The Papers

Audience Research and the Survival of Broadcast Stations in 21ˢᵗ Century Nigeria

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Abstract

With about 322 radio and more than 100 television stations in Nigeria, the survival of broadcast stations in Nigeria's competitive broadcast industry is hinged on their ability to offer contents that meet the needs of the consumers. To achieve this requires more than sophisticated production facilities and creative personnel. It requires constant research to determine the type of contents that would attract and sustain the audience. This article emphasises that in broadcasting, content is king; and it is content determined through audience research that captures the audience and, by extension, the advertisers whose patronage is vital to the survival of broadcast stations. It further stresses the need for broadcast training institutions to start from the cradle to emphasise audience research.

Keywords: Audience Research, Broadcast Content, Consumers, Survival, Competition.

Introduction

There is high radio and television penetration in all parts of the world today. Radio reaches about everyone, everywhere, while television has reached many people even in the poorest parts of the world. This does not mean that there is no unevenness in the availability of television and radio channels in the world. In Nigeria, for example, the metropolitan centres of Lagos, Ibadan, Abuja, Kaduna, Kano and Port Harcourt have more broadcast stations than other parts of the country (Nairaland.com, 2018). While audiences in some parts of the world have choices and options as regard the channels available, in some other areas such options are simply unavailable (Mytton, 1992).

The primary pre-occupation of radio and television is to provide information and entertainment from across the world, and at the speed of light. They do this with the assumption that the messages they disseminate are being watched or listened to, and that the audience actually prefer or like such messages which come by way of

programmes or shows. That this assumption may be right or wrong motivates broadcast operators to ascertain if their programmes do reach the target audience, and who and who in the target audience are exposed to such programmes. In this regard, Mytton (1992, p.2) states:

> The questions "who is listening?" or "who is watching?" are surely not unwarranted or even remarkable questions to ask. Certainly broadcasters need to know something about the people who are watching or listening. In all kinds of communication activity we think about the person or persons with whom we are communicating...Every time we speak, write a letter, and make a phone call...we consider with whom we are communicating. If we don't know, we do a little research.

The above statement by Mytton suggests that broadcasters may sometimes be in the dark concerning those who constitute their audience with regard their listening habits, programme preferences etc. In such circumstances, research may be necessary to better understand the audience.

The need for research on the audience of radio and television is heightened by the fact that broadcasts are largely unidirectional and there is always the assumption that what is broadcast is being listened to or watched. The assumption is still prevalent – that people actually listen or watch. This is indeed a carryover from the early days of radio or television when there were no options available to the broadcast audience. For many decades, many cities in Nigeria had only one radio station and perhaps no television station and some had one television station and one radio station. The audience had no option but to listen to or watch what was available for as long as the station was on the air. Coincidentally, ownership of a television or radio set and consequent exposure to broadcasts were then regarded as status symbols.

But when the government liberalised the airwaves with the establishment of the National Broadcasting Commission through the NBC Act No. 38 of 1992 (as amended) as well as the Commercialisation and Privatization Act No. 43 of 1992, viewers and listeners now had the options of which stations to tune to. The licensing of satellite and cable operators further opened up the broadcasting space with the accompanying options for broadcast consumers as well as competition for the consumers among broadcast operators. Regularly, the National Broadcasting Commission recommends to the President new applicants for licensing as broadcast operators; hence, the space regularly takes in more operators who, on coming on stream, must carve out their survival from the existing radio, television and satellite/cable stations (Otu, 2006). In Nigeria, there were 322 radio (Nairaland.com, 2018) and more than 100 television stations (finel.com, 2018) as at January 5, 2017, in different parts of the country. In the light of this, the survival of these stations becomes an issue. This paper argues that the survival of these stations rests on audience

research, which aims to discover and give to the audience a bouquet that meets their infotainment needs.

This paper sees audience research in line with List's (2000) conceptualisation that it is a systematic and accurate way of finding out about an audience. The concept is also used interchangeably with audience measurement. Similarly, the broadcast media and the mass media are used synonymously, except where another meaning is intended. Audience is here defined as listeners, viewers, readers, subscribers, and all those who use broadcast messages. Survival is seen as the ability of broadcast stations to remain on the air notwithstanding the rigours of operation, and remain on the path of sustainability despite these rigours.

History of Audience Research

The needs of media industries gave rise to audience measurement. The earliest and simplest kinds of research were designed to obtain reliable estimates of what were otherwise unknown quantities. According to McQuail (2005, p.403), "these were especially the size and reach of radio audiences and the 'reach' of print publications (the number of potential readers as opposed to the circulation or print run). These data were essential to management, especially for gaining paid advertising". McQuail (2005) states that in addition to size, the social composition of the audiences was similarly important. These elementary needs gave rise to an immense industry interconnected with that of advertising and market research.

The British Broadcasting Corporation (BBC) did not engage in audience research for more than ten years after its establishment. In fact, there were strong arguments for and against audience research before it actually began. Mytton (1992, p.4) recalls a speech by Val Gielgud, BBC Productions Director in 1930, which made a case for audience research:

> I cannot help feeling more and more strongly that we are fundamentally ignorant as to how our various programmes are received, and what is their relative popularity. It must be a source of considerable disquiet to many people besides myself to think that it is quite possible that a very great deal of our money and time and effort may be expended on broadcasting into a void.

But Gielgud's colleague and BBC Director of Talks, Charles Siepmann, vehemently opposed him and by extension audience research:

> I do not share Gielgud's view on the democratic issue. However, complete and effective any survey we launch might be, I should still be convinced that our policy and programme building should be based first and last upon our conviction as to what should and should not be broadcast. As

> far as meeting public demand is concerned, I believe that the
> right way is to provide for a more conscious differentiation of
> objectives within our daily programmes (Mytton, p.4).

While Gielgud's position was based on the need to have some more reliable information on the audiences and to help the broadcasters to do their jobs better, Siepmann's view was a caution against over-reliance on quantitative audience research. Six years after this debate -1936- audience research was firmly established within the BBC. The American experience was somewhat different. Broadcasting in the United States, from inception, was guided by the fundamental principle that people were attracted to watch or listen if they got the programmes they wanted. This motivated broadcast operators in the United States to attempt to find out through audience research the desires and preferences of their assumed audiences.

At the beginning of broadcasting, audience research, even in the richer countries, was not primary and therefore not widespread. Broadcasters in both the United Kingdom and the United States knew very little about their listeners. The little they knew was based on unreliable and unrealistic methods, and therefore based more on assumptions than facts. Mytton (1992, p.5) records that:

> In the very early days of radio in the United States, there was no
> systematic audience reach. Very often it was the personal
> likes and dislikes of a prospective commercial sponsor - most
> United States broadcasting was and is paid for by advertising
> – which determined what went on air. An advertiser might
> sponsor a programme because of his own tastes and
> preferences.

Mytton (1992, p.4) further states that "the first form of measurement used in the United States to guide programming was obtained by counting the number of letters elicited by programmes. Other 'measurements' used by broadcasters in the early days were no more reliable. Some radio station managers used to draw a circle on a map with a hundred-mile radius about the station and determine the number of people who lived within the circle".

Today, it is reasonably safe to say that the desirability of audience research has been acknowledged, although the purposes of audience research may differ from one national system of broadcasting to another. Akpan (2017) states that in the paternalistic and permissive broadcast orientations, audience research is meant to reveal audience preferences, but in the authoritarian system, it is designed to confirm that the propaganda dished out as information is working on the audience.

Theoretical Framework

This paper is founded on the Consumer Sovereignty Theory which, according to Watson and Hill (2015, p.59), is concerned with "the notion that consumers should drive the production and allocation of goods and services through the purchasing

decisions they make within a free market – that is, a market not controlled by the State or other monopolistic powers". Consumer sovereignty is associated with market-driven approaches to the operation of economic activities, including the production and distribution of media contents. The theory works best in a competitive economy such as it is being experienced in the broadcast industry. For broadcasters to survive the competition, they have to strive to meet the needs of their content consumers. Such needs can best be determined through audience research which can reveal the type of media contents that their consumers want.

Approaches to Audience Research
Constructing a profile for a specific target audience is a specialised area of work. As a result, some media producers employ market research organisations to analyse specific audiences to determine what they want (Branston and Stafford, 2008). There are at least three known approaches to audience research – quantitative, qualitative and geodemographic. Quantitative audience is a "number-crunching exercise" (Branston and Stafford, 2008, p.345) which is aimed at producing audience figures for print products. This is also demographic research, obviously the most familiar type and presents quantitative information on the media habits of audiences (Albarran, 2006). On the other hand, qualitative research is not interested in the number of responses but in the opinions or ideas that that respondents express. This is also known as psychographic research which goes beyond numeric information to offer qualitative data on audiences, such as lifestyle and purchasing patterns.

The third approach, Albarran (2006) calls it geodemographic research. It combines demographic and psychographic data with geographical locations or clusters (using postal zip codes and census data) to determine audience tastes and preferences. Albarran says the geodemographic was developed in the 1970s and "is used in advertising and marketing to aim messages and products at specific geographic areas" (2006, p.152). Broadcast managers should appreciate the value of using all the three approaches – demographic, psychographic and geodemographic – to help them to analyse and target audiences.

Audience Research in Broadcast Stations in Nigeria
Many, if not all, broadcast stations in Nigeria would claim to engage in one form of audience research or another, the intent of such research efforts notwithstanding. Just as it happened in other climes where public broadcasting preceded private broadcasting (for example, the United Kingdom), audience research in Nigeria has become more pronounced since the coming on stream of private broadcast operators.

Before private broadcasters came on the scene, the existing stations in Nigeria, just as Charles Siepmann, BBC Director of Talks, said in 1930, tended to

have equated audience preferences with the convictions of the broadcasters on what the audience needs were. In other words, broadcast professionals determined what the audience wanted and accordingly served audiences through programming. And even when the stations started imbibing the concept of audience research, it remained more on the level of concept than practice. It was a subhead in the budget which appropriated funds for it – funds that were duly "accounted for" to balance the books. In practice, though, audience research did not go beyond the desk of officers designated as audience research officers. The existing broadcast stations did not see the need for audience research – they were sole operators who had monopoly in their areas of operation and the audiences had no option but (were condemned) to listen to or watch such stations. To the extent that the broadcast operators were sure of audiences that circumstances of choice and status symbol had compelled them to listen or watch, to that extent did the operators not find any compelling factors to expend a great deal of time and money on an audience whose loyalty was never in doubt. Therefore, the budgetary provisions for audience research were used for other purposes as were determined by the authorities of such stations based on what they determined as areas of need.

As already stated, this did not and still has not prevented broadcast stations in Nigeria from creating research units to oversee audience research. The new stations (private ones) have tended to follow on the footsteps of their "elder cousins" in the handling of audience research. Audience research is more a perfunctory matter than a critical issue in broadcast operations.

For public broadcasters who blazed the trail in broadcasting in Nigeria, their attitude to audience research was conditioned by the assurance of a loyal audience in the absence of opposition (and perhaps the cost of audience research). But for the private broadcasters, their attitude is defined by the frightening cost of audience research. Whatever seems to define the attitude of the operators, one fact remains supremely clear – that broadcast stations treat audience research with levity and nonchalance.

What efforts have Nigeria's broadcast stations made towards audience measurements? They do this through letters written by audience members expressing their opinions on some issues, particularly programming; vox pop where stations regularly go into the streets to ask viewers or listeners their opinions on programmes aired or what programmes they would want the stations to focus on; phone calls, e-mails, face book and whatsapp chats on live programmes. Although these may yield some workable data, the methods are not systematic; they are not reliable; there are no rules, and all depends on what the station or the personnel in charge desires to achieve. A common but often unstated weakness in these methods listed above is that they are usually compromised by the personnel of the stations being the source(s) of the so-

called audience reactions. To this extent, the methods listed above are misleading and unreliable (Akpan and Senam, 2011). Hence, the need for the stations to have reliable audience measurements remains.

Why Audience Research is necessary
Since 1936 when audience research was formally established in the BBC (Mytton, 1992), its role from the outset has included that of serving as an instrument of public accountability as well as providing an information system for programme makers and management. It has also provided the intelligence that guide decisions on major policy issues.

1. **Audience research enables a proper understanding of the audience:** At the foundation of audience research is the supposition that every communicative act presupposes an audience. Embedded in every mass media message is a theory of who should consume it. Of course, if no one is giving attention, then the communicative act is useless. We communicate with the implicit assurance that someone would listen, read or watch, understand same and respond, hopefully in the manner we had envisaged. Therefore, as Attalah (2006, p.45) has stated, "Successful communication requires...that we inhabit the mind and the context of the other. As such, the audience is always present at the very beginning of every communicative act". Unfortunately, some broadcasters tend to dismiss the audience and assume that they know all about them and their responses. With communication itself becoming richer, more intense and more complex with a corresponding more sophisticated audience, the result has been a poorly understood or utterly misjudged audience – a challenge which only audience research can unmask and solve.

    Audience research is more than determining who is listening or viewing. These inevitable questions must be answered: "Who is the programme intended for? Are they listening or viewing? Do radio broadcasters, living in the cities, know what time to broadcast to farmers? They might think they do, but experience shows that without research they can get it wrong. If programmes are aimed at children, are the children being reached?" (Mytton, 1992, p. 3).

    Attalah (2006, p.47) corroborates Mytton's position by underlining the importance of the audience:

    > Every message is, therefore, a theory of the audience, and every audience is an instruction on how to produce messages. We can therefore begin with audiences and ask which strategies media use to reach them, or we can begin with messages and ask how the intended audience is already embedded in them. Messages will contain markers that orient audiences appropriately, and audiences will respond to

messages that contain appropriate markers. It becomes highly significant, therefore, to ask what type of message will be produced if we assume that the audience is, for example, female or young or poor. Likewise, it becomes significant to ask what audiences are imagined by messages that contain markers that are indicative of gender, age or social status.

2. **Audience measurement assists the broadcast station to operate profitably:** Radio and television stations, especially the private ones, are in business to make profit. Therefore, "a media outlet will become financially self-sufficient or profitable only if it attracts an audience desired by advertisers" (Johnson, 2006, p.196). Advertisers select the outlets to carry their messages based on the value of such outlets as determined by the size and quality of its audience – quality being defined by demographic factors that can impact on purchasing decisions. Such considerations include age, gender, ethnicity, family pattern, occupation and lifestyle choices. Advertisers want to reach the highest number of potential consumers at the lowest possible cost. This is the information that audience research makes available to the advertisers and the broadcast operators.

3. **Audience research enables the media to increase their value to advertisers:** There is no disputing the fact that there is a symbiosis between the broadcast media and advertisers. Should the point be further stretched, it becomes evident that advertisers do not need the mass media or, to be more considerate, the broadcast media need advertisers more than the advertisers need the mass media. Advertisers can duly publicise their products in many ways, including event sponsorship, direct mail flyers, catalogues, billboards or through their own web sites. But since the mass media need revenue from advertising, it behoves on them to increase their value to advertisers by producing the largest audiences possible across demographic categories. The media, in order to have the patronage of advertisers, must produce the kind of audiences sought by advertisers and also pander to other needs of the advertisers who in turn provide the funds with which the media are run.

4. **Research into the audience ensures that stations withstand competition:** The concentration of broadcast stations in various cities creates competition among them. Following the deregulation of broadcasting in 1992, many cities now boast of many radio and television stations, unlike the pre-1992 era when only a few federal- and state-owned stations existed. Now the scenario is different. In Uyo, the Akwa Ibom State capital, for example, there were only two broadcast stations – Radio Akwa Ibom (radio) and AKBC Channel 45 (TV) - both belonging to the State Government before 1992. Today, there are two television stations and five commercial radio stations. Without doubt, the primary market of

these seven stations is their immediate transmission area which is Akwa Ibom State. By market here is meant both advertisers and audience. Other stations face similar situations in their areas of operation.

In order to keep their stations afloat, operatives of the stations cover every corner of the city to canvas for advertisements to generate revenue for the survival of their stations. Competition in broadcasting, many times, translates into creativity in programming; but quite a lot of times, too, as it is already being witnessed, it descends into a fight for the greatest possible number of listeners and viewers and advertisers. Competition may also lead to lower forms of mass appetite which would more and more be catered for in programmes. This is what Idiong (2017, p.8) calls "tabloidization"- the catering for frivolities by the media in order to survive.

In the face of competition such as it is being experienced in the broadcast industry today, a research into what the audience want and the subsequent satisfaction of those wants will pull audiences to stations and entice advertisers in the process. This underlines the importance of consumer sovereignty which is associated with market-driven approaches to the operation of economic activities, including the production and distribution of media contents.

5. **Audience measurement conserves resources:** It is similarly important that broadcast resources are not wasted but harnessed to achieve maximum results. There is no glory in deploying scarce resources – personnel, money, time, facilities etc – to produce a programme that ends up not being listened to or watched in great number by the target audience. This makes a research into ratings, shares, resonance and reach of broadcast channels compelling.

According to Watson and Hill (2015, p.18): "A rating is defined as the estimated percentage, in case of television, of all the 'TV households' or of all the people within a demographic group who view a specific programme or station. A share refers to the percentage of the overall viewing figures which a particular programme commands". Resonance occurs when "messages match the expectations of the receiver, when they are in alignment with or confirm the experiences, perceptions, values, beliefs or attitudes of the receiver" (Watson and Hill, 2015, p.271). Audience reach, according to McQuail (2005, p. 413), "is the overall portion of the potential audience that is reached over a particular period of time". The ratings, shares, resonance and reach of a station can only be fairly estimated through audience research. When these are fairly ascertained, the broadcaster can then channel resources into programme areas that have the potentials to generate profitable returns on investment.

Content: The Recipe for Survival

All the labour of broadcast stations, particularly privately owned, is aimed at advertisers and their funds through large audiences. In the current suitor-bride relationship where the suitor is the broadcast stations, and the bride, the advertisers, the suitor attempts at all times to woo and convince the bride that he is best suited for the relationship. Pursuant to this, the broadcast stations strive to offer their bride – advertisers – what they (advertisers) desire most – large audiences. Here lies the centrality of consumer sovereignty - that consumers should drive the production and allocation of goods and services through the purchasing decisions they make within a free market. Large audiences are achieved through programming here looked at from two perspectives – the individual shows (the contents) that are aired as well as the process of selecting those shows as well as scheduling, promoting and evaluating the shows. Eastman and Ferguson (2009, p.2) drive home the importance of broadcast contents: "In the media world, programming is the software that gives the hardware a reason for existing. Both are necessary for the system to work, but without programming no broadcast or wired services would exist. Programmers sincerely believe that 'content is king' ".

The primary objective in advertiser–supported broadcast stations is to maximise the size of an audience targeted by advertisers. The only way to achieve this goal is to satisfy the needs and wants of the audience through programming – i.e. through the contents in the first instance and through type of contents selected for airing at a particular time, through the way the contents are promoted and through a periodic evaluation of such contents *vis-a-vis* the audience. Thus, stations whose programmes are weak – i.e. contents do not appeal to the audiences – stand the chance of going under because stations typically seek large audiences for their advertisers. In these circumstances, the stations must re-invent themselves with new programmes that must appeal to their audiences more than the old contents did. It is only audience research that will reveal audience preferences.

It is also necessary to emphasise that the audience, despite all the technology at their disposal to choose programmes from a variety of sources, typically prefer the broadcaster to do the programming chore. Eastman and Ferguson (2009, p.3) underscore this point: "Viewers tend to choose channels, but expect someone else to have filled those channels in an expected way". The 'expected way' is both the contents and the time that such contents are placed before the audience. The logic is simple: the larger the size of the target audience, the easier it is to make money. To have good contents costs money, but bad ones are produced at a cost too. Therefore, it is of utmost importance that money be spent wisely – on contents that meet the tastes and needs of the target audience – especially as broadcasters are not in the business of merely creating programmes, but are in the business of creating audience, through

programmes , that advertisers want to reach. To ascertain the programme needs of the audience is critical for the financial health of broadcast stations.

Although much of the broadcast world is operating a pluralistic system – a system with two or more programming motives – the profit or commercial orientation is getting stronger by the day. This is the permissive broadcast orientation which emphasises the need for broadcasters not to think or assume what the audience want but to find out the preferences of audiences and provide same. Akpan (2017, p.150) states that the permissive system "allows station owners and operators to offer a programme diet that is in line with the tastes and preferences of audience members". In a highly competitive set-up that the broadcast industry now is, content remains the king. Any programme that cannot command large listening or viewership may not command the sponsorship of advertisers and would likely die and be off the air because:

> Advertisers are only willing and ready to commit their resources to programmes that have a large audience; only programmes that interest the audience and do satisfy them will command a large audience that can then interest the advertisers; and only programmes that satisfy the needs of the audience would sustain viewership and listenership (Akpan, 2017, p.131).

Audience Research: The Training Institutions Angle

It is an observable fact that in many of the training institutions for prospective and serving media personnel, audience research is not emphasised as much as other components of media training. Yet, audience evaluation is a vital part of the work of the media personnel, particularly those of the broadcast medium. Mention has already been made of the meaning of programming as the process of selection, scheduling, promotion and evaluation of programmes. This process defines the work of a broadcast programmer. It is necessary for training institutions to emphasise to their trainees that the work of the programmer does not begin and end with the selection and scheduling of individual shows but that selection and scheduling are made better if the programmes and audiences are periodically appraised to ascertain the viability of programmes aired and the preferences of the audience.

This is not saying that audience evaluation is not taught in schools but it is offered as an appendage of other broadcast offerings. The point here is that audience research should be a course of its own, a compulsory one that is allocated its own credit hours. If audience research is ingrained in communication students, especially those specialising in broadcasting, then the foundation would have been laid for media operations that are geared towards providing media consumers what their preferences are, and not what the media operatives think and assume the audience want.

When media operatives are grounded in the theory and practice of audience measurement, the media are the better for it, especially in this period of intense competition which has made survival a primary object of broadcast stations. As more operators are licensed into the broadcasting space in Nigeria, competition can only continue and media consumers' choices can only broaden. This demands a generation of broadcast professionals who are willing and ready to undergo the rigours of audience research in order to offer a programme bouquet that meets audience preferences, draws advertisers and generates revenue for the broadcast channels. The starting point is the training institutions.

Conclusion

The discourse above acknowledged the growing competitive broadcast media industry in Nigeria which, expectedly, has followed on the heels of the opening up of the broadcast spectrum to both public and private broadcasters. It emphasised that given the multiplicity of channels available, consumers now have choices among the stations; hence to keep consumers, broadcast professionals need to satisfy the tastes and preferences of media audiences. This can only be achieved through audience measurement.

In the light of stiff competition among broadcast operators for media consumers, and by extension advertisers, it is concluded that the survival of the broadcast stations is becoming more and more dependent upon meeting the tastes and preferences of the audience. This can only be ascertained through audience research. It is further concluded that 21st century broadcast professionals must be steeped in the theory and practice of audience research to help their organisations stay ahead of the competition; hence early grounding in the training institutions is of utmost necessity. To the extent that every broadcast organisation aims to have adequate returns on investment and therefore stay afloat, to that extent shall audience research be a weapon of survival in the hands of broadcast operators.

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