

AUDIENCE AND IMPACT

OVERVIEW FOR 2019



U.S. AGENCY FOR
GLOBAL MEDIA

UNITED STATES
BROADCASTING
BOARD OF
GOVERNORS

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USAGM AUDIENCE BY MEDIA PLATFORM AND PERCENTAGE GROWTH SINCE 2015

+42%



TV

201 MILLION

+36%



RADIO

139 MILLION

+297%



DIGITAL

127 MILLION

+55%



UNDUPLICATED
AUDIENCE
ACROSS ALL MEDIA

350 MILLION

The U.S. Agency for Global Media (USAGM) Global Audience Estimate provides a snapshot of the total measured audience – the number of individuals – of the five USAGM media outlets: Voice of America (VOA), Radio Free Europe/Radio Liberty (RFE/RL), Office of Cuba Broadcasting (Radio and TV Martí), Radio Free Asia (RFA) and the Middle East Broadcasting Networks (Alhurra TV and Radio Sawa).

In 2019, USAGM networks attracted 350 million people weekly in unduplicated audience worldwide – including radio, television and Internet.

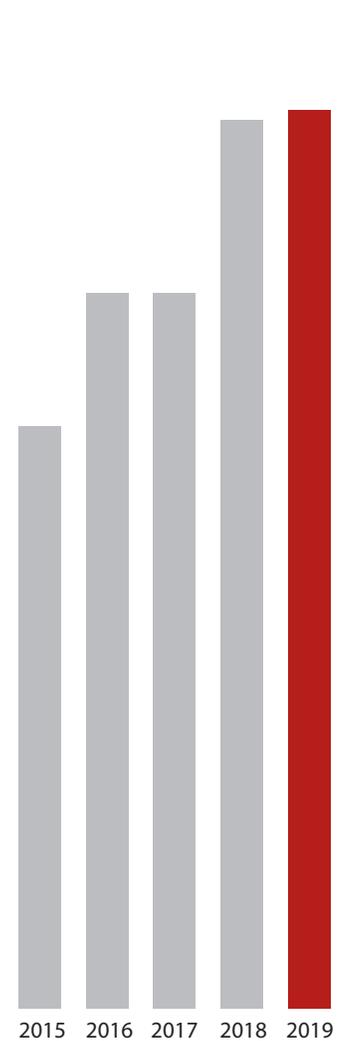
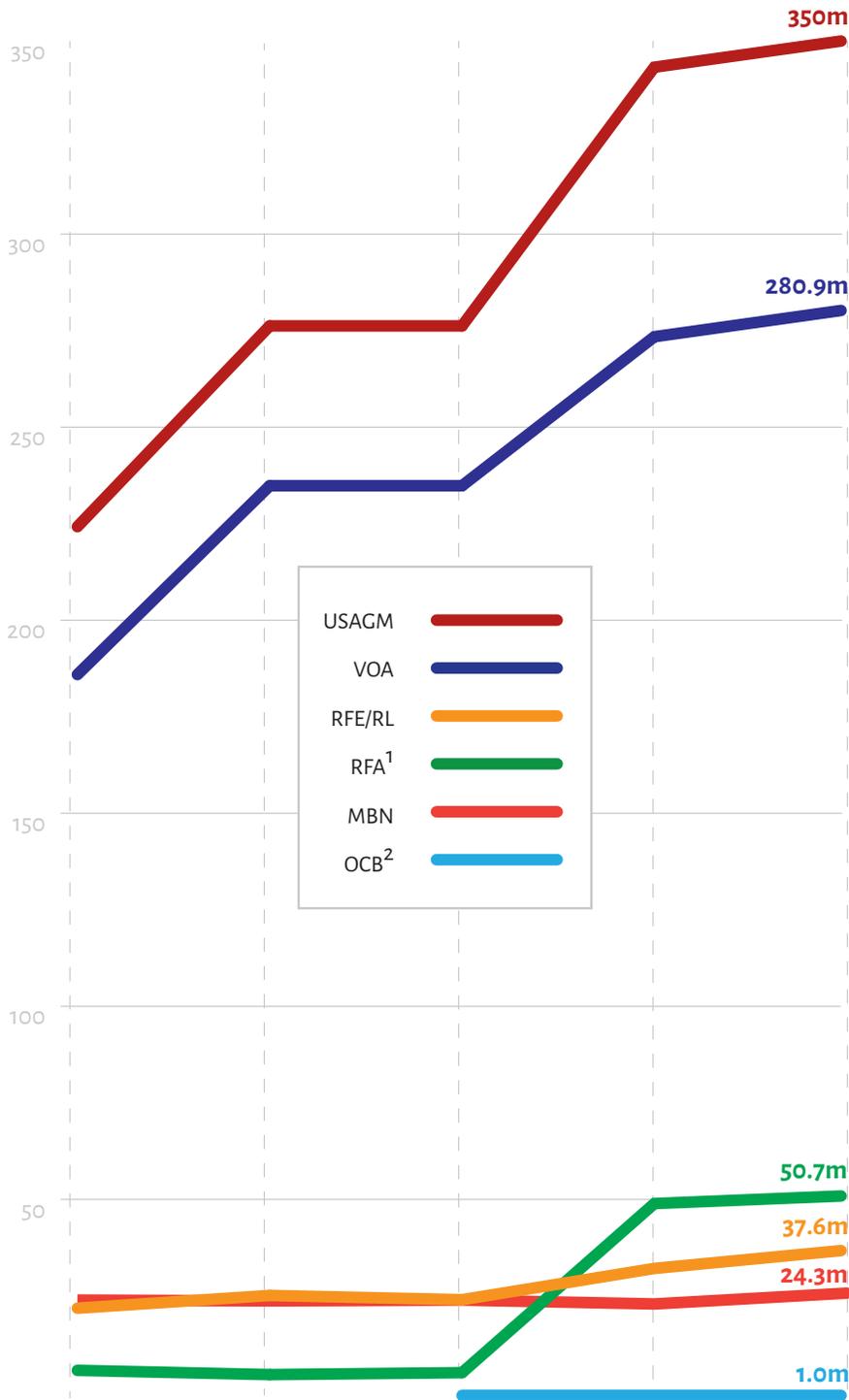
In keeping with standards developed by the major western international broadcasters, USAGM measures and reports unduplicated audience, meaning each individual, regardless of how many programs watched or listened to, or media platforms used, is counted only once. This is a conservative approach to quantifying the audience and in keeping with the mission of USAGM to inform and engage people, rather than count individual interactions with them. Hence the reported total audience for a broadcaster is often smaller than the sum of its audience on each platform, and USAGM global audience is smaller than the sum of audiences for all individual networks.

The audience estimate is based on surveys

- conducted within the past five years;
- in more than 100 countries and territories; and
- that represent 3 billion people in markets around the globe.

The audience estimate excludes areas where USAGM is unable to conduct audience surveys, including Eritrea, North Korea, Oman, and Tibetan and Uyghur regions of China.

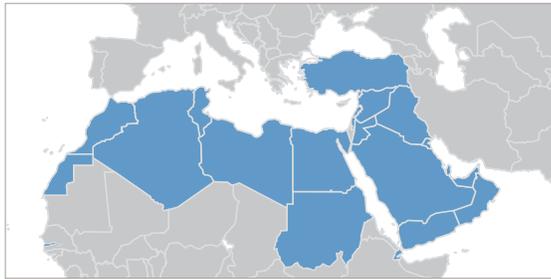
Audiences by Network (in millions)



OVERALL USAGM GROWTH WAS 55% OVER THE PAST FIVE YEARS TOTALING 350 MILLION UNDUPLICATED VIEWERS ACROSS ALL MEDIA

¹ Audience estimate for RFA does not include data for North Korea or the Tibetan and Uyghur regions of China, because political risk has made it impossible to carry out representative surveys in the target regions. This represents a significant portion of the countries and regions targeted by RFA language services. RFA's growth in 2018 is due to new data from China. ² Because of the historical limitations of reliable survey data in Cuba, FY 2017 was the first year in which USAGM was able to conduct a representative survey in Cuba and report an audience for OCB.

AUDIENCE BY REGION



MIDDLE EAST AND NORTH AFRICA

29.1 MILLION

Reflects audiences for MBN and VOA.

Includes research from the following countries and territories: Algeria, Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Palestinian Territories, Qatar, Saudi Arabia, Syria, Tunisia, Turkey, UAE, Yemen



NEAR EAST, SOUTH AND CENTRAL ASIA, EURASIA

65.2 MILLION

Reflects audiences for RFE/RL and VOA.

Includes research from the following countries and territories: Abkhazia, Afghanistan, Albania, Armenia, Azerbaijan, Bangladesh, Belarus, Bosnia, Chechnya, Dagestan, Estonia, Georgia, Iran, Kazakhstan, Kosovo, Kyrgyzstan, Latvia, Lithuania, Macedonia, Moldova, Montenegro, Nagorno-Karabakh, Pakistan (including former FATA), Russia, Serbia, Tajikistan, Turkmenistan, Ukraine, Uzbekistan



EAST AND SOUTHEAST ASIA

117.8 MILLION

Reflects audiences for RFA and VOA.

Includes research from the following countries and territories: Burma, Cambodia, China, Hong Kong, Indonesia, Laos, Taiwan, Thailand, Vietnam



SUB-SAHARAN AFRICA

69.1 MILLION

Reflects audiences for VOA.

Includes research from the following countries and territories: Benin, Botswana, Burkina Faso, Burundi, Central African Republic, Cote d'Ivoire, Democratic Republic of Congo, Ethiopia, Gabon, Ghana, Kenya, Liberia, Madagascar, Malawi, Mali, Mozambique, Nigeria, Senegal, Sierra Leone, Somalia, South Africa, South Sudan, Tanzania, Uganda, Zambia, Zimbabwe



LATIN AMERICA

68.8 MILLION

Reflects audiences for OCB and VOA.

Includes research from the following countries and territories: Argentina, Bolivia, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Haiti, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, Venezuela

OTHER IMPACT INDICATORS

Percent of weekly audience who consider information to be very or somewhat credible	FY 2018 Actual	FY 2019 Target	FY 2019 Actual
VOA	84	82	83
RFE/RL	77	77	73
RFA	77	77	77
MBN	80	80	75
OCB	97	100	97

PROGRAM CREDIBILITY

Program credibility is determined by a survey question about the trustworthiness of news and information of those sampled respondents who listened to or viewed each station at least once a week. The answers are registered on a four-point scale: trust it a great deal, trust it somewhat, do not trust it very much, do not trust it at all. The credibility index is a weighted percent of respondents who report trusting news from a station either "somewhat" or "a great deal." Credibility estimates are not available for countries where the small number of regular listeners/viewers/online (n = <50) renders the estimate unreliable.

Helps form opinions on important topics Percentage of weekly audience who report that the broadcasts have helped them form opinions on important topics somewhat or a great deal	FY 2018 Actual	FY 2019 Target	FY 2019 Actual
VOA	63	60	63
RFE/RL	52	54	56
RFA	87	88	87
MBN	71	72	75
OCB	75	85	75

HELPS FORM OPINIONS

The indicator tracking whether broadcasts inform audience opinions is determined by asking past week listeners/viewers/online users of [insert relevant language] whether broadcasts have helped them form opinions on important topics. The answers are registered on a four-point scale: a great deal, somewhat, very little, or not at all. This indicator is a weighted percent of respondents who chose "somewhat" or "a great deal."

TOP 10 AUDIENCES FOR U.S. INTERNATIONAL MEDIA IN 2019

Overall weekly audiences: adults who listen/view/use programming at least once a week.

Weekly unduplicated audience

adults who listen/view/use programming at least once a week

In millions

China	65.4
Indonesia	39.1
Mexico	35.8
Nigeria	19.6
Iran	14.3
Afghanistan	10.5
Tanzania	8.9
Russia	7.9
Iraq	7.9
Ethiopia	7.5

As percentage of adult population

Afghanistan	69.3%
Albania	61.0%
Burundi	58.0%
Palestinian Territories (East Jerusalem only)	53.0%
Kyrgyzstan	44.1%
Armenia	41.2%
Mexico	40.4%
Bahrain	40.4%
Kosovo	38.0%
Iraq	35.0%

COUNTRY PROFILES

In FY 2019, USAGM-commissioned surveys found audience growth in key strategic markets.



MEXICO

USAGM had its largest increase in measured past-week audience in Mexico, where VOA Spanish content reached 35.8 million adults nationwide, 5.2 million more than last measured in 2016. The increase came in TV audience, where addition of a second major broadcast partner channel led to weekly audience reach of almost a third of adults, vs about a quarter in 2016. Weekly online use of VOA Spanish content rose to one in ten. Radio weekly audience declined slightly.

40.4%
audience reach in 2019



VOA SPANISH WEEKLY AUDIENCE OF 35.8M (40.4% OF ADULT POPULATION), UP FROM 30.6M (33.1%) IN 2016.

 **RADIO – 11.3M**

 **TV – 28.4M**

 **INTERNET – 9.5M**

Survey: August 2018

COUNTRY PROFILES



AFGHANISTAN

USAGM's FY 2019 survey of Afghanistan found that VOA and RFE/RL content is used by 69 percent of adults in Afghanistan on a weekly basis. These audiences have high levels of trust in the information provided by the USAGM networks.

Usage of VOA and RFE/RL grew on every platform in Afghanistan. VOA's weekly audience increased by 4.3 million to 9.6 million or 63.6 percent of the adult population. RFE/RL increased the size of its measured weekly audience by 1.7 million to 6.6 million and now reaches 43.9 percent of Afghan adults each week; growth in radio listening and RFE/RL's return to TV broadcasting provided the largest audience increases.

Over this period of time, audiences in Afghanistan, where peace talks have recently progressed between the Kabul government and the Taliban, have sought out RFE/RL and VOA news and reporting. RFE/RL has exposed the harsh realities faced by those under the Taliban's rule, aired women's voices and concerns that Afghan women might pay a huge price if a peace deal is reached with the Taliban, and showcased Western voices and analysis of what could result from a deal. VOA has provided policy and perspectives from the U.S. and around the world.

69.3%

OF AFGHAN ADULTS
CONSUME USAGM
MEDIA WEEKLY

AN INCREASE OF

3.3M

OVER TWO YEARS

VOA – 9.6M

RFE/RL – 6.6M

 **RADIO – 7.9M**

 **TV – 7.5M**

 **INTERNET – 1.3M**

Survey: July 2018

COUNTRY PROFILES



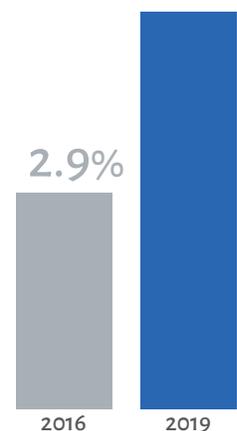
PAKISTAN

According to the most recent survey, VOA Urdu reaches an estimated 6.3 million adults weekly, vs. 3.2 million in 2016. VOA Urdu is taking advantage of Pakistanis' increasing use of internet and social media for news, measured VOA past-week audience reach online now tops that on radio or TV. Almost three-fourths (73.1 percent) of VOA Urdu users trust its news, though its growing online-only audience is more skeptical of news sources.

USAGM also registered gains for Pashto-language programming in Pakistan through VOA's Radio Deewa and RFE/RL's Radio Mashaal. Although this national survey did not include the border areas home to their primary target audience (since they are surveyed separately), it found a combined weekly audience of 1.7 million for Deewa and Mashaal.

Through RFE/RL's Radio Mashaal and VOA's Radio Deewa, USAGM engages Pashto-speaking audiences, primarily youth, which are targeted by recruitment efforts of militant groups that have had a monopoly on information in Pakistan's former Federally Administered Tribal Areas, which merged with Pakistan's northwestern Khyber Pakhtunkhwa province in 2018. In FY 2019, Radio Mashaal also launched a special radio project focusing on how extremists seek to influence and radicalize youth via social media.

5.3%
audience reach in 2019



GROWTH IS DRIVEN PRIMARILY BY INCREASED ONLINE USAGE OF USAGM CONTENT – FROM 0.2% IN 2016 TO 2.6% THIS YEAR.

VOA Urdu – 6.3M

VOA Deewa (Pashto) – 1.0M

RFE/RL Mashaal (Pashto) – 1.0M

 **RADIO – 3.0M**

 **TV – 1.7M**

 **INTERNET – 3.5M**

Survey: January 2019

COUNTRY PROFILES



INDONESIA

According to surveys conducted in FY 2019, VOA's online audience surged, while its TV audience declined, though still remaining the largest platform. VOA now reaches 21.6 percent of Indonesian adults each week, 6.8 percentage points lower than that measured in 2016 (28.4 percent) and closer to 2014 levels. Nearly the entire audience consumes VOA in Indonesian and consists primarily of those who watch its TV programming, which is distributed via placement on affiliate stations throughout the country and reaches 18.5 percent of the population weekly.

VOA's internet audience, including web and social media reach, grew by a factor of more than five since 2016, with a current weekly reach of 7.4 percent among the adult population. This growth is larger than the growth of internet use in the country overall.

VOA WEEKLY AUDIENCE OF
39.1M
(21.6 % OF ADULT POPULATION),
DOWN FROM
47.8M
(28.4 %) IN 2016.

 **RADIO – 6.9M**

 **TV – 33.5M**

 **INTERNET – 13.4M**

Survey: January 2018

COUNTRY PROFILES

ZIMBABWE

VOA currently reaches one-third of Zimbabwean adults (34.4 percent) each week through radio, television and internet content, and across four different languages. This figure represents a sharp increase from the 5.8 percent weekly audience reach recorded in 2015. VOA's weekly audience reach is highest among men living in the country's rural areas. Radio is by far the most popular medium for regular users to access VOA, with 32.0 percent of all adults in the country listening to VOA radio each week. Shortwave radio as a distribution platform continues to have a role in delivering news and information to Zimbabwean audiences as it is used to bypass restrictive Zimbabwean broadcast legislation. Two thirds of all VOA radio listeners (62.9 percent) say they hear VOA's programs direct from abroad via shortwave.

In 2019, 3.2 percent of Zimbabwean adults say they have used VOA online in the past week, continuing an upward trend from 0.0 percent in 2015. The internet is more accessible in Zimbabwe's cities (60.0 percent) than in rural areas (22.7 percent).



VOA WEEKLY AUDIENCE OF 2.9M (34.4 % OF ADULT POPULATION), UP FROM 0.6M (5.8 %) IN 2015.



Survey: April – June 2019

MALAWI

VOA's audience reach in Malawi has risen from 4.7 percent of adult residents each week to 23.0 percent over the past four years. While all three service mediums — TV, radio and internet — have seen gains, much of VOA's increase comes from television viewers; 26.3 percent of Malawians currently watch VOA TV programming each week, compared with 4.3 percent in 2015. This was a result of increased television viewing in rural areas. VOA broadcasts its flagship TV programs, Straight Talk Africa (viewed by 20.1 percent of adults in the past week) and Africa 54 (with 18.8 percent weekly reach) across Malawi through three local affiliates.

Though TV audience drove the weekly VOA audience increase, the majority of Malawians (71.5 percent) say they get news from radio every week, and four in 10 (42.6 percent) say they get news from television. VOA radio use stands at 3.9 percent in 2019, up from 1.4 percent in 2015. As in most countries, use of internet for news continues an upward trend; in Malawi, it rose from 0.0 percent in 2015 to 3.1 percent in 2019.



VOA WEEKLY AUDIENCE OF 2.8M (26.3 % OF ADULT POPULATION), UP FROM 0.4M (4.7 %) IN 2014.



Survey: April – June 2019

COUNTRY PROFILES

NIGERIA

VOA's weekly audience reach in Nigeria has been largely steady in recent years. The current estimate of 19.2 percent of adults is down slightly from 21.0 percent in 2016, but remains higher than the 16.9 percent recorded in 2014. Currently, the network's Hausa Service reaches about twice as many Nigerians each week as its English to Africa programming — 16.0 percent vs. 8.2 percent, respectively.

Radio remains the most common media platform for news consumption in Nigeria; two-thirds of adults say they have listened to radio news in the past week, while just over half have watched TV news during that time. About one in six adults overall (16.3 percent) have listened to VOA radio in the past week, while fewer (6.5 percent) have watched VOA TV programming.

Just 3.3 percent of Nigerians say they have accessed online content from VOA in the past week. In general there has been slow growth of internet access and use in the country. The 29.7 percent of Nigerians in 2018 who said they have used the internet at all in the past week is up only slightly from 27.9 percent in 2016.



VOA WEEKLY AUDIENCE OF 19.6M (19.2 % OF ADULT POPULATION), DOWN FROM 20.8M (21.0 %) IN 2016.

 **RADIO – 116.6M**

 **TV – 6.6M**

 **INTERNET – 3.4M**

Survey: April–July 2018

HIGHLIGHTS IN PRIORITY REGIONS

USAGM networks used a combination of broadcast and digital platforms to engage with audiences in closed societies and worked where media freedom has declined. Here are some of the key countries and strategic markets of USAGM's focus:



IRAN

In Iran, where the government bans satellite dishes and online access to international media, VOA Persian and RFE/RL Farda have been able to evade censorship. They reach audiences in Iran via internet, social media, and satellite television, broadcasting stories not reported by Iranian state media or that had previously been spun to reflect only the interests of Iran's regime, as well as covering live events important to Iranians from the United States perspective.

In FY 2019, under the network umbrella of VOA365, VOA Persian, in cooperation with Radio Farda, added specialty web and TV programming focusing on the issues of corruption and inequality in the Iranian regime that have sparked continuing widespread protests. VOA365 has broadened its slate of content offerings to present programs unavailable in Iran, combining original content with commissioned and acquired offerings.

23.4%

OF IRANIAN ADULTS
CONSUME USAGM
MEDIA WEEKLY

VOA – 9.7M

RFE/RL – 9.6M

 **RADIO – 5.8M**

 **TV – 11M**

 **INTERNET – 5.3M**

Survey: July – Oct 2017

HIGHLIGHTS IN PRIORITY REGIONS



NORTH KOREA

Amid intensive United States diplomatic efforts to denuclearize North Korea in FY 2019, VOA's Korean Service expanded its daily TV news offerings to North Korea. The Korean Service has increased video content on social media platforms in order to reach senior government officials inside North Korea and abroad. RFA's Korean Service also expanded the use of social media to amplify its reach and leverage the phenomenon of human proxies bringing information from the outside into the Hermit Kingdom.

USAGM has collected data from multiple surveys of North Korean refugees and defectors since early 2003, most recently in 2018, which have repeatedly confirmed direct use of RFA and VOA radio programs inside North Korea despite the threat of severe penalties for listening. While not representative of the underlying population, 13 percent of respondents reported listening to RFA and 9 percent had used VOA before they left their homeland – the majority on a weekly basis.

HIGHLIGHTS IN PRIORITY REGIONS



CHINA

VOA and RFA Mandarin Services played increasingly prominent roles through their coverage of China in FY 2019. Their online and social media audience shot up during major news events that were heavily censored or even not reported inside China. Chinese audiences used circumvention technology to access this online, social media, and broadcast coverage. Distribution of branded VOA and RFA content through peer-to-peer social media technology was increasingly used by Chinese interested in other points of view about U.S./China relations and trade practices, and coverage of the massive incarceration of Muslim minorities and interference in Taiwan and in Hong Kong affairs that were unreported domestically.



COVERAGE OF HONG KONG PROTESTS

RFA Mandarin and Cantonese Services have collaborated closely and shared content in covering the 2019 Hong Kong protests. In June as the protests were taking off, Hong Kong staff from the Mandarin and Cantonese Services ran a five-hour live show to provide first-hand information to audiences, including on social media.

6.2%
audience
reach in 2018



VOA & RFA HAVE EXPANDED ON DIGITAL AND SOCIAL MEDIA PLATFORMS IN CHINA AND ACHIEVED DRAMATIC GROWTH IN A COUNTRY WHERE THEY ARE CENSORED ON MAINSTREAM PLATFORMS

RFA – 44.1M

VOA – 40.7M

 **RADIO – 13.9M**

 **TV – 15.1M**

 **INTERNET – 53.5M**

Survey: August – December 2017

HIGHLIGHTS IN PRIORITY REGIONS

COVERAGE OF INTERNMENT CAMPS IN XINGJIANG UYGHUR AUTONOMOUS REGION

RFA Uyghur Service has been breaking the shocking stories of Uyghurs being detained in internment camps in the Xingjiang Uyghur Autonomous Region (XUAR) since 2016. It is now estimated that more than one million Uyghurs are in the camps all over XUAR, including the family members of six RFA Uyghur Service reporters. Despite tremendous pressure, RFA's Uyghur service is still on the front line delivering exclusive news from inside Xingjiang. The Uyghur Service's reports are continuously cited by major media, the U.S. Department of State, the U.S. Congress, and academia around the world, making the Uyghur situation one of the most concerning human rights issues today. RFA Uyghur Service serves as the leading news source for the Uyghur-speaking community as well as for the Western media and human rights observers.

REACHING SENSITIVE COMMUNITIES

High levels of political repression make it impossible for USAGM to conduct representative surveys for its Uyghur, Tibetan, and North Korean language services. However, RFA, working with USAGM and external research vendors, has successfully carried out surveys of travelers, defectors, and refugees from these inaccessible target markets in order to obtain the best possible information on these extraordinarily difficult markets.

In FY 2019, USAGM completed its first-ever survey of Uyghur travelers and refugees in Turkey. As more than a million Uyghurs were forced into reeducation camps within Xingjiang, Chinese threats to Uyghurs working and studying abroad led many to seek refuge in Turkey. This unprecedented survey of 300 Uyghur adults reached a relatively more educated and affluent group than the Uyghur population in Xingjiang. Even among this relatively elite group, direct experience with Chinese repression was widespread, including 62 percent who had had their homes searched, 97 percent who had been stopped a random checkpoint and 5 percent who had been forced by the government to marry or divorce. More than a quarter of respondents were punished for using banned media, including RFA, which was used weekly by nearly 19 percent of respondents while in Xingjiang.

One in four RFA audience members said they had gotten in trouble for using RFA. Most paid bribes to avoid harsh punishment, but others were detained or had their media confiscated or destroyed. Two were detained more than a year for RFA use. VOA's Mandarin and/or English services also were used by more than one in ten of these multilingual Uyghurs refugees.

HIGHLIGHTS IN PRIORITY REGIONS

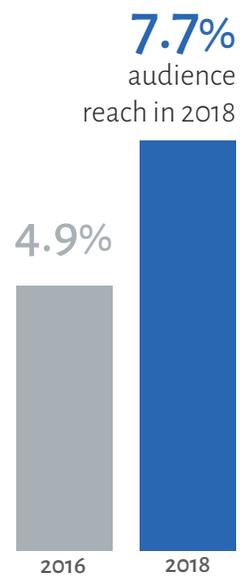


RUSSIA

The 24/7 Current Time TV and digital network, led by RFE/RL in collaboration with VOA, provides Russian speakers across Russia, Ukraine, Central Asia, the Caucasus, the Baltics, Eastern Europe, and as far away as Israel with access to factual, accurate, topical and trustworthy information, and serves as a reliable antidote to disinformation that is driving conflict in the region. Current Time aims to depoliticize the Russian language by serving as a bias-free news source for all Russian speakers, who are often limited to Kremlin-controlled media options even when living far beyond Russia's borders. Current Time covers social and political protests that state media ignore and reports extensively on corruption and the ongoing war in eastern Ukraine.

This year, VOA's Russian Service launched a digital video series analyzing and debunking manipulation and propaganda entitled "Context", which analyzes rhetorical manipulation by Russian officials and the role of Russian state media in slanting domestic and foreign events. "Context" has achieved more than three million views since its onset.

RFE/RL's Faktograph in Russian and VOA's Polygraph in English are fact-checking sites that serve as a resource for verifying the increasing volume of disinformation and misinformation being distributed and shared globally. Especially popular on these sites are video fact checks, which have attracted hundreds of thousands of video views, particularly in Russia, Ukraine, Georgia, and Central Asia.



VOA & RFE/RL HAVE INCREASED RUSSIAN AUDIENCE ACROSS ALL MEDIA

RFE/RL – 6.9M

CURRENT TIME – 3.9M

VOA – 3.2M

 **RADIO – 1.8M**

 **TV – 3.2M**

 **INTERNET – 5.3M**

Survey: April – June 2018

HIGHLIGHTS IN PRIORITY REGIONS



CUBA

Cuba is one of the most media-restricted societies in the world, with a repressive political system and lack of democratic institutions and guarantees for human rights. Reporters Without Borders ranks Cuba last among all Western Hemisphere countries for press freedom, and Freedom House notes that Cuba is the hemisphere's most restrictive environment for information and communication technologies. The Cuban news media are owned and controlled by the state. The independent press is considered illegal and its publications are classified as "enemy propaganda." While Cuba has long had one of the lowest internet penetration rates in the world, Cuban civil society has fostered a broad range of innovative technologies to distribute digital information, including the famous "paquetes" (digital content packages on removable media). Earlier this year, new regulations permitting broader access to the internet and networking equipment significantly expanded the potential reach of digital content.

USAGM reaches Cubans through the Office of Cuba Broadcasting, which is based in Miami and operates Radio and TV Martí. Research conducted in 2017 found that approximately one in ten Cubans consumed Martí content each week, and that 97 percent of the audience found the information trustworthy, while 79 percent said that little or none of what they learned from Martí was available from other sources. While Martí has historically reached its audiences largely through shortwave and medium wave radio, the rapid expansion of access to digital media on the island in recent years means that the organization must adapt its approach in order to meet audiences as they migrate platforms.

**OCB WEEKLY AUDIENCE
OF 1.0M (11.1% OF ADULT
POPULATION)**

 **RADIO – 0.7M**

 **TV – 0.6M**

 **INTERNET – 0.5M**

Survey: March 2017

MEASURES OF IMPACT

In FY 2019 USAGM continued to implement its Impact Model, which tracks networks' performance against indicators aligned with the agency's mission to inform, engages and connect with foreign audiences, media, and government.

Indicators include weekly audience numbers; perceived trustworthiness of content; content-sharing; content co-creation with affiliates; perceived uniqueness of news (i.e., not available elsewhere); increased understanding of current events; and recognition—positive or negative—by foreign governments.

WEEKLY AUDIENCE

Measured weekly audience captures the number of people consuming USAGM products – radio listeners, TV viewers, and online users – and is the number of adults (15+) who “listened, watched or saw online materials last week.” It is the standard measure of audience reach for USAGM and other international broadcasters. This number is estimated by scientific survey using probability sampling to identify and project audience members in a given population.

Wherever possible, USAGM-commissioned surveys are national in scope, including rural and economically marginal populations that are typically excluded from commercial media studies but whose behavior is critical for understanding USAGM's audience and tracking performance.

Although USAGM has conducted surveys in more than 100 countries and territories, and continuously looks for creative methods of sharing or buying research from commercial media studies, the agency cannot survey everywhere that an audience might possibly exist, and the estimate may therefore reflect an undercount.

Measured audience size and its expression as a percentage of the adults within a population, is not the same as “popularity” or “preferred source of news” – indicators sometimes cited by other polls. Weekly audience is also not the same as “footprint” or the number of people who have access to broadcasts. Measured audience size is in keeping with the standards of the Conference of International Broadcasting Audience Researchers, and is a key indicator of success for international broadcasters in a local market.

QUALITY RESEARCH

USAGM's audience and market research is done in accordance with the highest professional standards via local market research firms around the world. Since the FY 2016, USAGM has implemented research projects by awarding competitively-bid contracts to the international media research industry's leading firms. USAGM has also relied on industry experts such as AC Nielsen and others for market data, although only surveys using USAGM's standard questions and meeting its methodological and quality-control criteria are currently used to estimate audience reach.

To achieve maximum objectivity, measurements are performed independently. Outside research providers under contract to USAGM carry out the representative audience research on VOA, OCB, RFE/RL, RFA, and MBN. Network-wide performance values are computed by the USAGM Office of Policy and Research and verified by each network's research director.

INVESTMENT IN RESEARCH

In FY 2019, the agency continued to expand its acquisition of digital analytics sources and to lay the groundwork for future upgrades in research methodology. Research funding obligated in FY 2019 was just over \$4 million, which was divided among quantitative and qualitative research (\$2.7 million), digital analytics and related services (\$1.1 million), and research methodology (\$250,000).

HARD TO REACH LOCALES

USAGM commissions research in the overwhelming majority (95 percent) of its target countries and regions, except for a small group of countries where geopolitics make it dangerous to conduct research activities and/or the government has severely restricted press freedom. In countries where information is tightly controlled and tuning in to foreign broadcasts is sometimes illegal or where populations are hard to access, audiences can be difficult to measure. In the FY 2019, the Agency was not able to research audiences in China's Xingjian-Uyghur Autonomous Region (XUAR), North Korea, Tibet, and Oman. Numbers for these hard-to-reach countries and regions (where we can only conduct non-representative surveys) are excluded from the overall audience reach estimate.

METHODOLOGY

Quantitative audience measurement comprises national (and to a smaller extent and sub-national or urban) surveys, utilizing face-to-face interviews whenever possible and phone interviews in restricted environments.

Random probability sampling is used where possible, and sample sizes range from 1,000-5,000 respondents. Probability sampling means that survey participants are chosen such that each unit of the population has a known probability of being surveyed. The use of random probability sampling allows a researcher to make extrapolations to the wider population.

Non-representative surveys are surveys that do not employ random probability sampling, and thus cannot be extrapolated to the population. These would include surveys of diaspora or refugee populations.

BY THE NUMBERS

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The U.S. Agency for Global Media is an independent federal agency, supervising all U.S. government-supported, civilian international broadcasting, whose mission is to inform, engage, and connect people around the world in support of freedom and democracy. USAGM networks have an audience of 350 million in more than 100 countries. USAGM networks include the Voice of America, Radio Free Europe/Radio Liberty, the Middle East Broadcasting Networks (Alhurra TV and Radio Sawa), Radio Free Asia, and the Office of Cuba Broadcasting (Radio and TV Marti).

WORLDWIDE OPERATIONS

50

Overseas bureaus and production centers

1,500

Stringers/reporters

Nearly

200

Operational transmitters for TV, FM, MW & SW at 100 transmission sites in over 40 countries worldwide

AFFILIATES

68

Number of USAGM affiliates with national reach that air custom or interactive segments during primetime

Over

3,700

television, radio and digital affiliates across the globe

ANNUAL BUDGET

\$807.9 million

EMPLOYEES

3,561

LANGUAGES

61

AUDIENCE

350 million



DIGITAL GROWTH
23 million

Weekly Average
Web & Mobile Visits

Social Media EXPANSION

USAGM networks engage with audiences on:

Facebook 
Twitter 
YouTube 
Instagram 
OK.ru 
VKontakte 
WhatsApp 
WeChat 