



Review of the Efficiency and Effectiveness of the BAI Strategy Statement 2014-2016

1. Introduction

Section 29 of the Broadcasting Act 2009 (“the Act”) requires the BAI to draw up and adopt a statement of strategy reflecting the statutory functions of the Authority, Contract Awards Committee and Compliance Committee. Under Section 29 (2) (d) of the Act, the BAI is required to undertake a review of the efficiency and effectiveness of the statement during the previous three-year period.

In May 2016, Ipsos MRBI were commissioned to undertake a review of the 2014-2016 strategy among key stakeholders of the BAI, with the primary objective of obtaining views on the efficiency and effectiveness of the existing strategy across all themes, goals and objectives. The report entitled “**BAI Strategy Statement 2014-2016 – A Review**” provides a comprehensive review of the 2014-16 strategy addressing the BAI’s performance in the achievements of the vision, mission and values and strategic themes and objectives during the period.

Section 2 beneath provides a short commentary from the BAI on the report’s key findings. The findings of the review were also taken into account by the Authority to support their deliberations in the preparation of the BAI Strategy Statement 2017-2019. The report is a useful supporting document which will help to inform the public consultation process on the development of the new strategy statement which will cover the period 2017-19. **Appendix One** contains a copy of the Ipsos MRBI Report.

2. BAI Commentary on Review Findings

Vision, Mission and Values

The BAI welcomes the finding in the report that the Vision of the BAI to be an effective regulator is considered to have been achieved to a substantial degree. The BAI is also perceived to have gained significant levels of trust among its stakeholders. Some concerns were expressed as to whether the vision has been communicated effectively with stakeholders and the public generally and this is something we hope to pay particular attention to in the next strategy.

The Mission statement makes reference to ensuring diversity and plurality and the Authority noted that there were some mixed views from stakeholders under these headings. There appears to be general agreement that there is wide diversity in content but less support for the view that programming reflects diverse needs and experiences of Irish audiences. It is also considered that



there is greater diversity on radio than television in Ireland. Plurality and diversity will remain central to the delivery of the next strategy and the Authority will take into account the feedback received from stakeholders under these headings. The feedback is also reflective of some of the challenges facing potential new entrants into the broadcasting sector, in particular with the rise of new media players in the non-traditional digital space.

The BAI has seven core values and we welcome the fact that the organisation is very positively perceived in respect of its adherence to these values. Respondents agreed that the BAI is a public organisation trusted by its stakeholders. Within the values, particular strengths are noted around the BAI being professional, committed to learning, independent and impartial and fair and proportionate.

BAI Strategic Themes and Organisational Objectives

The Authority welcomes the effective performance of the BAI in the achievement of its organisational objectives and particularly notes the conclusion that the BAI performs strongly on themes of trust, facilitation and setting of codes and standards. With regard to diversity and plurality, the BAI performs better when its role is described as “facilitating” rather than “ensuring” and this is something to be reflected on in the proposed new strategy. We also note within the commentary on the strategic objectives that high performance is recorded for holding broadcasters to account and ensuring broadcasters operate within the BAI codes and rules.

The BAI is seen as “supporting” rather than “shaping” Irish broadcasting, particularly in the context of the production of quality, diverse Irish content and ensuring access to diverse programming and perspectives.

Overview

With regard to the forthcoming 2017-19 strategy, the BAI notes that stakeholders consider that facilitating greater diversity and plurality, holding broadcasters to account and being a trusted and informed voice should be key strategic objectives of the BAI. Challenges are identified in relation to the BAI role in plurality and building competencies for the public to participate in media. Another challenge for the BAI will be to remain relevant in a fast moving and evolving media landscape.

Overall, the BAI is perceived as an effective regulator, visible in its setting and upholding of codes and standards, largely independent and impartial and one which has achieved significant levels of trust among its stakeholders.



Concluding Remarks

The BAI welcomes the key findings of the strategy review which was undertaken by Ipsos MRBI and has been a very worthwhile element of the overall strategy review and development process. The review has endorsed the work of the BAI to date and confirmed that it is operating in accordance with its statutory objectives. Importantly, it also confirms that the BAI is an efficient and effective regulator and that it is trusted by its stakeholders. Some of the challenges that will face the regulatory system over the next number of years are outlined and this has provided a useful framework for the development of the next strategy, which is currently taking place.

Pauric Tavers
Chairperson
October 2016



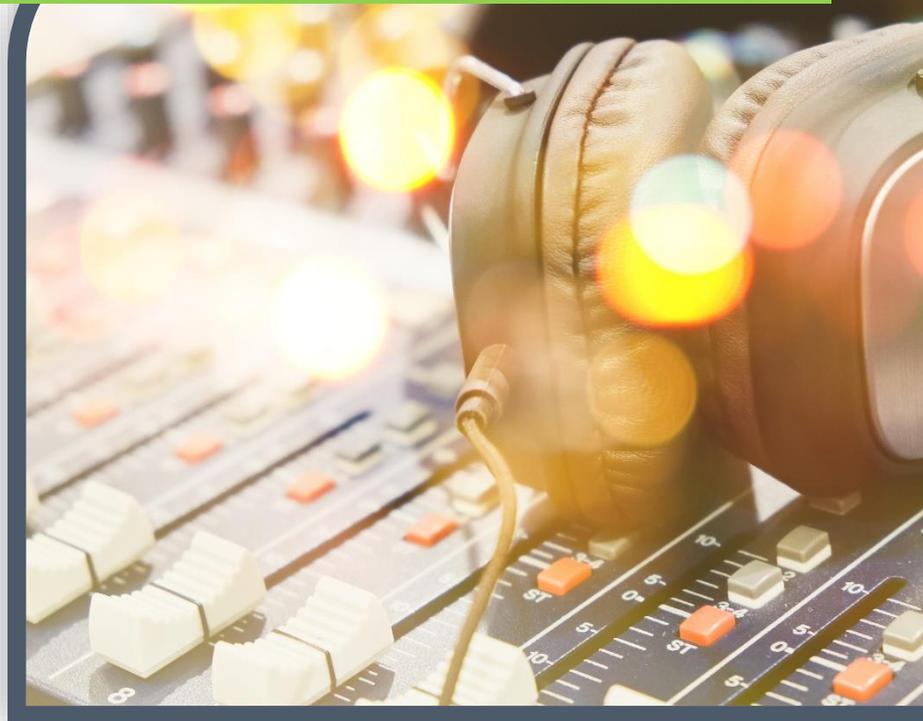
APPENDIX ONE

BAI STRATEGY STATEMENT 2014-2016

A REVIEW

Ipsos MRBI August 2016

BAI STRATEGY STATEMENT 2014-2016 A REVIEW



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1 EXECUTIVE SUMMARY

The role of the BAI is established in the Broadcasting Act of 2009 and, in particular, Section 29 of the Act stipulates the implementation of a three-year Strategy Statement which sets the course for the BAI for the forthcoming period. This section also stipulates the inclusion in the Strategy of a review of the Statement for the preceding three years. In the context of this review the BAI commissioned Ipsos MRBI to undertake research among relevant stakeholders with the primary objective of obtaining stakeholder views on the efficiency and effectiveness of the existing strategy across all themes, goals and objectives.

The Review of the 2014-2016 Strategy Statement was undertaken via a quantitative survey among the stakeholder group. The survey was conducted on-line, hosted and collated on Ipsos MRBI's secure network. All respondents had the option to respond in either the Irish or English language. Using this self-completion methodology, stakeholders were invited to review all elements of the Strategy Statement including the Mission, Vision, Values and Strategic Themes and Objectives of the BAI. In total, 167 responses were achieved representing a very positive response rate.

BAI's Vision, Mission and Values

Considering the components of the Vision Statement - to be an effective regulator, trusted by stakeholders to serve the needs of Irish audiences - overall stakeholders perceive the BAI to have achieved its vision to a substantial degree during the current period. In particular, the BAI is recognised as being an effective regulator by three-quarters of all stakeholders. Furthermore, the BAI is perceived to have gained significant levels of trust in this period, a perception held to a particularly strong degree among the Broadcaster respondent segment and among internal BAI stakeholders. Among this latter group, while the majority believe the organisation has achieved its vision to serve Irish audiences there is some doubt as to whether the BAI has effectively communicated its vision to the public.

In the Mission statement the BAI further clarifies its role in serving Irish Society by detailing the organisation's intentions in this regard. In its statement, the BAI ensures that Irish audiences have access to a diverse and pluralistic range of broadcasting services and content which reflects their diverse needs and experiences. In this context, perception of the BAI's performance is somewhat more mixed than in relation to the Vision Statement. While more than three in five agree there is a diverse range of content on Irish television and radio, it is less sure that programming reflects the diverse needs and experiences of Irish audiences. Furthermore, it is apparent that diversity on Irish radio is somewhat easier to achieve than on Irish television.

Underpinning the BAI's Strategy Statement are seven core values which influence all activities undertaken by the organisation. Overall, across all stakeholder groups, the BAI is very positively perceived in terms of association with these values again reflecting its position as a public organisation trusted by its stakeholders. In particular, the BAI is associated most strongly with being professional and committed to learning; independent and impartial; and fair and proportionate. While internal BAI stakeholders almost universally associate the organisation with its core values, some small differences emerge among other stakeholder groups with small minorities of the Broadcaster and Funding Applicant sectors not in agreement on the issues of fairness and impartiality.

BAI's Strategic Themes and Organisational Objectives

The BAI captures the focus of its work in seven strategic themes with each theme associated to a high level goal. Overall, BAI emerges as a strong performer on the themes of trust, facilitation and the setting of codes and standards, which are core components of the organisation's Vision and reflect the visible role of the BAI as the industry regulator. On the issue of diversity and plurality, BAI's performance is perhaps better measured here in the context of facilitation as this more accurately reflects its role in this area. In this context, the BAI performs very positively in terms of facilitating the provision of diverse content and plurality in Irish broadcasting, a better performance than when measured under Mission.

In the context of the future Strategy, diversity clearly emerges as the most important issue for stakeholders. Delivering plurality, holding broadcasters to account and being a trusted and informed voice emerge closely together in next order of priorities for the future. BAI's relatively strong performance on these themes to date can be positively viewed in light of these stated priorities for the future.

Within these over-arching themes specific operational objectives were measured. Performance on nineteen individual objectives, grouped into three broad categories, was measured. Generally, on the objectives relating to the BAI's compliance and enforcement role, the BAI is perceived to perform most effectively. High performance scores emerge in relation to holding broadcasters to account, ensuring broadcasters operate within the BAI codes and rules and, in the promotion of the complaints handling process. However, more mixed views emerge for those objectives measured under the collective term - *Shaping Irish Broadcasting*. Overall in this area, the BAI is perceived in a strong supporting role, supporting the production of quality diverse Irish content and ensuring access to diverse programming and perspectives. However, the BAI faces challenges in relation to the issue of plurality, where to date it is not perceived to be visible in terms of leading the debate. Generally, across these set of objectives the Broadcaster segment is more critical of the BAI and particularly so in relation to the BAI's support of Irish content across digital platforms. A further challenge emerges in relation to the general public and the efforts to build competencies among the public to participate in the media area.

Overview

Overall, the BAI is perceived as an effective regulator, visible in its setting and upholding of codes and standards, largely independent and impartial and one which has achieved significant levels of trust among its stakeholders. Diversity and plurality are leading priorities for the future and while the mission statement aims to ensure Irish audiences have access to diverse content this goal is perhaps better framed as one of facilitation in fostering and supporting an environment within which diversity and plurality can flourish. A significant challenge for the BAI is to remain relevant in a fast moving and evolving media landscape by ensuring standards remain up to date and by supporting broadcasters and other providers across emerging platforms. In so doing, the BAI needs to clarify its role within the legislation and to better understand and manage the expectations of broadcasters and other content providers. Achieving awareness and impact among the general public presents another challenge. While media literacy initiatives can be undertaken to support and empower audiences, it is important to identify the most appropriate approach to such initiatives in light of the BAI's role and resources.

For the future, stakeholders would like to see BAI as a strong advocate of the sector, committed to development and support of diversity in a changing media landscape.

2 BACKGROUND & OBJECTIVES

The BAI was established in 2009 as the independent regulator for television and radio broadcasters in Ireland. The role of the BAI is established within the Broadcasting Act of 2009. As stipulated in Section 29 of the Act, this includes the preparation and adoption of a three-year Strategy Statement which sets out the objectives and functions of the Broadcasting Authority and of the Contract Awards and Compliance Committees for the forthcoming period.

The current Strategy Statement (2014-2016) encompasses seven strategic themes reflecting the Vision and Mission of the Authority. These themes determine the role of the BAI and range from facilitating a diverse and pluralistic broadcasting sector for the public in Ireland to ensuring accountability and responsibility among broadcasters through consultation and regulation. Each theme contains a strategic goal and a series of objectives which determine the organisation's work plan for the year ahead.

Section 29 also stipulates the inclusion in the Strategy of a review of the efficiency and effectiveness of the statement during the preceding three-year period. In the context of this review the BAI commissioned Ipsos MRBI to undertake research among relevant stakeholders including BAI staff, members of the Compliance and Contract Awards Committees, members of the BAI Board and other stakeholders in the broadcasting and related industry sectors.

The requirements of the research were specified in terms of the following objectives.

- To obtain stakeholder views on the efficiency and effectiveness of the existing strategy across all themes, goals and objectives.
- To assess stakeholders' experience of the BAI and to gather their views on the operations of the BAI over the past three years and the priorities for the next three years.
- To gather stakeholder views on topics relevant to the development and content of the new strategy as decided by the Authority.

3 METHODOLOGY

The review of the 2014-2016 Strategy Statement involved a broad consultation among BAI stakeholders, both internal and external stakeholders, and was undertaken via a quantitative survey among the stakeholder group.

The survey was conducted on-line utilising CAWI (computer aided web interviewing) methodology. This survey design facilitated a quantification of responses among the diverse range of stakeholders and ensured a comprehensive and focused assessment of all the informational aspects of the review.

The sample universe was identified by the BAI and comprised the following stakeholder categories.

- BAI Staff
- BAI Authority and Committee members – current and past members
- Public service broadcasters (PSB's)
- Commercial broadcasters
- Community broadcasters
- Sound & Vision fund assessors
- Sound & Vision fund applicants
- Sponsorship and development funding applicants
- Archiving organisations
- Industry networks and agencies
- Media organisations
- Government departments
- Suppliers

Prior to the survey launch all stakeholders were contacted directly by the BAI to inform them of the upcoming Strategy Statement Review and to invite their participation in the research. All those contacted were given the option to decline. Furthermore, to broaden the scope of the potential respondent base and to include other interested parties, a bilingual public notice was published in the national press, circulated via social media and published on the BAI website. In this manner, members of the general public were also informed and invited to participate. Following this initial consultation, an invitation via email was dispatched to each individual directly from Ipsos MRBI which contained a secure link to the on-line survey. Printed and accessible versions of the questionnaire were also available. The survey questionnaire was scripted in both the Irish and English language and was designed for self-completion by respondents. The survey was hosted on Ipsos' secure network and all responses were collated here.

From a stakeholder list of c500 individuals, 167 completed interviews were achieved, representing a very positive 33% response rate. Eight interviews were completed in the Irish language. This level of response was higher than the anticipated rate and reflects the level of engagement and willingness to participate by stakeholders. This response was spread across all stakeholder categories.

The survey was conducted in the period from 19th May to 7th June 2016.

3.1 The Stakeholder Interview

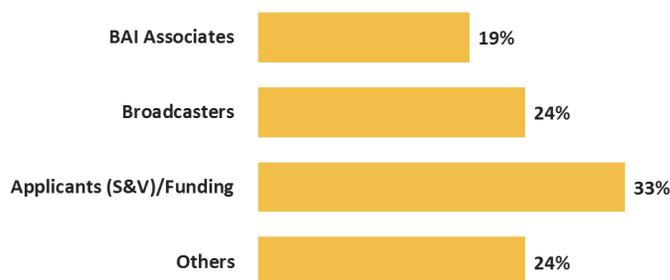
The review comprised a self-completion questionnaire whereby stakeholders were invited to review all elements of the Strategy Statement including the Mission, Vision, Values and Strategic Themes and Objectives of the BAI. In the main, to ensure a systematic approach by all respondents, the interview comprised a range of questions with pre-coded, rating scale, answer options. There was also the opportunity to include an open, "unstructured" response at certain intervals throughout the survey.

NOTE ON REPORTING

In reporting the results of the Stakeholder Review, all findings are presented for the total sample of stakeholders who completed the survey and, to provide greater understanding across the various stakeholder categories, further analysed by relevant sub-segments of this whole. These sub-segments include BAI Associates (*staff and committee members*), Broadcasters (*including all PSB, community and commercial broadcasters*) and Applicants-Sound& Vision/Funding (*including Sound and Vision fund applicants and sponsorship/development fund applicants*). In the context of such sub-segments all other respondents, comprising a diverse range of stakeholder categories, are grouped together as “Other”.

The final sample composition contained the following responses across the stakeholder categories:

Respondent Profile

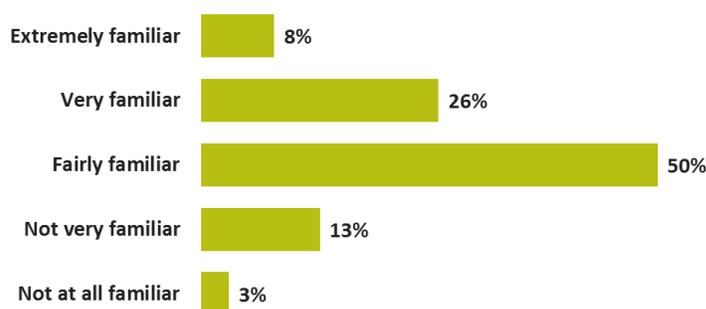


4 FINDINGS

To set the survey findings in context, the level of familiarity with the BAI Strategy Statement 2014-2016 was measured at the end of the interview.

The majority of respondents (84%) claimed to be familiar at some level with the Strategy Statement. Naturally enough, familiarity was highest among those associated with the BAI. One-in-five of non-BAI associated segments claim not to be familiar.

Familiarity With BAI Strategy Statement 2014-16



Q.12 And lastly, prior to completing this survey, how familiar would you say you were with the BAI Strategy Statement 2014-2016?

The first section of the interview addressed the BAI's Mission, Vision and Values contained within the Strategy Statement, 2014 to 2016.

4.1 BAI's Vision 2014-2016

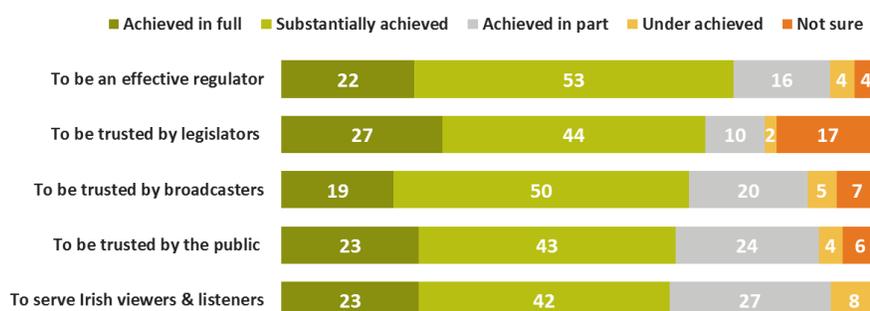
"The BAI is an effective regulator, trusted by the public, broadcasters and legislators to serve the viewing and listening needs of the people of Ireland, now and in the future".

Each component of the Vision statement was assessed individually. The Vision statement was presented as five separate statements and, using a pre-coded rating scale, stakeholders' perceptions of the BAI's performance in regards to each of these statements were measured. The rating scale used to measure performance in this context was:

- Achieved in full
- Substantially achieved
- Achieved in part
- Under achieved
- Not sure

Considering all aspects of the Vision statement, it is clear that stakeholders perceive the BAI to have achieved its vision to a significant degree during the period of the current Strategy Statement. While the Vision has not been achieved in full, stakeholders believe that substantial achievement has been made on all aspects, most particularly in terms of the BAI's core function of regulation in the sector and in regards to achieving trust among legislators. Internal stakeholders and those in the Broadcaster group rate the BAI most positively on these criteria.

Vision – Has BAI Achieved Its Vision?



Q.1 Below is a list of the core components of the BAI Vision for 2014-2016.
For each, please indicate the extent to which you think the BAI has achieved its Vision?

Looking at the individual components of the Vision Statement, the vast majority, three-quarters of all stakeholders - believe BAI has either “*substantially achieved*” or “*achieved in full*” its vision to be an effective regulator with only 4% perceiving the organisation to have underachieved in this regard. This perception is held across all stakeholder groups.

On the issue of trust, again when the top two responses on the rating scale are combined, there is a strong belief overall that BAI has achieved its vision (*fully/substantially*) to be trusted by its stakeholders. When comparing research findings across the different stakeholder segments, this view is held to an even greater degree by the Broadcaster segment with three-quarters or more of this group rating BAI as achieving trust among legislators (75%), among broadcasters (78%) and among the public (78%).

Among internal stakeholders, the BAI Associate segment, while the vast majority (87%) believe the BAI is largely trusted by legislators, only 55% believe this is the case in terms of the general public. In fact, one-third believe the BAI has only achieved this public trust “*in part*”. This suggests that internally the BAI is less sure of having communicated its Vision to the Public.

On the issue of servicing Irish viewers and listeners, two-thirds of all stakeholders (65%) believe that the BAI has achieved this element of its vision to a substantial level. Among the Broadcaster and Funding Applicant categories, those principally engaged with producing and delivering content to the Irish Public, rating of BAI's achievement is somewhat lower than among the internal stakeholder group.

Vision – Has BAI Achieved Its Vision?

TOP 2	Total	BAI Associates	Broadcasters	Applicants/Funding	Other
<i>In full/substantially</i>	%	%	%	%	%
To be an effective regulator	75	77	78	71	78
To be trusted by legislators	71	87	75	64	63
To be trusted by broadcasters	68	74	78	65	59
To be trusted by the public	66	55	78	65	63
To serve Irish viewers & listeners	65	71	63	64	66

Q.1 Below is a list of the core components of the BAI Vision for 2014-2016.
For each, please indicate the extent to which you think the BAI has achieved its Vision?

When examining the data, of particular note is the very small proportion of respondents who believe that BAI has underachieved in terms of its Vision, thus reflecting a positive performance on the part of the BAI.

Achieving trust and indeed recognition among the public would appear to be more challenging for the BAI. While considerable focus is placed on the general public throughout the BAI Strategy Statement and subsequently all BAI operational activity is directed to the service of the public, the organisation is not a public facing one. Previous research has consistently indicated a relatively low awareness of the BAI and its functions among the general public. In this context, this particular target “to be trusted by the public” may be difficult to achieve.

4.2 BAI's Mission 2014-2016

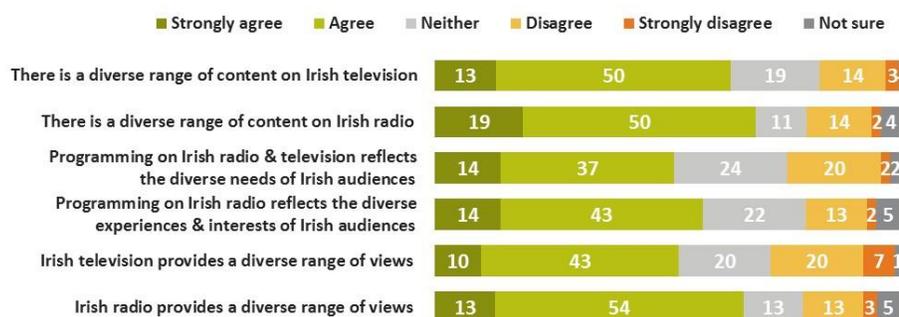
"The Broadcasting Authority of Ireland serves Irish society by ensuring that viewers and listeners in Ireland have access to a diverse and pluralistic range of broadcasting services, content and programming, that reflects their diverse needs, experience and interests, and supports their entitlements as citizens in a democracy."

As with the Vision Statement, each component of the Mission statement was assessed individually. The Mission statement was presented as six separate statements and, responses were measured using a five-point scale. In this instance the scale intended to establish levels of agreement with the range of statements. Answer options were as follows and allowed for a "not sure" response:

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Not sure

In the context of the Mission statement, perception of the BAI's performance is more mixed than seen in relation to Vision. However, once again, across all components of the Mission statement, broadly the majority agree that the BAI has delivered on its goals of providing diversity and plurality in the Irish broadcasting sector. In particular, in the context of having a diverse range of content on Irish radio and TV, more than 60% of all respondents are in agreement.

Mission – Has BAI Delivered On Its Goals?



Q.2 The BAI Mission for 2014-2016 contained a number of key goals. Please indicate below the extent to which you think the BAI has delivered on each goal?

However, there is a consistent minority of stakeholders who hold a different view. More than one-fifth of all stakeholders do not agree that programming on Irish TV and Radio reflects the diverse needs of Irish audiences. Furthermore 27% disagree with the concept that Irish television provides a diverse range of views.

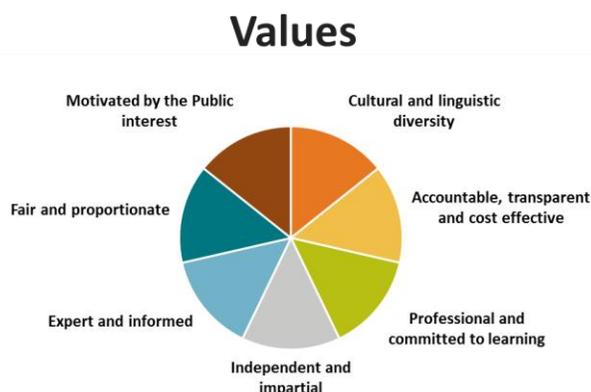
On all aspects measured, it is apparent that diversity on Irish radio is somewhat easier to achieve than on Irish television. Irish radio is perceived to deliver more diversity of content (69%) and to better provide a diverse range of views (67%) when compared to TV.

The composition of the radio market, comprising an established local and community sector, perhaps facilitates radio to provide greater diversity and to reflect the views and experiences of Irish audiences throughout the country. On the other hand, Irish TV broadcasters compete in a more open market where television content delivered from non-Irish operators is consumed every day by significant proportions of the population. Such content does not fall under the BAI’s regulatory remit. The impact of this open market is perhaps best reflected in the above analysis where stakeholders are somewhat more critical of the current representativeness of Irish television as it competes for viewers in this environment.

These findings must be analysed in the context of the BAI’s role and reach in this area. While the BAI mission focuses on delivery of diverse programming, the BAI does not directly deliver broadcast content to Irish audiences but rather is responsible for regulating, supporting and facilitating an environment and industry within which plurality and diversity can flourish. Within this framework, it would appear that some stakeholders are not fully satisfied that this environment has been realised.

4.3 BAI’s Values 2014-2016

There are seven core values underpinning BAI’s Strategy Statement. These values, listed in the chart below, influence all activities undertaken by the organisation and inform the BAI’s approach to the task of regulation. All values are deemed to be of equal importance by the BAI.

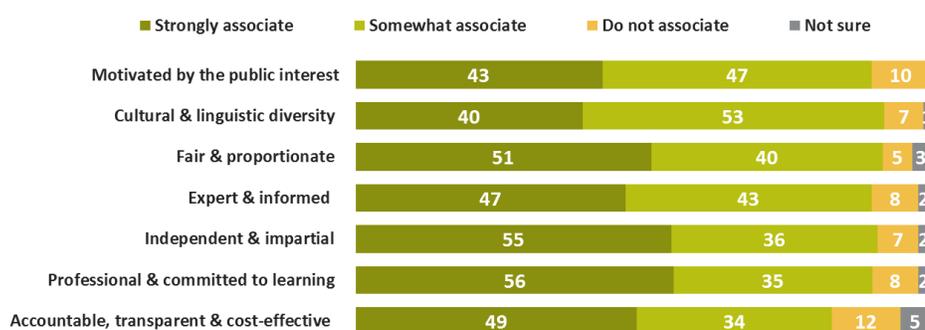


In the context of this review, to determine how well or otherwise the BAI has performed in terms of its stated values, stakeholders were asked to consider the degree to which they associated the BAI with each of these values. For this question, responses were measured using a three-point scale, as shown below. A “not sure” response was also allowed for.

- Strongly associate
- Somewhat associate
- Do not associate
- Not sure

In general, the BAI is associated to a very significant level with each of its values. In particular, there is a strong association with the values of professionalism, impartiality and fairness. As the Regulator this perception of fairness and impartiality is a critical one and, stakeholders internal to the organisation all believe the BAI is operating to these standards.

Values – Is BAI Associated With Its Values?



Q.3 Listed below is a list of the BAI Values from the 2014-2016 Strategy.
For each, please indicate the degree to which you now associate the BAI with these Values?

While there are significant levels of association among all stakeholder groups, with upwards of 80% either strongly or somewhat associating the BAI with each value, there is evidence of some minor differences among the various stakeholder segments. Internal stakeholders, BAI Associates, are consistent in their assessment across all values, almost universally associating the BAI with each one. Views on fairness and impartiality vary by group. While the majority of broadcasters (85%) associate the BAI with being independent and impartial, this is somewhat lower than the average rating. A small proportion of this group (13%) do not associate the BAI with this value at all. Among funding applicants, once again while the majority associate the BAI with being fair and proportionate, there is a small proportion (11%) who do not perceive the BAI in this light. However, this category particularly associates the BAI with being motivated by the public interest (95%).

On all components measured the lowest levels of association emerges on the value of being “accountable, transparent and cost effective”. Overall, just over one in ten stakeholders (12%) do not associate the BAI with this value. This level of dis-association is somewhat higher among the funding applicant sub-group (16%).

Values – Is BAI Associated With Its Values?

TOP 2	Total	BAI Associates	Broadcasters	Applicants/Funding	Other
<i>Strongly/somewhat associate</i>	%	%	%	%	%
Motivated by the public interest	90	94	85	95	88
Cultural & linguistic diversity	92	87	88	95	98
Fair & proportionate	92	100	93	84	95
Expert & informed	90	97	90	89	85
Independent & impartial	91	100	85	91	90
Professional & committed to learning	90	97	93	87	88
Accountable, transparent & cost-effective	83	97	83	78	80

Q.3 Listed below is a list of the BAI Values from the 2014-2016 Strategy.
For each, please indicate the degree to which you now associate the BAI with these Values?

Overall, these positive findings would seem to reflect BAI’s position as a public organisation that is trusted by its stakeholders. It is perhaps unsurprising that views on fairness and impartiality vary somewhat by stakeholder group and this difference could be driven by the outcomes of decisions taken by the BAI in regards to regulation or funding. In regards to the issue of accountability and transparency, at 83% association, this is undoubtedly a very positive position for the BAI. However, perhaps this is an area where improved communication can enable the BAI to further build trust among its stakeholders.

For the future, there is a desire to see BAI as a strong advocate of the sector, committed to development and support of diversity in a changing environment.

4.4 BAI’s Strategic Themes 2014-2016 – BAI’s Performance

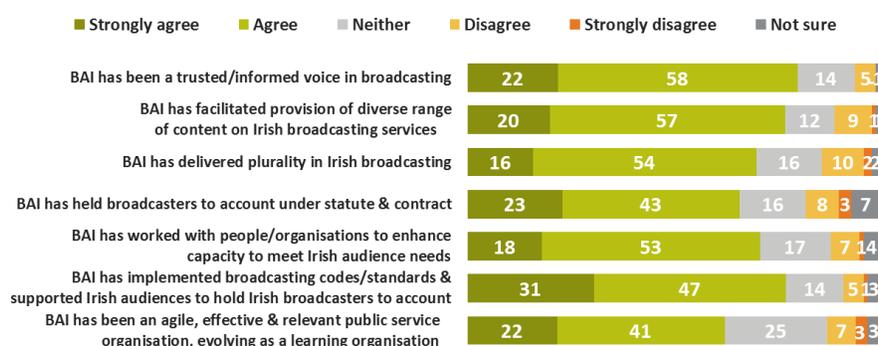
The BAI captures the focus of its work in seven strategic themes, with each theme associated to a high level goal. All themes are deemed to be of equal importance and all are directed towards the achievement of the BAI’s strategic vision to be an effective regulator, trusted by stakeholders.

In this section respondents were asked to consider whether the BAI had delivered on its Strategic Themes over the past three years. Responses were measured using the five-point scale rating levels of agreement with a range of statements that reflect the seven strategic themes. Answer options were as follows and allowed for a “not sure” response:

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Not sure

Once again, there are very high levels of agreement that BAI has delivered across each of the strategic themes featured in the Strategic Statement 2014 to 2016. On five of the seven themes measured at least seven in ten stakeholders agree that the BAI has delivered on its goal, a very positive outcome for the BAI. In particular, 80% agree that BAI has been a trusted and informed voice in broadcasting, a view held across all stakeholder groups.

Strategic Themes – Has BAI Delivered On Each



Q.5 Shown below are the BAI's seven over-arching Strategic Themes. Please indicate below the extent to which you think the BAI has delivered on each Theme?

Three in ten respondents strongly agree that the BAI has implemented broadcasting codes and standards in the past three-year period. This increases to 78% when the top two responses, strongly agree and agree, are combined. This view is held to a greater extent among internal BAI stakeholders, whereby the vast majority of internal stakeholders (90%) agree that BAI has delivered on this theme. However, there are significant levels of agreement across other stakeholder groups as well – among the Broadcaster and Funding Applicant categories, almost four in every five agree.

On the other hand, the perception of the BAI as an organisation that holds broadcasters to account under statute and contract is not quite so strong. Two thirds of all stakeholders (66%) agree with this concept and, while Broadcasters are not in doubt about BAI’s performance in this regard (75% agree), in contrast internal BAI stakeholders are least likely to rate their success (61% agree).

BAI also emerges particularly well on the issue of facilitation. Almost four in five stakeholders (77%) agree that the BAI has facilitated the provision of diverse range of content. This perception is upheld among arguably the most relevant categories of stakeholders in this context - Broadcaster and Funding applicants. Among the rest there are relatively high proportions who are neutral or unsure on this issue. Furthermore, 71% perceive the BAI to be an organisation that works with external stakeholders to enhance capacity to meet Irish audience needs. It is interesting to contrast this outcome with the findings emerging under Mission in relation to the diversity of content on Irish television. The wording used here, “facilitate” rather than “ensure”, seems to better reflect the BAI’s role and therefore in this context the rating achieved would seem more relevant.

While the majority of stakeholders overall (70%) perceive that the BAI has delivered plurality in Irish broadcasting, a small proportion (12%) disagree. In particular, this view is not held to quite the same extent among the Broadcaster segment – only 60% are in agreement. As stated above, the nature of the commitment implied, “delivering plurality”, may be a relevant factor here.

In terms of BAI’s organisational capacity, three in every five (62%) agree that the BAI has been an agile, effective and relevant public service organisation, the lowest score emerging in this section. While internal BAI associates rate the organisation very positively on this criterion (81%), levels of agreement are lower among other groups, particularly among the broadcaster category (55%). However, it should be noted that one-quarter of all are neutral on this topic, a finding which might suggest a level on unfamiliarity with the internal functions of the organisation.

Strategic Themes – Has BAI Delivered On Each

Top 2	Total	BAI Associates	Broadcasters	Applicants/Funding	Other
<i>Strongly agree/agree</i>	%	%	%	%	%
BAI has been a trusted/informed voice in broadcasting	80	77	83	82	78
BAI has facilitated provision of diverse range of content on Irish broadcasting services	77	84	80	82	63
BAI has delivered plurality in Irish broadcasting	70	77	60	76	66
BAI has held broadcasters to account under statute & contract	66	61	75	67	59
BAI has worked with people/organisations to enhance capacity to meet Irish audience needs	71	77	70	69	71
BAI has implemented broadcasting codes/standards & supported audiences to hold broadcasters to account	78	90	78	76	71
BAI has been an agile, effective & relevant public service organisation, evolving as a learning organisation	62	81	55	62	56

Q.5 Shown below are the BAI’s seven over-arching Strategic Themes.
Please indicate below the extent to which you think the BAI has delivered on each Theme?

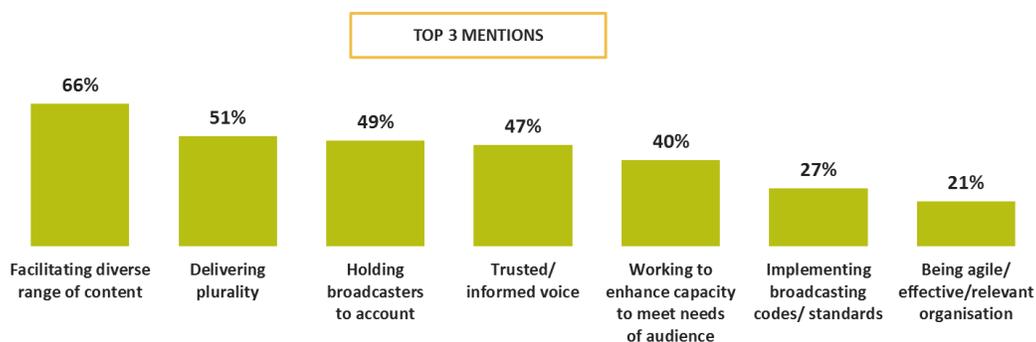
Overall, strong levels of agreement emerge on the themes of trust, facilitation and setting of codes and standards, core components of the BAI's Vision. These findings perhaps best reflect the very visible role of the BAI as the industry regulator, with the responsibility for the setting of codes and upholding standards across the broadcast industry. Perhaps this rigor in pursuit of effective regulation may have a somewhat negative impact on the image of the organisation – the theme of agility and effectiveness not easily sitting side by side with the more bureaucratic functions of the organisation.

4.5 BAI's Strategic Themes 2014-2016 – Relative Importance

The importance of the Strategic Themes was considered next, particularly in the context of their inclusion in the Strategy Statement for the forthcoming three-year period. Respondents were asked to rank the strategic themes in order of importance and the chart below shows the relative positioning when the top three mentions are combined.

In this context, diversity clearly emerges as the most important issue for stakeholders and this is true across all stakeholder groups, both internal and external stakeholders.

Strategic Themes – Ranking of Importance



Q.6 Thinking ahead to the BAI Strategy for 2017-2019, please rank each of the Themes below in order of how important you feel it is that they are included in the 2017-2019 Strategy?

Delivering plurality in Irish broadcasting, holding broadcasters to account and being a trusted and informed voice emerge closely together in 2nd, 3rd and 4th positions of importance, with agreement on prioritisation evident across all groups. Broadcasters rank the theme of support - working with people/organisations to enhance capacity to meet Irish audience needs – much more highly than other stakeholders, placing this theme as joint 2nd in terms of relative priorities for the future.

While being an agile and effective organisation emerges as least important, relative to other aspects, it would seem important to maintain focus on this aspect, as this capacity or characteristic within an organisation will facilitate all other work to be undertaken. Equally, the implementation of broadcasting codes and standards is at the core of BAI's regulatory function and is therefore likely to remain as a necessary feature for future strategy.

4.6 BAI's Objectives - 2014-2016

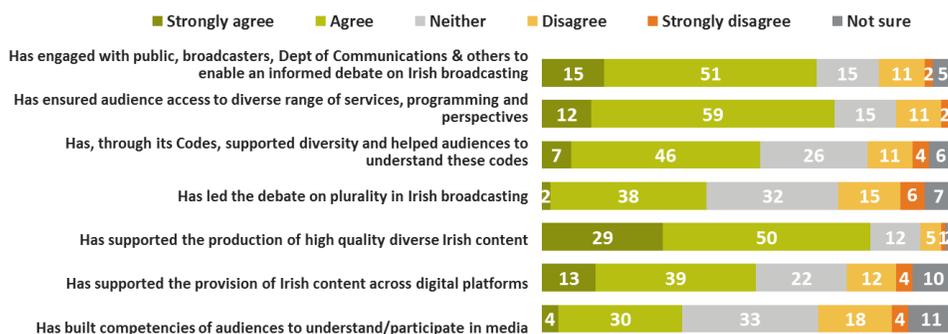
Under the over-arching strategic themes, the interview next focused on specific working objectives of the BAI in delivering these themes. These objectives were grouped into three broad categories and for each category respondents were asked to assess the BAI in terms of its performance in meeting each objective. As before, responses were measured using the five-point scale rating levels of agreement. Answer options were as follows and allowed for a "not sure" response:

- Strongly Agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Not sure

4.7 BAI's Objectives 2014-2016 – Shaping Irish Broadcasting

Firstly, seven specific objectives with the collective aim of shaping Irish broadcasting, were measured. In this category the BAI is clearly perceived in a strong supporting role having achieved very positive scores on the objective "*supported the production of high quality diverse Irish content*". The majority of respondents, four in every five, agree with this view, a position that is held across all stakeholder groups.

Shaping Irish Broadcasting – Has BAI Met Objectives



Q.8 Beginning with the Objectives that relate to the BAI's role in shaping the Irish broadcasting landscape, please indicate whether you agree or disagree that the BAI has met its Objectives?

Furthermore, still on the topic of diversity but specifically that of access - *access to diverse programming and perspectives* - seven in ten (71%) believe the BAI has delivered on this criterion. However, views are more mixed when examined among stakeholder groups – with broadcasters being less likely than others to be in agreement (60%) and a further one quarter are somewhat unsure about BAI's performance in this regard, offering a neutral rating.

Similarly, in terms of diversity across broadcast platforms, while half of all respondents perceive the BAI to support the provision of Irish content on digital platforms the broadcaster stakeholder group is most critical in this regard with only 33% in agreement.

Broadly, on the theme of trust, two-thirds of respondents (66%) agree that the BAI has engaged with its stakeholders, including the public, to enable an informed debate on Irish broadcasting. While this rating is particularly high among the internal BAI stakeholder group (84%), broadcasters are less likely to agree (58%). Almost one-quarter of broadcasters are neutral on this topic and a further 15% disagree.

In terms of impacting at the general public level by supporting audience understanding of the sector, the BAI's perceived performance is not quite so strong or, perhaps is simply not as visible as other activities. On these objectives there are relatively high proportions of respondents who choose a neutral score, suggesting some lack of awareness of the BAI's activities in this area. That said, while more than half (53%) agree that the BAI has helped audiences to understand its regulatory codes, only one-third (34%) believe the organisation has built audience competencies to understand and participate in the media. On this latter objective, views among internal BAI stakeholders are split down the middle with an equal proportion (32%) on either side of the agree/disagree scale.

Finally, it would appear that the BAI is not particularly visible in terms of leading the debate on plurality in Irish broadcasting. Only two-in-every five, (40%) agree with this statement and a relatively significant minority, one-in-five (21%) disagree. Again, for broadcasters it would seem that more needs to be done on this issue - lowest levels of agreement (30%) emerge among the broadcaster segment. Of those themes measured, delivering plurality is the second most important one for stakeholders so it is worth exploring how this can be improved upon.

Overall, BAI's performance in the area of diversity is very positive and, considering this theme is ranked as the top priority for the future this is a notable achievement for the BAI. However, there is evident criticism in regards to BAI's support of Irish content on digital platforms, particularly among broadcasters. To improve on this objective and to remain relevant in this space in the future, it seems necessary for the BAI to better understand what broadcasters mean by digital in this context.

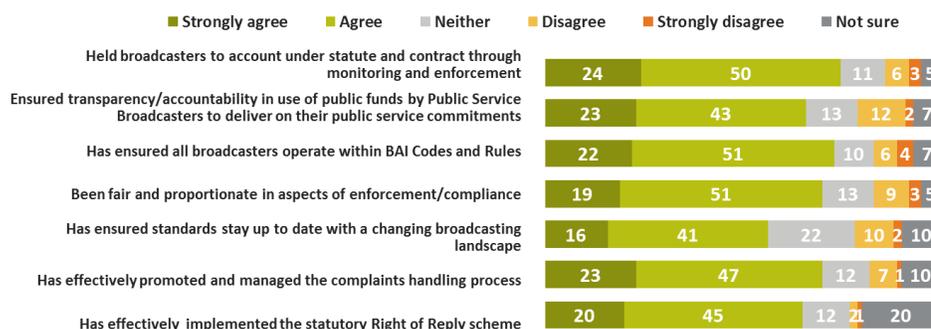
The ability of the BAI to meaningfully impact at the general public level emerges when analysing these objectives. While media literacy initiatives may work towards empowering audiences it is important to recognise the scale of this task and to consider the most appropriate way to structure such an objective within the BAI's role and resources.

Generally, the broadcaster stakeholder segment is somewhat more critical than average of the BAI on this particular set of objectives. This would seem to signify a need to clarify the BAI's role on the one hand and, on the other, to better understand and manage broadcasters' expectations.

4.8 BAI's Objectives 2014-2016 – Compliance and Enforcement Role

It is on these objectives, grouped under the umbrella heading of compliance and enforcement, where the perception of the BAI's performance is strongest. In particular, in terms of holding broadcasters to account, ensuring broadcasters operate within the BAI codes and rules and promoting the complaints handling process, with levels of agreement at 70%+, it would seem the BAI is delivering on a core function by successfully facilitating a well monitored and systematic environment within which broadcasters must operate.

Compliance & Enforcement Role – Has BAI Met Objectives



Q.9 Thinking now about the Objectives that relate to BAI's Compliance and Enforcement role, please indicate whether you agree or disagree that the BAI has met its Objectives?

On the value of fairness, seven in ten (70%) perceive the BAI to be fair and proportionate in aspects of enforcement and compliance and this perception is even stronger among the internal BAI stakeholders (84%). Levels of agreement also remain high among the Broadcaster sector (73%).

There appears to be a difference of opinion on the issue of transparency in the use of public funds. Almost all internal BAI stakeholders agree (90%) that the BAI has met its objectives on this issue, but among broadcasters and funding applicants this level of agreement drops, with three in five agreeing. This is perhaps unsurprising as the BAI is only one part of a more complex process and its work in this area may suffer from a lack of visibility.

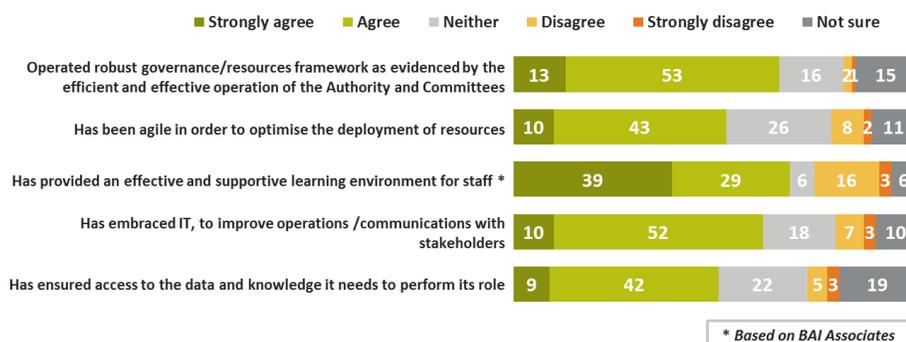
The BAI's poorest performance in this area is in the context of ensuring standards stay up to date in a changing landscape. While a significant proportion (22%) hold a neutral position, only 56% are in agreement, a finding that may reflect the significant challenge that exists for the BAI to remain relevant in a fast evolving media landscape. This result may also highlight a challenge for the legislation that underpins the BAI's operations.

4.9 BAI's Objectives 2014-2016 – BAI as an Organisation

In this section, the BAI is assessed in terms of its organisational objectives. While overall five individual objectives are measured, responses reflect some level of unfamiliarity with the operations of the organisation - there are relatively significant proportions who respond with "not sure" or "neither" throughout.

Of the five objectives measured in this section, the BAI performs most strongly on the issue of *operating a robust governance framework*. Two thirds of all respondents (66%) agree that the BAI has met this objective and among the internal BAI stakeholders there is an even stronger conviction that the BAI has been successful in this regard with 84% in agreement.

BAI As An Organisation – Has BAI Met Objectives



Q.10 Looking now at the Objectives that relate to the BAI as an organisation, please indicate whether you agree or disagree that the BAI has met its Objectives?

Three in five respondents (62%) perceive the BAI to have embraced IT with the goal of improving operations and communication with stakeholders, arguably an important criterion in the operation of a public service organisation. However, a small minority of internal BAI stakeholders disagree with this statement (16%).

On the issue of agility and securing access to relevant knowledge, there are mixed views particularly among the internal BAI stakeholder and Funding Applicant categories. While just over half of all respondents (53%), perceive the BAI to be agile, optimising deployment of resources, one in five of BAI Associates disagree (19%). A similar proportion (51%) believes the BAI has ensured access to the data and knowledge it needs to perform its role. Again, small levels of criticism among internal stakeholders on this point – 16% disagree.

Specifically, among the internal BAI stakeholders there appears to be some difference of opinion on the issue of fostering an effective and supportive learning environment for staff – while almost seven in ten agree, a small proportion (19%) disagree.

While overall internal BAI stakeholders rate the achievement of these objectives more highly than others, attesting to greater familiarity with the operations of the organisation, there remains a consistent minority of this group who are somewhat critical of the BAI on these objectives.