



Broadcasting
Board of
Governors

Acknowledgments

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Preface

This is the briefing book for 2011 in support of the BBG's congressionally mandated, annual review of all broadcast language services – the process known as Language Service Review.

The book provides BBG governors, managers and employees with quick access to core performance and other data for all language services as well as relevant data and information regarding the media and political environments in which the services operate. While such information is already available across the agency through routine research reports, there is added value in a ready reference document.

This marks the ninth year that the BBG has produced some version of this book. This two-page layout replaces the previous one-page design, and many data points expressed as numbers before are now represented in graphs and charts. All this aims at making the book simpler and easier to use.

It bears noting that the BBG does not attempt to evaluate the performance of the language services based only on a few indicators, regardless of their relevance. The BBG research program yields a host of other data that are fully factored into both program reviews at the broadcast entities and the Language Service Review conducted by the Board.

The Language Service Review Briefing Book is designed to give an overview of the broadcasting environment, programming, and performance of each language in which the BBG broadcasts during the fiscal year under review. This section will explain what is measured and reported in each section and how to interpret the graphic indicators. All survey data are current through FY2011 while profile and context sections are current through Spring 2012.

Profile Section

A Media Icons identify the platforms for which the relevant language service produces content.



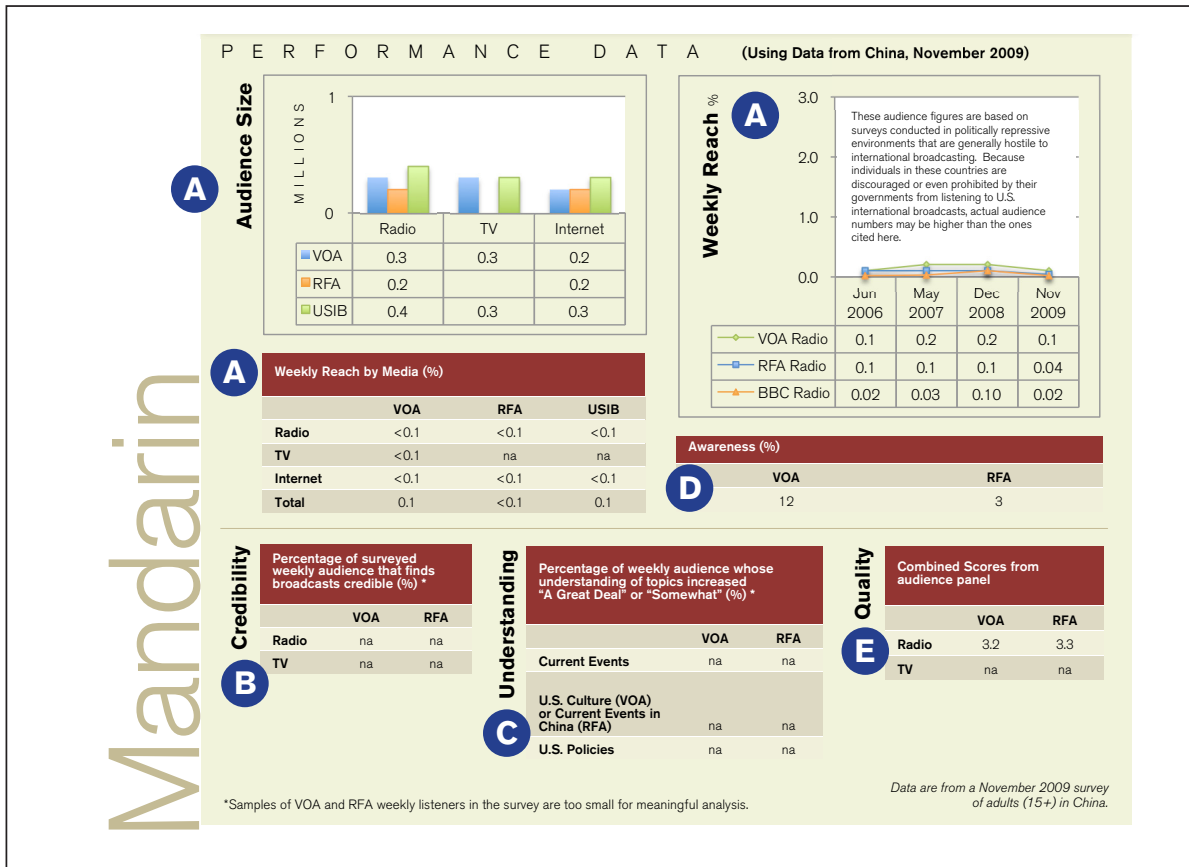
B Affiliates summarize broadcast partners, although those itemized in the distribution section do not include the many small or transitory stations defined as 'low impact' by the Office of Marketing and Placement.

C Staff figures are FY2011, actuals, unless otherwise noted.

D Budget figures include FY2011 employee salaries, benefits and general operating expenses for each language service.

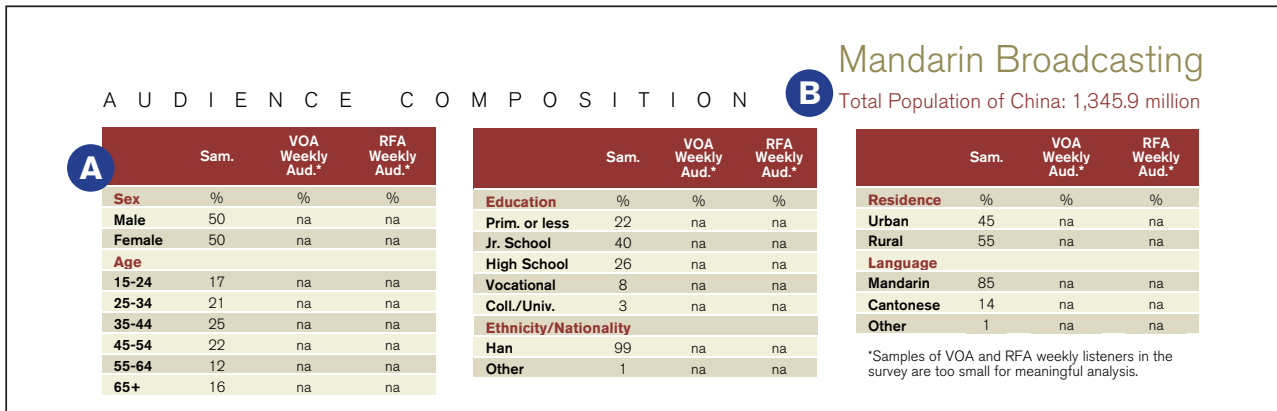
E Map generally display services' target countries for broadcast and/or the source of national market and performance data found in subsequent tables and charts.

Performance Data Section



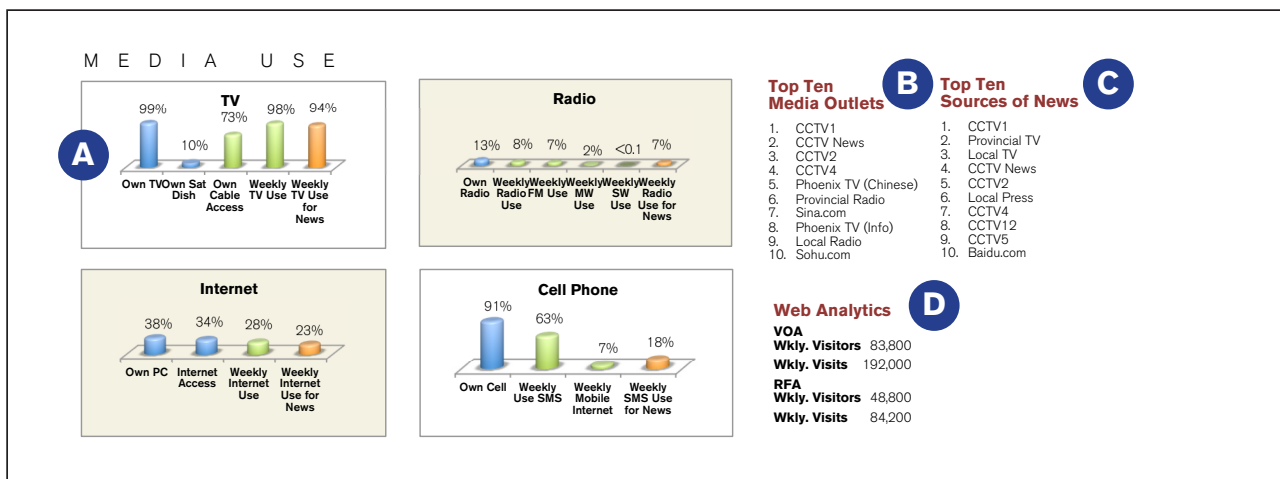
- Data in this section reflect the agency's core performance measures of **Weekly Reach A** (in numbers as well as a percentage of the adult population), **Credibility B** of programming and **Understanding C** of current events and other mission-related topics (both as percentage of weekly audience), by language service. USIB indicates total unduplicated figures for U.S. International Broadcasters where there is language overlap.
- When available, multi-year shifts in reach of U.S. Broadcasters and key competitors is shown in the trend graph in the upper right . Unless otherwise noted in the table below the trend graph, broadcaster weekly reach includes all media platforms.
- Also shown are two other important indicators: **Awareness D** and **Quality E** . Awareness figures reflect the percentage of the population that has heard of the broadcaster, either prompted or unprompted. Quality scores reflect the weighted combined score of internal and external evaluation panels who rate programming for both content and production quality on a scale of 1(poor) to 4 (excellent).
- Data in this section come from the most recent survey in 1 or 2 target countries of the service. Some language services, by definition, target only one country. Others target multiple countries, though not every such service gets a survey in each country every year. In the case of Arabic, however, the BBG conducts annual surveys in 5-12 countries. Two surveys are featured on the Arabic page while data from other countries surveyed can be found in an addendum spreadsheet.

Audience Composition Section



- A** Tables in this section describe what we know of the adult population 15 years and older (in the 'Sample' column), side by side with what we know about our respective broadcaster audiences. The standard demographic indicators: sex, age, education, ethnicity, residence and language are also displayed. 'Language' indicates the language spoken most at home.
- B** The **Total Population** of each target country, found in the upper right, is based on validated data from the Population Reference Bureau. This reflects the total population, including those less than 15 years old.

Media Use Section



- A** In the TV, Radio, Internet and Cell Phone bar charts, blue bars indicate ownership, or more specifically, 'access in the household'. Green bars indicate use of a particular medium at least once per week, and orange bars indicate at least weekly use of that medium for news, regardless of ownership.
- B** **Top Ten Media Outlets** lists the local media outlets that have the greatest daily reach, from highest to lowest, regardless of their news content. Daily reach reflects the percentage of the adult population that tuned into that station the 'yesterday' at the time of the survey. 'Yesterday' listening or viewing is a common proxy for 'daily' listening or viewing in audience research.

- C** ▪ **Top Ten Sources of News** reflects the most frequently cited sources of news, regardless of platform, from highest to lowest. While different from reach, this measure is a very important indicator of impact for our broadcasters. If a page highlights two target countries, top sources of news for both are typically displayed, although are omitted for target countries where researchers cannot ask this question.
- D** ▪ Google Analytics is the source of the **Web Analytics** data for all broadcasters. 'Weekly Visitor' describes the number of unique weekly visitors to a broadcaster's website. 'Weekly Visits' describes the number of total visits to that site in one week. Visits and visitors from USIB IP addresses (agency computers) are filtered out of these figures.

Context Section

C O N T E X T

A ↔ **Stability**

↓ **Political Freedom**

↓ **Press Freedom**

↓ **Ease of Distribution**

↑ **Competition**

Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- While China has continued to grow during the global economic slowdown, the recent purge of a popular Politburo member Bo Xilai and blind activist Chen Guangcheng's sheltering at the U.S. Embassy in Beijing have exposed serious cracks in the regime as it begins a delicate transition of power. Corruption charges against Bo expose the kind of abuses of power that extend to other top leaders.
- The State Department's annual human rights report includes reports of extrajudicial killings, executions without due process, forced confessions and torture. Still, dissatisfaction with severe restrictions on political participation and legal rights has not been reflected in public opinion surveys, where Chinese say they are satisfied with the direction of Chinese society.
- With a huge internal migrant population, overcrowding in major cities and massive job creation requirements, internal stability is the Chinese government's primary political concern. Grievances about land, housing, entitlements, the environment, or corruption also have led to protests and petitions. Lawyers representing aggrieved parties or cases deemed sensitive have faced harassment, disbarment and detention.
- Extreme tensions have arisen between the CCP and Chinese ethnic minorities in recent years, most visible in the form of harsh government crackdowns in response to unrest in Tibet and Xinjiang.
- Although China has become more "open" in some ways, social and media research remains an area where extreme caution is needed. International projects only occur with permission from the government after the research design has been inspected. The Chinese government has tried to tighten control of media, including microblogs and instant messaging, and foreign investment in the media industry.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 136.00 (174/179)**
- U.S. International broadcasters are among the most tightly censored media outlets in China. VOA and RFA radio broadcasts are intensively jammed and both broadcasters' websites are blocked in China. Such restrictions present serious obstacles to those in China attempting to access VOA and RFA content.
- CCTV remains the top source of news for most Chinese. Satellite dish ownership was measured at 10 percent in 2009 with 90 percent of satellite owners living in rural areas.
- China's media environment is evolving at an extremely rapid pace. Internet World Statistics suggests more than half a billion Chinese, 38 percent of its massive population, are using the Web. New technologies are quickly spreading beyond cities to rural areas, where 3G mobile phones are fueling Web growth.
- Blogs, podcasts, social networking sites and micro-blogs are becoming a normal part of many Chinese Internet users' online routines. However, China also leads the world in imprisoning bloggers and other cyber dissidents, so a certain level of self-censorship and indirect communication is common when discussing sensitive topics.
- The proliferation of new equipment and platforms to access and share information has created extraordinary channels for copying and spreading information and for coordinating citizen activities, including popular protests. Viral videos, sensitive blogs and cell phone activism represent a challenge to Beijing, which has redoubled resources devoted to controlling new media. In addition to web monitoring and blocking, new regulations require cell phone owners to use official identification to purchase SIM cards.
- In spite of an aggressive campaign to control online discussion, China's domestic internet sites including QQ, Baidua and Sina are key sources of news and provide forums for the discussion of current events.

- A** ▪ Red arrows quickly describe the state of five key elements in the target country or region. Down arrows imply a poor or declining state, up arrows a good or increasing state, and sideways arrows a middling or static state.
- The states of **Stability**, **Political** and **Press Freedom** are based on both respected external indices, such as Freedom House and the Economist Intelligence Unit, and the judgment of analysts familiar with BBG audience research from that market. (Note: Economist Intelligence Unit had not updated their index of 2011 by publication date.) States of **Ease of Distribution** and **Competition** are based on audience data and the experience of the service. Rarely is any market experiencing a decrease in media competition, even those under heavy state control.