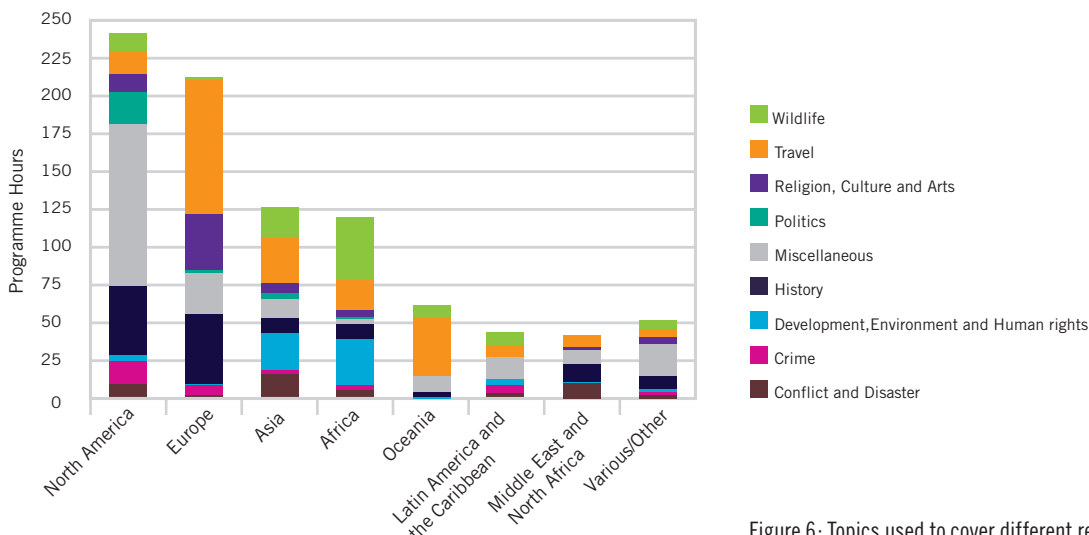


Figure 6: Topics used to cover different regions of the world in 2010

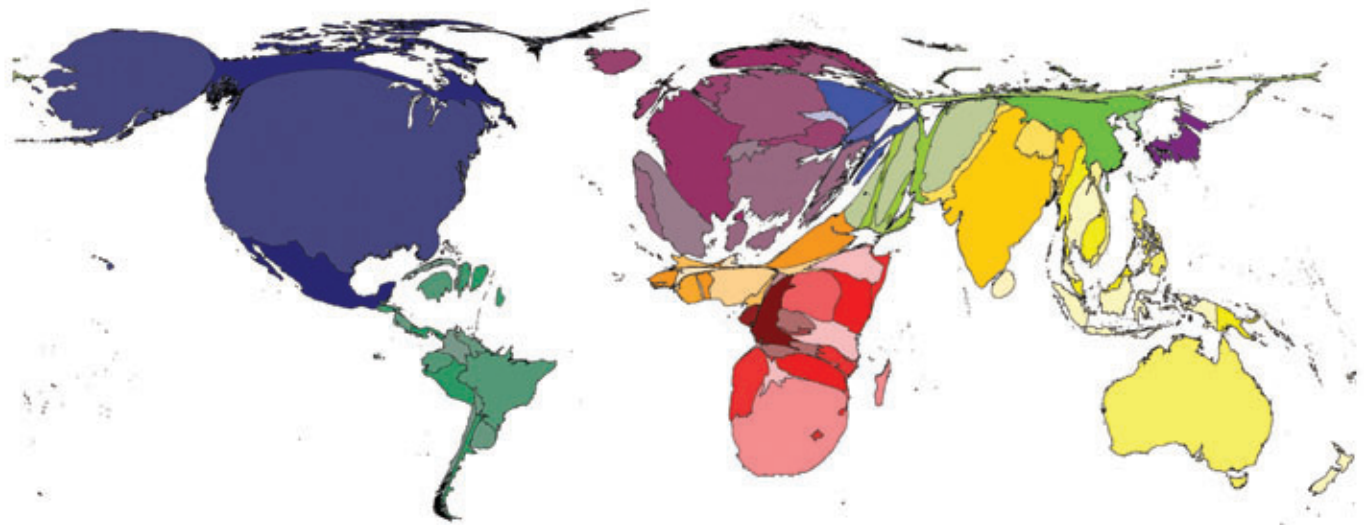


Figure 7: World map distorted to show the amount of new factual programming received by different countries in 2010

By illustrating the amount of coverage each individual country received in 2010 and 2007 in figures 7 and 8, we can reveal in more detail both the areas of the world that receive the most and least factual coverage but also the extent to which this has changed over time. In figures 7 and 8 the size of each country on the world map is distorted to reflect the amount of new factual coverage received in 2010 and 2007 respectively.

Figure 7 reveals the relatively large amounts of coverage of the USA, Australia, India and South Africa and a number of countries in Central Europe such as France, Italy and Germany. These seven countries received 43% of all international factual programming in 2010, leaving the remaining 57% of coverage spread across 89 countries. 103 countries, or 52% of all countries in the world, were not the main subject of any new factual programme in 2010 across any of the nine channels in the sample. This included countries like South Korea and Singapore and many in Europe such as Belgium, Bulgaria, Denmark, Finland and Hungary. Figure 7 also reveals that much of Latin America and the Caribbean, West Africa and Central Asia received little or no coverage in 2010.

Given the recent dramatic political changes in the region, perhaps the most significant lack of coverage is for countries in North Africa and the Middle East. While Egypt was the main focus of 7 hours of new factual programming in 2010, Tunisia and Morocco were the principal focus of just one 30 minute programme each.

Algeria, Bahrain, Lebanon, Libya, Oman, Qatar, Saudi Arabia and Yemen were not the principal subject of any factual programme.

A comparison between figures 7 and 8 reveals, once again, the similarity between the nature of international coverage in recent years, notably the dominance of USA and Western Europe and the lack of coverage in Latin America and North Africa. Many of the minor differences can be explained by individual programme strands or series or by global events. The slightly larger amount of coverage of South Africa in 2010, for example, can be explained by the football World Cup, whilst the slight increase in the amount of coverage of India is due largely to Channel 4's *India Season* of programmes in 2010. Notwithstanding these slight discrepancies between the two graphs, the extent to which the geographical distribution of factual coverage remains the same is striking.

Implications

Seen separately, figures 5, 6, 7 and 8 and Tables 1 and 2 reveal a number of facts about the nature of international coverage, such as the dominance of serious factual programming and of 'softer' topics, and the extent to which coverage focuses on a small number of countries. Seen together, they reveal something more striking: the extent of the stability and predictability of the nature of international coverage over time. Although individual producers and commissioners do not set out to reproduce the same view of the world on television each year, this study reveals that the combined result of all of those individual

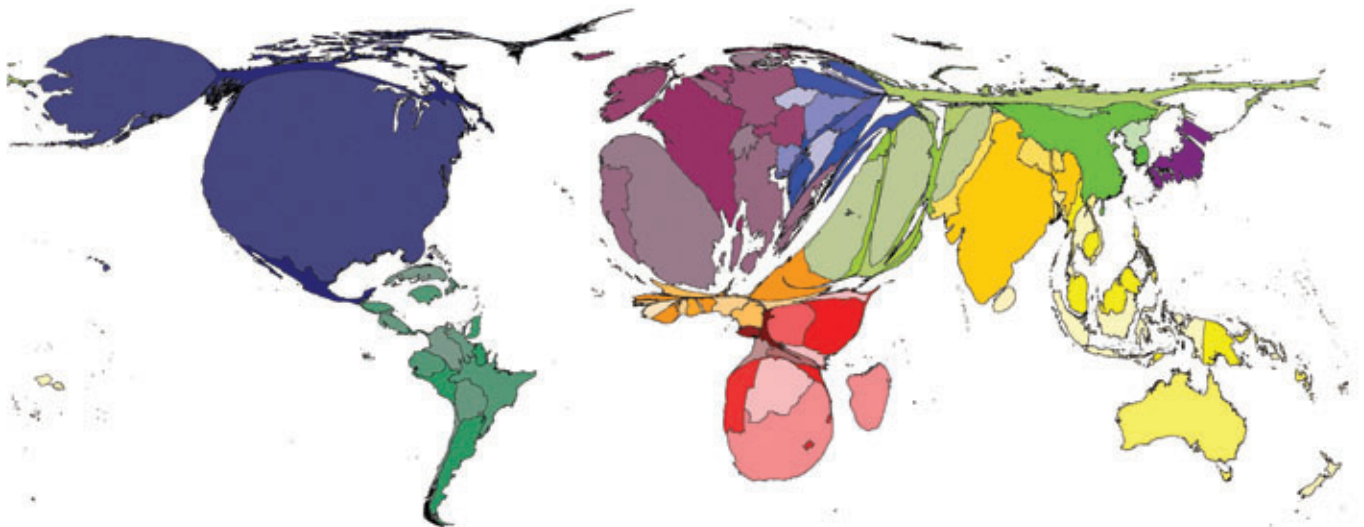


Figure 8: World map distorted to show the amount of new factual programming received by different countries in 2007

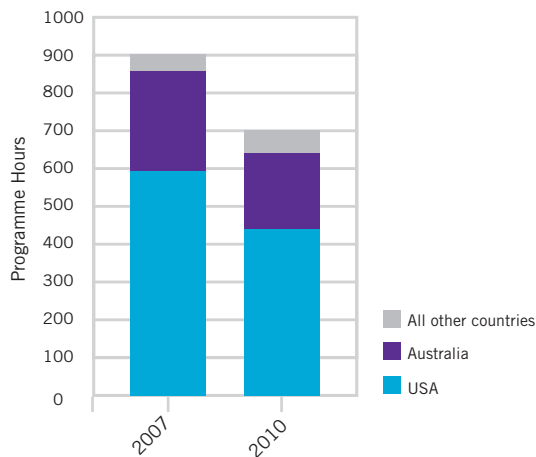


Figure 9: Total hours of new international television drama in 2007 and 2010

commissioning decisions, amongst all broadcasters, is to produce factual programmes that cover broadly the same topics, in the same formats, featuring the same parts of the world, every year. While predictions about the future are notoriously difficult to make, on the evidence presented here, it is not unreasonable to speculate that, for example, only around 2% of new international factual programming in 2011 will be related to politics, that Latin America and the Caribbean will receive around 6% of coverage and that the dominant topic used to cover Africa and Europe will be wildlife and travel respectively.

Lighten up? International drama

While IBT's studies have been recording the quantity and nature of new international factual programming for over 20 years, never before has the nature and quantity of non-factual genres such as drama and entertainment been published. It is often assumed that international television programming is dominated by factual but there is no publicly available evidence to test that assumption. Do high profile, popular international dramas such as *The Promise* (Channel 4) and *The No. 1 Ladies' Detective Agency* (BBC1) represent a new way of bringing international issues to UK television audiences? Are successful international films

such as *Blood Diamond*, *The Last King of Scotland* and *Slumdog Millionaire* inspiring the production of new international television dramas? This research aims to explore this issue further.

Figure 9 shows that in 2010 there were 704 hours of new international drama on the 9 television channels included in this study. Figure 9 also shows that new international drama was almost entirely dominated by just two countries. In 2010, 63% of all programme hours of new international drama were set in the USA which included programmes such as *Flash Forward* (Channel 5) and *House* (Sky1), while another 29% were set in Australia, dominated by *Neighbours* and *Home and Away* (Channel 5). The remaining 8% of new international drama covered just 12 other countries. 93% of countries in the world received no coverage through international television drama in 2010.

Countries which did receive coverage included Sweden (*Wallander*, BBC4), Afghanistan (*The Taking of Prince Harry*, Channel 4), Sudan (*I am Slave*, Channel 4) and Nigeria (*Blood and Oil*, BBC2). In total, though, only 3% of all new international drama (or 23 programme hours) was set in developing countries in 2010. The ITV1 drama *Wild at Heart* made up 40% of this.



India Season: *Slumdog Children of Mumbai*, Channel 4



This pattern of coverage of new international drama has changed little from 2007 when a similar, previously unpublished, study was conducted by this author. In 2007, coverage of USA (63%) and Australia (29%) still dominated by the same degree and just 2.2% of drama was set in developing countries. Latin America and the Caribbean received no new drama coverage in 2010 or 2007. The one major difference between 2007 and 2010 is that the total amount of new international drama declined by 22%. Previous IBT research has shown that international television drama can appeal to a much broader audience than international factual programming (Scott, 2009). But while drama may have the potential to bring the world to the UK in new and challenging ways, on the evidence presented here, it appears that this potential is not being realised.

Light entertainment

Light entertainment refers to situation comedies, other types of comedy, chat shows, variety shows, cartoons, animation, quiz shows, game shows and family shows (Ofcom, 2010). Although this genre of programming has not generally been associated with coverage of the wider world, it does attract large audiences and is the third most common genre of programming on terrestrial channels at peak time, behind factual and drama (Ofcom, 2010). In previous IBT research it has been argued that most UK audiences

have a tendency to respect but avoid much international factual programming and are often looking simply to be entertained (Scott, 2009). It is, therefore, illuminating to reveal the extent to which the wider world does or does not feature in light entertainment.

In 2010 there were 220 hours of new international light entertainment programming on the terrestrial and digital channels featured in this report. This was overwhelmingly dominated by coverage of the USA (95%) which included programmes such as *The Simpsons* (Channel 4), *Raising Hope* (Sky 1) and *The Daily Show* (More4). 5% of new international light entertainment programming, or 11.5 programme hours, related to countries other than the USA in 2010. Examples include an episode of the Indian version of *Who Wants to be a Millionaire* broadcast on Channel 4 as part of their *India Season*, and the BBC1 adventure/ game show *Dropzone*. In 2010, only 9 countries received any coverage in new international light entertainment.

A previous IBT report concluded that 'while television content about developing countries has the potential to engage all audiences, this can only be achieved if a broad range of relevant connections to the lives of those in the audience is made in all genres of programming' (Scott, 2009). On the basis of the evidence presented here, UK television is a very long way away from achieving that.



METHODOLOGY

Included within this study is all new factual, drama and light entertainment programming (as defined by Ofcom) broadcast on BBC1, BBC2, ITV1, Channel 4, Channel 5, BBC3, BBC4, More4 and Sky1 between 1 January 2010 and 31 December 2010, which meets the following definition of 'international programming'.

All programming in which the principal themes are explicitly and directly related to a country or countries outside the UK or persons from such countries (whether it was shot in the UK or abroad).

The data for this study was collected from publicly available listings sources such as Radio Times, and was then subject to rigorous cross-checking with all relevant broadcasters, who have co-operated closely in order to verify the information needed for correct classification of individual programmes. We would like to thank all the broadcasters for their help and co-operation. The following categories, developed by IBT research over the last 20 years, were used to classify the topic of each programme.

- **Conflict and Disaster:** comprising international and civil war, global security, terrorism, crime and civil unrest within the past ten years, and both historical and contemporary natural and man-made catastrophes.
- **Crime:** all aspects of crime, criminal activity and investigation, including CCTV and police video compilations.
- **Development, Environment and Human Rights** issues.
- **History:** factual programmes telling stories which took place over ten years ago (in order to distinguish the History category from Conflict and Disaster, in the case of war documentaries). This category also comprises archaeology, and includes standard documentaries made up of archival footage and 'talking head' interviews, if the historical subject matter was placed outside the UK.
- **Miscellaneous:** comprising lightweight human interest topics, observational documentaries or docu-soaps, science, medicine and less easily classifiable programmes.
- **Politics:** comprising elections and political change, political economics, and political analysis within the past ten years.
- **Religion, Culture and Arts** including anthropology.
- **Travel:** all variations on the travel/adventure/holiday programme.
- **Wildlife and natural history:** shows mainly about animals.

This report relies on the United Nations Development Programme's classification of 'developing countries' and The World Population Programme's classifications of different regions of the world.

Further details of the methodology and the data used for the graphs can be found on the International Broadcasting Trust website www.ibt.org.uk

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CHAPTER 2
**INCREASING THE
IMPACT OF INTERNATIONAL
CONTENT ON TELEVISION**



Storyville: Marathon Boy, BBC4

INTERNATIONAL PROGRAMMING IN A CHANGING MEDIA LANDSCAPE

In 2011, the political, social and economic fallout of the global financial crisis and the protests sweeping through North Africa and the Middle East continue to illustrate the extent to which we live in an increasingly interconnected and interdependent world.

But at a time when our awareness of international affairs has never been more relevant to understanding our position in the world, coverage of international issues on UK television – our main source of information about the rest of the world – is contracting. As the previous chapter showed, non-news international factual programming on terrestrial channels has decreased by 41% in the last 5 years.

This narrowing of television's horizons has coincided with what has arguably been the most dynamic period of change the UK media landscape has ever seen. The emergence of social media, the development of new digital devices, advances in mobile technology and the proliferation of high-speed Internet access have revolutionized the delivery and consumption of media in the UK. The rise of Video on Demand, YouTube and time shift television mean that audiences are no longer restricted by time or point of access and are empowered to pick and choose what, where, when and how they want to watch content. Social media and other online resources have changed the way we think about television by opening up a wealth of opportunities for audiences to interact with, discuss and even mould the content they consume.

Whilst these changes bring significant opportunities, they also present huge challenges for international programming. With so much content available from so many different sources it is increasingly difficult, particularly for content that is often marginalized in the schedules, to 'stand out from the crowd'. International programming also has to compete with other television genres that have found innovative ways of taking advantage of the opportunities presented by online and social media.

How can international content on television continue to reach a range of audiences? How can it make use of the new tools and opportunities that are available so that it has even greater impact? In this chapter we look at some of the success stories and the critical role of marketing, time-shift television and online and social media.

The discussion that follows is based on interviews with broadcasters, programme makers, marketers and social media experts, an analysis of audience and web traffic data, and a review of IBT's previous research in this area.

MARKETING

Since international content is often marginalized in the schedule, either on 'niche' channels or late at night, or both, marketing plays a particularly significant role in encouraging audiences to watch such content.

Previous IBT studies have shown that many audiences tend to

Interviewees:

- David Aukin – Executive Producer, Daybreak Pictures
- Alanna Clear – Strategic planner, Red Bee Media
- Matthew Godfrey – Senior Strategy Manager, BBC
- William Greswell – Controller, Strategy, BBC Vision
- Roly Keating – Director of Archive Content, BBC
- James Kirkham- Managing Director, Holler
- Martin Kirk – Head of UK campaigns, Oxfam
- John McDonald – Creative Strategist, BSkyB
- Mark Rossiter – Producer/Director, Fresh One
- Mark Sandell – Editor, *World Have Your Say*, BBC World Service
- Oliver Steeds – Journalist, *Unreported World*, Channel 4
- Terry Stevens – Head of Home Entertainment, Dogwoof
- Celia Taylor- Head of Factual and Features, Sky Entertainment
- Vicky Taylor – Commissioning Editor, New Media, News and Current Affairs, Channel 4
- Clive Tulloh – Head of Entertainment, Tiger Aspect
- Hal Vogel – Executive Producer, Daybreak Pictures
- Terry Watkins – Media consultant, TWResearch
- Frederica West – Associate Director, Open Gate Foundation
- Helen Yanacopulos – Senior lecturer, International Politics and Development, The Open University

avoid international content because they regard it as ‘worthy’ or ‘difficult viewing’ or because they associate it with moral and emotional pressure (Scott, 2009). Appropriate marketing is vital for attempting to overcome these perceptions. As Clive Tulloh, Head of Entertainment at Tiger Aspect points out, based on his own experiences with the Ross Kemp series ‘it’s the way you package up things to make people interested, as soon as they think it’s current affairs they switch off’ (see box). The significance of marketing for driving audiences to international programming is revealed in Figure 1. It shows that marketing is the second most important reason given by UK audiences for watching programmes set in developing countries.

However, despite the importance of marketing for the success of international content, such programmes have traditionally received, and are likely to continue to receive, less promotion than most other television genres.

Broadcasters prefer to concentrate their marketing budgets on a few big shows, as Matthew Godfrey, Senior Strategy Manager at the BBC explains: ‘there is usually one thing that you plug heavily every month, something that will really rate heavily like *The Apprentice* or *Strictly*, and a few others get a little bit. For international documentaries, which tend to be relatively low budget and short runs, it can be a waste of marketing’.

Although international content is unlikely to see the types of

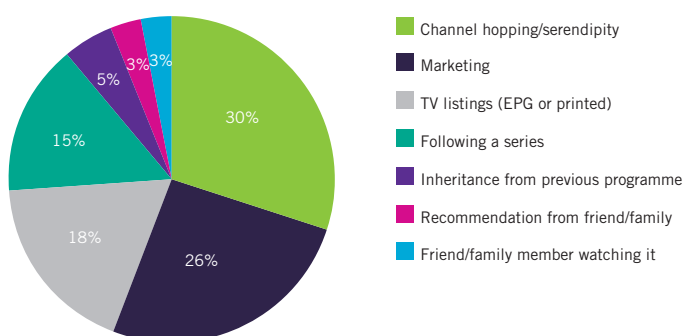


Figure 1: Reason given for watching non-news television coverage of ‘developing countries’ (unpublished data from previous IBT report (Scott, 2009))



ROSS KEMP

Some of the most successful international programmes are those which reach beyond audiences who regularly watch international content and find new audiences, like Sky’s *Ross Kemp: Extreme World*. As the BBC’s Matthew Godfrey notes: ‘it’s easy to make programmes about the developing world for people who are interested in the developing world – but that’s not our job – our job is to bring a big audience to things that they don’t necessarily think they want to watch’.

The Ross Kemp series have been part of Sky’s international content since 2006 and are a rare example of factual programming which successfully brings large audiences to difficult international issues. As Celia Taylor, Sky’s Head of Factual and Features says, ‘Ross Kemp has a track record for tackling subjects that you usually only see in current affairs programming but he takes a much broader audience to these subjects and places than straight news journalism’.

According to the executive producer, Clive Tulloh, ‘when Sky have analyzed why the Ross Kemp programmes are successful, one of the principal reasons has been because audiences say they trust Ross, he’s a regular guy, an actor not a journalist – he has no agenda’.

Ratings for the Ross Kemp series are good and Sky has used a repeats strategy very effectively to build its audience. Episode 1 of the latest series *Ross Kemp: Extreme World* had a live audience of 427,000 but by adding Sky+ playback and repeats on subsequent nights on Sky1 and Sky2 the audience almost trebled to 1.2 million.

Most of our interviewees told us that the main driver of impact is the quality of the programme itself. However, content alone does not guarantee impact – marketing a programme so that it appeals to its target audience is essential. Viewing figures for *Ross Kemp in the Middle East* were significantly lower than other series despite being, in the words of Clive Tulloh, ‘two of the best programmes Tiger Aspect have ever made’. He explains why: ‘I think it’s because it suddenly sounded like a current affairs programme. If we’d called it *Ross Kemp Meets a Suicide Bomber* I think it would have been more successful with audiences’.



Storyville: *The Trouble with Pirates*, BBC4

marketing budgets that big entertainment strands receive, in the online, digital world effective marketing no longer has to be about expensive campaigns. The new media environment offers a number of opportunities that, if seized upon in the right way, could help to increase the visibility of international content and drive audiences towards it.

Getting talked about

Many of our interviewees argued that one of the most effective means of promoting international programming without relying on traditional marketing approaches is to target relevant opinion leaders through social media. Being tweeted about by individuals who may have a connection to the issues in your programme and who have a large, active network of 'followers' who may themselves re-tweet about the programme, can at the very least dramatically increase the number of people aware of your content.

As Terry Stevens, Head of Home Entertainment at the film distribution company Dogwoof, argues, 'if we can find these key proponents, then they will help us to shout an awful lot louder. It's about passing the megaphone up to people at the top of the pyramid of influence. When Dogwoof get a film we look to the key charities, the key NGOs and advocates who can help support us and then they can help us to open other doors'.

These kinds of recommendation can have a significant impact upon viewing figures. Clive Tulloh identifies *Eddie Izzard: Marathon*

Man on BBC3 and *An Idiot Abroad* on Sky 1, as examples of recent programmes which 'got above expected viewing figures, at least partly because both Ricky Gervais and Eddie Izzard have over a million people following them on Twitter and they are regularly tweeting "watch the programme tonight"'.

This form of personal recommendation can be more effective than conventional marketing because, as John McDonald, Creative Strategist at Sky explains, 'it feels better if your friend is recommending a programme to you rather than if a promo is recommending it to you'. It can also be far more efficient, particularly for international programmes, if it is used to target 'ready-made audiences' who already have a connection or existing interest in the issues featured in the programme. In the months before a film's launch, Dogwoof stage previews for special interest groups and invite these audiences to post comments.

John McDonald concludes that 'you can almost predict the success of a programme based on the volume of tweets in the week running up to its launch and the ratio of positive to negative mentions'.

Much of the content that is being shared on social media is being quoted from a relatively small range of sources such as news websites, blogs or content sharing platforms, so if programme makers or broadcasters can find ways of having their content featured on the right blog or news site, the visibility of that content can be increased.

Successful online marketing can achieve greater impact not just by increasing the number of people watching but also by raising awareness of the issues featured in a programme, particularly amongst key audiences.

Building audiences early

Another potential advantage of social and online media is that it allows the process of marketing and promotion to begin much earlier. As Alanna Clear of Red Bee Media says, 'suddenly, as a programme producer, you can use these tools to start talking to people even before the channel that you end up on starts talking about it'.

Involving audiences early on is a key feature of successful marketing for entertainment programmes such as the Channel 4 youth drama, *Skins* (see box). Releasing teasers on YouTube or Facebook, placing early release content on an external website or using social media to increase visibility, are all strategies that can serve to build interest before a programme is broadcast. 'If you can involve people, if you can interest people very early on in a programme then you know when it comes out you have a ready-made audience. And if they start talking about it then it's just going to snowball and go on from there' (Terry Stevens).

John McDonald explains that it's crucial to avoid a top down approach: 'there are certain programmes where conversation happens around them by accident. *Mad Men* is a very good example. You had fans independently setting up Twitter feeds



SKINS

E4's flagship teen drama, *Skins*, is an example of how social media and marketing can successfully be used to raise visibility and ratings. It was one of the first programmes to think strategically about how to make use of the new marketing tools offered by online and social media, and to integrate them throughout the planning, production, post-production and broadcasting of the programme. The aim was to build a community of interest by word of mouth and then to sustain audience interest in, and commitment to, the programme over the long term, rather than simply building short-term awareness.

Ten weeks before the first episode was shown the characters were introduced through their own Myspace pages and fans were invited to sign up for community updates, exclusive previews, online invitations to style the cast, choose the music and designs, and to feature alongside the cast at a filmed party. Interest built rapidly and the 3 minute party trailer received 250,000 unique views. Fans were invited to start creating their own character pages and promote their own *Skins* content. Before transmission, '57% of 16-34s were spontaneously aware of *Skins*' (Walker et al, 2007).

The first episode had 1.6 million viewers – the largest ever audience for an E4 drama and a bigger audience than *Lost* or *24* received when they were launched. After the first episode, alongside an outdoor and press promotional campaign, fans on social networking sites were constantly fed with short-films, photographs, forums, competitions and events related to the programme.

While many elements of this approach may be more suited to UK-focused, youth drama than international programming, this example does illustrate the potential impact of involving audiences at an early stage and building a community of interest. As Allan Blair, Social Media Director at DDB UK, has said 'brands are realising it's not about shouting "watch this programme", it's about fostering a different relationship with consumers. *Skins* is a great example. Social media was purely about getting people to love the characters. Because they loved the characters, they trusted the programme would be good. That's how social media works: you get people to trust and love you, rather than just listen to you and do what you say'.



for the main characters and tweeting as if they were Don Draper going into the office every day. So, what you want ideally is for this to happen organically, or at least to pretend it's happened organically and then wait for it to take off'.

Involving audiences early on can also help generate interest from broadcasters or distributors. As Terry Stevens explains, 'if you start building audiences early, when you come to a distributor or commissioner you can say, "we've attracted an audience of 8,000 people on Facebook, an additional 5,000 on Twitter and however many signed up to my Flickr channel". Anyone is going to read that as potentially 10,000 viewers already. You've not only tapped into this audience of 10,000 people but all of their friends, if they each made one friend aware – 20,000 people. This is something anyone can do.'

Social media can also be a powerful tool for drawing attention to programmes – and the issues they raise – after they have been broadcast. Roly Keating, the BBC's Director of Archive Content believes that broadcasters need to learn to 'work with social media in different ways to encourage audiences to spot their own recommendations and spread the word and use their own networks to spot programmes they care about, use their network of friends, Twitter contacts, Facebook contacts to raise awareness of a show that they particularly love'.

Keating acknowledges that 'the power of the social is that it can spot things that the broadcasters have missed. Part of the lesson for broadcasters is that we're not in control of everything - we don't spot every connection that could be made, even in our own output, and we need to publish our material in a way that allows other viewers to make those connections and allow things to rise to the surface'.

Co-producing with audiences

Another way of generating interest is by giving potential viewers the opportunity to become involved in the production process. As John McDonald says, 'getting people involved in the creation of something makes them far more interested and committed to the project' and it allows producers to understand much better what will and will not work for different audiences. Terry Stevens adds that, just as social media can be a great editorial tool for news programmes by providing tip-offs and leads, so documentaries can benefit from the involvement of audiences because it might help to identify Diaspora communities or individual experts or persons with valuable experiences that might help provide material.

However, several interviewees cautioned against ceding too much control to audiences. As David Aukin, Executive Producer of *The Promise* warned, 'the audience doesn't know what it wants until it gets it – they want to be surprised'.

Table 1: Viewing figures for first transmission and BBC iPlayer requests for a number of international programmes shown on BBC channels in 2010

Programme title	Channel	Audience Live (000s)	iPlayer requests (000s)	Viewers added by iPlayer as a percentage of initial viewing figures
The World's Strictest Parents (episode 7)	BBC3	305	352	115%
Zimbabwe's Forgotten Children	BBC4	160	79	49%
Storyville: New Kings of Nigeria	BBC4	78	33	43%
Sex Trafficking in Cambodia – Stacey Dooley Investigates	BBC3	539	195	36%
Blood, Sweat and Luxuries (episode 2)	BBC3	420	144	34%
Wags, Kids and World Cup Dreams (episode 2)	BBC3	314	96	31%
Kids with Guns -Stacey Dooley Investigates	BBC3	282	86	31%
Wags, Kids and World Cup Dreams (episode 3)	BBC3	290	68	23%
Welcome to Lagos (episode 1)	BBC2	1,127	223	20%
Storyville: The Trouble with Pirates	BBC4	210	28	13%
South Africa Walks (episode 1)	BBC4	471	55	12%
Stephen Fry and the Great American Oil Spill	BBC2	1,117	92	8%
Secret Iraq	BBC2	1,079	84	8%
This World: Surviving Haiti	BBC2	784	22	3%
Panorama: Death in the Med	BBC1	2,184	51	2%
An African Journey with Jonathan Dimbleby (episode 3)	BBC2	1,701	31	2%
Panorama: Orphans of Haiti	BBC1	2,168	24	1%

NON-LINEAR VIEWING

Nowhere are the challenges and opportunities brought about by changes in the UK media landscape so evident for international content as in the rise of non-linear viewing platforms, such as Video on Demand (VOD) and time shift television. The proportion of time shift viewing in the UK has more than tripled since 2006, from 1.7% to 5.9%. Whilst most viewing of non-linear content is currently on Digital Video Recorders (57%) (Ofcom, 2010), demand is growing rapidly for services such as BBC iPlayer and 4oD. The number of programme requests on BBC iPlayer almost doubled from 53 to 93 million in the 12 months between April 2009 and April 2010 (Ofcom, 2010). This shift to non-linear viewing gives audiences far more control over what they watch, when and how. But, as they gain more control, the range and breadth of programmes they choose to watch is narrowing, with audiences consistently tuning into what they are familiar and comfortable with.

Programme choice in time-shifted viewing is driven far less by serendipity, or chance encounters with programmes. The impact of this on international programming is particularly important because, as Figure 1 showed, serendipity was found to be the most common reason why audiences begin watching international content. However, VOD and time shift services also present significant opportunities for international content by extending the life of a programme so that audiences can catch-up with something they miss or only hear about through word of mouth after the initial broadcast. Table 1 reveals the extent to which this is happening for a number of international programmes shown on the BBC in 2010. For some programmes, such as *The World's Strictest Parents* (BBC3), total programme requests on BBC iPlayer are greater than the size of the initial linear audience. Other international programmes whose initial audience was significantly increased by BBC iPlayer include *Zimbabwe's Forgotten Children* (BBC4) (49%), *Storyville: New Kings of Nigeria* (BBC4) (43%) and *Sex Trafficking in Cambodia – Stacey*



Zimbabwe's Forgotten Children, BBC4

Table 2: Top 10 most featured and most popular programmes on various catch-up TV platforms in February 2011.

CATCH-UP PLATFORM	FEATURED	MOST POPULAR
ITV Player	Emmerdale x 20	Coronation Street x 28
ITV Player	Secret Diary of a Call Girl x 18	Emmerdale x 28
ITV Player	Coronation street x 17	Secret Diary of a Call Girl x 24
ITV Player	Take Me Out x 12	Marchlands x 19
ITV Player	Marchlands x 10	The Jeremy Kyle show x 13
ITV Player	Dancing on Ice x 9	Take Me Out x 12
ITV Player	Gossip Girl x 9	Gossip Girl x 8
ITV Player	The Brit Awards x 7	The Vampire Diaries x 7
ITV Player	Taggart x 5	The Brit Awards x 6
ITV Player	Wild at Heart x 5	Dancing on Ice x 6
BBC iPlayer	Outcasts x 8	Eastenders x 21
BBC iPlayer	Nurse Jackie x 7	Top Gear x 14
BBC iPlayer	The Tudors x 7	Human Planet x 11
BBC iPlayer	The Chinese are Coming x 6	QI x 9
BBC iPlayer	How TV ruined your life x 5	Live at the Apollo x 7
BBC iPlayer	Madagascar x 5	Sun, Sex and Suspicious Parents x 6
BBC iPlayer	The Apprentice USA x 5	Waterloo Road x 5
BBC iPlayer	Human Planet x 4	Episodes x 4
BBC iPlayer	Let's Dance for Comic Relief x 4	Madagascar x 4
BBC iPlayer	Master Chef x 4	Being Human x 4
4oD	Skins x 19	
4oD	The Cleveland Show x 16	
4oD	Tool Academy x 15	
4oD	Big Fat Gypsy Wedding x 14	
4oD	The Joy of Teen Sex x13	
4oD	The Promise x 11	
4oD	Red Riding x 10	
4oD	90210 x 10	
4oD	The Good Wife x 9	
4oD	The Big C x 9	

Note: The numbers next to the programme titles indicate the number of days in the month when the programme was featured prominently or appeared as one of the 'most viewed'.

Dooley Investigates (BBC3) (36%). BBC iPlayer has also significantly boosted the audience of *Blood, Sweat and Luxuries* (BBC3) (see box).

However, Table 1 also shows that not all international programmes are given such a ratings boost by BBC iPlayer. *An African Journey with Jonathan Dimbleby* (BBC2) and *This World: Surviving Haiti* (BBC2) only received an increase of 2% and 3% respectively. One reason for this disparity is that programmes on the digital channels, BBC3 and BBC4, receive a greater relative uplift than those on BBC1 and BBC2. This is partly because audiences are more likely to have missed the original broadcast on a digital channel given its smaller audience reach.

Another explanation for why some programmes are given more of an uplift by BBC iPlayer is the extent to which they are featured on the front page of such platforms. Table 2 shows the 10 programmes which appeared most often in the 'most popular' and 'featured' sections on BBC iPlayer, 4oD and ITV Player in the month of February 2011. It indicates a marked difference between the strategies of the broadcasters regarding which programmes they feature. For ITV Player, it appears from the results in Table 2 that the programmes featured most often, such as, *Emmerdale*,

Secret Diary of a Call Girl, *Coronation Street*, *Take Me Out*, *Marchlands* and *Dancing on Ice* are also the ones which are most watched. ITV's strategy appears to be designed to drive yet more viewers to programmes that are already popular.

In contrast, BBC iPlayer is apparently not being used just to promote the BBC's most popular programmes, such as *Eastenders* and *Top Gear*. Instead, it is programmes such as *The Chinese are Coming* (BBC2) and *How TV Ruined your Life* (BBC2), which are often featured. As William Greswell, Controller, Strategy, BBC Vision argues, 'the BBC has a definite strategy of using BBC iPlayer to drive audiences towards public service content which they wouldn't otherwise watch. The front page of BBC iPlayer is designed with this in mind so it doesn't simply highlight the most popular shows but includes less well known ones in the hope that people will watch them. The strategy is working and BBC3 and BBC4 shows benefit in particular from a higher than expected take up on iPlayer'.

Such comparisons between what is 'featured' and what is 'most popular' were not possible for Channel 4, since on 4oD a list of the 'most popular' programmes is not always given. However, it appears that 4oD is adopting a strategy somewhere in between

that of the BBC and ITV by featuring some popular shows like *Skins* and other more public service programmes such as *The Promise*.

These different strategies for featuring programmes have significant consequences for international programming. If catch-up services continue to be an increasingly important way for audiences to access international content, then whether such programmes are featured and therefore visible, or not, on these platforms will play a key role in determining whether people watch them. It's also clear that in this new online world of on demand TV, broadcasters need to look for other ways of driving audiences towards public service content. In the linear schedule, strategies of 'hammocking' less popular programmes between more popular ones are used to try and maximize the audiences of key programmes. Broadcasters are still experimenting with the most effective methods of 'digital hammocking', so that people who watch popular shows online then come across something else that they had not planned to view. As Roly Keating, the BBC's Director of Archive Content admits 'we are in the very early days of what we increasingly call connected broadcasting, so by definition there is almost everything to be learned'. He envisages huge changes in the way in which audiences are offered different content online so that 'it will be possible minute by minute to offer audiences a smart selection of on demand viewing alternatives that either relate to what they are watching or complement it or take their interest further'. Keating is optimistic about finding ways in this new broadcasting landscape to draw attention to what may otherwise be minority programmes: 'the destiny of the next five years will be all



The Chinese are Coming, BBC2



BLOOD, SWEAT AND LUXURIES

Despite having a relatively small amount of international coverage, BBC3 has successfully tackled potentially dry international subjects like globalization, most recently with its *Blood, Sweat and Luxuries* strand. As Mark Rossiter, Producer/ Director at Fresh One, comments, 'this should be the holy grail for programmes of this nature – bringing serious issues to an audience in a way that is not preachy or worthy, and has the potential to engineer changes of opinion and influence purchasing power'.

The success of *Blood, Sweat and Luxuries* and BBC3's overall approach to international issues demonstrates how, once a potential audience has been targeted, programmes can be developed which work for that audience. Audience research has played a crucial role in helping BBC3 to understand its audience. As the BBC's Matthew Godfrey explains, 'there was a feeling that BBC3 had to be very slick, celebrity based, MTVish but actually when you did a deep analysis of which programmes worked for that audience, they tended to be factual, very low budget, warts and all observational documentaries'. Audience research is also being used to help BBC3 understand how best to direct audiences from the programme to additional material online. According to an internal BBC study, traffic on the BBC3 website increased by 250% immediately following the first transmission of *Blood, Sweat and Luxuries*. This was achieved by adding a message at the end of the programme that directed viewers to the BBC3 blog.

Many of the comments on the blog reflect a demand by viewers for concrete steps they can take and a frustration when they don't know what to do:

BBC you have rightly raised awareness through this programme, can you now please offer some real to assistance to mobilise the offers of help?

The Ghana episode has just reduced me to tears. WE HAVE TO DO SOMETHING. I feel helpless but desperately want to help in some way.

If programme-specific microsites can successfully address this desire for action, then they have the potential to offer audiences the opportunity to develop a more long-lasting relationship with international issues.



Blood and Oil, BBC2

about the universes of linear and non-linear coming together which I hope, in absolute terms, will be beneficial for minority programming. Everything will grow from this connectivity because you will get more viral effects, more abilities to promote, more abilities to connect for all kinds of programming’.

SOCIAL AND ONLINE MEDIA

We have already discussed how social and online media can be used to market international programming. It can also help to increase the impact of such content in other ways by providing viewers with more information about the issues featured and suggestions for further action. As IBT’s previous report, *The World Online* (Fenyoe, 2010) demonstrated, television is one of the most significant drivers of online searching about international issues. *The Promise*, Channel 4’s drama about the Israel / Palestine conflict is a notable example. In one month, February 2011, its website received 750,000 visits and almost 2 million page views.

Channel 4 regards online as an important opportunity for enhancing the impact of its international content and cites the example of its foreign affairs strand, *Unreported World*. As Vicky Taylor, Commissioning Editor, New Media for News and Current Affairs explains, ‘it’s absolutely a jewel in Channel 4’s crown but it is 30 minutes of television on a Friday evening, so it is quite hard to drive big audience to that... but what you can do online is to give it a life which goes on forever’.

Microsites

Whilst most international programmes now have their own websites, often these are little more than holding pages for their trailers. The microsites of *Unreported World* and *The Promise* demonstrate that much more can be made of these sites. *The Promise* site features a web chat with the writer/director, interviews with the cast, picture galleries, behind the scenes video, background on the history, suggestions for further reading and a ‘tweet constellation’ to show comments on Twitter about the series. This innovative tool aggregates all public tweets which use the hashtag #c4thepromise and groups them around particular themes, enabling the audience to visualise the scale and variety of the online conversations around *The Promise* and contribute to them.

The *Unreported World* site has additional video for each episode, a reporter’s blog, links to find out more information or to get in touch with organisations working on the issues featured and a ‘local heroes’ strand which profiles individuals who are fighting to make a difference around the world.

The popularity of programme specific microsites varies enormously. Figures for *Panorama* (BBC1) and *The World’s Strictest Parents* (BBC3) show that in the period October – December 2010, their microsites had a weekly average of 15,000 and 9,000 unique users respectively. The site for the BBC2 drama, *Blood and Oil*, had around 6,500 unique users a week at the time it was broadcast.

It's clear that some issues will inevitably generate more interest online than others, but no international programme has come close to the number of hits received by Channel 4 for *The Promise*. This is an area that urgently needs further investigation since many programmes that have the potential to drive audiences online are not succeeding in doing so.

Web chats

Live web chats or Q and A's involving presenters or experts answering audience questions immediately after transmission are a regular part of *Unreported World's* online offering. 'We did a web chat immediately after *Malaria Town* and it had something like 600 people in the chat. It's not huge, *Big Brother* could have thousands, but if you had 600 people in a town hall or lecture who were actively engaged in the subject you'd think you had a really successful event and that's what it felt like. There were people who were really engaged with the issues, asking "what can we do about malaria?"' (Vicky Taylor).

The results of audience research conducted for *The World Online* (Fenyoe, 2010) showed that live web chats were particularly popular with audiences because they provide 'voices on the ground'. They also enable specific questions to be answered, unlike comment sections on web pages which are often full of unanswered questions about what can be done, and which, for many, may simply reinforce feelings of a lack of agency.

Integrating with social media

On their own, microsites for individual programmes can only achieve a limited impact. Making maximum use of social networking sites should be a priority according to James Kirkham, Managing Director of the brand agency Holler, which has worked on the Channel 4 series *Skins*. 'It's vital you take out any new property, whether factual, dramatic or comedic, to where your audiences are. This means going into all the places, spaces and destinations where they might spend time and allowing them to find and sample the property in a way which is easily shared'.

Social networking sites account for nearly a quarter of all time spent on the internet and are being used by over 60% of 15-34 year olds (Ofcom, 2010). But simply being present in audiences' online worlds is not enough. As Vicky Taylor points out, 'a lot of people make the mistake of thinking that simply having a page is enough and they don't have to do anything with it apart from occasionally put a press release up there – they may as well not bother. The attention span on any of these social media platforms is microseconds so it's got to be content that people will want to click on'.

Terry Stevens adds: 'don't just put things up for the sake of it. You need to try to be innovative, try to be intelligent. One rule I try to live by is – give people something to work on. Give people content and give it regularly. Give people an image, give people a trailer. If you've got a whole bunch of behind the scenes stuff, perhaps put a



Unreported World, Channel 4



Panorama: Chocolate – The Bitter Truth, BBC1

couple of shots up on the Monday, a couple more on the Wednesday. Feed people stuff so they want to keep taking a look at it'.

Sense of agency

One of the striking conclusions of IBT's *Global Generation* report (Cross, et al. 2010) was that television coverage of developing countries frequently reinforces a feeling amongst young people that 'there is nothing they can do' to address global issues like poverty. Online media has the potential to challenge this assumption by giving viewers a sense that they can undertake action that will make a difference. But this can be challenging territory for broadcasters since regulations do not allow them actively to campaign.

Vicky Taylor argues that Ofcom regulations regarding impartiality and restrictions on campaigning should not stop broadcasters from providing audiences with options for action. 'We actively provide links to a range of charities. I think we feel quite comfortable about that. What would be difficult for us would be to say, "this is the only charity that works in this sector". So what we do is say "malaria is a big topic, there's lots of people working in this and here are the ones you might find interesting". Then it is up to people to do what they want to do with it'.

Despite offering such links, many individuals who comment on the *Unreported World* website and on the microsites of international





Pink Saris, Channel 4

programmes in general, express the feeling that they want to take action but do not know how to. The following comment left on a webpage for the *Unreported World* programme, *Malaria Town* was typical. ‘Your film was harrowing, this is such an important issue that needs to be raised. But what is being done to help? What are the charities doing to get the drugs to those that really need it? How can we help? Is anyone raising money to help this town?’

The frequency of these sorts of comments suggests that offering viewers clear options for action online needs to be a priority for the websites of international programmes.

Thinking outside the box

In many television genres there are successful examples of programmes experimenting with new ways of using social and online media, not simply to attempt to drive greater audiences to conventional content, but to re-think both the nature of the programme itself and its relationship with the audience. There are few examples of this happening with international content. As Hal Vogel, the producer of *The Promise* says, ‘there are lots of incredibly interesting things going on, particularly in entertainment. *Misfits*, *Shameless* and *Skins*, they’ve all been doing it very well. But we don’t spend enough time thinking about how we can use what they’re doing in entertainment in what we’re doing’.

So, what can international programming learn from the success of other genres?

A key element of *Skins*’ marketing strategy was the way it used social media to involve audiences at an early stage and to get them

interested in the main characters. Social media was used to enhance the unique selling points (USPs) of youth drama: the characters and plot. The successful use of social media by other genres could be explained in the same way. Quiz or game shows, such as *Million Pound Drop Live*, use online media to enhance their particular USP: they allow audiences to play along and answer the questions in real time. Political discussion programmes, such as *Question Time*, use social media to allow audiences to discuss amongst themselves and even to ask questions of the panel members. Thus, the question for international programming is ‘what are its principal USPs and how can social and online media be used to enhance these?’

Travel

One of the greatest USPs of international content is that it allows audiences to travel virtually and experience places which they are unlikely to visit in person. By making use of online tools, such as web documentary formats or applications such as Google Earth 3D, international content can allow audiences to feel as though they are experiencing other places in a more personal way, rather than as passive observers.

A web documentary could allow audiences to navigate their own way around the places that feature in a series like *Welcome to Lagos* for example. *Save the Children* has used this approach to promote the development work they are doing in Kroo Bay, Sierra Leone. They have uploaded short, interactive pieces that combine 360 degree navigable stills with video content and audio. These ‘webisodes’ take the audience to where *Save the Children* are working, allowing them to see the people, hear the sounds and have their own experience whilst learning about the work.



WORLD HAVE YOUR SAY

World Have Your Say was launched by the BBC World Service in 2005 with the aim of building 'a global conversation' about international issues between audiences around the world. Interactivity is key and audiences can contribute either by phoning, emailing and texting in or by posting comments online. It now broadcasts for two and a half hours a day and is televised once a week on BBC World News.

Audiences set the agenda for the show. As Mark Sandell, the programme's editor, notes 'we have open editorial meetings so people can call in or even turn up and contribute. People also email in or text or post ideas for discussion on the Facebook page'. This sometimes leads to controversial questions being chosen for discussion, for example 'was Africa better off under colonialism?' or 'what do we have to thank George W Bush for?'

The programme's interactive format involves listeners and viewers putting questions directly to studio guests as well as talking to each other, with the presenter acting as facilitator to encourage genuine conversation.

One of its principal achievements, according to Mark Sandell, is to create greater understanding between people in different parts of the world: 'there's a polarisation between the views of the developing and the developed world which I think is when the programme is most interesting, where people make assumptions about each other and they are challenged'.

The programme uses a range of platforms to stimulate conversation. It has its own RSS and Twitter feeds, Flickr and YouTube channels and a Facebook page with more than 20,000 active users. *World Have Your Say* has a loyal following, particularly in Africa and North America and each programme typically sees comments posted from several dozen different countries.

The success of *World Have Your Say* demonstrates that broadcasters can facilitate conversations between audiences in different countries. If producers in the UK can find ways of following the example of the World Service, and using their websites to stimulate global conversations, this could significantly increase the impact of their content.

Interaction

The second USP of international content is the potential it has to enable audiences to interact with people from a range of different countries who they will never otherwise have the opportunity to meet or talk to. The World Service's *World Have Your Say* is a rare example of a programme that has successfully initiated global conversations (see box), but on television the default response is to provide Q and A's with reporters, actors or producers, rather than individuals on the ground. *Unreported World* has taken a step in this direction with its 'Local Heroes' strand by providing a biography of a particular individual featured in each programme. The next step would be for broadcasters to provide more of these opportunities and to make them less mediated and more interactive.

As Martin Kirk, Head of UK campaigns at Oxfam argues, 'why don't we have, at the end of an international documentary, for example, instead of saying "go to this website for more information" why don't we invite a connection between people. "If you've been affected by this series and you want to discuss more, we're going to be opening up a web chat or social media chat or Facebook group for one week for people to connect with other people who are in this country and who are facing these issues". Build the network and let it go'.

CONCLUSION

In this report we have discussed, for the first time, the particular challenges and opportunities faced by international programming in a rapidly changing media environment – specifically in relation to marketing, non-linear and social and online media.

It's clear that a more significant commitment by broadcasters to spend money on marketing international content would enhance its impact. However, since that is unlikely to happen, we have noted other, less expensive ways of raising the visibility of such content. Producers can use social media very effectively to get their programmes talked about and, by using a range of networks, help to build audience interest in advance of transmission. There are also benefits of enabling audiences to become involved in co-producing content.

Non-linear viewing also offers significant opportunities for international content. If broadcasters choose, as the BBC does, to use catch up services like the BBC iPlayer to encourage audiences to view public service content, the number of people watching international programmes can be significantly boosted.



Stacey Dooley Investigates, BBC3

Finally, we have argued that some genres, particular youth drama, have achieved a great deal as a result of their innovative use of social and online media, but international programming has not been so successful. Producers need to consider how they can make better and more imaginative use of online content to enhance the impact of international programmes and in particular to give viewers more opportunities to take action.

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GLOBAL GENERATION – HOW YOUNG PEOPLE IN THE UK CONNECT WITH THE WIDER WORLD

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The report can be downloaded from our website www.ibt.org.uk

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THE WORLD ONLINE

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