

Measuring content impacts



A landscape review

in the media sector

The Responsible Media Forum

The Responsible Media Forum is a partnership between 27 leading media companies to identify and take action on the social and environmental challenges facing the sector. The RMF started in 2001 as a UK initiative, but now has participants drawn from all over the world. Whilst the companies are as diverse as the media sector itself, they all recognise that sustainability in a media company has many features that set it apart from traditional industry and other sectors.

The Forum provides a platform for participating companies to:

- Learn from each other and leading organisations in other sectors;
- Identify trends and areas for prioritisation based on sound research and robust discussions;
- Engage with stakeholders, be they campaigners, policy makers, academics or peers; and
- Run collaborative projects and events on key issues.

The Forum meets quarterly, including an annual conference, Mirrors or Movers, and there are working groups throughout the year which focus on a challenge that the RMF can come together to solve. In short, The Responsible Media Forum gives participating companies access to insights and collaboration that few organisations could manage on their own. In the fast-changing world of media, we are flexible and business-led but always open to input. The Responsible Media Forum is a multi-client partnership run and chaired by SLR consulting.

SLR Consulting

SLR Consulting is a global sustainability consultancy with over 4,000 expert environmental and business consultants, engineers and scientists, partnering with clients in Making Sustainability Happen.

Formerly, the RMF was managed by Carnstone, a management consultancy specialising in ESG and sustainability. Carnstone was bought by SLR in 2023 and the team has now been fully integrated.

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Measuring content impacts in the media sector

A landscape review

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For more information, visit

[The Responsible Media Forum](#)
[Mirrors or Movers](#)

Executive Summary

This report aims to provide an overview of how different organisations are trying to measure the impact (environmental or social) of their content. At a high level, this means trying to quantify how and where content may be impacting behaviours, viewpoints or even catalysing action on topics such as climate change and diversity, equity and inclusion.

This research and report are intended to be a landscape review looking at the state of play, the different company approaches to measuring impact, the organisations which are working in this field, and the lessons we can learn from emerging approaches and examples.

Based on desk-based research, a survey of Responsible Media Forum participants and interviews with experts in the field, the report finds that content impact measurement is still an emerging field.

Media companies clearly focus on content in their sustainability reporting, suggesting a consensus that content has the power to have a significant impact on environmental and social topics. This remains the sector’s unique superpower: its potential brainprint (the impact a company can have through its messaging) is huge, particularly when compared to the sector’s footprint (the impact of company operations), which is much smaller than peers of a similar size in other sectors.

Nevertheless, we find a persisting gap between how much media companies talk about the impact of content compared to how much that impact is measured. This is largely due to how difficult it is to define and measure impact. We lack commonly accepted definitions and metrics and commonly agreed methodologies. Resource constraints in budget and time pose another challenge.



Whilst these challenges persist, there are examples and case studies which we can learn from. Two clear examples are advertising, where demonstrating the impact of ad sales are core to the business model, and broadcasters, who have advanced tools for audience research and engagement. One key lesson to be drawn from both is that combining big data such as surveys, trends, or census data, with qualitative insights from audience panels is a powerful combination for measurement.

There is a proliferation of organisations working in this space. However, the majority are focused specifically on climate change. This is not surprising given the scale of that challenge and the attention that climate change has received over the past ten years. However, it is misaligned with the diverse priorities media companies have when considering content impact, which include mental health and wellbeing, and diversity, equity and inclusion. There is a need to share knowledge gained on content impact in the climate change field, where it is transferable to other fields.

The report concludes with four recommendations for companies which are seeking to start measuring the impact of their content, or expanding their efforts in this area:

- 1
Be selective in the data you want to leverage;
- 2
Be targeted with what you want to measure;
- 3
Start somewhere - don't let perfect be the enemy of good;
- 4
Combine different measurement methods and data types to bring impact to life.

Introduction

... the films you watch, the news stories you read, the advertisements you see, the books you read, and the podcasts you listen to will affect the way you view the world.

The Responsible Media Forum (RMF) exists to further media companies' understanding of, and collaboration on, responsibility topics within the media sector. It exists because the Forum believes that responsibility, sustainability, Environmental, Social & Governance (ESG) (or whatever your preferred term for companies' impact on society and the environment) is somehow different for media companies. This belief, and the idea that the impact of content on society is media's unique and biggest sustainability impact, has been a focus of the RMF since its 2013 [Mirrors or Movers report](#).¹

The 2013 report first posed the question: does media content simply mirror society back at itself, or does it actively move and influence society? Ten years ago, the Forum took the view that media content does actively move society. Some found this view controversial back then; critics argued that it was not desirable for media companies, particularly privately owned ones, to have purposeful agendas to change hearts and minds. Our argument was that whether you like it or not, the films you watch, the news stories you read, the advertisements you see, the books you read, and the podcasts you listen to will affect the way you view the world. As a media sector, we cannot ignore that impact. We must acknowledge it, respect it, take ownership of it, and understand it.

Our 2013 report also highlighted a measurement gap: while media companies talked a great deal about content, measuring its impact was another story. We developed six impact modes to provide a framework for thinking about the impact of media content:

6 Impact Modes



Questioning

Challenging existing practices and structures in society, highlighting adverse effects and bringing to light hidden information which leads to subsequent changes in policy or behaviour.



Campaigning

Deliberately taking a partisan stance on an issue, topic or product with the explicit aim of selling, changing behaviour or raising money.



Inspiring

Stimulating action via changed perspectives, alternative futures or by highlighting different ways of behaving.



Silencing

Ignoring or restricting voices on certain topics, events or groups, knowingly or not with the effect of creating a particular representation of society which differs from the reality...



Amplifying

...or, conversely, giving disproportionate voice to or coverage of certain topics, events or groups, again creating a particular representation of society which differs from the reality.



Normalising

Introducing or legitimising forms of behaviour that may otherwise be unknown or marginal.

¹ Toennesen, C. & Hodgson, S. & Mimmack, F. 2013. 'Mirrors or Movers? Framing the debate about the impact of media content', Carnstone Partners LLP.

Our 2013 report spawned the RMF's successful Mirrors or Movers conference series. To our knowledge, Mirrors or Movers is the world's only conference fully focused on the impact of media content on society. Over the years, we have heard numerous examples of impactful content, from Channel 4's Hollyoaks storyline on male suicide prevention to BBC's Blue Planet II and its impact on plastic pollution, and from Netflix's climate metaphor in Don't Look Up to the role of tabloid media in perpetuating gender stereotypes. This report includes some examples of recent impactful content and how it was measured, including CME's Sex O'Clock: Afterparty in Czechia and ITV's Love Island x eBay partnership.

However, after a decade of talking about the impact of content on society and two more reports (2017's [The Future of Responsible Media](#) and 2020's [The Superpower of Media: Mirrors or Movers II](#))^{2,3} the content impact measurement "nut" is yet to be cracked. There are emerging examples of impact measurement, and broadcasters are leading the way on this. For example, RCN's 2020 No Olvidarás Mi Nombre was proven to have improved peace and reconciliation in the aftermath of the 2016 Colombian peace treaty by a USAID-funded impact evaluation. Similarly, ITV had huge success in boosting vegetable sales through its Eat Them To Defeat Them campaign. Overall, there is still a lack of solid examples of impact measurement and most success stories were conducted on a specific piece of content that was created with a specific impact in mind. The end goal for impact measurement is systematic, cross-portfolio measurement that would enable media to take an informed, strategic and data-driven approach to creating content with impact.

This report aims to provide a landscape review of content impact measurement, looking at the state of play, the different company approaches to measuring impact, the organisations which are working in this field, and the lessons we can learn from emerging approaches and examples.

2 Toennesen, C. & Hodgson, S. & Pickett, W. 2017. 'The future of responsible media', Carnstone Partners LLP.

3 Towe, R. & Witte, D. & Toennesen, C. 2020. 'The Superpower of Media', Carnstone Partners Ltd.

This report aims to provide a landscape review of content impact measurement, looking at the state of play, the different company approaches to measuring impact, the organisations which are working in this field, and the lessons we can learn from emerging approaches and examples. It is not intended to 'solve' the question of impact measurement of media content. It aims to contribute to our overall understanding of the state of play, to point to interesting examples of emerging best practice, and to identify where to direct our resources and energy to achieve success.



The superpower of media

Content impacts survey

Throughout this report, you will find data from a survey we ran across the companies which participate in the RMF on how they approach content impacts, how they measure those impacts, how that informs content creation decisions, and what the challenges are in this area. The survey, and this report, were designed to be aligned with the OKRE Entertainment Taskforce research survey.

OKRE (Opening Knowledge across Research and Entertainment) is an independent charity and international hub, which is on a mission to connect the entertainment industry with researchers and lived experience to offer genuine insights into real-world issues. OKRE published their report, *Delivering Social Impact in Entertainment Content in 2024*, based on the results of their survey.⁴ The report and survey was focused on the entertainment industry, including broadcast, streaming, and gaming. The RMF survey was designed to reach other media sub-sectors so that the findings from both surveys can be read together to provide a fuller picture of the wider media sector's approach to content impacts.

Content is media's superpower, and its impact can be far reaching and powerful.

⁴ OKRE. 2024. 'Delivering social impact in entertainment content'. https://indd.adobe.com/view/publication/c89e77c7-877b-4517-936c-260e16d094f1/1/publication-web-resources/pdf/OKRE_social_impact_report.pdf

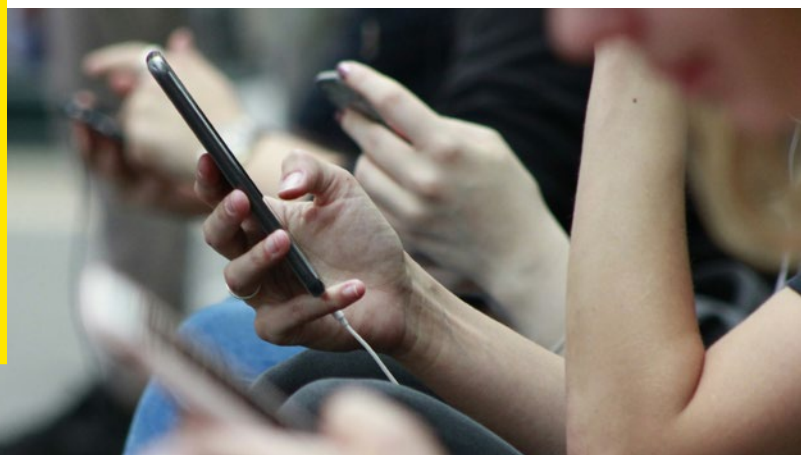
The superpower of media

Throughout the history of the Responsible Media Forum, we have returned to the question of content: does media content mirror society back at itself, or actively move society? What is the power of content? How should the power of content be used? How can we measure, understand and manage the impact of content?

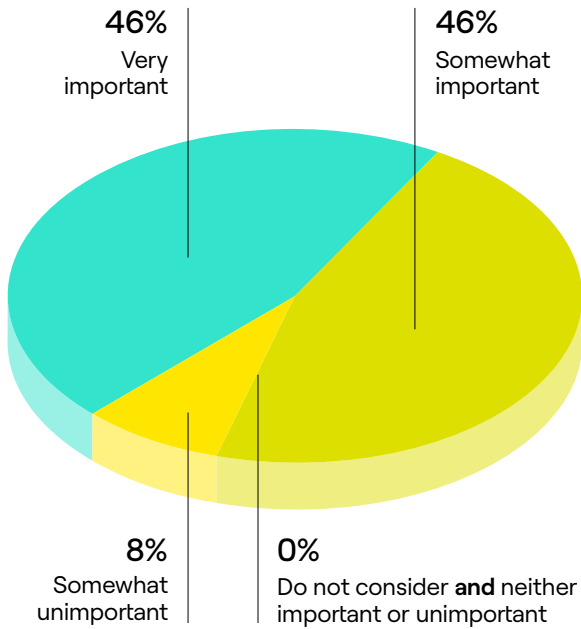
A consensus has emerged over time. Content is media's superpower and its impact can be far reaching and powerful. How deliberate media companies should be in seeking to employ this power to reach specific outcomes, and how this relates to editorial freedoms, remains a point of difference between media companies.

In 2020, The RMF published the *Superpower of Media Report*³. In her foreword, Christiana Figueres proposed that it is culture, not science or politics, that is in the strongest position to motivate, excite and lead to action. She believes that the gap between current efforts to limit climate change and what is needed to achieve the goals of the Paris Agreement to limit global warming to safe levels, is culturally driven. As the sector with arguably the largest cultural power, it is media which must rise to the occasion and challenge existing carbon-intensive practices, inspire action, amplify solutions, normalise low-carbon behaviours, and campaign for change.

Content is the key product and the main output of the sector. This view was supported by our survey, with 92% of respondents agreeing that it is either very important or somewhat important to consider societal impact when creating content. This is remarkably aligned with OKRE's survey, where the same metric was 89%. Yet, as this report will explore, measuring the impact of the content remains a challenge.



When creating content, how important is it to consider its societal impact?

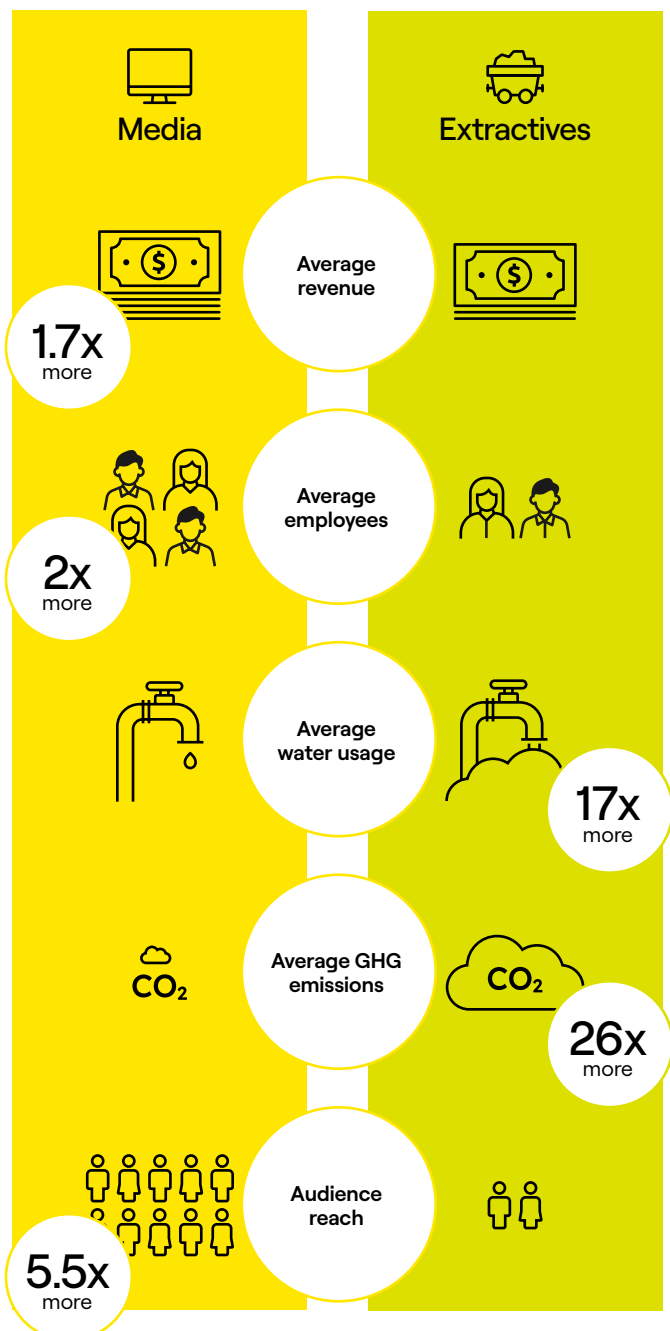


How do media’s foot and brainprint compare?

We have compared the average media company’s corporate, environmental and content footprint to that of an extractive company in previous reports (2013¹, 2017², 2020³). Extractive companies (companies which extract natural resources such as mining, oil and gas) were chosen due to their known environmental impacts and the external pressure they face as a result of that footprint.

Our analysis has continued to show that while media and extractives companies are comparable in size, the environmental impact of media is dwarfed by that of extractives. However, media’s brainprint (the impact a company can have through its messaging) is potentially infinitely larger than that of extractives, depending on whether you believe extractive companies can have a brainprint, e.g. through advertising. We have repeated our analysis this year and compared the world’s ten largest technology, media and telecoms (TMT) companies by revenue against the ten largest extractive companies according to the Forbes Global 2000.⁵ It is clear that the environmental footprint of media remains tiny compared to the extractives average. On average, extractive companies emit 26 times more Scope 1 and 2 Green House Gases (GHGs) and consume 17 times more water, yet only have half the average number of employees compared to media.

We then explored media’s audience reach compared to the global customer reach (daily customers or number of global customers) for extractives companies. Based on the data available, media companies reach five and a half times as many people as extractives.⁶ While there is no directly comparative data available (extractive companies do not have audiences), we expect that the content impact on each individual is also greater for media companies due to the nature of their content. This suggests that although the reduction of emissions and environmental impact should still be a priority for media companies, it is not where their biggest potential for impact lies.



5 The Global 2000 ranks the largest companies in the world using four metrics: sales, profits, assets and market values. Forbes. "The Global 2000 2023". June 2023. [The Global 2000 2023 \(forbes.com\)](https://www.forbes.com/global2000)
 6 Media companies’ reach was calculated using audience reach/number of customers, whilst extractive companies’ reach was calculated using daily customers/ number of global customers.

The measurement gap and why it exists



What media companies talk about, and what they measure

In previous reports (2013¹, 2017², 2020³), the RMF conducted an analysis on the sustainability reports⁷ of media companies, ranging from broadcast to newspapers, to publishing and entertainment. This research highlighted a stark measurement gap. While companies dedicate large sections of their reports to the content they produce, this has never been accompanied by the same volume of quantifiable metrics to measure the impact of that content.

Looking back to the 2013 report, the analysis showed that whilst the average pages on content ranged from 27-40% of the total, the reporting on content impact was 'by exception', usually focused on three topics: editorial guidelines and policies to ensure information is accurate and trustworthy; impacts of on-screen or in-print social campaigns (often charity focused); and the use of investigative journalism. The emphasis of content impact was on content "conceived specifically for impact"¹.

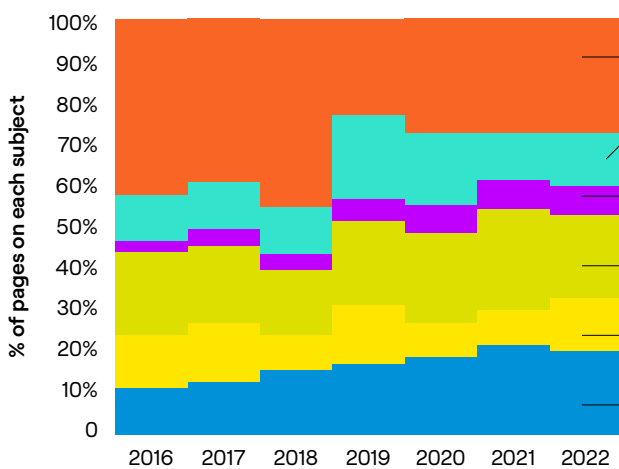
Similarly, the 2017 report concluded that "a third of CR [corporate responsibility] reporting narrative is dedicated to content, but this accounts for less than one in ten KPIs"². In 2020, the same analysis showed that there had been some movement in content reporting, but that this was being driven by broadcasters, through the results of broadcaster-wide (rather than content-specific) audience research surveys. The average number of KPIs attributed to content increased from three to ten per report including broadcasters. However, if broadcasters are excluded, the average remains at three KPIs per report, indicating no change from the 2013 or 2017 analysis.³

⁷ The companies analysed for this data set were BBC, Channel 4, Sky, ITV, Modern Times Group, Vivendi, AOL, Guardian News and Media, RELX, Bertelsmann, Pearson, Schibsted, Dentsu, Informa, Future, The Economist Group. They refer to their sustainability reports interchangeably as CR, CSR, or Sustainability Reports etc.

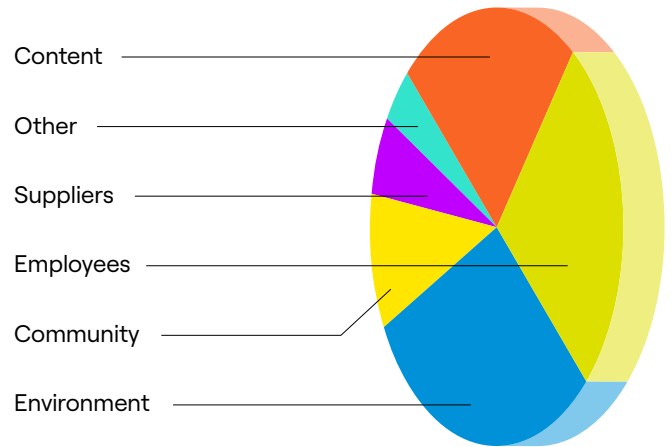
The story remains largely the same in 2023. The analysis looked at averages across 2016–2022 to account for the business shift to standalone, detailed CR/Sustainability reports. The data continues to suggest that no organisation has significantly cracked content impact reporting. The graph below indicates that content remains a key part of CR reporting, with up to 40% of pages being dedicated to it over the seven-year period, whilst the average number

of content metrics per report is six (22%), mirroring the findings of the 2020 report. Furthermore, those metrics are still predominantly focused on the same reporting measures as found in the 2013 report: editorial guidelines and the impacts of campaigns (mainly fundraising). The exceptions are still largely seen in broadcaster’s reports. The table below highlights some examples of content impact KPIs over the years.

What do media companies talk about in their CR reports



Average number of content metrics per report (2016–2022)



Examples of content impact KPIs over the years.

2013

% of viewers felt it favourably changed their perceptions towards people with disabilities

% of people who had seen the film had “changed their mind” about global warming and % watching the film had been made more aware of the problem

An estimated \$X millions of airtime was leveraged through only \$X hundred of thousands in annual grants to the project

2020

% of respondents which agree that channel X has brought new perspectives

% of vegetable sales increased due to ad campaign

% change in those who viewed the ex-armed group’s re-integration into civil society positively

2023

X climate-positive actions took place from fans attending some of the biggest sporting events over the summer from a campaign launched

% of viewers claimed to have spoken to others about the issues raised in the programmes

% reported subsequently increasing their participation in at least one environmentally friendly behaviour

The data continues to suggest that no organisation has significantly cracked content impact reporting.

What is driving the measurement gap? The challenges of measuring content impact

Data-based footprints, like carbon and water, are simple to compare and track. For example, carbon footprinting metrics (Scope 1, 2 and 3 GHG emissions) are well-defined, accepted globally and therefore comparable between organisations. Similarly, the causal relationship between the company's activities (e.g. energy consumption) and the GHG emissions metric is direct and clear. Conversely, we lack a globally accepted and defined metric for content impact and the causal relationship between a media company's content and its impact on an individual (and by extension society) remains nebulous.

A key barrier for many organisations is how to define the measurement parameters. The 2024 OKRE report highlighted that there is a lack of consensus around what impact means (e.g. raising awareness, driving behavioural change or even driving structural change) and that the tools for measurement greatly vary. Only 14% of OKRE's respondents follow an industry standard framework, while most use a mixture of levers like surveys, statistics, anecdotal evidence, interviews and observational studies.⁴ They found other key constraints, such as resource (lack of budget and time) and also that there is no cohesive and standard approach: 43% cited a struggle to balance standardised frameworks with the bespoke nature of the content and 83% cited the challenge of different types of impact requiring different methodologies.

Overcoming the challenges

BBC MEDIA ACTION

One way companies have navigated this challenge is by creating content with the intent to inspire change, which has clear and measurable goals, informed by research and agreed from the outset.

BBC Media Action, the BBC's international charity, is considered a leading organisation on this topic and has successfully been applying content impact measurement to their work. One project they worked on in India, in partnership with the Bill & Melinda Gates Foundation and the Government of India, harnessed entertainment media⁸ to support sanitation efforts across the country. With 60% of

urban India not connected to modern sewage systems and relying on on-site sanitation such as septic tanks,⁹ this was a critical but hidden social issue.

A key lever for improving national sanitation was public awareness of safe waste treatment in the home. BBC Media Action and its collaborators produced a 26-episode TV drama series called '*Navrangi Re!*' ('Nine to Shade'), the first ever drama series to focus on urban sanitation in India. It was also the first ever public-private partnership around a drama on a social issue in India.¹⁰ It was designed to achieve commercial objectives (e.g. reach and ratings) and respond to a challenge – could they help the urban populace to see sanitation as an issue that is as important as air pollution had become?

The team devised specific "outcome indicators". They used both intermediate indicators such as *knowledge* (e.g. how frequently do you need to empty a septic tank and why?) and *interpersonal communication* (e.g. stimulating conversations), as well as "distal indicators" (i.e. longer-standing) such as intentions (e.g. does the show inspire audiences to take action). The team chose the 'TV drama' format to achieve these outcomes due to its ability to engage people on an emotional level and to unpack complex issues and make them easier to understand so that they stick in people's minds. The evaluation also captured how viewers engaged with the show using a model of narrative engagement (the sensation of being 'pulled in' to the world of a story).¹¹

Prior research revealed that people were not making 'optimal' decisions when it came to sanitation. In fact, they departed from what traditional economic theory would classify as 'perfect' rationality in specific and predictable ways. For example, many focused on the short-term gains (e.g. not paying for regular desludging), and ignored both the long-term benefits (e.g. protecting water resources and ensuring the well-being of families and communities) and uncertain future costs (e.g. repairs or system failure). Behavioural economists call this 'present bias'.

Therefore, the content needed to reach these 'procrastinators' as well as those who hadn't thought about what happens after they flush. The drama focused on risk perception and social disapproval, which could inspire urban populations to take either individual or collective action to bring about change.

An independent evaluation of the show provided the team with powerful results. However, evaluating media – particularly popular, wide-reaching programmes – can be very difficult. One obstacle to measuring impact that the

8 Newton-Lewis, T., Das, R., Gambhir, V., Godfrey, A., Sanyal, R., Sethi, I., Mitra, R., Pasricha, R., Mehrotra, P., Mamidi, P. 2022. 'Starting Conversations to Tackle Sanitation in India Through TV Drama'. The Journal of Development Communication. https://www.researchgate.net/publication/357534782_Starting_Conversations_to_Tackle_Sanitation_in_India_Through_TV_Drama.

9 Dasgupta, S., Agarwal, N. and Mukherjee, A. 2019. 'Unearthed - Facts of On-Site Sanitation in Urban India'. Centre for Policy Research. https://www.researchgate.net/publication/337387461_Unearthed_-_Facts_of_On-Site_Sanitation_in_Urban_India.

10 While India has a long history of using drama to address social problems, it had always been in association with the public broadcaster, Doordarshan – not the private sector. In an industry first, BBC Media Action partnered with the Bill & Melinda Gates Foundation, and Viacom18 to create '*Navrangi Re!*'.

11 This included narrative understanding (recall of key story arches), attention (e.g. average minutes watched per episode), emotional engagement (e.g. reporting feeling happy after watching), reactance (e.g. appreciation of the show's focus on sanitation) and enjoyment (e.g. would watch more episodes).

team faced was the fact that viewers can choose whether to watch a TV show or not. This makes it challenging to apply a robust methodology or create a true control group. The fact that viewers are choosing to watch the show introduces “self-selection bias”: this refers to the fact the show will attract viewers who might already have an interest in the topic.

To counteract this, the team used a listing exercise to identify households that already consumed other, unrelated, content on the same TV channel. The idea behind this was that not all households who watched the channel would end up watching the show. However, it was assumed there would be a high degree of similarity between households who watched and those that didn't. These households were then retrospectively allocated into treatment and control groups so that a difference-in-differences (DID) model could be used to identify causal impact. This social sciences statistical technique “compared changes in outcomes of those exposed to the TV show with those unexposed” using a panel dataset. It also took into account the level of narrative engagement and the intensity of exposure to *Navrangi Re!* i.e. the number of episodes of the TV show watched.

The team saw an impact by dose. Overall, *Navrangi Re!* reached 59.6 million unique viewers. For those exposed to over a quarter of episodes (7+ episodes), the team saw significant and positive effects on most indicators. This impact was underpinned by high levels of narrative engagement with the show.

Overcoming the challenges



However, if a specific outcome or impact is not the main purpose of the show, organisations may need to lean on other indicators to understand its potential impact on viewer behaviour or beliefs. ITV used this method to understand the impact of their Love Island x eBay partnership by using commercial data to supplement audience data.

Love Island is a hugely popular ITV reality dating show. In 2022, eBay partnered with the show to become its primary sponsor. The partnership campaign embraced a fundamental principle of communications, show don't tell. The intention was to bring second-hand fashion into mainstream conversation and reach audiences who aren't engaging with second-hand shopping. The partnership went beyond free advertising slots and was activated across all the show's touchpoints, such as in-show placement (down to the clothes hangers), social media and digital activations, auctioning outfits to the audience and take-overs on the eBay homepage, amongst many others.



In order to understand its impact, ITV worked with a market research firm to launch a survey to more than 1,500 adults in the UK. The survey asked questions about whether the partnership had changed the respondents' views, and found that as a result of the partnership, 3.1 million people were more aware of the impact of disposable fashion on the planet and more likely to shop sustainably. Furthermore, as this was a commercial partnership, ITV and eBay could supplement the survey data with sales data from the second-hand marketplace to add depth to the analysis: eBay data saw a 7,000% increase in searches for 'pre-loved clothes' and one item of clothing was sold every minute that the partnership was live.¹² This coupling of data enables ITV to understand potential impact on audience awareness but also on behavioural change via shopping trends.

Image © Love Island

Overcoming the challenges



Similarly, when looking at social impact, metrics like economic contribution or job creation could be considered too. These metrics are often easier to obtain and it may be easier to trace the show's contribution to both. For example, the BBC looked at this angle when assessing the impact of *Wild Isles* (a 2023 nature documentary series presented by Sir David Attenborough, which focused on the wildlife of the British Isles). They reported that the show, produced in Bristol by the independent production company Silverback Films, supported over 80 full-time equivalent jobs during its three-year production and contributed £9 million GVA (Gross Added Value) to the UK economy. In 2022 alone, the BBC Studios Natural History Unit had a £127m impact on Bristol's regional economy.¹³

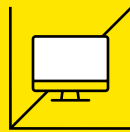
¹² eBay internal data, 2022 and Optiseller Analysis.

¹³ BBC. 2024. 'Group Annual Report and Accounts 2023/24': <https://www.bbc.co.uk/aboutthebbc/documents/ara-2023-24.pdf#page=18>, p.33.

The causal relationship between content and impact

This remains the grey area of defining the measurement parameters and its complexity is only increasing in the digital, omnichannel world. Where do you draw the line in attributing an impact to one organisation?

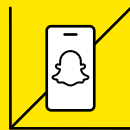
A traditional news company (e.g. broadcaster or newspaper) may first publish a story in print or on their website,



but it could then be picked up by a news aggregator (e.g. Apple News),



then be picked up by a social-based channel (e.g. Snapchat or Instagram news feed), where most users will consume the headline and a short caption at most)



before being mentioned by an influencer in their Tik Tok video.



Whilst the story and content may have originated with the news company, the story has been disseminated and re-interpreted by multiple sources before reaching a specific demographic. Can it still be said to be the original news story?

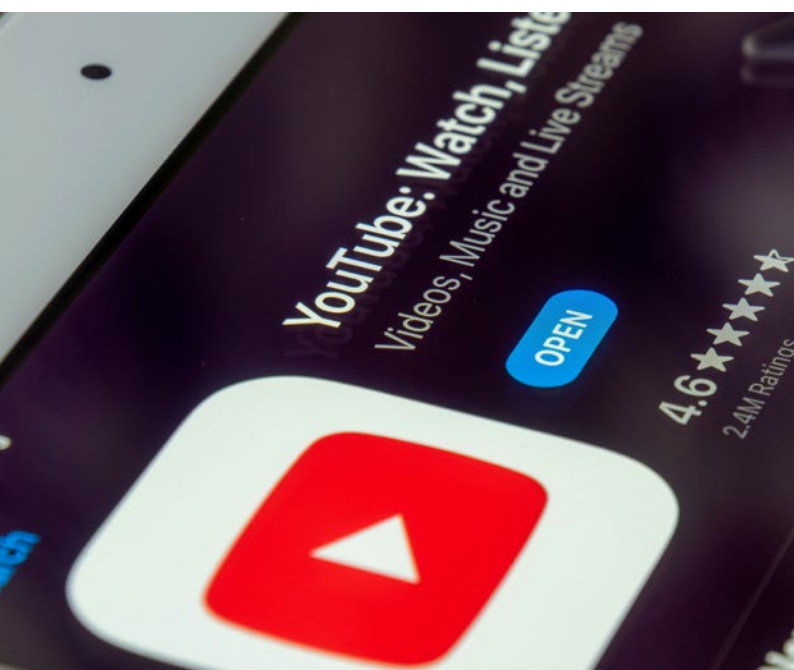
How much is digital consumption affecting what viewers consume?

The world of content creation is fast growing, with new platforms springing up constantly. Generations no longer sit together to watch the same TV episode. Instead, audiences have near-infinite choices to make when it comes to content. They can choose what platforms to pay for, whether to watch something live or download it and even what speed it's watched.¹⁴

The Reuter's 'Digital News Report 2022' explored this shifting behaviour in news consumption specifically, a sub-set of media content. In the US, it found a decrease in the use of all news sources (TV, Print, Online, Radio News) from 2013–2022 except for social media, which increased from 27% to 42%.¹⁵ What is starker, is the number of "news avoiders" amongst the younger generations. In 2022, 40% of 18–24 year olds sometimes or often actively avoided news (across all markets studied). For those who do consume news, their primary sources are no longer traditional news sources. Amongst 18–24 year olds in the UK in 2022, only 28% started their news journey with a news website or app (it was 53% in 2015), mirroring the rise in social media. This offers a challenge to companies attempting to measure the impact of their content, as that impact is increasingly diffuse and outside of their line of sight or control.

14 Quah, N. 2024. 'The Case for Speed-Watching', Vulture. <https://www.vulture.com/article/speed-watching-netflix-tv-shows.html>.

15 Newman, N., Fletcher, R., Robertson, C., Eddy, K., Kleis Nielson, R. 2022. 'Reuters Institute Digital News Report 2022', Oxford: The Reuters Institute for the Study of Journalism. [Reuters Institute Digital News Report 2022 \(ox.ac.uk\)](https://www.reutersinstitute.org/news-report-2022).



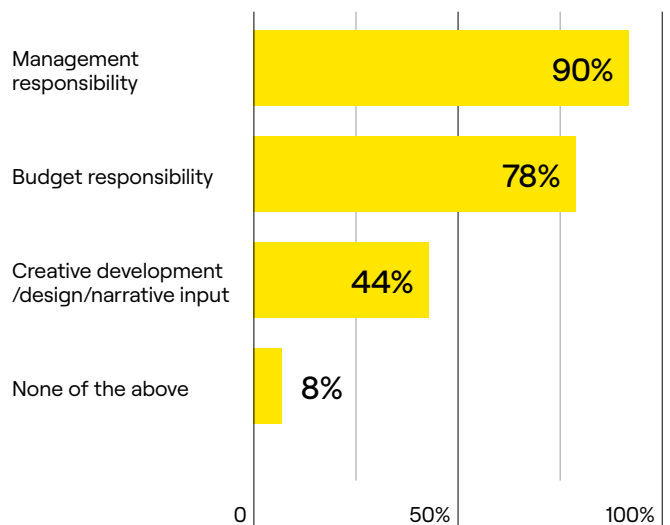
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Who is measuring impact?

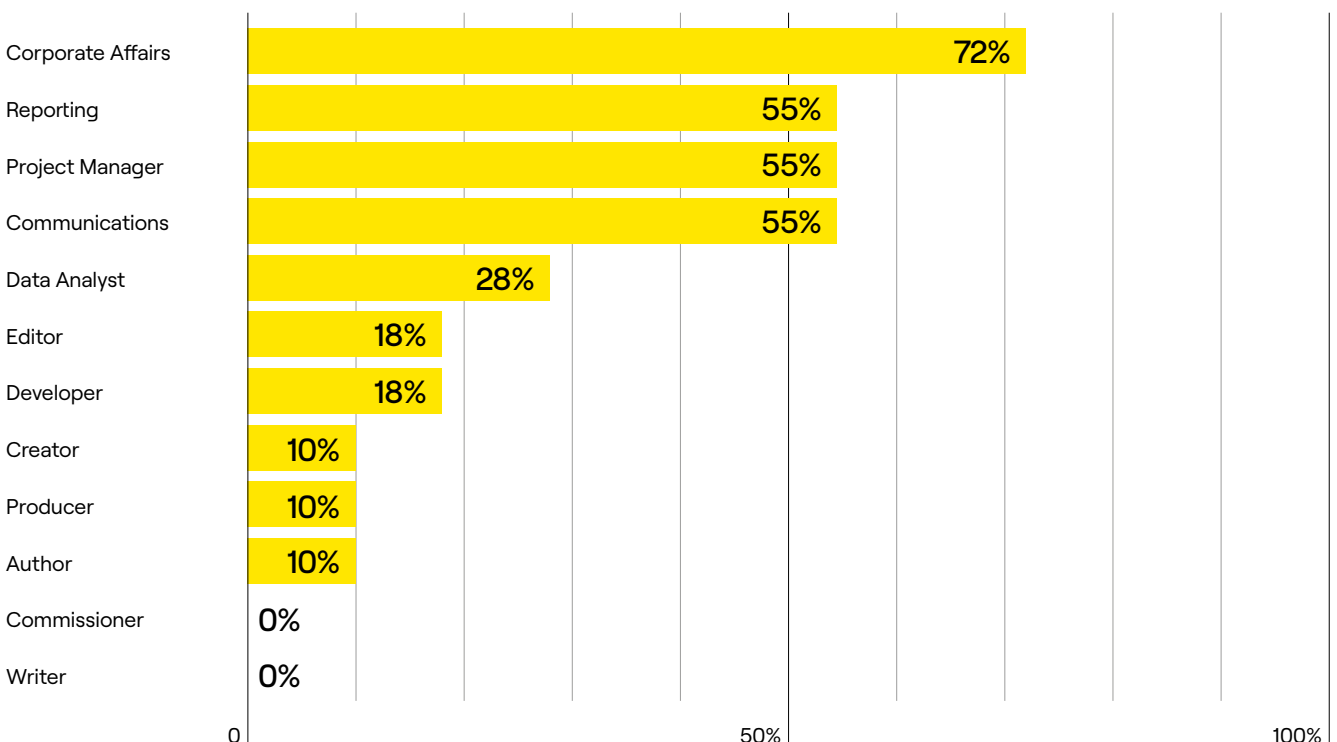
Generally, content creation is within the remit of editorial, production, marketing, and creative teams. However, the measurement of a company’s impact tends to fall in scope of the sustainability (or ESG/Corporate Responsibility) teams. Respondents to this survey were largely from the latter (sustainability) teams. Increasingly, these teams are being asked to include impact reporting in their disclosure.

For example, the EU’s Corporate Sustainability Reporting Directive (CSRD) explicitly asks companies to consider and report on their impact on environmental, social and governance issues. If we argue that content is a media company’s largest impact on the world, then it will become increasingly untenable to shy away from quantifying this, especially in a world where regulators are asking for quantitative disclosures on impact. However, there is no guidance (yet) on how companies can or should report on the impact of content on the environment and society.

Which responsibilities are within your remit? (Select all that apply)



Which of the following responsibilities apply to your role? (Select all that apply)



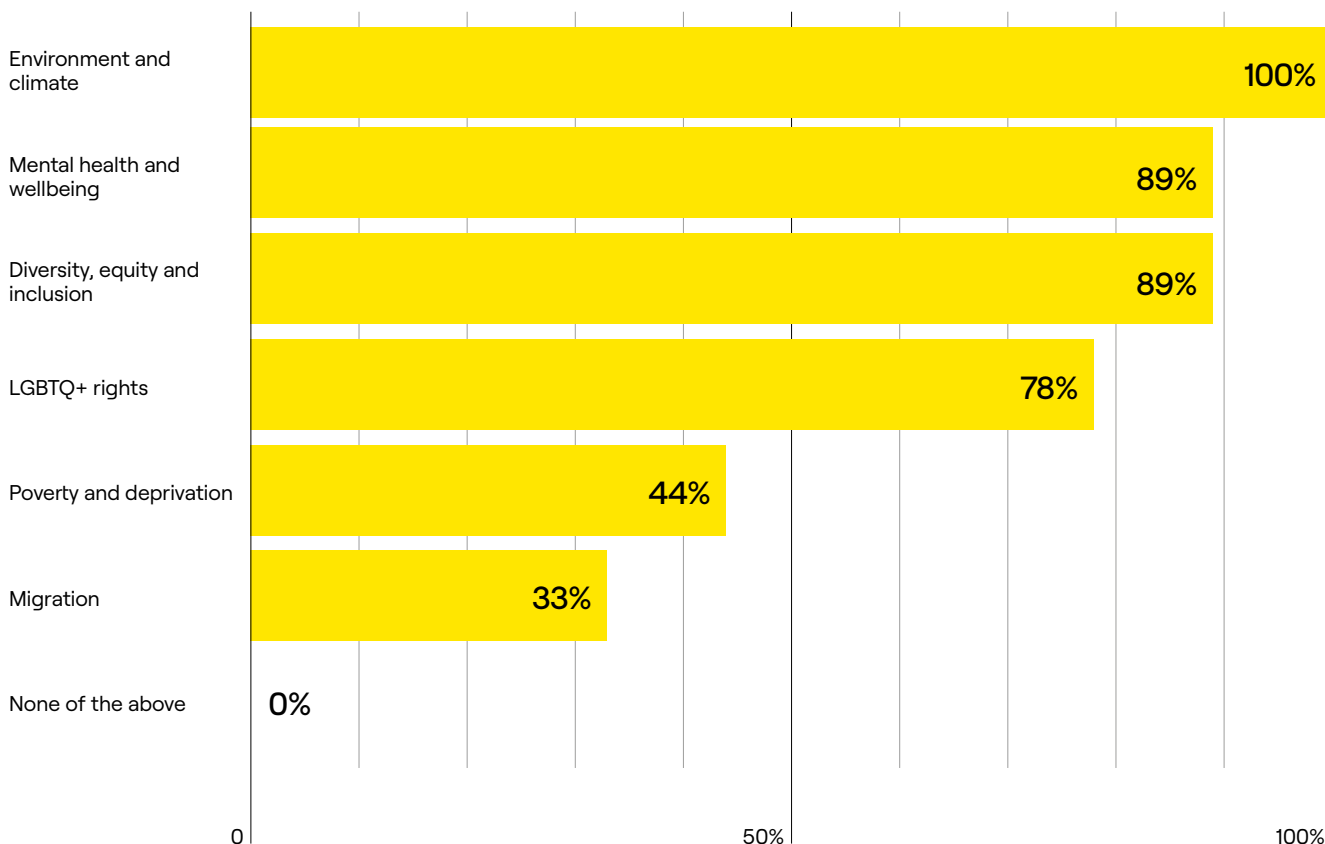
What are teams trying to measure?

In the survey which the RMF ran for this report, respondents were asked to select which themes they think about when developing content. There was a clear focus on social topics (mental health and wellbeing, LGBTQ+ Rights, and Diversity, Equity and Inclusion (DEI)) and Environment and the Climate. Our findings are broadly aligned with OKRE's findings, which also found DEI, mental health and wellbeing, and environmental sustainability to be the top three themes. One difference between the surveys is LGBTQ+ rights. Whereas almost 80% of respondents to the RMF survey selected this as a priority, that number was closer to 60% in the OKRE survey. This follows the broader industry trend of increasing demand for representation within content, with the potential for higher engagement as a result.^{16, 17}

We saw similar themes emerge in the 2022 Media Materiality Report.¹⁸ The outputs were based on desk-based research and interviews with, and reviews by, media sustainability practitioners and external experts. The highest ranked material topics that could have crossover with content were climate change (which was upgraded from the previous analysis), responsible content, DEI and wellbeing. The other material topics were more operational in their focus: data privacy, cybersecurity, skill development, people management and sustainable value chain.

Companies are increasingly expected to protect and champion the wellbeing of their employees, particularly as mental health and wellbeing has deteriorated significantly since the pandemic, especially amongst young people.¹⁹ This is an area where content potentially has a powerful impact opportunity: a study by Mind showed that 26% of people who consumed media with mental health content were inspired to open up conversations on their own mental health.²⁰

What kind of societal themes do you think about when developing content? (Select all that apply)



16 FT Strategies. 'Diversity Inside Media Organisations: Trends 2024'. <https://www.ftstrategies.com/en-gb/insights/diversity-inside-media-organisations-report>
 17 Project Diamond. 'Diamond: The Seventh Cut'. https://creativediversitynetwork.com/wp-content/uploads/2024/09/Standard-main-Report_Diamond-The-Seventh-Cut_CDN_12-Sept-2024pdf.pdf
 18 Witte, D., Okolo, V. and Towe, R. 2022. 'Media Materiality 2022: The Material Issues for the Media Sector'. <https://responsiblemediaforum.org/downloadDocumentFile?document=359>
 19 Montero-Marin, J., Hinze, V. and Mansfield, K. (2023). 'Young People's Mental Health Changes, Risk, and Resilience During the COVID-19 Pandemic' doi:10.1001/
 20 Mind. 'Media guidelines: Talking about mental health'. <https://www.mind.org.uk/media/u2dnyhnm/mind-media-guidelines-talking-about-mental-health.pdf>

The state of the art in measuring content impact

Learning from other sub-sectors

There are some media sub-sectors that have more mature methods for measuring content impact, such as advertising and broadcast, which have been measuring the impact of their content for a long time. As a result, they have developed quite sophisticated methods which we can learn from.

Advertising

Advertising uses detailed data on end-user profiling to maximise the effectiveness and sale price of ads. This is a commercially driven need and as a result, organisations have invested in the tools to measure it. Furthermore, the variables (the data points which may have a correlation) are often easier to define and therefore measure.

Firstly, the dependent variable, which is the main factor you are trying to predict (e.g. volume of sales), is an accessible metric for most businesses. Secondly, the independent variable, the factor you suspect may have an impact (e.g. reach of an advert), is easier to quantify because generally, brands pay for advertising coverage and this is often a market price based on the expected reach of the advertising slot. Furthermore, data on the geographic reach, repetition and engagement for an advert is collected by most advertising platforms. As these platforms and systems are more mature, there may be learnings that can be lifted and applied to the practice of content impact measurement.

Advertising uses detailed data on end-user profiling to maximise the effectiveness and sale price of ads.



Broadcast and audience measurement

To help understand content impact, many broadcasters collaborate with the Broadcasters' Audience Research Board Ltd (Barb). It is a Joint Industry Currency (JIC), created by and for the UK TV and advertising industry and jointly owned by the BBC, Channel 4, Channel 5, the IPA (Institute of Practitioners in Advertising), ITV and Sky.

Barb uses a hybrid approach to measure viewing patterns across broadcast, Video on Demand (VOD) and video-sharing platforms. Their method integrates two sources of data:



Data on people,

obtained via the Barb panel (audience and households),



Data on devices,

obtained via census data for online TV viewing.

This hybrid approach is how they claim to deliver a trusted and objective insight into audience viewing habits in the UK.

A potential limitation of audience panels is that they can be self-selecting and therefore not be truly representative. Barb attempts to combat this through active panel recruitment, with the objective of removing the bias of self-selection. The aim for the panel is to represent households across diverse geographies, demographics and TV platforms. They are expanding it to 7,000 households, which will equate to around 16,000 people.

Barb consistently vets and manages the panel by conducting weekly interviews with thousands of households to ensure it remains a true reflection. Each household on the panel is set up with a meter attached to the TV set and a special remote, with buttons to track who is viewing what and when in that household. The meter is able to pick up the 'audio footprint' of the shows being watched and later match them to the show titles.

Whilst a panel on this scale is not easy to replicate, the overlaying of people data improves the depth of insight. Caroline Baxter, Chief Operating Officer at Barb, believes that it is the overlaying of their panel insights on top of the big data (from large samples of millions) that enables them to understand the detail of viewing habits, like co-viewing and cross-platform duplication.²¹

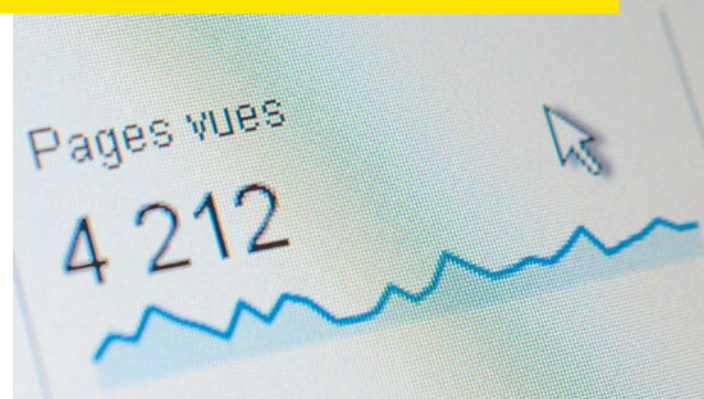
²¹ Baxter, C. 'Better together: Why Barb's panel is crucial in the age of big data'. <https://uk.themedialeaders.com/better-together-why-barbs-panel-is-crucial-in-the-age-of-big-data/>

BBC Audience Research

The BBC uses a variety of research tools and data to better understand and serve UK audiences. One of them is an online survey, designed to assess what audiences think of the programmes they have watched and listened to. It is run by the research agency GfK. Around 15,000 people are invited to complete a daily survey on the content they consumed the day before. The survey measures audience responses to the BBC and competitor channel programmes. The reporting panel is weighted for age, social grade, sex, presence of children, religion, and the household digital type to ensure it is representative of the UK as a whole.

The BBC is able to use this data to gather insights on particular shows and supplement standard research with bespoke surveys and additional in-depth analysis. For example, when measuring the impact of *Wild Isles*, the BBC used a combination of data from this online survey, 'virtual in person' sessions with audience members, and desk-based research into search trends, Wikipedia analysis and the impact of financial spend. This internal work was supplemented with an additional survey and analysis from impact specialists Simetrica-Jacobs, using a much larger sample size to capture data before and after broadcast and create a monetised estimation of the series' social value.

Around 15,000 people are invited to complete a daily survey on the content they consumed the day before.



What might the limitations be?

Audience measurement, such as the model used by Barb, is a strong gauge for impact. Furthermore, with the advances in technology (smart TVs, phones, apps) that people are consuming content on, it is becoming possible to measure content consumption in real time.

A report from The Center for International Media Assistance (CIMA) delves into audience measurement and highlights some of its limitations.²² Most traditional impact evaluation (for advertisers) is based on ‘exposure’ to consumers, with pricing based accordingly. One key limitation is that estimated exposure is backward-looking, as it uses historical data. It also tends to estimate exposure based on audiences within the content medium’s distribution reach, which means rural areas are often missed, and on consumers with consistent electricity, which can skew the data economically.

There is the possibility of corruption, particularly where state news is tightly controlled. However, one of the largest limitations is that the data reflects how many people may potentially be exposed but does not show whether they were actually exposed to it.

To combat this, companies are increasingly moving from ‘exposure models’ to ‘engagement models’, which are based on real-time data as opposed to statistical sampling.

For advertising in online environments, this enables a model where ad buying can be in real-time, in relevant contexts and tailored to the user. This model is becoming increasingly accessible with the rise of smartphones and connected devices, where viewing data can easily be collected.

The CIMA report also highlights the work of BBC Media Action (their work is explored in other sections of this RMF report as well) and their ‘Three Pillars of Media Research’. The first pillar is research to take form (audience feedback research, listening groups); the second is to evaluate (e.g. base, mid and endline surveys); and the third is research for evidence (e.g. learning across data or content and looking at contribution and attribution based on the data). Whilst the CIMA report highlights that cost is a prohibitive factor for many organisations, it does suggest that many of these techniques could be translated into less sophisticated but lower cost operations, using tools like in-house or listening group research and audience panels.

Most traditional impact evaluation is based on ‘exposure’ to consumers, with pricing based accordingly.

Differences in how media is measured



Exposure model

Engagement Model

Geography	Media-defined geography	User-defined geography
When measured	Past	Present
Level of reporting	Demographic or other segments	User groups based on known behaviours
Media markets	Cohesive	Fragmented
Frequency	Periodic	On-going and immediate
Base	Statistical sampling	Measurement of users
Media impacts	Often inferred, measurement difficult	Measured

CIMA, 'Measuring the Audience' P.5

²² Foster. M. 2014. 'Measuring the Audience'. Center for International Media Assistance, and National Endowment for Democracy. <https://www.cima.ned.org/resource/cima-measuring-the-audience/>



Takeaways

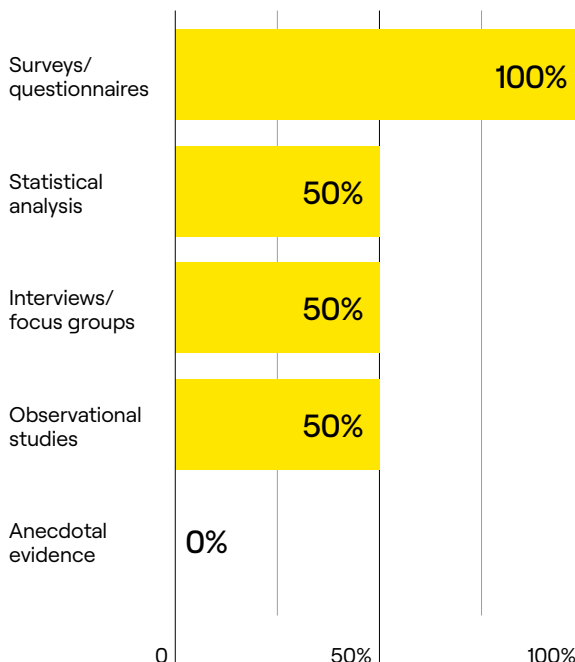
Despite it being easier to implement the 'engagement' approach in a selling model, i.e. advertising, there is crossover with impact measurement for other media content and how it could be approached. Firstly, combining big data (national census data) with more bespoke collected data through audience measurement tools like panels, listening and focus groups, and baseline, midline and endline surveys. Secondly, through harnessing the increase of digital data available on end users, enabling better engagement measurement. This is especially true of viewers consuming data via apps and on smart TVs. Lastly, by concentrating on a clearly defined content value chain.

Survey

How do you measure the societal impact of content?

There are some interesting differences between the results of the RMF and OKRE survey. Whereas all of the RMF respondents reported using surveys and questionnaires to measure impact, 66% of respondents to OKRE's survey report the same. On the other hand, statistical analysis and observational studies were reported by 50% of RMF respondents, whereas the comparable figures were 66% and 37% in the OKRE survey. Interestingly, 57% of OKRE respondents reported using anecdotal evidence to understand impact, whereas none of the RMF respondents did. Finally, our findings were aligned on the use of interviews/focus groups, at around 50%.

How do you measure societal impact of content? (Select all that apply)



Whereas all of the RMF respondents reported using surveys and questionnaires to measure impact, 66% of respondents to OKRE's survey report the same.

Today's content impact measurement landscape

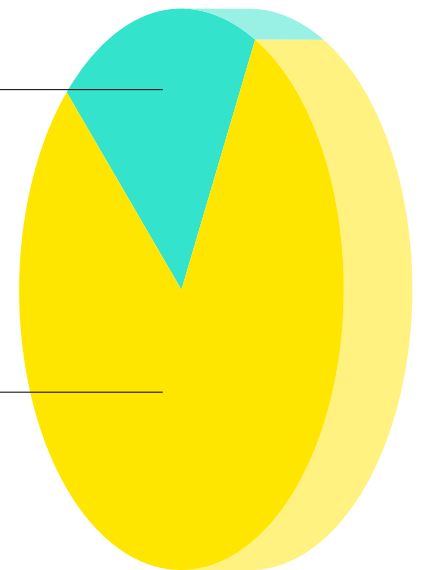
80% of respondents to the RMF survey said they do not measure the societal impact of their content, as opposed to 28% in the OKRE survey. This suggests that the entertainment industries, particularly screen entertainment, are markedly ahead of the broader media sector on impact measurement. There is a clear desire to do more in this space: 90% of respondents agree that they would like more information on measuring the impact of content on society and all (100%) the respondents either strongly agree or agree that they would like to do more to ensure the content they work on has a positive impact. It is also encouraging to see that no respondent has stated that they do not measure the impact of their content due to a lack of interest.



Do you measure the societal impact of your content?

20%
Yes

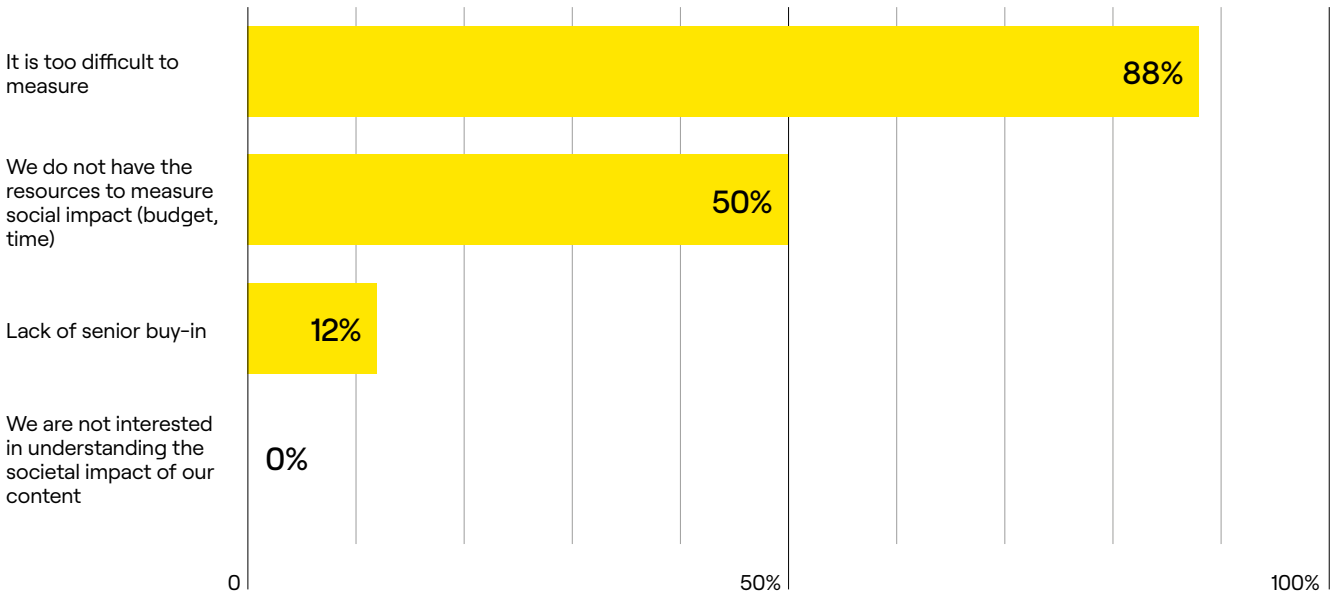
80%
No



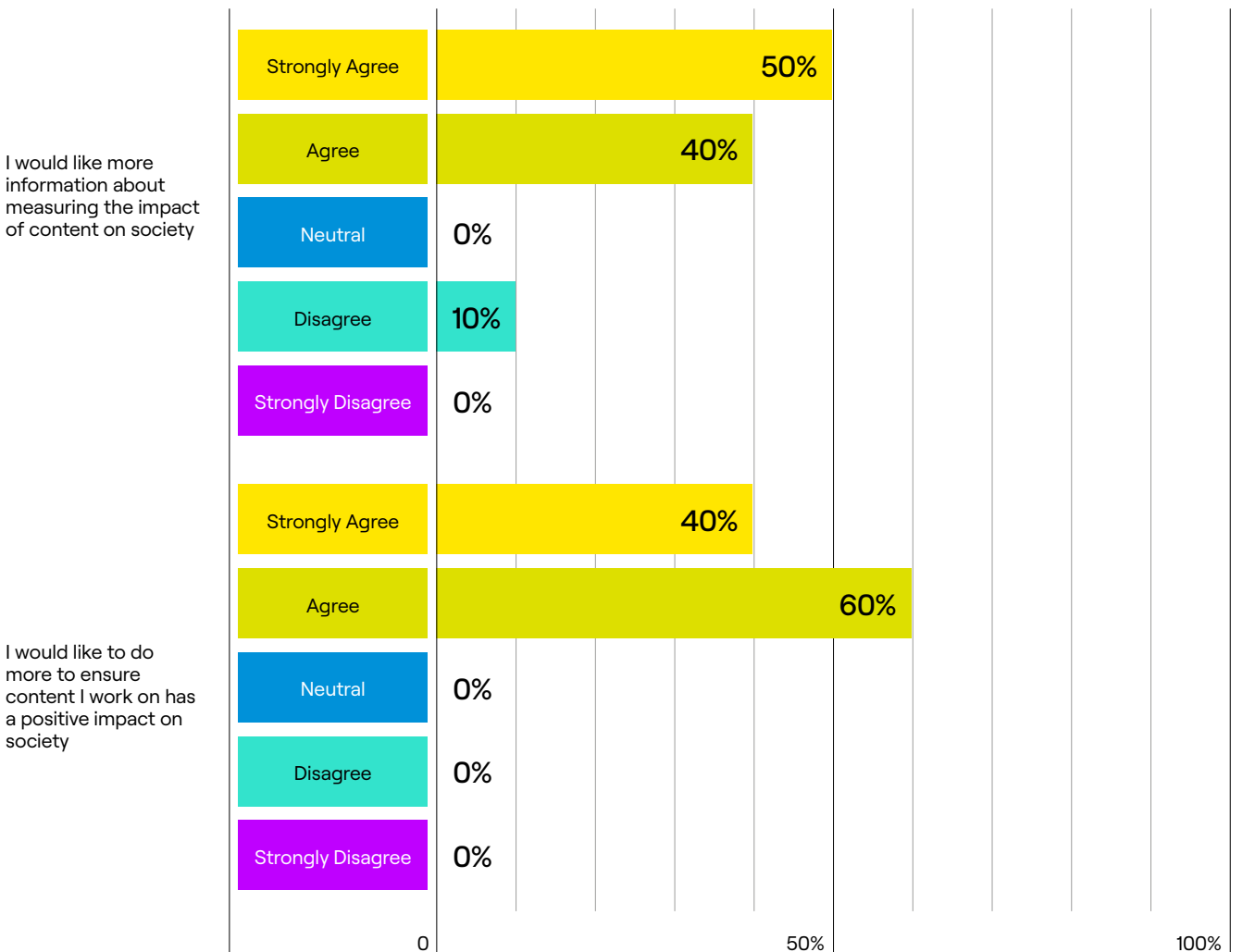
That said, two key challenges preventing companies from doing more emerge: the difficulty of measuring impact, and a lack of financial or temporal resources. In addition, a minority of respondents flagged a lack of senior buy-in. These findings are consistent with OKRE's finding that the lack of measurement is not due to apathy but due to practical workplace challenges.⁴

80% of respondents to the RMF survey said they do not measure the societal impact of their content

Why do you not measure the societal impact of your content? (Select all that apply)



To what extent do you agree with the following statements?



Who's working in this field?

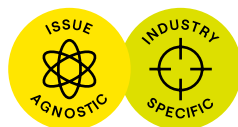
There is a mix of organisations working to progress measuring the impact of content. These can be categorised into organisations or initiatives which are issue-agnostic or issue-specific and those which are cross-sector or industry-specific.

This landscape review finds that there is no organisation working on content impact measurement across the entire media sector and across all key topics. With the exception of OKRE, all organisations identified are focused on climate change. This is understandable as climate change is arguably the greatest challenge humanity faces in our lifetime. However, as both our and OKRE's survey showed, it is certainly not the only focus area for media content impact. And whereas OKRE covers all topics, it is focused on the entertainment industries. There is therefore work to do to broaden the work of OKRE to other sectors, and to apply the learnings and knowledge base that is being developed specifically on content impact on climate change to other issue areas.

Of course, we may well have missed an important organisation working in this field. We would be very interested to hear from other organisations who are working to further the understanding and measurement of media content impact.

OKRE

<https://okre.org>



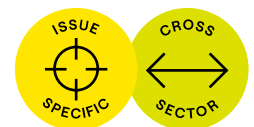
OKRE (Opening Knowledge across Research and Entertainment) is an independent charity which works to connect tv, films and games with academic researchers and lived experience. It has set up an Entertainment Industries Taskforce for Social Impact, composed of leaders across the UK entertainment industry and which represents major global media corporations including Netflix, Prime Video, BBC, Sky, ITV, Spotify, Snap, Disney, and is supported by Comic Relief. The Taskforce aims to assess the approaches of the entertainment industry to the social and cultural impact of content and how this is measured.

As a first step OKRE have published the report 'Delivering Social Impact in Entertainment Content'.⁴ OKRE carried out in-depth qualitative interviews with many entertainment platforms and ran a survey of commissioners and creatives in 2023 to gain quantitative insights, assessing how the different entertainment industries (TV, Film and Games) think about the impact of their content on people's attitudes, perceptions, policy and generally in shaping the world. OKRE hopes to develop an Entertainment Impact Index, a practical and accessible framework for mapping and understanding the impact of entertainment content, focusing on collaboration and shared definitions of content impacts.



Nesta

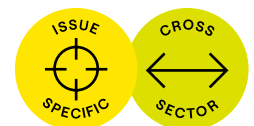
<https://www.nesta.org.uk>



Nesta is the UK's innovation agency for social good. It designs, tests and scales new solutions to society's biggest problems. It has three "innovation missions": a fairer start; a healthy life; and a sustainable future. The sustainable future mission is focused on making it easier for people to use clean, green sources of energy to heat and power their homes, with a goal of reducing UK household emissions 30% by 2030 from 2019 levels. As part of this mission, Nesta is scoping a narrative change initiative on the decarbonisation of the home. Their plan has six key elements, each with its own recommendations on policy. This includes driving top-down transition with Government support, to make low-carbon heating more affordable and developing a 'comprehensive Heat and Buildings Strategy'. However, bringing customers along on that journey will require a focus on influencing changes in behaviour and purchasing decisions. Their planned campaign is about raising awareness of low-carbon heating and providing a home energy advice service.

Ipsos

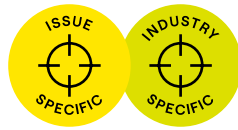
<https://www.ipsos.com/en>



Ipsos is a global market research and public opinion specialist. Operating in 90 markets, it works to understand society, brands, markets and people. Ipsos worked together with the Centre for Climate Change and Social Transformations (CAST) to develop a theory of change for how UK broadcasters can best help and inspire their audiences to tackle the climate crisis. To achieve this, Ipsos conducted an evidence review, titled Pan UK Broadcaster Climate Research, based on interviews with broadcasters, creatives and policy experts to see what role broadcasters can play in inspiring audiences to tackle climate change and biodiversity loss.²³

albert

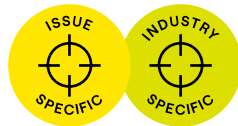
<https://wearealbert.org>



Albert is a BAFTA-owned organisation that brings together the film and TV industries to tackle their environmental impact and inspire their audiences to act for a sustainable future. It does this by supporting the industry to reduce the environmental impacts of production and create content that supports a vision for a sustainable future. They run a variety of services and tools, including training, events, the albert toolkit (carbon calculator and carbon action plan) and planet placement, a creative guide to putting the planet into programme editorial. As part of its planet placement programme, albert published a report on the impact of climate content on audiences' pro-environmental behaviour.²⁴ While this report does not directly tackle the question of impact measurement, it does contain some interesting findings on how impact can be achieved: aligning climate messaging with a call to action is effective, and repeated exposure to climate content and targeting habit-forming behaviours helps.

Climate Spring

<https://www.climate-spring.org>



Climate Spring harnesses the storytelling power of the screen to shift how society perceives and responds to the climate crisis. It does this in close collaboration with film and TV industry partners, gatekeepers, commissioners, creatives and producers. Their recent campaign film, *More Flames*, explores the struggles of talking about the end of the world in a short comedy-satire format ([watch here](#)).

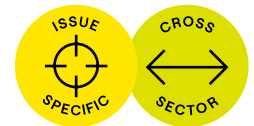
Climate Spring brought together a group of organisations to discuss climate narratives in mass entertainment in 2022-2023. This group identified three research needs: screen industry engagement, theory of change evidence, and impact measurement. For the latter, the key priority is to build a shared measurement framework for continual monitoring. Until now, impact measurement related to climate in the Film and TV industry has consisted primarily of mentions analysis and case studies. However, a systematic and shared approach to impact measurement is required,

including narrative analysis to understand narrative shifts within the media and wider public space. Climate Spring has recommended that work continues to develop an acceptable impact measurement framework, including continual media monitoring, best practice identification, and measurement of impact.

Climate Spring also runs The Hot House development lab for scripted long-form TV and feature film projects. In early 2024, they announced that the 2024 lab would spotlight 'stories of the climate transition', aiming to incentivise "screenwriters to craft engaging and relatable climate stories set in a near future without fossil fuels and polluting practices".²⁵

Rare

<https://rare.org/program/climate-culture/entertainment-lab/>



Rare is a non-profit organisation that supports writers and creators in telling stories that reflect our changing world and inspire audiences at home. Rare leverages behavioural science research and insights to inspire change to protect our people and planet. The Entertainment Lab at Rare inspires climate culture through TV & Film, helping creators to include climate-friendly behaviours and stories on mainstream screens across all genres. This support includes workshops, events, consultations, audience surveys, public opinion research, and impact measurement and evaluation.

Rare's Entertainment Lab has conducted research and released reports on the impacts of popular content, for example exploring the impact of 'Don't Look Up' on climate-related beliefs and attitudes.²⁶ They conducted a survey which found that watching the film increased the participants' perceived threat of climate change and the likelihood to take individual action, as well as the influence on their political stances when it comes to addressing climate change. Other reports include a study on the CBS political drama *Madam Secretary* and how its portrayal of climate change impacted beliefs around key climate concerns and actions,²⁷ and a study of the impact of Max's *And Just Like That...* on including content on plant-based eating.²⁸

Climate Spring brought together a group of organisations to discuss climate narratives in mass entertainment in 2022-2023.

24 Graves, C. & Morris, L. 2023. 'What do we know? The impact of climate content on audiences' pro-environmental behaviour'. Albert. <https://wearealbert.org/wp-content/uploads/2023/05/Albert-Pres-Doc-Impact-Report-v3-MSW20.pdf>.

25 Climate Spring. 2024. Climate Spring's The Hot House development lab returns with focus on 'stories of the climate transition.' <https://www.climate-spring.org/latest/climate-springs-the-hot-house-development-lab-returns-with-focus-on-stories-of-the-climate-transition>.

26 Thulin, E., Rakhimov, A. and Tiwathia, A. 2024. 'Don't Look Up: Shifting Climate Beliefs'. Rare. <https://rare.org/wp-content/uploads/2024/09/2024.09-Dont-Look-Up-Impact-Study-9.23.24.pdf>.

27 Tiwathia, A., Watamanuk, E., Syropoulos, and Thulin, E. 2024. 'Small Screen, Big Impact How *Madam Secretary* Boosted Support for Climate Policy and Climate Justice'. Rare. <https://rare.org/wp-content/uploads/2024/06/Small-Screen-Big-Impact-Report-The-Impact-of-Madam-Secretary.pdf>.

28 Tiwathia, A., Watamanuk, Dodson, S., Thulin, E. and Paine, N. 2024. 'And Just Like That: Small moments on screen can boost climate-friendly food norms'. Rare. https://rare.org/research-reports/and-just-like-that-small-moments-on-screen-can-boost-climate-friendly-food-norms/?utm_source=social+media&utm_medium=linkedin&utm_campaign=entertainmentlab.

Case Study

itv

How do you approach impact evaluation across your content portfolio?

ITV is able to leverage the commercial opportunities of its advertising slots as well as the content and output of its popular shows. It has predominantly approached impact evaluation in two ways: through audience measurement or against a specific target or goal (often fundraising). To gather data on their audiences, and potential changes in attitude or behaviour, the team often leverages available data from market research firms, with clear parameters that are relevant to the show or content they are trying to assess. This data can then be extrapolated to understand potential impact at a national scale. For campaigns which are explicitly linked to public or social impact, and the objective of changing audience habits, they have used surveys.

Firstly, the approach to measuring audience impact is usually set against an overarching goal (e.g. 'our audience feels that ITV looks out for their mental health'). 'Eat Them To Defeat Them' is an award-winning campaign from Veg Power and ITV, which aims to increase kid's consumption of vegetables. The story centres around the idea that vegetables are coming to take over the world and children must eat them to defeat them. The story was shared through a combination of TV advertising, a national schools programme and the expertise of top experts in the UK.

After five years of the campaign, the teams produced a report analysing its hugely positive impact. This data was collected from a combination of participant claims, economic analysis of vegetable sales (excluding macro influences like lockdown or increasing veganism), and from a national online survey of 3,000 demographically and geographically representative parents and their child of primary school age (March/April 2023).

45% of parents who saw the advert said their children ate more vegetables



Image © Veg Power CIC 2023

This combination of data enabled the team to view the impact from different lenses, such as audience reach, impact on sales, and potential behavioural change. For example, the report found 36+m people have been reached every year since 2019 and 45% of parents who saw the advert said their children ate more vegetables.²⁹ It also estimated that there were more than £132 million worth of vegetable sales as a direct result of the campaigns from 2019-2022.

This analysis also allowed the team to understand which techniques had greater impact. It showed that broadcast is still a powerful tool for social impact. Based on data collected from parents (52%) and children (55%) who recall seeing the advert on TV, the report shows 36% of parents have talked with family and friends about the advert and 74% of children said the advert made eating vegetables seem more fun. Secondly, the report found that activation and engagement across multiple touchpoints had a marked impact: 55-70% agreed with the positive statements if they were aware of the campaign through the TV and schools. Similarly, continued engagement over a longer period (in this case five years) increased the percentage of parents who agree with the positive statements: 53% of parents

29 VegPower. 2023. 'Five Years Evaluation'. ETTDT-5-year-Evaluation-report_DIGITAL.pdf (vegpower.org.uk).

who had repeated exposure (taking part in 2023 and more than once before) felt the school programme has had a long-term positive effect on the number and variety of vegetables their child eats.

Another approach to measuring impact is against a specific target like a fundraising goal. Socceraid for UNICEF is an entertainment-led fundraising campaign that has been running since 2006 and has raised over £90 million in that time.³⁰ It culminates annually in the biggest celebrity football match in the world, which is exclusively broadcast on ITV.

Can you give us an example of a recent impact evaluation you've conducted?

Another great example is the Love Island x eBay partnership. Traditionally, viewers expect to see environmental impact themes in factual programming, but do not necessarily expect it from pure entertainment shows. Love Island, a highly successful dating reality TV show, was launched in 2015. Initially, the show was inexorably linked to fast fashion due to its early commercial partners, and the huge fast fashion deals scored by winners. However, in 2022, Love Island announced a new partnership with eBay, heralding a shift in the cultural perception of the Love Island brand and of second-hand clothes. Contestants were encouraged to 'eat, sleep, rewear, repeat' and Tasha Ghouri (season 8 finalist) went on to become the first Love Island x eBay brand ambassador following the show. As ITV said, "Partnering with eBay allowed us to stitch a practical sustainable behaviour through an entire series of one of our most loved shows. We could, in eight weeks of summer, make pre-loved cool, encouraging the nation to shop sustainably".

Image © ITV Commercial



7000%

increase in searches for 'pre-loved clothes' was seen on the platform

By showing instead of telling their audiences that second hand could be cool, Love Island and ITV were able to bring younger demographics onboard to a more sustainable approach to shopping. ITV leveraged the range of audience touchpoints that it has at its fingertips. For example, there was a 'shop the show' tab on the Love Island app, they brought on a dedicated stylist to bring the partnership to life, and created ten second-hand ad spots to target the audience.

The partnership found a balance between a commercial and environmental impact by targeting audience awareness, perception and action. Through a survey of around 1,500 audience members, the team found that nearly one in five UK adults (and two thirds of Love Island viewers) were aware of the partnership, 3.1 million people were more aware of the impact of disposable fashion on the planet and are more likely to shop sustainably, and 3 million people have a more positive opinion of shopping sustainably.

This data could be further supplemented by commercial data from eBay's channels. The platform saw a 7000% increase in searches for 'pre-loved clothes' onsite and one item of clothing was sold every minute that the partnership was live. By looking at both the sales data from their commercial partner and the audience insights from the survey, the overall impact could be more robustly measured.

What are the challenges?

It wasn't without challenges. Getting the buy-in of Love Islanders was critical to the success, as was the logistical switch to sourcing enough outfits in the right sizes second-hand. However, the campaign has had a measurable impact on the popularity and perception of second-hand clothing and paved the way for similar partnerships in the future.

Case Study



How do you approach impact evaluation across your content portfolio?

The BBC has used multiple methods over the years for evaluating the impact of its content on audiences, including surveys, regression analysis and social value assessments. Simetrica-Jacobs, who have conducted work for the BBC on The Green Planet and Wild Isles, explain how regression models include a set of control variables in their design. This means that, when estimating the individual effect of watching a series, factors such as age, gender, marital status, educational level, health, income group, region and dependent children are accounted for. As a consequence, the effects estimated from watching content are not influenced by these factors and the impact of watching the content itself is clearer. This is a more complex process which usually requires larger sample sizes and methodological transparency.

Alongside more classic TV content, the BBC often creates complimentary content to act as “bitesize inspiration”, such as interactive games alongside the main show. This fits into broader patterns across the industry where content creators are thinking about how concepts can work across platforms.



Image © BBC Studios

Frozen Planet II (BBC Studios) partnered with Minecraft Education to create immersive and interactive content alongside the main show. Minecraft is the best-selling game ever and sees very high engagement from younger players. The team created five free Frozen Planet II worlds, which included immersive landscape and animals, as well as learning resources, all in a game-based environment.³¹ Gamers were able to play from the perspective of animals, such as penguins and polar bears.

Similarly, Let It Grow (a Radio 2 and BBC Children's and Education initiative³²) partnered with AER Studios³³ to create a game which would bolster the messaging around engagement with nature. It aimed to inspire gamers to feel more connected to nature by getting them to cultivate the perfect environment for wildlife. Gamers had to plant a variety of plants and flowers to attract a species and enhance the species' satisfaction levels. The game was showcased on Blue Peter to broaden its reach and was inspired by the show Wild Isles.

These both showcase a key element of the BBC's approach to creating impact: aligned programming and activity. Multiple touchpoints like this help to broaden the messaging and make it 'sticky', thus inspiring the potential for condition change (the long-term benefit to the broader public) and public discourse. Content can have a “tentpole” effect, creating space for conversations and discourse to take place across society and inspiring other organisations to raise their ambitions.

Can you give us an example of a recent impact evaluation you've conducted?

The BBC's natural history programmes have evolved from showing the natural world in all its glory to incorporating messages around the challenges facing the climate and nature. Even relatively small 'moments' can have a huge impact. For instance, Blue Planet II helped to catalyse the movement against single-use plastic in the UK and beyond through a particularly powerful sequence in one out of the nine episodes. In the last five years, messaging around climate change and nature loss are an increasingly core narrative in natural history programming.

Wild Isles was a 2023 nature documentary series presented by Sir David Attenborough, which focused on the wildlife of the British Isles. The show was

31 BBC. 'BBC Earth builds partnership with Minecraft for Frozen Planet II'. 21st September 2022. <https://www.bbc.co.uk/mediacentre/bbcstudios/2022/bbc-earth-builds-partnership-with-minecraft-for-frozen-planet-ii>

32 BBC. 'New BBC Let It Grow gardening campaign launches'. 1st April 2023. <https://www.bbc.co.uk/newsround/65112562>.

33 ER Studios. 'Our wildly fun tower defence game'. <https://aerstudios.co.uk/work/let-it-grow/>

co-produced and part funded by organisations such as the Royal Society for the Protection of Birds (RSPB), the World Wide Fund for Nature (WWF) and The Open University. The show focused on the importance of British wildlife in a global ecosystem and on key habitats in the UK: the ocean, woodlands, freshwater and grasslands. It was surrounded by complimentary content. For example, The Open University created an [interactive map](#) that showcases the different species and habitats you can find across the British Isles. It was further accompanied by the Let it Grow content initiative (see above), curriculum resources for schools, collaboration with diverse social media influencers, work with other organisations such as the Scouts and Girlguiding, and much more.

In order to understand the impact of Wild Isles, the BBC commissioned Simetrica-Jacobs to conduct a large-scale audience survey including in-depth audience research and polling. 3,300 participants completed a baseline survey before the series broadcast and then they were recontacted and requested to complete an endline survey after the series had finished. This created a viewer group and non-viewer ('control') group for the series, allowing for comparison between the two, and difference in difference analysis to ascertain the impact of the content.

They found that the show led to an increased awareness of the current state of nature in the UK, additional visits to green spaces and increases in some pro-environmental behaviours, such as no mow areas, avoiding peat and planting. They valued some of these impacts in line with the Government guidance on self-reported wellbeing and at a UK societal level "the total value due to increased wellbeing associated with behaviours inspired by watching Wild Isles was estimated to be £134.7million".³⁴

This work was complemented by desk-based research into search trends, using tools like Google Search Trends, as well as Wikipedia analysis, Hansard mentions and data drawn from bespoke nationally representative surveys using the BBC Audience's online survey giving further insights.

3.3k participants completed a baseline survey before the series broadcast

Case Study



How do you approach impact evaluation across your content portfolio?

Central European Media Enterprises (CME) is a content creator and broadcaster operating in Central and Eastern Europe across six geographical locations. 'CME Cares' is a new brand which was created exclusively to deliver CME's ESG strategy and the company's commitment to having positive impacts on the environment, communities, and society.³⁵ It has an explicit focus on responsible content, which includes developing an approach to measuring impact – a new area that the team is beginning to explore.

In 2024, CME conducted an analysis on the impact of their educational sketch show, 'Sex O'Clock: Afterparty', which compliments their original young adult series, Sex O'clock (broadcast on VOYO, their paid video on demand service in Czechia). The short-form sketches deep-dive on important social impact topics which have been featured as storylines in the main show. The short videos were predominantly distributed through TV Nova's online platform and social media, and reached wider audiences through outlets such as film festivals, NGO partner platforms, schools and clubs. It was positively received, especially amongst the young target group (13-25 year-olds).

Can you give us an example of a recent impact evaluation you've conducted?

To evaluate the impact of 'Sex O'Clock: Afterparty', CME partnered with a Czech audience research agency, Confess, to conduct the analysis. The research goal was to understand whether the show had successfully helped to break down barriers to discussing sensitive issues and what role a commercial television channel should play in enabling these discussions.

CME used 'Reaction Time' (RT) analysis to understand whether the show was having an impact by assessing changes in the participant's unconscious belief and level of certainty. Reaction Time is a widely used measure to assess the speed at which a

34 BBC. 2024. Group Annual Report and Accounts 2023/24. <https://www.bbc.co.uk/aboutthebbc/documents/ara-2023-24.pdf#page=18>, p.73

35 CME. CME Cares. <https://www.cme.net/about-cme/cme-cares>

person responds to an external stimulus, usually expressed in milliseconds.³⁶ This could also be called the 'subconscious reaction time' and is used to indirectly measure thought processes that happen below the conscious awareness level, revealing the respondent's unconscious belief.

The test was conducted on two different sketches from 'Sex O'Clock: Afterparty', with one focused on sexting and one on body shaming. Respondents were given six statements before watching the content and asked whether they agreed with them. After watching the content, they were presented with the same six statements and asked again whether they agreed with them. The first three statements related to the topic being covered by that episode, e.g. body shaming, and the last three statements related more generally to the role of commercial television.

The subconscious reaction was measured on a scale from 0 to 1,000 milliseconds, where 0 is low level of certainty and 1,000 is a high level of certainty (unconscious or reflex actions are usually much faster). They also measured the participant's conscious evaluation of their decision, on a scale from 0 – 100% (0 being low level of certainty and 100 being high).

A strongly held belief (i.e. at the subconscious level) translates to a quick reaction time with a high level of certainty, whereas a conscious evaluation refers to the self-aware experience of feeling toward a statement, in this case the % agreement, which is more easily changed. Therefore, the team was measuring both indicators when asking the respondents if they agreed to the statements and seeing how they changed after watching the show, with a bigger focus on the subconscious outcomes.

The Sexting episode results showed that the respondents were more familiar with the topic beforehand. Therefore, the difference between the pre and post-test subconscious reaction and conscious evaluation were small. The questions relating to the role of private television resulted in a bigger change in subconscious reaction and conscious evaluation (+108-160ms, +24-72% respectively) demonstrating the positive impact the content had on the respondents perception of a TV broadcaster's role in helping viewers with their mental and sexual health.

The body shaming episode provided greater differences in the results. In particular, the

subconscious reaction to the statement '*When someone comments on my appearance, I should make it clear that it's not okay for me*', which nearly doubled, changing from a low level of certainty to an average level of certainty (268 to 519ms).

This quantitative measurement was accompanied by qualitative questions, to help the teams understand the results they were seeing. Participants in the research were asked open questions and recorded short videos of their responses.

Overall, the research showed the positive impact the content had on the respondents in the target age group, encouraging young people to have more open discussions on sensitive topics.

What are the challenges?

One key challenge is time and investment; this research was done in partnership with an external agency. However, the CME team found that the investment has hugely supported them, both when presenting the show externally and gaining press traction but also internally with stakeholder engagement. Having real data that demonstrates the show's impact has enabled the team to generate conversations within the company on media responsibility and the powerful, positive impact that their content can have.

Image © TVnova.cz



36 Balakrishnan, G., Uppinakudru, G., Girwar Singh, G., Bangera, S., Dutt Raghavendra, A., & Thangavel, D. (2014). 'A comparative study on visual choice reaction time for different colors in females'. <https://doi.org/10.1155/2014/301473>.

Conclusion

This landscape review into the measurement of the impact of media content on society paints a picture of a nascent field.

There is a slowly but steadily growing list of example methods for measuring content impact, driven in particular by broadcasters. The media companies which have measured the impact of content have reaped benefits in terms of internal and external profile, and this is increasingly being linked to decision-making about new content. There is also a rising number of organisations working in this field. While most are focused on climate change specifically, there are lessons to be learned which can be transferred to other areas.

Our survey showed that while most companies do not yet measure the impact of their content, there is agreement on the importance of understanding impact and of expanding this work across the sector. Our findings were strongly aligned with OKRE's in this regard. This is further driven by the increasing regulatory pressure to report on impact, particularly from the EU CSRD.

The challenges to expand content impact measurement across the media sector appear three-fold:

1 There is no standardised definition of impact, nor method to measuring or reporting it. While impact will differ based on the type of media content (film, advertisement, written news story, written book, etc.) as well as the issue the content is attempting to tackle, this lack of guardrails makes it hard to know where to start. Developing a playbook or catalogue of examples of impact measurement may help and we hope this report has added a few useful examples to those starting out.

2 Proving correlation and causation between content and impact is hard. People are constantly exposed to information. It is hard to cut through that noise and isolate the impact of one specific piece of content. This is only being exacerbated by digitalisation, by the proliferation of channels and platforms and by the very different media consumption habits between generations. However, there are social science methods that can control for these factors and examples of impact studies that have used them.

3 Resource constraints are, as ever, a challenge. Impact measurement costs time and money. In many cases, media companies do not have the required expertise in-house and therefore partner with external research agencies. This barrier is especially acute given the current context, in which many media companies face decreasing revenues and budgets.

We conclude this landscape review with the following recommendations for media companies starting out or looking to expand their measurement of content impacts:

1 Be selective. It is impossible to measure everything. Start small and focus on one specific piece of content or campaign. It makes sense to link this to a strategic focus area for your business in order to access budget and ensure senior buy-in.

2 Be targeted. It is easier to measure a specific impact or angle than to attempt to measure the impact of a piece of content writ-large.

3 Start somewhere. The examples mentioned in this report range from small audience surveys to full randomised controlled trials with regression analysis. Start with simple methods, learn from them and develop them over time if resource allows. Don't let perfect be the enemy of good.

4 Combine different measurement methods and data types to bring impact to life. The most powerful examples of impact measurement combine big quantitative data (e.g. from audience devices) with targeted qualitative data to add depth and nuance to the trends identified.

There is clearly a lot of work still to do: to work towards a more common understanding of impact in the media sector, to improve and scale our ability to measure and report on impact, and to start linking impact to content strategy. But there are emerging areas of work we can share, learn from and build on. The RMF will continue tracking this field and contributing to it through its research and events. This is an imperative if media is to successfully use its superpower to influence culture and make progress on the challenges of our time.

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