

VIEWING MIND THE GAP

An industry report by **digital.i**

“One of the main aims of Public Service Broadcasting (PSB) is to **represent diversity** and alternative viewpoints, through programmes that **reflect the lives of diverse groups of people** and communities both within the UK and elsewhere, to **make its audiences aware of the different cultures and viewpoints.**”

Ofcom, 2015

What is the 'Viewing Gap'?

You may have heard of the 'Pay Gap' or the 'Gender Wage Gap', now **digital.i** wishes to highlight the 'Viewing Gap' that is symptomatic and supportive of a lack of ethnic diversity within the British TV industry.

Industry talent, media gurus and academics alike have been calling for a revolution to finally bring the TV industry into colour for over a decade.

As TV becomes more interactive and viewer-driven, it makes sense to include TV viewing figures in the debate about industry diversity.

digital.i brings its expertise gleaned from 14 years of providing TV rating figures, regular reports and ad hoc analysis to Broadcasters and Indies to shine a light on a new angle of the diversity problem.

This report looks at four key themes that emerged from collating BARB data with online industry debate:

- Social Responsibility
- Accountability
- Intersectionality
- Measuring Diversity Success

A never-ending cycle?

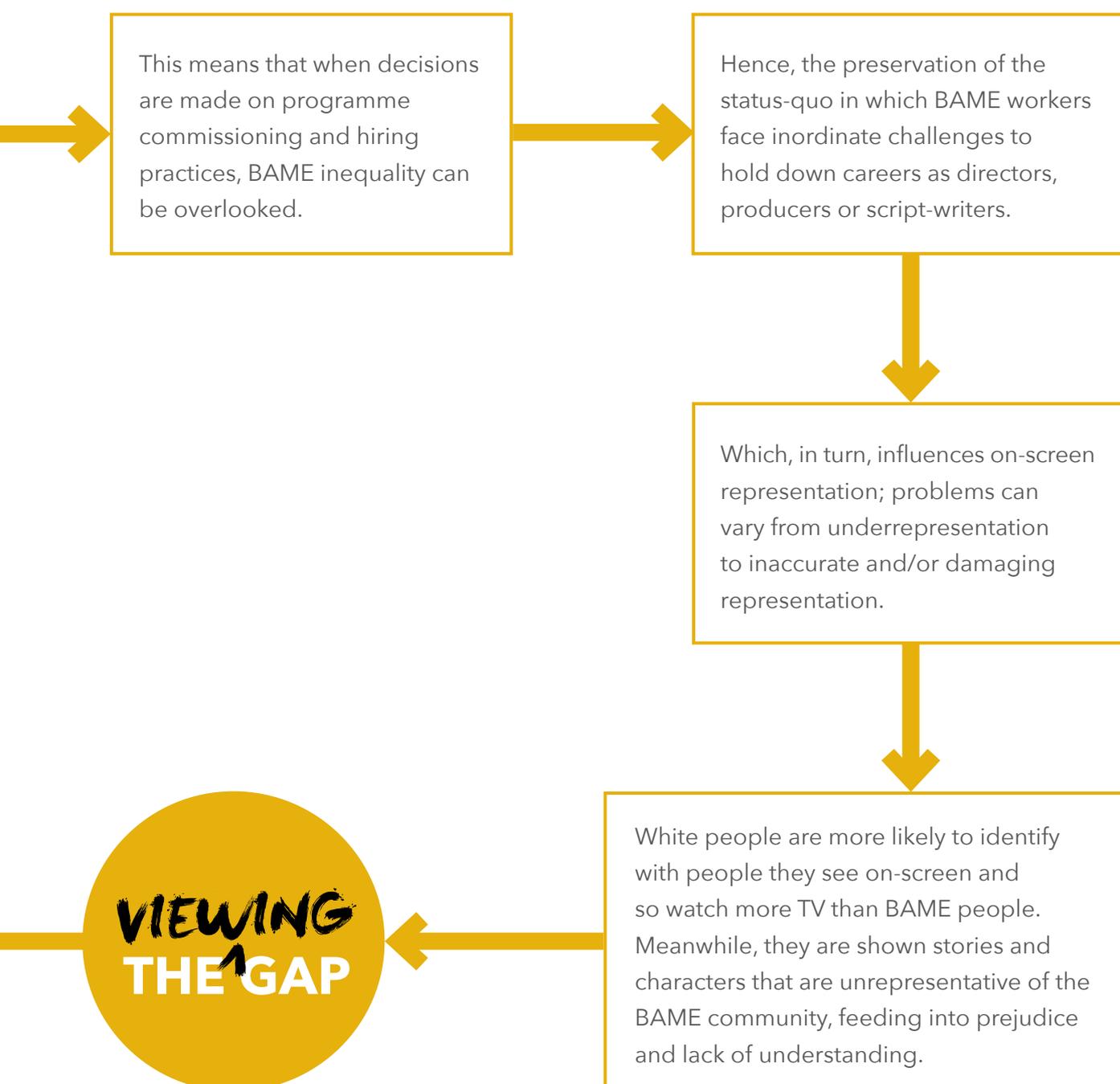


The BBC's Executive Committee
(as of 30 June 2017)

If the leaders of a Broadcaster or Indie are exclusively white, they will not fully understand the challenges faced by BAME members of the industry.

Less BAME applicants, less BAME recruiters, continued prejudice and power struggle means that BAME board members or company directors are fewer and far between. Meaning that most industry leaders are white.

BAME viewers are watching less mainstream TV. Switching over when they see inaccurate representations of their communities and subconsciously associating the TV industry with limited BAME opportunities.



Social responsibility and TV

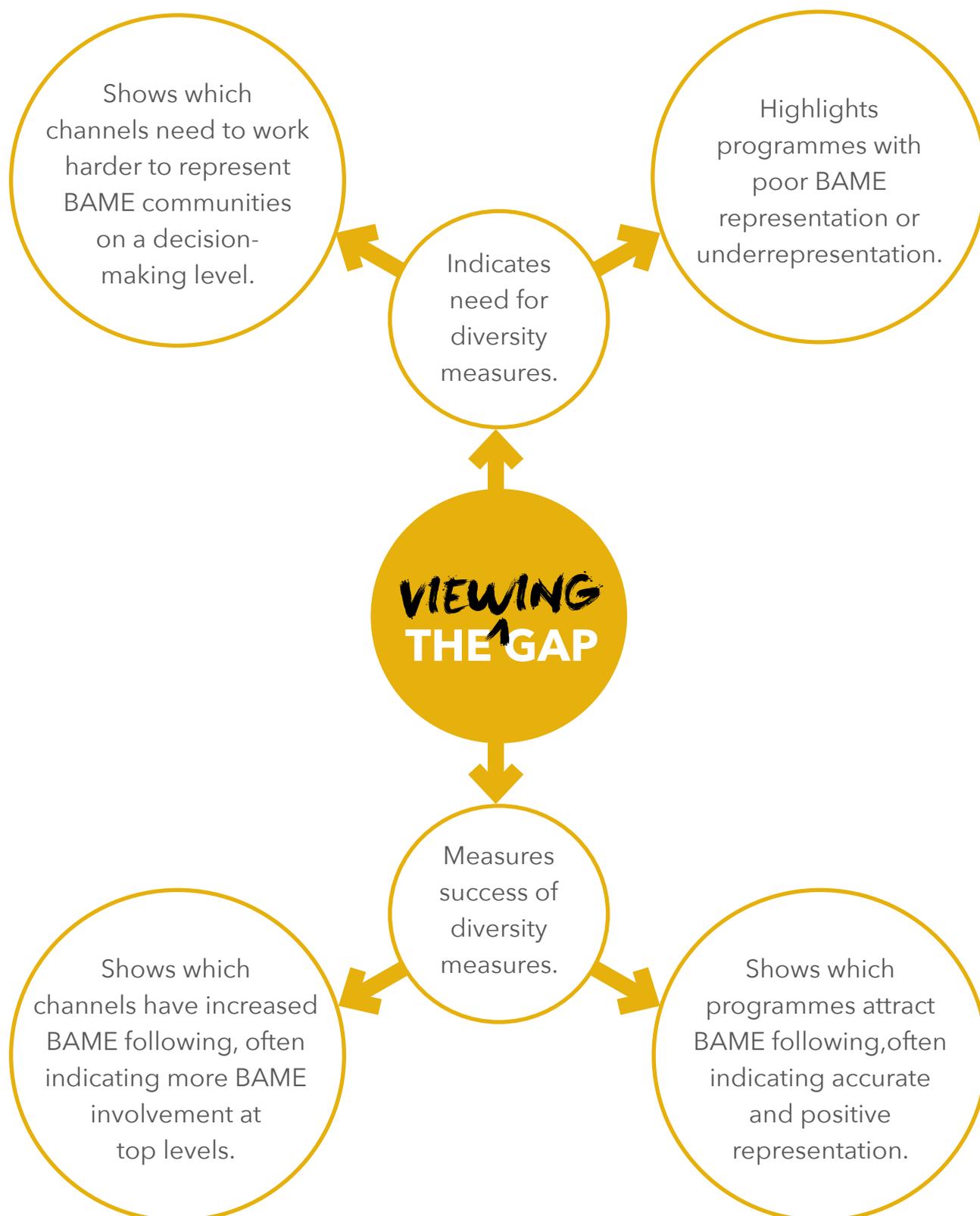
digital.i's interest

The founder of **digital.i**, Ali Vahdati, is an immigrant to the UK himself and part of the BAME community. He's passionate about the social responsibility **every** member of the TV industry has to address the diversity dearth.

digital.i trawled through online debate in the mainstream media (broadcast, academic reports and filmed speeches) and concluded that there is currently no clear, all-inclusive way to measure diversity across the industry, from on-screen to off-screen.

The solution is to 'Mind the Viewing Gap'.

Through analysing audience ratings **digital.i** presents a controversial, complicated problem in a digestible and clear way. This method serves to diagnose industry shortcomings as well as monitor improvement.



Social responsibility and TV

Public Service Broadcasting (PSB)

- 12% of the UK population identify as BAME
- 9% of total TV viewing is made up of BAME viewers
- Only 6% of PSB viewing is made up of BAME audiences
- Over 50% of total white viewing is to PSB channels
- 40% of total black viewing is to PSB channels
- 32% of Subcontinent Asian viewing is to PSB channels
- Overall, total BAME viewing is only 36% attributed to PSB channels

Fig 1: Ethnic makeup (from outside-in) PSB viewers, total TV viewers & UK population

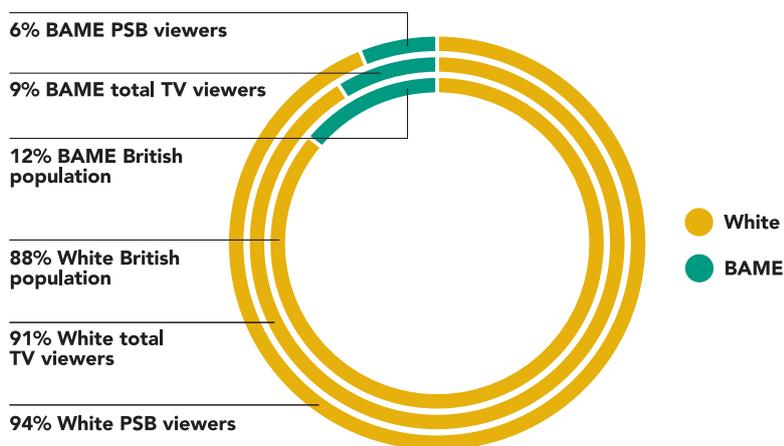
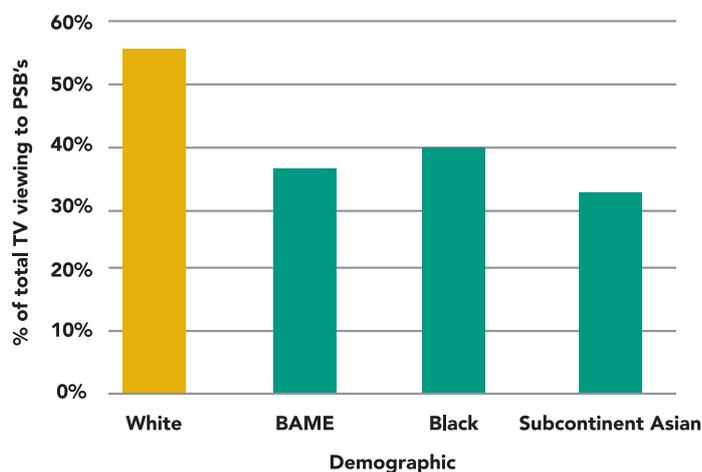


Fig.2: % of total TV viewing attributed to PSB's



Source | BARB/Digital-i. Channel totals used where applicable (Inc. +1 & HD). All data based on July-Dec. 2016, All Network Homes, fully consolidated viewing. Population stats based on BARB Universe / Establishment Survey (30/09/2016). PSB Channels: BBC1, BBC2, ITV, Channel 4, Channel 5.

Social responsibility and TV

Fig. 3 shows the uneven spread of share per demographic per PSB. BBC1 and BBC2 are heavily skewed towards white viewers (accounting for almost 30% of white total TV viewing), but only 18.6% of BAME total TV viewing.

ITV is more successful at attracting viewing with Black audiences than Subcontinent Asian viewers. Channel 5 and Channel 4 have the most evenly distributed viewing patterns. However, the pattern is clear; BAME viewers are consistently underserved by PSBs. Even the diversity PSB winners, Channel 4 & 5, still has a long way to go to match the population makeup (Fig.4)

Fig.3: Ave SOV (%), PSB broadcasters

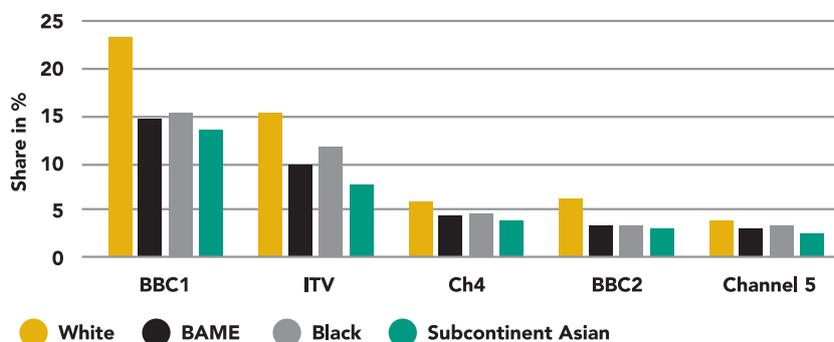
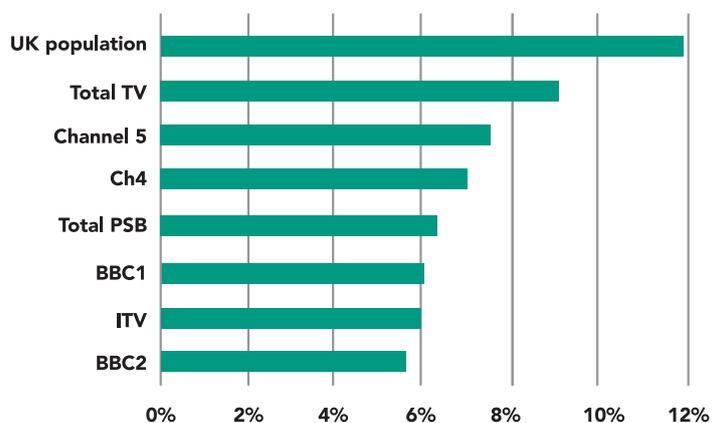


Fig.4: % of viewing that is BAME vs population



Source | BARB/Digital-i. Channel totals used where applicable (Inc. +1 & HD). All data based on July-Dec 2016, All Network Homes, fully consolidated viewing. Population stats based on BARB Universe / Establishment Survey (30/09/2016). PSB Channels: BBC1, BBC2, ITV, Channel 4, Channel 5.

“The fact that we are still discussing diversity and ethnicity in 2007 is in itself a sad reflection on our society. It is also equally sad that **we still require special legislation, to prevent racism, sexism and ageism**, or need the hypocrisy of political correctness, in trying to rescue multiculturalism.”

Anver Jeevanjee,
Head of the Advisory Group for Cultural Diversity, 2007

Accountability

BBC and the Licence-Fee

Figs. 5&6 show how the average white viewer watches far more BBC than their black and subcontinent asian counterparts. Black viewers watch 36% less BBC than their white viewers. Subcontinent Asian viewers watch 51% less BBC than white viewers.

There was a noticeable uplift in viewing from black audiences during the BBC coverage Rio Olympics in August 2016, however, in the second half of 2016, White Licence-Fee payers on average watched an extra 103.8 hours (4.3 days) of BBC1 and BBC2 than BAME Licence-Fee payers. This is the 'Viewing Gap'.

Fig.5: Average daily viewing minutes, BBC channels

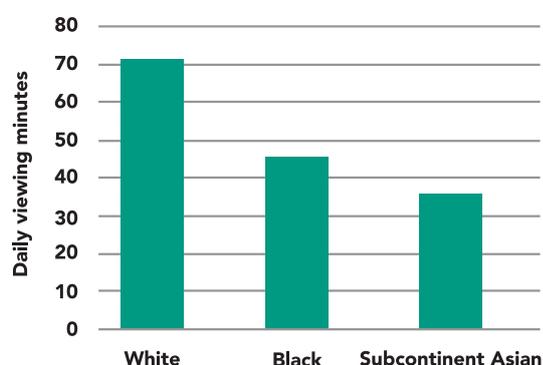
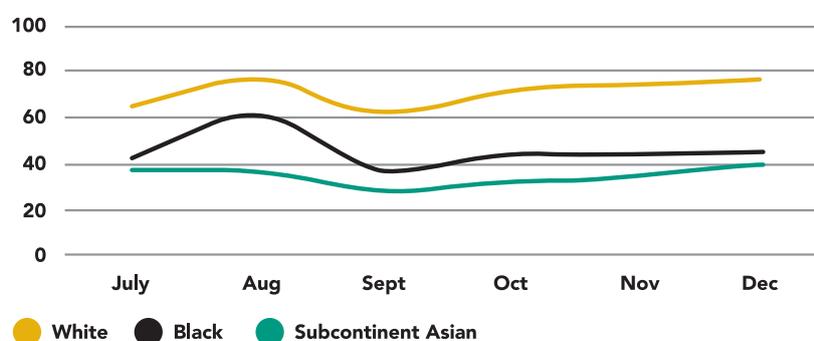


Fig. 6: Average daily minutes, BBC channels per month



Source | BARB/Digital-i. Channel totals used where applicable (Inc. +1 & HD). All data based on July-Dec 2016, All Network Homes, fully consolidated viewing. BBC Channels: BBC1, BBC2, BBC Four, CBBC, Cbeebies, BBC Parliament, BBC News.

Accountability

Ofcom and its duty

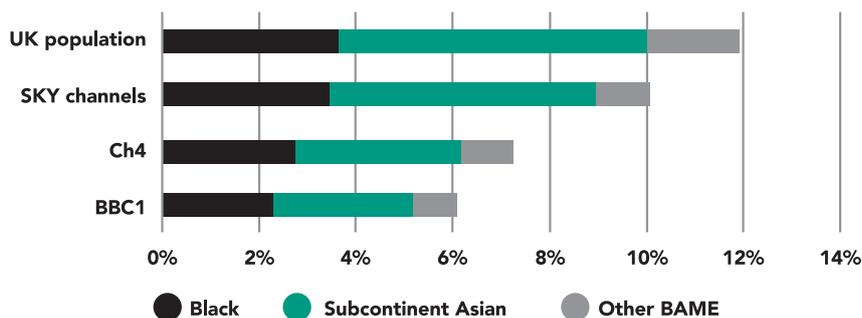
Fig.7 illustrates the variety in industry diversity across broadcasters. Subcontinent asians are the most underserved demographic, despite Sky edging towards the 6.3% that the demographic represents in the UK.

Black viewers, despite being poorly served by BBC1, are better served by Channel 4. Sky consistently outperforms PSBs with regards to inclusion across ethnicities.

3.5% of Sky's viewing is made up of black viewers, marginally under the percentage of the UK population.

Ofcom's duty is to ensure that PSBs provide a service for all members of the public. Why then is Sky topping the leader board for audience diversity when PSBs (especially the BBC) are supposedly subsidised to do just that?

Fig 7: % of channel viewing x demographic vs UK population



“Because **the BBC is failing in its duty to reflect modern Britain**, ethnic minorities are well within their rights to ask why they should continue to pay their license fee at all, given that it is used to fund a service that does not serve them.”

Mr David Lammy,
Labour MP and Former Culture Minister, 2016

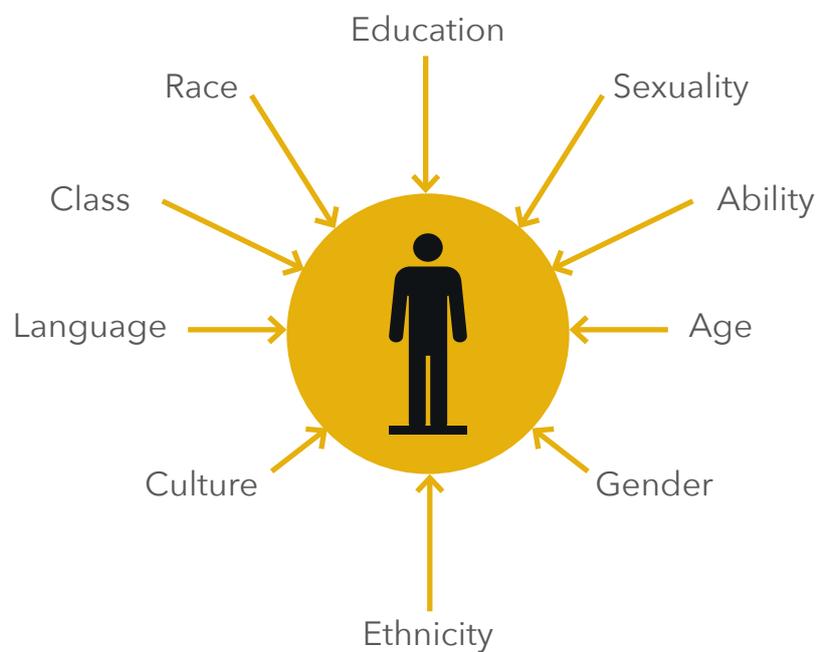
Intersectionality

Promoting intersectional inclusion

Intersectionality is a term used to refer to overlapping social categorisations (race, class, gender etc.) and the interconnected nature of systems of discrimination.

This is useful to us because it means that diversity and BAME inclusion can be tackled on a more integral basis.

Put simply, when we improve inclusion of one category of person, we often improve inclusion across a range of categories because a single person can possess many social identities.



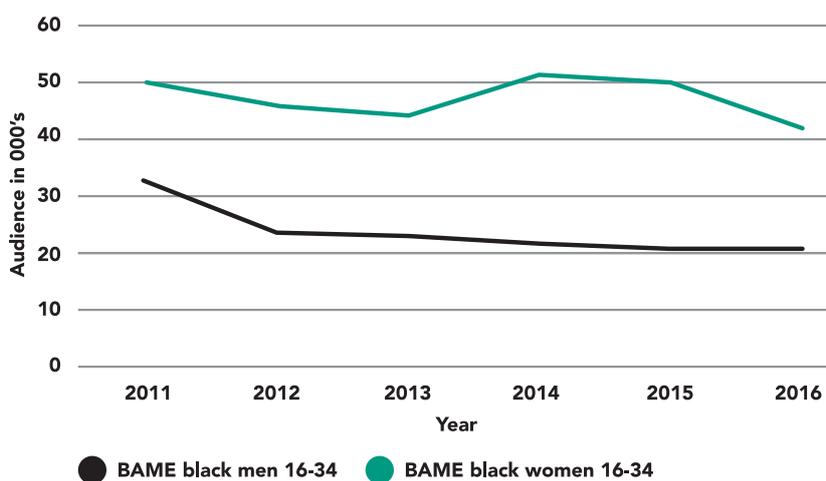
Intersectionality

The Creative Skills Set's 2012 report shows how a drive to include more women within certain areas of the industry led to women representing 36% of the workforce up from 27% in 2009:

Whilst a large amount of this increase included more women in Make-Up, Hairdressing and Costume, it also included over 10% point increases in Strategic Management, Creative Development, Broadcast Management, Business Management and Production.

How and why did this impact BAME viewing habits? The figures below show that black women began to watch more TV after a drop from 2011 to the end of 2012. Could this be linked to higher female participation at the top?

Fig.8: Total TV black men and women viewing trend



VIEWING
MIND THE GAP

Intersectionality

Promoting intersectional inclusion

According to the BBC's 2011 and 2013 Diversity Reports, female representation at senior management level increased from 35.7% in 2010 to 41.1% in 2013.

Figs.9&10 show how viewing figures for PSBs has changed over time for black men and women. For black men we notice a spike in 2012 for BBC1 when the Olympics were shown, an event with a high number of positively represented black men on-screen. Interestingly, for black women, the most noticeable increase is on the BBC channels from 2013-2015.

Fig.9: Black men 16-34 viewing trend on PSB's

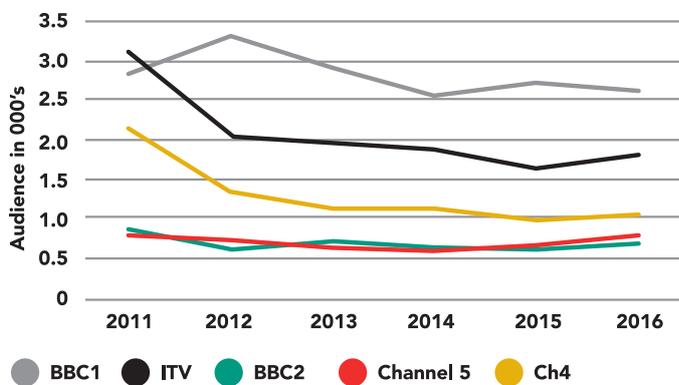
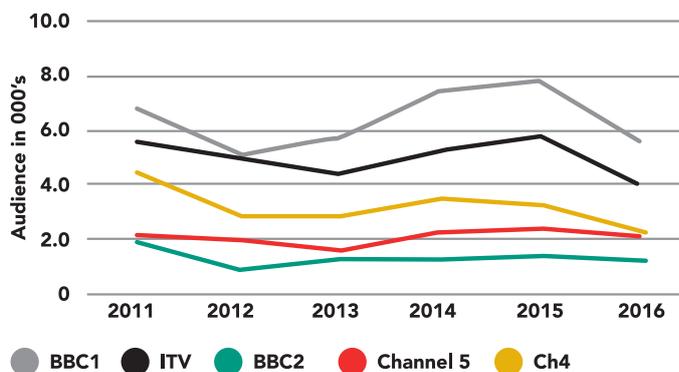


Fig.10: Black women 16-34 viewing trend on PSB



Measuring diversity success

How can **digital.i** help you with your commitment to make the industry more diverse?

digital.i offers bespoke Overnights, Regular Reporting and ad hoc analysis to Indies, Broadcasters and key Stakeholders in the media industry.

As part of our dedication to increasing diversity across the industry we are now offering a new product to help track diversity success.

We offer a breakdown of viewing data, concentrating on how programmes and/or channels have performed within specific BAME demographics.

Overnights with a customised BAME level will give immediate insight on the inclusiveness of a programme. Regular reporting could help track the success of certain initiatives and/or new commissions.

If you're interested to see whether long-term company-wide initiatives are working and wish to analyse the difference between good and bad diversity encouragement practice, you could commission some ad hoc analysis taking an in-depth look at what the audience figures show about the ethnic diversity of your company or production.

Methodology

All data sourced from BARB and represents TV viewing over the six-month period from July 2016 to the end of December 2016 (unless stated otherwise)

The demographics used are:

BAME4+ Refers to all viewers who fall under the category of Black and Minority Ethnic.

Asian All viewers who self-identified as either Indian, Pakistani, Bangladeshi, Chinese, Mixed White/Asian or Other Asian Background. **digital.i** recognises that there are many problems with applying the single term 'Asian' to refer to a myriad of different cultures, races and lifestyles but for the sake of this analysis it is necessary to identify some shared problems and issues across these ethnicities when it comes to underrepresentation and inaccurate representation in the UK's TV industry.

Black All viewers who self-identified as either Black Caribbean, Black African, Black Other, Mixed White/Black Caribbean or Mixed White/Black African.

Subcontinent Asian All viewers who self-identified as either Indian, Pakistani, Bangladeshi or Mixed White/Asian.

NB: A negligible amount of viewers refused to supply their ethnicities and so are not included in this analysis.

The sample sizes for those who self-identified as Chinese or Any Other Mixed Background were too small to provide any accurate insights and for that reason and that reason only they have not been included in this analysis.

In opposition to the Office of National Statistics, **digital.i** has chosen to put those who identify as Mixed White/Black Caribbean or African in the category of Black as opposed to Mixed the same has been done for those who identify as Mixed White/Asian. This is because, despite many people of mixed ethnicities sharing forms of oppression and inequality **digital.i** believes that the plights of representation have the most in common amongst all those who may be Black-presenting or Asian/Subcontinent Asian-presenting.

The terms used are simply the terms with which viewers self-identified in BARB data. It is not **digital.i**'s intention to make any assumptions of a person's ethnicity or link it with nationality. We treat all our data as representative of different types of viewers with no political agenda.

“Television is like a **great
mirror of society.**”

Sir Jeremy Isaacs,
Founder of Channel 4, 1998

“Diversity is not an add-on
to professional practice –
it is a reflection of the
society we live in.”

Dr Myria Georgiou,
Deputy Head of Communications & Media at LSE, 2014



www.digital-i.com