

# THE IMPACT AND INFLUENCE OF THE BBC

## Background

This research aims to understand the ‘influence’ and ‘impact’ of the BBC- how does consumption of the BBC interrelate with affinity for British values (such as democratic values) and likelihood to transact with the UK (such as likelihood to travel, work and invest in the UK).

It was commissioned by the BBC and conducted by [Tapestry Research](#).

## Methodology

Findings come from two parallel online quantitative studies between:

- **‘Mass’ audience samples:** total sample of 15,476, at least 1000 per country aiming to represent either the total population or the online population of the country. Data Collection: 12 May 2021 – 9 June 2021.
- **‘Influential’ audience’ samples:** total sample of 3,187, comprising of 2204 (69%) business decision makers and 983 (31%) high-ranking executives (‘C-suites’). Data Collection: 14 May 2021 – 2 June 2021.

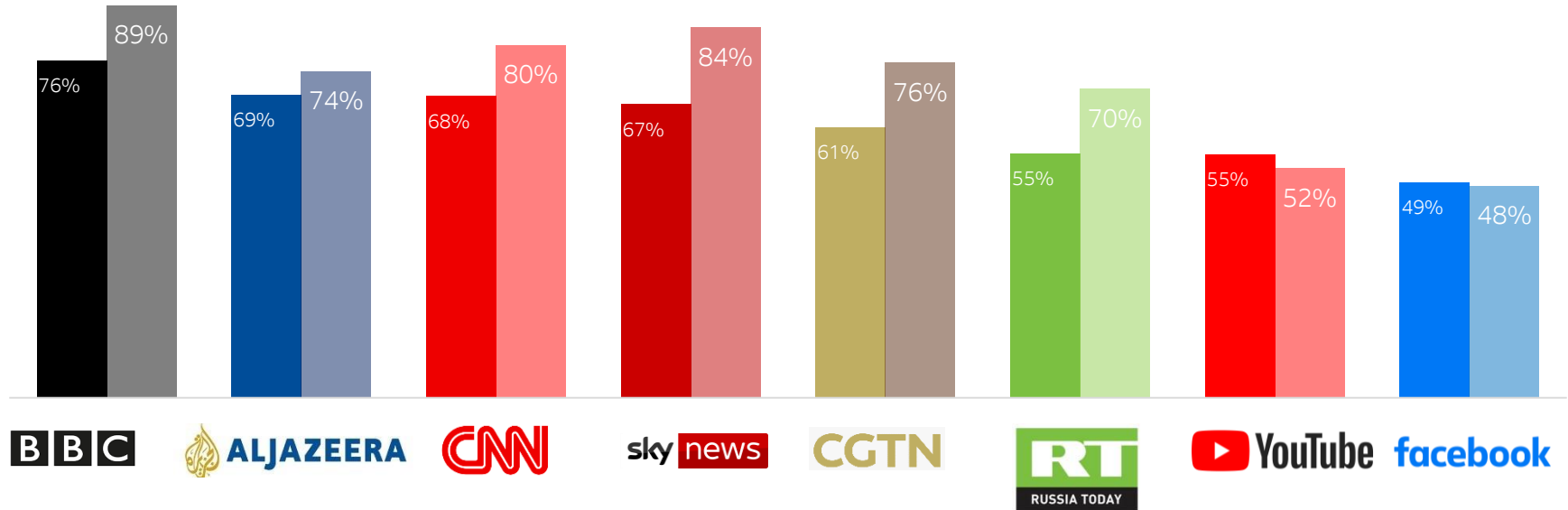
Research was conducted across Canada, USA, Mexico, Germany, Turkey, Nigeria, Saudi Arabia, India, South Korea, Indonesia, Australia, Ukraine (mass only), Kenya (mass only) and Japan (influential only).

# 1. BBC Audiences: Trust, Politics, Attitudes

# BBC News is the most trusted source of news

## % of brand users who say they trust different International News Providers

Among mass audience users (left hand bar) | Influential users (right hand bar) of each brand. All countries  
7 point scale; 0=Do not trust at all, 6=Trust Completely – results show % users 4-6



Question: And how much, if at all, do you trust the following brands? Base: 15,476 mass audience sample, 3187 Influential sample

Sample: News Users of each Brand (Mass audiences): BBC=5,619, CNN=6,113, Sky=2,719, CGTN=892, RT=998, Al Jazeera=2,818, YouTube=9,527, Facebook=8,308

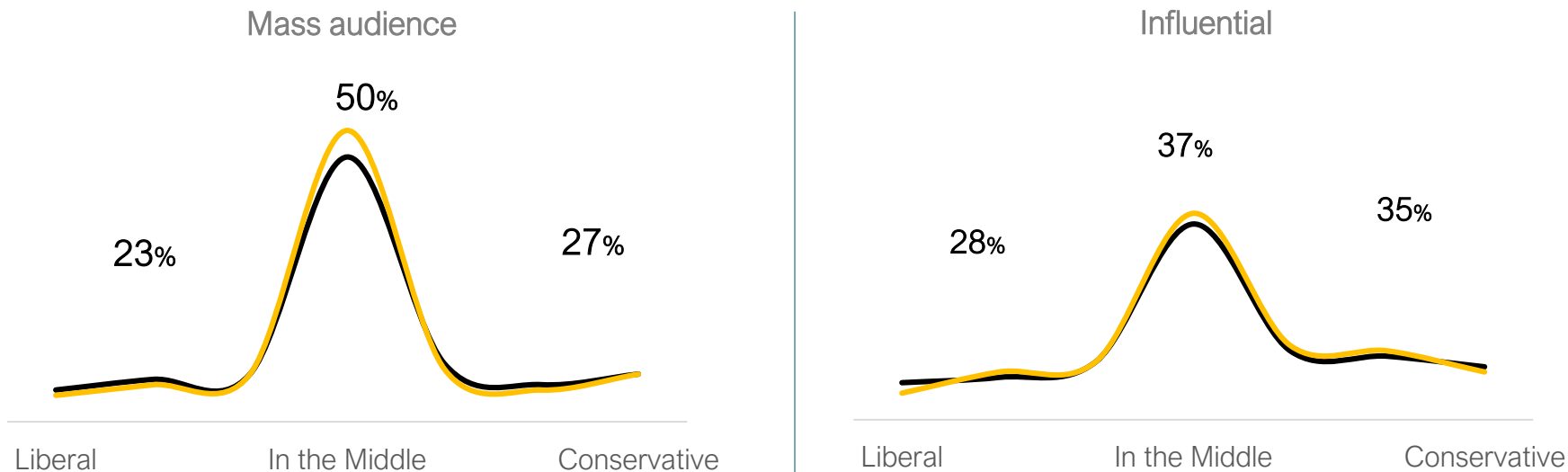
Sample: News Users of each Brand (Influential audiences): BBC=2,120, CNN=2,140, Sky=1,333, CGTN=586, RT=542, Al Jazeera=949, YouTube=2,214, Facebook=1,917

# The BBC reaches audiences across the political spectrum

## Self-defined political positions of BBC Users vs all respondents in sample

All countries

— BBC      — Market



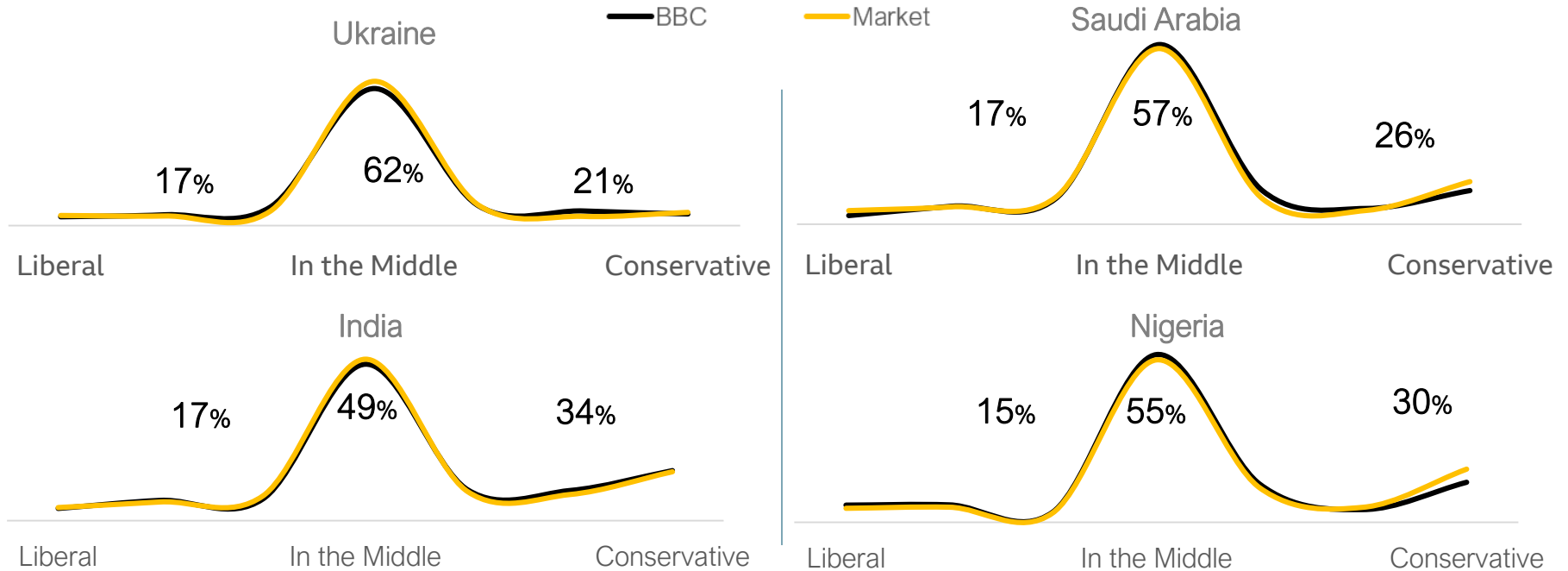
Question: Thinking about your political beliefs and values, where would you place yourself on the following scale? (Very liberal; somewhat liberal; In the middle; somewhat conservative; Very conservative)

Base: : Base: 15,476 Mass sample; 3,187 Influential sample: BBC Users, 5,619 Mass Sample; 2,120 Influential sample

# Particularly in markets where BBC World Service has high reach

## Self-defined political positions of BBC Users vs all respondents in sample – by market

Mass audience sample, Ukraine, India, Saudi Arabia, Nigeria



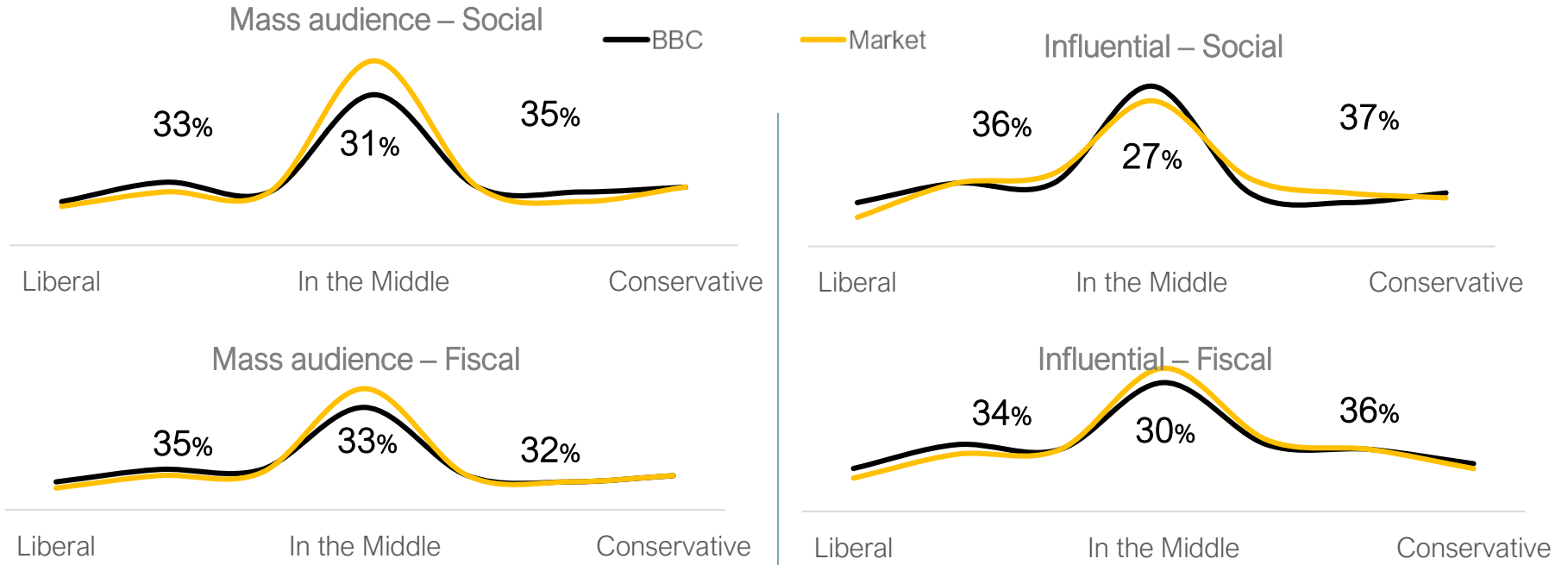
Question: Thinking about your political beliefs and values, where would you place yourself on the following scale? (Very liberal; somewhat liberal; In the middle; somewhat conservative; Very conservative)

Base Mass sample: Ukraine (1092), Saudi Arabia (1085), India (1617), Nigeria (1088)

# BBC spans the political spectrum across social and fiscal issues, for mass and influential audiences

BBC reach of audiences by their self-defined positions on certain issues vs all respondents in sample

All countries



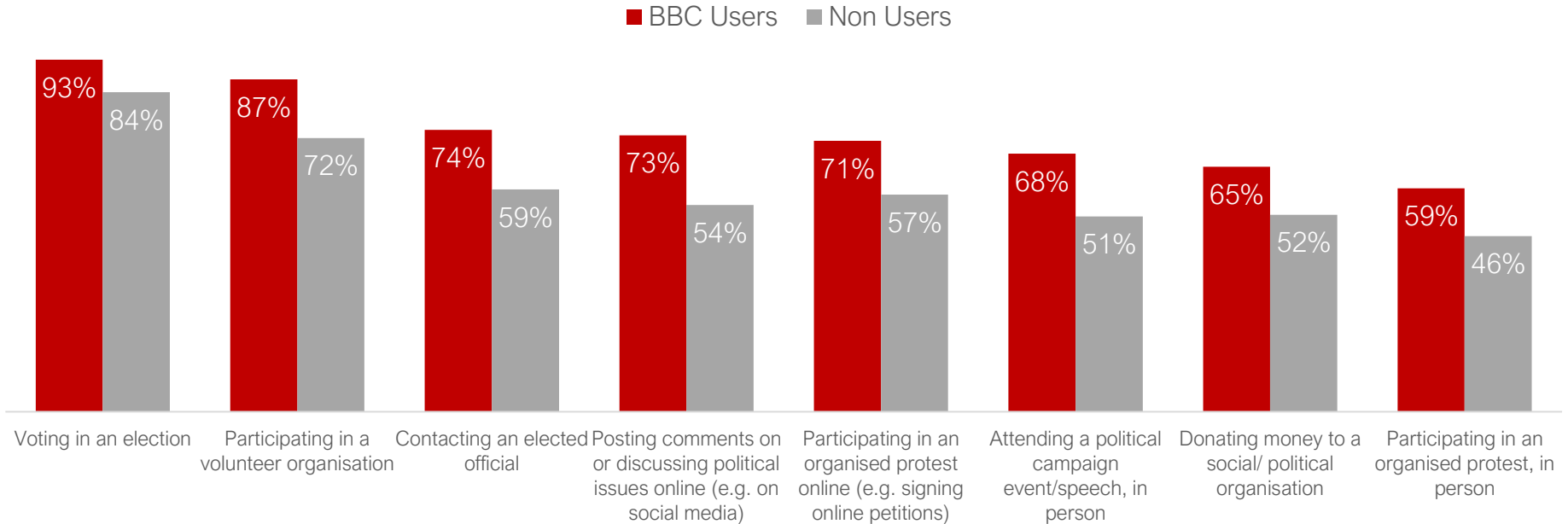
Question: Now thinking more about your values and beliefs, where would you place yourself on the following scales: "I'm fiscally liberal- the government needs to spend money if they are to improve things ... I'm fiscally conservative-the government should spend as little of the taxpayer's money as possible" (7 point scale) ; "I'm socially liberal- everyone has the right to be who they want to be without conforming to standards and boundaries ... I'm socially conservative- it's important there are some standards and boundaries even if they affect some people's rights to be who they want to be" (7 point scale);

Base: 15,476 Mass sample; 3,187 Influential sample BBC Users, 5,619 Mass Sample; 2,120 Influential sample

# BBC users say they are more likely to participate in democratic activities

## Claimed participation in the democratic process (have ever done or might do)

Among Mass Audience sample, all countries



Could you tell us to what extent you have used the following brands to consume news in the past one month period.; [ I have done this ] [ I might do this in future, but I don't know how to do so ] , [ I might do this in future, and I know how to do so ] Listed below are some activities that you might or might not have engaged in. Could you tell us whether you have done these, might do these, or don't see yourself doing these?

Base: 15,476 Mass sample and 6546 BBC users



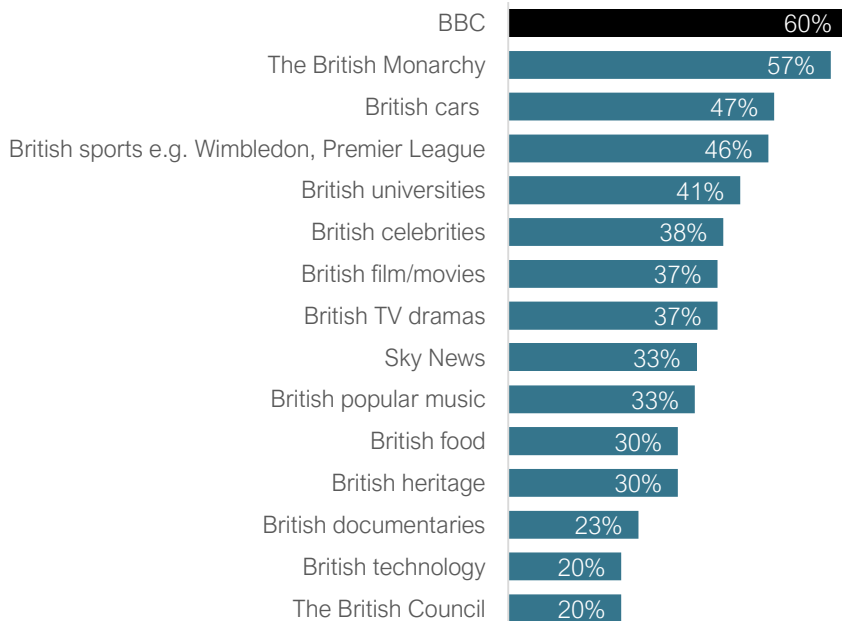
## 2. BBC and other cultural exports

# The BBC is better known than other cultural exports

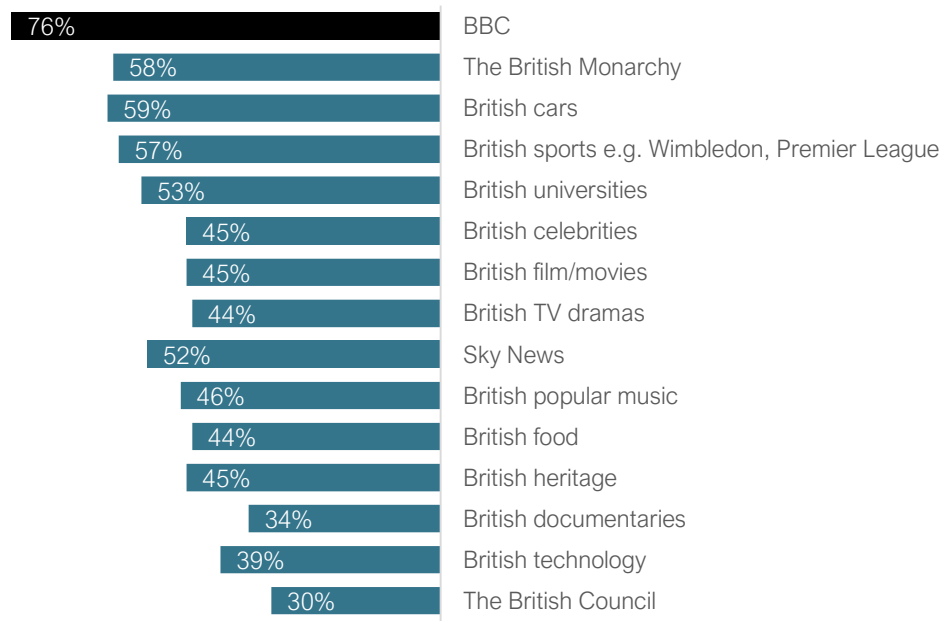
## Percentage of sample who are aware of the following British cultural exports

All countries

### Mass audiences



### Influentials



Question (News Brands): Which of the following brands that provide news have you heard of?;

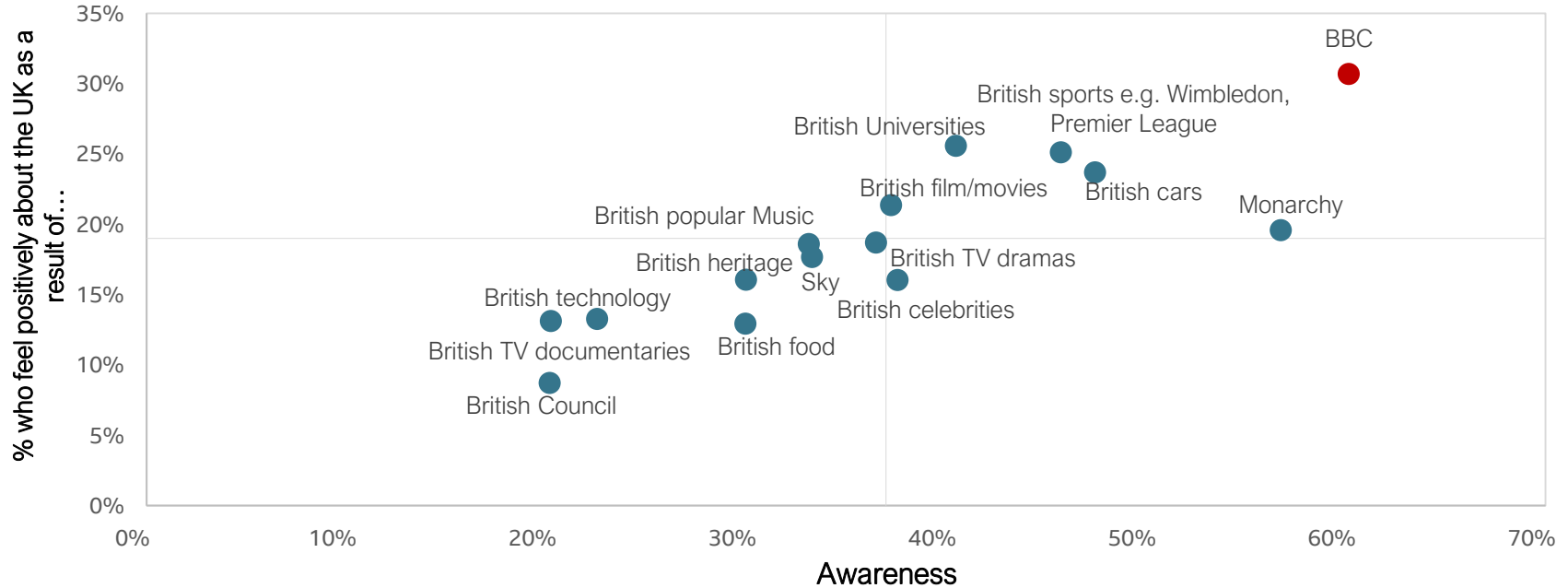
Question (British cultural exports): Could you now please tell us if you have ever heard of any of the following?

Base: 15,476 Mass sample, 3,187 Influential sample

# Of the cultural exports included in the survey, the BBC is unmatched in delivering scale and favourability

60% of the mass audience sample across the countries surveyed had heard of the BBC. 31% of users said that they felt more positively about the UK as a result of the BBC. This is higher than the other cultural exports included in the survey.

All countries



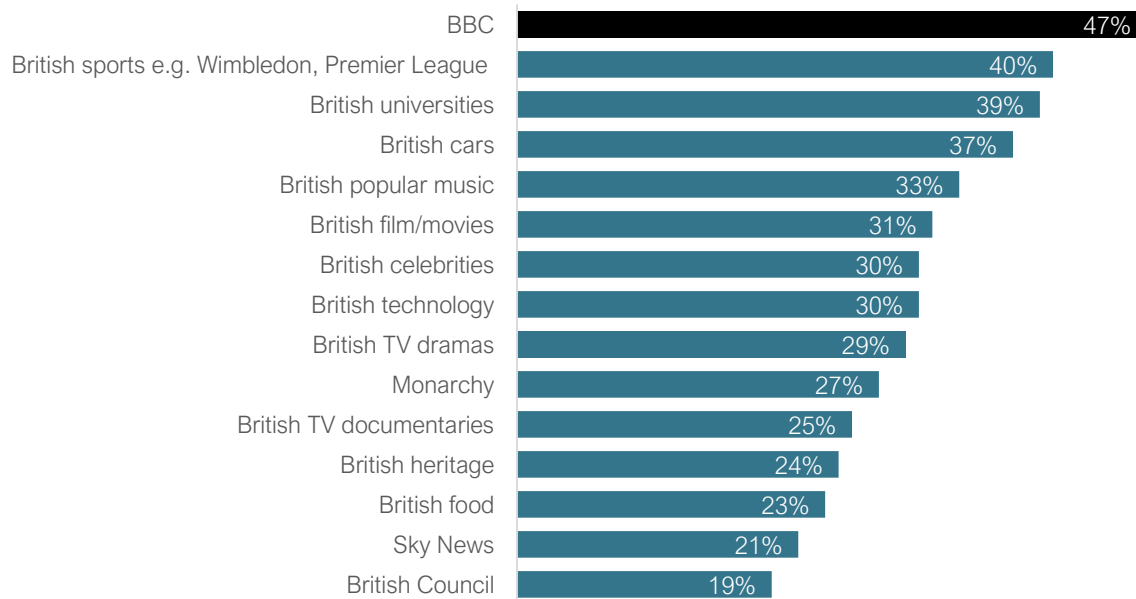
Question (BBC): Which of the following brands that provide news have you heard of? Could you tell us how, if at all, consuming the BBC influences your attitudes towards the UK?

Question (Cultural Exports): Could you now please tell us if you have ever heard of any of the following? Could you tell us how each of the following affects your attitude towards the UK, if at all? Base: 15,476 Mass sample

# Amongst influentials, the BBC has the broadest positive impact on the UK

47% of the influential sample across the countries surveyed had heard of the BBC *and* said that they felt more positively about the UK as a result of consuming it. This is higher than the other cultural exports included in the survey.

All countries



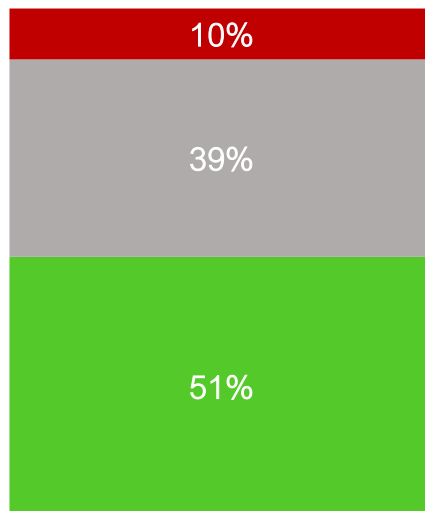
### 3. BBC's Impact on UK perceptions and likelihood to transact with the UK

# The BBC has a direct positive influence on UK perceptions, particularly amongst influential users

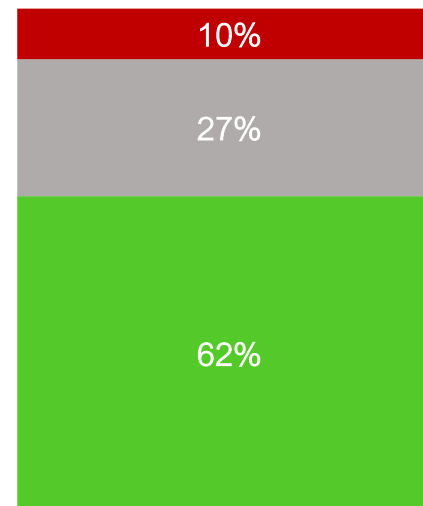
## How BBC consumption influences attitudes towards UK

Among Mass and Influential BBC users, all countries

### Mass Audience



### Influential



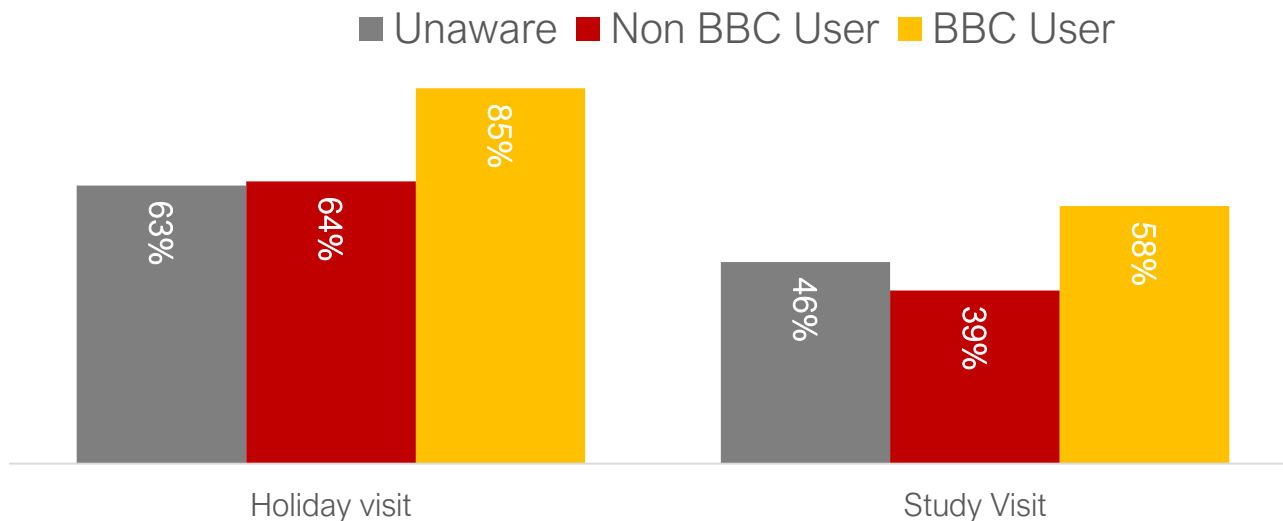
- More Negative (total)
- Doesn't influence
- More positive (total)

# Amongst mass audiences, BBC users have higher intention to visit the UK than non users

## Intentions to engage with the UK

Intend to in the future total, Mass Audience sample, all countries

### Mass audience

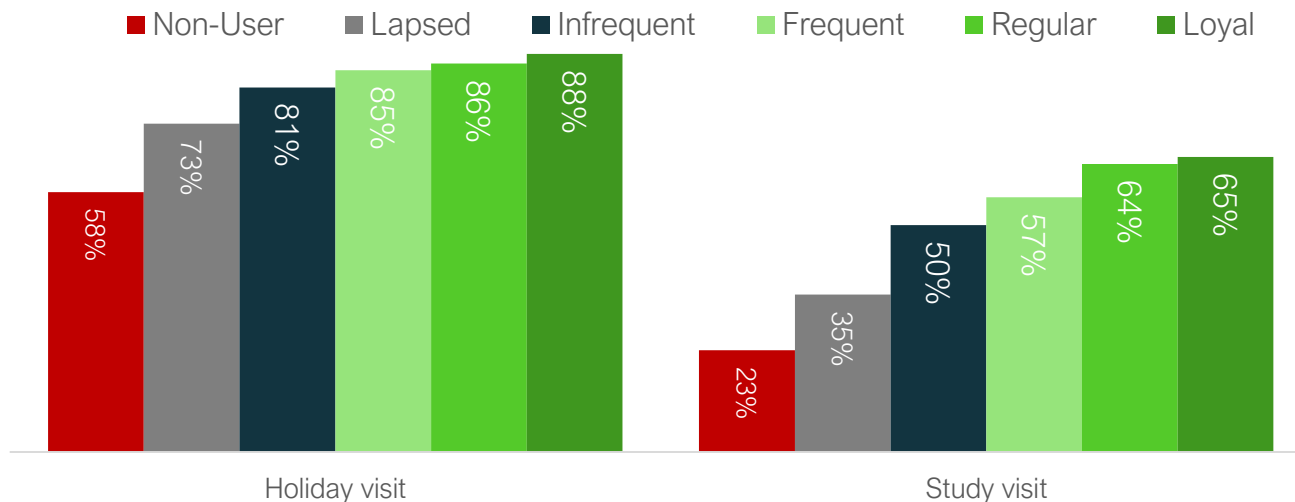


# The more frequently they consume the BBC, the more likely audiences are to say they want to visit the UK

## Intentions to engage with the UK

Intend to in the future total, Mass Audience sample, all countries

### Mass audience

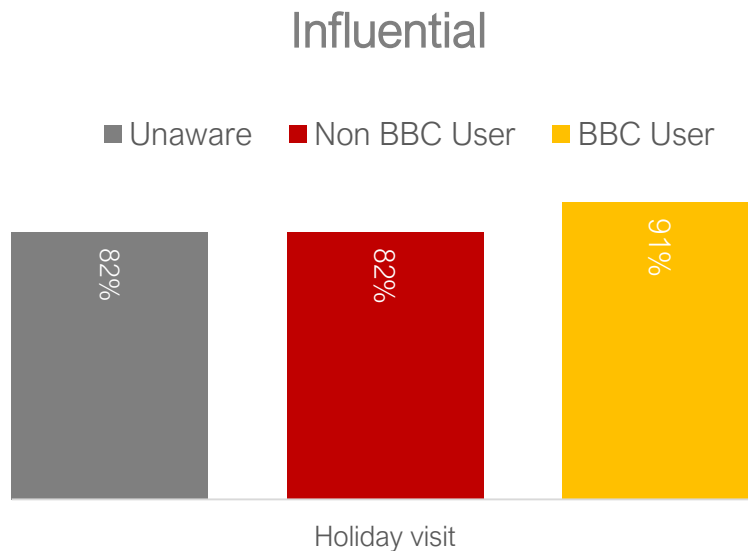




# Influential BBC audiences are likelier to travel to UK for a holiday than non users

## Intentions to engage with the UK

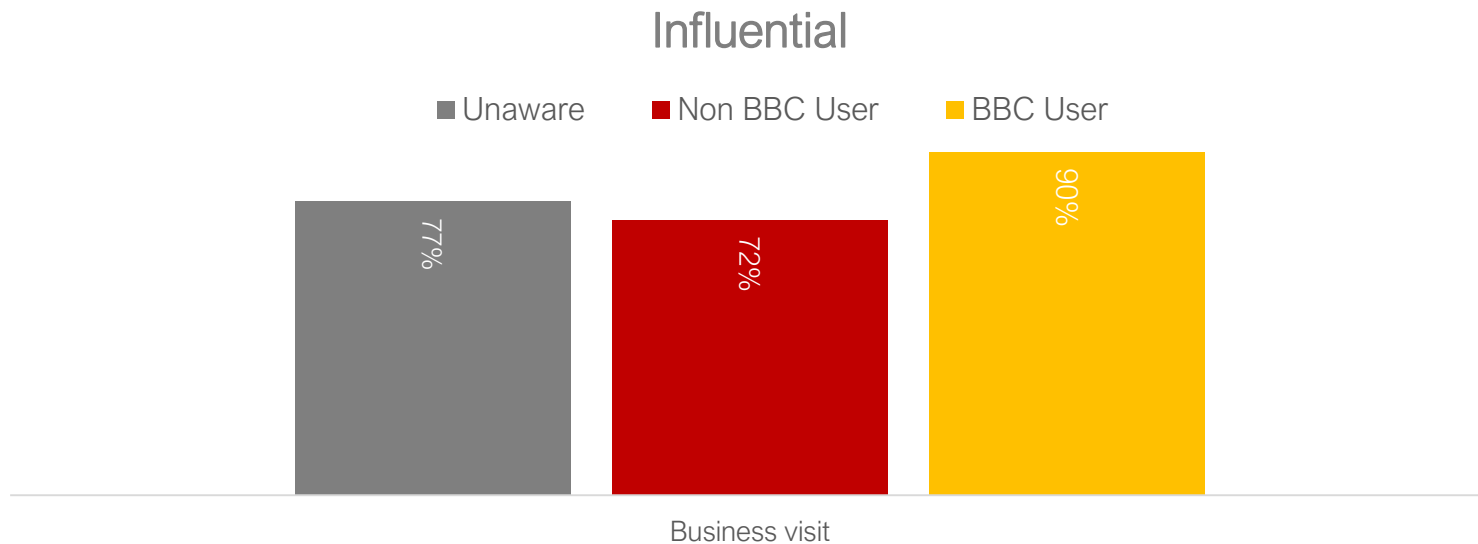
Intend to in the future total, Influential sample, all countries



# Influential BBC audiences also more likely to travel to UK for business purposes

## Intentions to engage with the UK

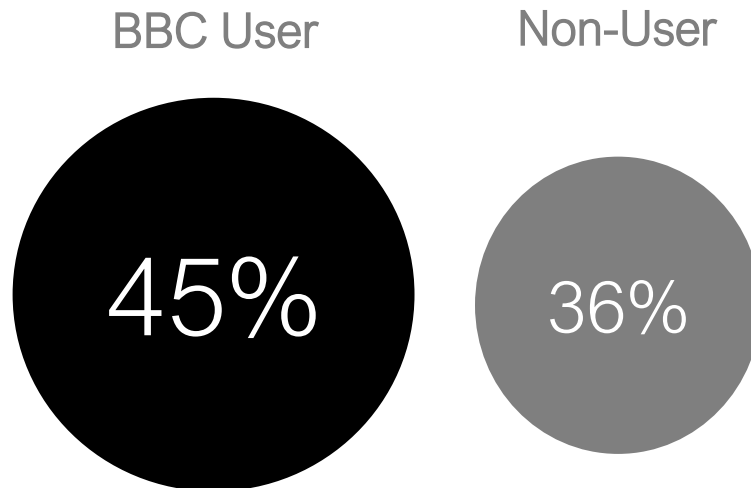
Intend to in the future total, Influential sample, all countries



# BBC influential audiences prefer to do business with countries whose values they agree with personally – more so than non BBC users

I would prefer not to engage in business with countries whose values I don't agree with personally

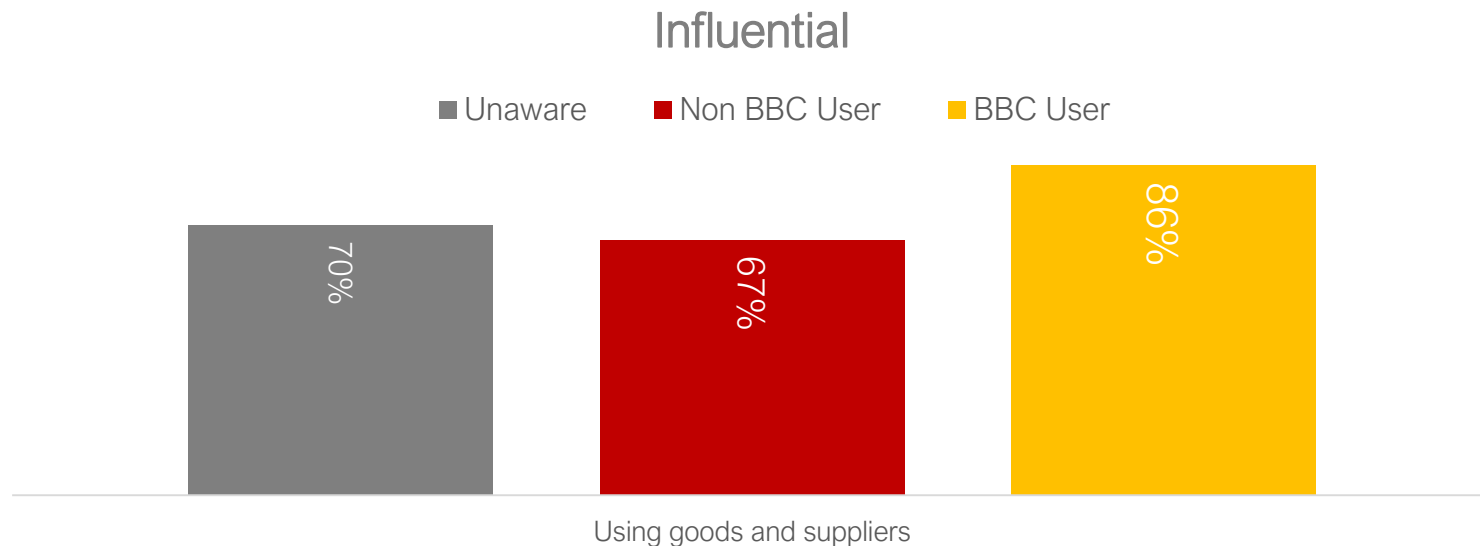
Among Influential sample, all countries



# BBC influential audiences have higher intentions to use UK goods and suppliers than non users

## Intentions to engage with the UK

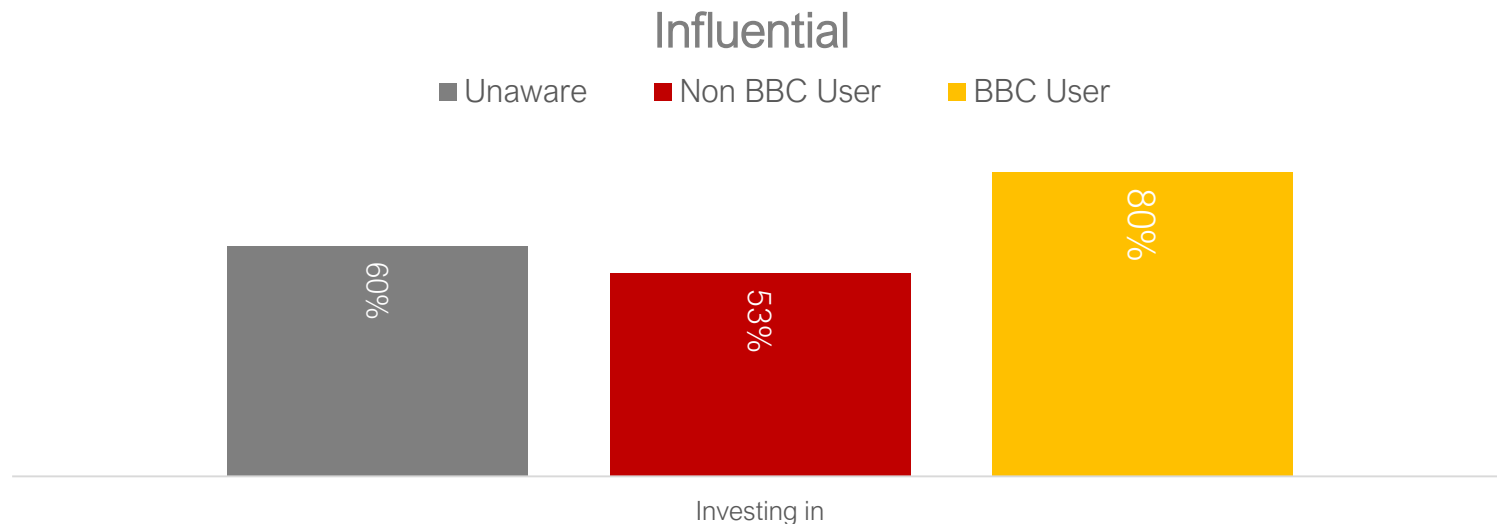
Intend to in the future total, Influential sample, all countries



# BBC influential audiences have higher intentions to invest in the UK than non BBC users

## Intentions to engage with the UK in the future

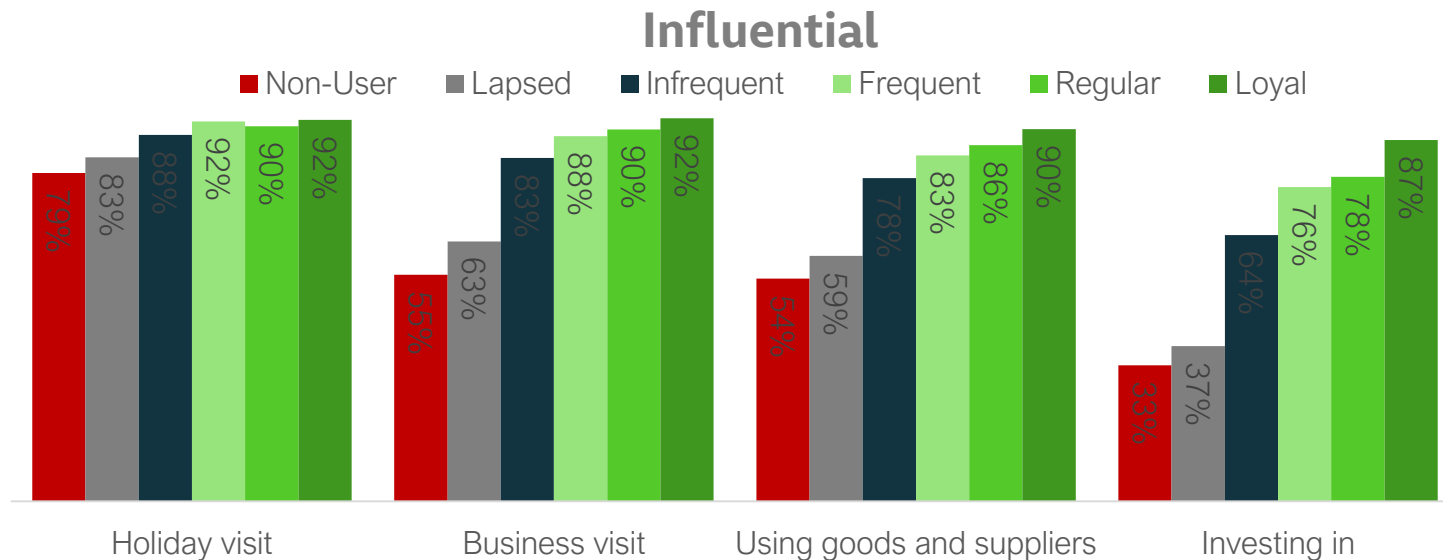
Intend to in the future TOTAL, Influential sample, all countries



# The more frequently they consume the BBC, the more likely influentials are to transact with the UK

## Intentions to engage with the UK

Intend to in the future TOTAL, Influential sample, all countries



Question. [UK / Britain] To start, can you tell us about your level of engagement with the following countries, with respect to visiting for leisure/holiday? [UK / Britain] And similarly can you tell us about visiting for business (i.e. attending a conference, striking a deal, for meetings, starting a new office or improving a new office, etc)? [UK / Britain] What about using suppliers of goods and services to international projects, including in third markets (i.e. using an American or British supplier for a German-led project in Nigeria or a Chinese or Japanese supplier for a British-led project in India and so on)? [UK / Britain] Have you invested in, or do you intend to invest in, job creation or opening/ expanding/ upgrading the status of your offices in any of these countries? Base: 3,186 Influential sample, 2120 BBC users