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9 The Audience

The public is an audience, but it is also a market. It could not be a market unless it had given its consent to be an audience, and it could not remain an audience ... unless it had proved itself as a market.

David Potter (Potter 1967: 54)

In Chapter 8, we found that advertisers now ‘enumerate’ the audience in complex ways, many of which have inbuilt assumptions about who the audience is and in what audience behaviour consists. Advertisers are not only interested in a picture of the audience but in being able to predict what the audience will do. In this chapter we turn to the audience itself, an important but often unacknowledged partner to the audience-ratings convention. When Nielsen and Arbitron joined forces to set up the experimental Project Apollo in 2005 they expected to be able to capture all of the everyday behaviour of audiences, from reading papers through to using mobile phones and buying food. To their surprise they found that people did not want to participate. The more they were asked to do and to provide, the more they resisted and refused. This is just one of the ways in which the audience has a ‘voice’ in how audience ratings are developed and how the audience as informants and respondents actively sets limits to what information can be collected and how it can be collected.

Audience consent to research has been essential to the success of the ratings industry. The audience-ratings convention has been essential in balancing intrusion *and* demands for privacy. Part of this success has derived from the recognition of audience research participants that their data is being used in the public interest – that their own participation is in the democratic interest (literally and formally). Audiences also have a radical effect and limit on which technologies they are willing to allow in their household or to use to collect their data.

But there is another way in which audiences set limits to ratings. It is well encapsulated in the phrase the ‘unknowable audience’. This is that audiences domesticate and use media in their own unpredictable ways. While the consumer electronics and computing industries marketed the additional radio sets, TV sets, VCR then DVD, mobile phones and games, and the media industry pushed catch-up TV, IPTV, cable, satellite and then digital versions, it was always the audience which domesticated this technology; it took it up at particular speeds and put it all together in particular ensembles. Marketing does its best to introduce some semblance of predictability into this uptake but audiences will always run ahead

and run behind this marketing. They will configure media in ways that resist easy registration in ratings systems. The ongoing problems ratings agencies face are: determining what audiences are actually doing with their media receivers, monitors and recorders in a fast-developing media landscape; figuring out how what they are doing can be effectively tracked; and working out whether audiences would support this tracking. This was information the ratings could not provide.

This was a problem of knowledge at two levels: the ratings companies needed to develop ways of regularly assessing what was happening on the ground, in rooms within homes, and in other places in which media was being consumed and taken up; and they needed to find ways of working with audiences so that this use could be measured. The first was a problem of continually working to determine the effectiveness of the frame within which the ratings was being conducted. The second was of finding cost-effective, collection- and user-friendly ways of measuring this use. While this can be readily turned into a research problem which specialized companies such as Gale Metzger's SRI could help with, it is also an indicator of how audience behaviours and uses of technology powerfully shape ratings systems outside the control of these agencies themselves. Audiences, not media companies, put together media ensembles and associated viewing, searching, downloading and recording practices. Audiences shape the ratings convention in two ways: how they use media requires companies continually to update their understandings of how audiences are using media; and they set limits to what can be measured and how it can be measured.

This chapter will give an historical insight into how participants have been recruited into audience ratings studies and how issues of intrusion have been addressed. We will also discuss the implications of the decline of audience participation in research. New technologies that can draw data from households through, say, set-top boxes, do not solve the audience-participation problem. Indeed, the technologies have raised the problem of privacy of data, and thrown into question the 'public interest' component of audience consent to ratings research.

The Modern Audience

The patterns of modern audiences in advanced industrial countries tend to be relatively similar with media households marked by different mixes of media and media options. Canada and the United States are good examples exhibiting similar diffusion patterns but also some important differences with, for instance, the United States showing greater levels of personal video recorder (PVR) and multi-set households. Table 9.1 shows the massive differences in sizes of each media market but also similarities in media usage.

We know also, of course, that the patterns of media usage are diverse, with the computer and mobile media, including the internet, taking up an increasing amount

of people's time. Table 9.2 shows how these patterns among young appear to be similar across different countries.

A major Australian study on family use of media provides a useful overview of overall activities among young people. It reveals the mix of activities within which ratings measures of, for instance, commercial and public service broadcasting takes place. Table 9.3 provides a breakdown by different types of activity. These are patterns that we can see in most industrialized countries.

Table 9.1 Comparison of Canada and US media households

	Canada	US
1. Population (2+ within TV households)	32,117,000	289,720,000
2. Households	13,139,000	114,890,000
3. BBM Markets, TV Markets – DMAs	40	210
4. TV Households	13,008,000	112,800,000
% TV Households	99%	99%
5. Cable + Satellite (% of TV Households)	89%	87%
6. Pay-TV (% of TV Households with digital capability)	58%	58%
7. PVR (% of TV Households)	9%	19%
8. Multi-set (% of TV Households)	67%	82%
9. Average Daily Viewing Per Household (Hours:Minutes)	N/A	8:14
10. Average Weekly Viewing (Hours:Minutes)		
Persons 2+	26:48	31:55
Men 18+	27:42	31:55
Women 18+	30:00	36:37
Teens (12–17)	18:30	23:21
Children (2–11)	18:06	23:51
11. Advertising Volume (2006) (US\$)	13,673	256,826
12. TV Volume (2006) – millions (Canada CDN\$/US US\$)	3,240	59,928
13. TV Expenditure Per Capita (2006) (CDN\$)	99	228
14. Number of TV Stations (Conventional + Specialty & Pay stations)	302	1,375

Source: 'TV Basics 2008–2009', Television Bureau of Canada (TVB)

Table 9.2 Average time young people spend per day on computer and video games (hours and minutes)

	10–14	15–19	20–24
Finland	1:51	1:35	1:20
Germany	1:42	1:55	1:46
Italy	1:17	1:18	1:23
Norway	1:35	2:02	2:36
Spain	1:30	1:35	1:41
Sweden		2:27	
UK	1:29	1:48	1:37

Source: *Cultural Statistics (2007)*, Luxembourg: Office for Official Publications of the European Communities

Table 9.3 Family use of media

	Total	Boys	Girls	8–11	12–14	15–17
General (non-media) activities	4:30	4:26	4:34	4:46	4:05	4:29
School	3:53	3:50	3:57	3:53	4:05	3:38
Homework	0:35	0:32	0:38	0:21	0:41	0:52
TV	1:54	1:58	1:50	1:54	1:55	1:55
DVDs	0:24	0:24	0:24	0:24	0:21	0:26
Mobile phone	0:19	0:13	0:23	0:03	0:19	0:43
Other phone	0:05	0:05	0:05	0:02	0:04	0:08
Music and radio	0:35	0:30	0:40	0:17	0:38	1:06
Video/computer games (includes online gaming against others)	0:39	0:55	0:24	0:38	0:39	0:42
Internet (e.g. messaging, email, music/video content, visiting websites)	0:49	0:42	0:53	0:14	1:01	1:36
Other computer (not online or gaming)	0:04	0:04	0:05	0:04	0:03	0:07
Net electronic media/communications (excludes homework on computer internet)	4:49	4:51	4:44	3:36	5:00	6:43
Net screen time (homework on computer/internet + TV + DVDs + gaming + internet + other computer)	4:03	4:15	3:51	3:19	4:15	5:11

Source: *Media and Communications in Australian Families 2007*, Australian Communications and Media Authority (ACMA)

The future audience is computer, internet and mobile savvy, well rehearsed in moving from big screen to small screen, from one application to another. The picture of the modern audience also includes:

- 1 *Conduit multiplication and audience fragmentation*: With the advent of more television channels, more radio channels, thousands and if not millions of internet sites, mobiles phones, and so on, there is now an assumption of *fragmentation* of audiences. People have far more options available to them.
- 2 *Timeshifting*: People can use their *timeshifting technology*, like the personal video recorder (PVR) or TiVo to by-pass advertisements and make monitoring of their exposure difficult.
- 3 *New uses for television*: DVDs, game stations and other television-attached-media reduce attention to traditional broadcast television.
- 4 *Ambience*: Traditional broadcast television like radio is becoming a background medium with people doing other tasks while watching television.
- 5 *Shift to below-the-line advertising*: There is a trend towards a more accountable media spend because of conduit multiplication and fragmentation. Advertisers are demanding that there is evidence that their audiences are in fact exposed to advertising in a fractured media market.

Getting a 'picture of the audience' appears to be getting more difficult, or at least getting a more detailed picture that advertisers and others want is becoming more difficult.

The Average Household and the Representative Individual

Professor Elton Mayo was chair of Psychology and Ethics at Queensland University, Australia, when he gave the major address at the Second Advertising Men's Conference in 1920. Mayo went on to be internationally famous in the area of industrial psychology for the Hawthorne Experiments of the 1930s and 1940s. In his address he made an extraordinary statement that the advertising agencies' role is to 'educate in the broadest and highest sense of the term'. Their role is to identify the reasons for social disorder. Their role is to persuade in order to protect order. But Mayo goes further – 'you must think for the housewife'. While we can see Mayo as being paternalistic and condescending to women, Mayo is certainly not being derogatory. Housewives were not only the major advertising market of the time, such that the audience was typically conceptualized as a 'she' in this era and the most important business of advertising agencies was to collect data about

housewives, but advertising agencies were seen to be entering into a particular kind of social contract with housewives. They were to be seen by the housewives themselves to be doing research: 'and if you do that for her and if she finds you are doing it, you will have her confidence' (Braverman 1974).

Mayo anticipated the complex role advertising and marketing plays in contemporary society. Advertising and marketing are not simply part of a merchandising and management cycle but are an essential part of a governance cycle in research. Research about audiences has to be seen to be legitimate and an accurate representation of the interests of the audiences concerned. Mayo believed that if 'thinking for' the audience became seen to be manipulation then it would not be seen to be legitimate. 'Satanism' and 'Bolshevism' in this context are not to be met by rage and hate. Scaremongering or unplanned campaigns against them must be accomplished by other means which seek out motivations and seek to enter into the same relation with audiences as Mayo prescribed for housewives.

At first glance, this might all sound a little contrived. It is important to remember, however, that Mayo was talking at a time when there was an intense interest by advertisers in the discipline of psychology and, of course, behaviourist psychology in particular. The interest in psychology came from a need to gain *predictive advantage* with advertising, to be able to anticipate what consumers would do. Classification or categorization of consumers was one step, but prediction was not possible if those categorizations did not represent possible motivations. Today, we talk about people-as-categories without second thought, labelling generations as Generation X, Generation Y, the Net Generation and so on, as though whole collectives had specific psychological characteristics that could predict behaviour.

Advertising agencies employed high-level academics in order to investigate the link between advertising, motivation and product purchase. J.B. Watson, for example, worked for J. Walter Thompson (JWT) while keeping his post at university, and investigated the link between advertising, consumer motivation and product purchase. In 1922 Watson was appointed vice president of advertising of JWT. One of JWT's major studies at this time was in Australia. As mentioned in Chapter 2, it employed two psychologists, A.H. Martin and Rudolph Simmat, to conduct research into the categorization of Australian consumers of advertising. In 1927 Martin established the Australian Institute of Industrial Psychology in Sydney with the support of University of Sydney's Psychology Department and the Chamber of Manufacturers. He used his own mental tests that he had created at Columbia University to measure consumer attitudes towards advertising. Simmat, his colleague, was research manager for JWT in Sydney and involved in the standardization of art production and research procedures in advertising. As discussed, Simmat and Martin divided Australian society into four market segments

based on income and housewives, similar to those used by McNair and Anderson but with an additional interest in the psychology of the housewife. Classes A and B were high-income housewives. Classes C and D were average or below average income housewives. The categories, derived from interviews with over 30,000 women, were used to assist in creative production, helping JWT to fashion advertising for women within each of the classes. They were also used to make judgements about how to get information back from those classes, with recommendations from Simmat that interviewers avoid women in Class D and interview the husbands only (Simmat 1933).

Advertisers at this time were not only interested in enumeration – the number of people who looked at or listened to advertisements – but categorization – the types of people who looked or listened. This meant that the idea of making up ‘representative’ people became important in the whole advertising enterprise. The phrase ‘the average housewife’ is a description of a type of person that represents all other people within a collective. Moreover, these types could be counted. Categories of person could be linked to statistics and statistical decisions on what those types might do. When Crossley started audience ratings, therefore, it was not in order to just create a head count. Embedded in the ratings were the Classes. It is not surprising that CAB, the advertisers, wanted to keep its ratings secret. This was the first real linking of categorization to numbers. The broadcasters got the ratings on the black market up until 1936 when CAB gave in to industry pressure to give stations access.

It was not until later in the 1940s and 1950s, however, that the statistical representation of types of people in probability samples became commonplace. At that point, the ‘average listener’ could be found without having to interview 30,000 or more people; the average listener could be found from small samples and generalized to the whole of that statistical collective. Advertisers could talk about Class C being the average listener, for example, and the major user of radio. The categorizations of the audience, therefore, were definitely imposed and not ‘bottom up’, derived from interviews from the audience. Indeed, in order to find out whether someone was in A, B, C or D Classes for telephone interviews, research was done by rental classification in the geographic location where the telephone respondent lived – exchange and street address (Beville 1940). In the case of personal interviews it was left to the judgement of the interviewer to which class a person or household belonged. The social stratification of households in the early ratings radio surveys was: A, US\$5,000 and over; B, US\$3,000–\$4,999; C, US\$2,000–\$2,999; and D, under US\$2,000. But as Beville pointed out, none of these categorizations of individuals represented the typical, or the *normal*, listener (Beville 1940). The normal listener was a statistical construction based on the data.

Mayo's arguments about 'thinking for' the housewife assumed that the scientific derivation of categories of people, done properly, would be an accurate representation of the people concerned. There was, for Mayo, no manipulation of categories or subjective distortion when science was involved together with the proper application of psychological principles. With due respect to Mayo, of course, a simple translation of science to human society does not work and the influence of ideology is inevitable when constructing 'classes' of people for the purposes of analysis. Where Mayo is right, though, is that 'thinking for' people brings with it significant responsibilities, and his ethos for the role of the advertising agency remains a testament again to the strong democratic theme that existed among the early audience researchers and ratings intellectuals.

Early ratings data collection from samples, however, could involve very close contact with families. Gwen Nelson, field manager for McNair, as we found, knew all the families in the ratings samples. The categorizations A,B,C,D,E were chosen in McNair's procedure by the fieldworker's personal decision on which classification a household belonged to:

I went overseas in '55 to find out a little more about TV research. In 1956 we had the Olympic Games in Melbourne. I supervised the first TV survey ever done in Australia, and we combined it with our usual survey, checking what you were listening to or what you saw yesterday. And I remember very clearly, there were 3.2 per cent of Melbourne residents, according to us, that had a TV set. No one in the upper classes, around Richmond/Carlton area. The interviewer used to check if they found anyone who had a TV what they viewed yesterday, and how many people viewed. There was one house in Richmond, a very poor house, a very much an E, there was a huge group of people. And as the woman said, 'We're the lucky ones. We're the only one in the street that has a TV set. And we charge adults sixpence and children threepence and they all bring their own chairs to watch TV.' And that was the beginning of TV in 1956. (Nelson 2000)

The 'home' or 'household' was the first major unit of analysis for the purposes of categorization in ratings. Those units were then classified by Classes, the main target groups. Advertising and product planning revolved around the 'households' in Classes as the target groups. The unit of analysis then shifted to the 'individual' and a broader coverage of demographics and time use when mobile radios emerged and when peplemeters came into operation. Today, this has been broadened again to the use of product purchase data, 'buyer graphics', rather than only general demographics to define target groups, with the calculation of achieved television ratings against buyer graphics (with a resulting optimization of the television schedules).

Ratings definitions of audiences are abstract definitions of the audience can in turn affect how the people see themselves. Ian Hacking makes this point in terms of the use of statistical language generally:

We can think of average height as an abstract – the convenient result of an arithmetical operation – but we can also begin to think of it as a ‘real’ feature of a population. In 1988, it was noted that the longevity of Japanese has been increasing every year, to the point where the Japanese are now the most long-lived nation on earth. We find it hard not to think of this as being a real feature of Japanese life and culture, just as ‘real’ as the fact that Japanese corporate entities have among them the world’s largest accumulation of disposable capital for investment. (Hacking 1990: 108)

Home Studies and the Public

It would be a serious error to assume that research into audience ratings and homes has only been about statistical estimation and not the in-depth investigation of the domestic lives of the people themselves. Historically, wherever the audience-ratings convention has held there have been significant and ongoing studies of the domestic environments of homes. This is perhaps not surprising. Everyday life has changed dramatically over the past century together with the technology that supports it. Ratings have always been recalibrated to changed circumstances. Mobility with the radio transistor created changes, computers created changes, as has the changing work and lifestyle habits; among many others. It is beyond the scope of this book to cover all the home studies in the United States, United Kingdom and Australia. However, the US Committee on Nationwide Television Audience Measurement (CONTAM) reports are an excellent example of the depth to which home studies go. *How People Use Television I* and *II* looked at television use in detail, how they interact with the medium, what they consider to be watching television (Committee on Nationwide Television Audience Measurement 1991; Committee on Nationwide Television Audience Measurement 1992). The studies found, for example, that: the average US person in the 1990s watched television five nights a week for two hours or more and primarily watched it for entertainment; 80 per cent of people knew in advance what they were going to watch on any given night; and half of women and 40 per cent of men did other things while watching television (reading, doing paperwork or chores, playing a game, eating a snack). The Systems for Measuring and Reporting Television (SMART) reports likewise covered in depth quantitative and qualitative aspects of households, including among others: ‘Beyond ratings: what it means to be in the television audience’; ‘A set of one’s own: television sets

in children's bedrooms'; 'Children's and teen's research workshop: progress on the hard to measure'; and 'Children's lifestyles study'.

It might be argued that citizens do not take much interest in the abstract categories created to describe them in the audience ratings. But this is far from the case. In the United States, as in Australia and the United Kingdom, fan mail operated on a massive scale. For example, NBC alone received 20,000 letters a day from radio listeners all over the country throughout the 1920s and 1930s. Letters, postcards, telephone calls and telegrams received in the course of a year as a result of national advertising on the air ran into the millions (Banks 1981). Hugh M. Beville, in his first job with NBC, recognized the advantages of fan mail and created regular ways of soliciting, collecting and interpreting the mail. The difficulties with fan mail, however, were that it was not collected in one place, with some of it going to a radio station, some of it to the networks, some to the personalities, some to the sponsor and, not least, some to government authorities. These letters often made it clear how listeners felt about ratings, about programmes and about personalities, among many other things. This fan-mail 'voice' of the audience declined over the 1920s as other ways of organizing voices emerged. By the 1960s active interest in how the media worked was represented in groups such as Accuracy in Media, Action for Better Community, Action for Children's Television, American Council for Better Broadcasts, American Medical Association, Federal Communications Bar Association, National Association for Better Broadcasting, National Audience Board, National Black Network, National Citizens Committee for Broadcasting, National Council of the Churches of Christ, National News Council, National Organization for Women, Parent Teachers Associations, Prime Time School Television, Spanish International Network and United Church of Christ. This is only a sample. There were 32 entries under the *Aspen Handbook on Media* called Media Action Groups.

The ratings provider did not directly need consent from these groups to run its audience ratings research. However, it did need consent from those participating directly in its panels or research for permission to enter into their households and their personal lives.

Audience Consent

The dynamics of recruitment into audience ratings research are complex and thorough, meeting the highest standards of any market research code of ethics, leaving aside problems of sampling bias for other reasons. The letter opposite from McNair Anderson from the early 1970s gives an insight into the appeals the ratings provider made for consent from the listener or viewer. The letter makes it clear that the participant's household is *representative* of families in their own area and that their cooperation is essential because they cannot be replaced by just any other household.

McNair Anderson

Marketing Research
Advertising Research
Media Audience Measurement
Social Research
Nationwide Omnibus Surveys

40 Miller Street North Sydney
Australia 2060
Telephone 929 6122
Telex 26260
Cables: IPORES North Sydney

Also in Melbourne and Auckland

SURVEY OF RADIO LISTENING

Dear Household,

This brochure is to ask you to take part in a survey of Radio Listening in your area.

Naturally, the two questions which immediately come to mind are - "Why are we chosen" and "Why should we co-operate?"

These two questions can be answered very simply.

Firstly, there are a great many families living in the area covered by this study. Obviously, we cannot contact every one of these families, so we have scientifically selected a number of families in each of 100 different localities in such a way that the **Selected Families** will in total be truly representative of all the families in the area. Your family is one of these **SELECTED HOUSEHOLDS**.

Secondly, to ensure a high degree of accuracy in the results of the survey, a Household, once it has been selected, cannot in any circumstances, be replaced by another household. Therefore the co-operation of your **household is of vital importance**.

The object of this survey is to obtain basic facts to enable those concerned to keep abreast of rapidly changing conditions and to guide them in their programme planning to give continually improved programmes and service to Listeners.

Australia and New Zealand
representatives for
Starch/Inra/Hooper

Research facilities in over
60 countries.

Figure 9.1 McNair Anderson Survey of Radio Listening household appeal, 1970s

The appeal to *civic duty* was not accidental. People were surrendering their time and privacy to provide details to the ratings provider. The ratings provider, at the same time, understood the burdens that this might place on a household. Of course, a ratings panel, unlike a one-off survey, adds additionally to the participant burden because the data collection is continuous. The rationale of small samples representing big populations addressed important problems of intrusion. The

whole nation did not have to be surveyed to obtain quality data. The participating household's sacrifice of its time to help researchers also limited intrusion to the minimum necessary.

Today, the high quality of recruitment techniques for panels remains. The environment in which Gwen Nelson at McNair's recruited her participants, however, has gone forever. As we saw in Chapter 2, there are special factors that appear to be affecting audience participation and consent for participation in ratings panels, not least the issue of intrusion into a household's technology for data collection. Non-response to surveys, though, is not just an audience-ratings issue. People are refusing to participate in surveys across a range of demographics and in many countries. We know that:

- 1 Non-response to surveys has been increasing, with steep declines after 1996.
- 2 The increase in non-response rates is happening for most types of surveys with telephone and personal interview highest.
- 3 Increases in non-response is a global phenomenon.
- 4 There does not appear to be a single explanation for the trends in non-response.
- 5 Long-term trend surveys provide the empirical evidence of changes in response and non-response.

Curtin, Presser and Singer, in their study on changes in telephone survey non-response over the past quarter of a century in the United States (Curtin, Presser and Singer 2005), demonstrate these trends dramatically. The University of Michigan's Survey of Consumer Attitudes (SCA) shows non-response is marked by three distinct periods, a gradual decline in 1979 to 1989, a plateau from 1989 to 1996, followed by a steep decline after 1996 towards figures as high as 40 per cent. This trend in non-response can be found in other studies and the US Census was proactive in 2000 in attempting to address non-response rates. To understand non-response we need to understand what is a response. The most common definition for response is 'sampling units completing a survey' divided by 'all sampled units'. But there are different types of refusal. There could be a direct refusal, non-contact (the householder never answers or sends survey back; the survey not delivered; the household could not be found), partial completion of the survey, or an inability to participate (literacy or language barrier, or legal status in the society).

The motivations for non-response in the modern context are many. Once civic and, in the American context, patriotic duty has left the mix as a motivation to join a

survey, there are many motivational factors remaining to encourage non-response including: too many demands from survey researchers; respondents being too busy to meet the demands; concerns about misrepresentation and privacy; and, where the survey involves configuring home equipment, wiring, telephone and internet settings, concerns about the integrity of a home's media environment.

The survey researcher is, at the same time, faced with a range of access issues, such as answering machines, caller ID, mobile phones, multiple phone numbers, unlisted numbers, gated communities and limited access apartments, among others. Keep in mind that non-response from all these factors does not always equal non-response bias. However, if a survey researcher meets the point where the 'vitally important' type of household cannot be recruited in sufficient numbers to meet sampling needs, then sampling bias becomes a problem. Interviewing techniques and other factors, of course, can affect bias. But recruitment is key to having a sample and without that there is no participant to interview or household's media use to monitor.

Demand for more information from audiences or consumers is being matched by non-response from those audiences or consumers. Just as there has always been a trade-off between Case Rich and Data Rich designs, there have been trade-offs with participants on limits of intrusion. An understanding of these trade-offs has been integral to the audience-ratings convention historically and into the future. Equally integral to the convention is the longstanding ambition to marry ratings data with other data to create comprehensive systems of data measurement. These two tensions came together in Project Apollo. The desire for more information from people at all times led parties of the audience ratings to come together to try to create a single method for capturing all behavioural data.

Project Apollo started to take shape in 2004 as different parties to the audience-ratings and retail-panel conventions came together to try to use the same households to measure different things. Data was to be collected from 30,000 US households and involved close cooperation between ACNielsen, providing product-purchase data from its HomeScan panel, and Arbitron, providing media exposure information from its passive, Portable People Meter (PPM) technology. This was scaled down to 5,000 households. The aim of Project Apollo was to establish the ultimate single-source design, with purchase data linked to exposure, indoor and outdoor. The PPM system works by inserting an inaudible code into a broadcast transmission at the radio station. The small pager-type device, which is worn by the respondent throughout the day, uses a microphone to capture the codes and subsequently download them to a central computer. While technically feasible, participants in the Project Apollo study did not like the demands made upon them, demonstrating the limits of intrusion. The costs of getting the information, at the same time, were perceived to be beyond those who demanded it.

Over US\$100 million was spent on the development of this project with Proctor & Gamble a key sponsor, and Kraft Foods, Pepsi, Pfizer, SC Johnson and Wal-Mart on the project's steering committee. Various reasons were advanced for the scaling back of Project Apollo to a pilot study and then cancellation. Arbitron said that there were not enough marketers willing to make the long-term commitment, and Proctor & Gamble said that Nielsen and Arbitron did not have the patience or money to invest in order to work through the challenges. There were spin-offs from the study, including the Touchpoints product. But audience resistance to intimate and extensive data collection was also a factor. This is not only a matter for traditional media or single-source experiments as audiences have voiced similar concerns in internet, cable TV and personal video recorder environments as well.

Some companies are using professional survey takers (PSTs) to ensure that they get usable survey results for targeted demographics. At one stage, comScore's behavioural tracking panel showed that some major panels had 30 per cent of their surveys being taken by less than 1 per cent of their panellists (Bortner 2008). Audiences in a broadcast ratings panel are not bought, although incentives might be provided as reward for participation. The ratings has relied on its identity as a pro-social service and relied on its volunteers as a source of its integrity. The PST phenomenon, however, raises a broader issue about voluntary labour in the audience-research industry and whether audiences should have a stake in the valuable data that they provide. In the case of TiVo, it is voluntary audience labour that produces the data that TiVo packages and sells on. The audience is not paid for this 'work' nor does it receive a dividend from the sale of its data. The PSTs have clearly recognized their value in the market and no doubt it will not be long until the issue becomes a more generalized, society-wide one. While it is doubtful whether ratings sampling needs will permit using PSTs, ratings provision operates within environments where being paid for participation is increasingly common.

The Knowledge Aggregators

Knowledge Aggregators typically use the capacity of interactive systems such as the internet and set-top boxes and personal video recorders (PVRs) routinely to register and record activity from users and viewers. The creation and maintenance of large datasets is intrinsic to the very design of these media – the internet, cable TV and PVRs. Having created these datasets and functions it is a seemingly small step to try to monetize them, turning the search engine company, the pay-TV provider and the PVR facility into a knowledge aggregator. But unlike the traditional forms of audience measurement which needed to be built on top of TV sets and devices retroactively fitted to sets with the active consent of participants, in these media the

datasets, the information, are inbuilt whether as billing information or the registration of sites visited. Audience surveys are being built through the ordinary transactions and activities of people rather than through the active involvement of respondents. If the problem in the traditional ratings world was getting consent for participation, the problem in the knowledge aggregation world is getting informed consent for the aggregation of personal information.

What makes this area especially important for a book on audience ratings is that we are increasingly seeing these entities use their proprietary databases to generate and market ratings-like information about the audiences for their services. Such knowledge aggregators are promising to fill an acknowledged gap in the media measurement of small audiences, and to provide more detailed profiles of the audiences for their services and their media consumption. They are also promoting themselves as providing more accurate information because it is built on registration systems somewhat analogous to Nielsen's Audimeter in the 1940s – measuring actual rather than self-reported behaviours. So at three distinct levels these aggregators are important: they represent another way of collecting and organizing the sample population to the side of the traditional ratings instruments; they represent potential competitors for ratings services; and in doing these they are fundamentally altering the compact audiences have with collecting and sampling agencies.

In many ways these aggregators have a much weaker relation to their audiences. With click-through contracts the order of the day there is a far weaker connection with audiences as volunteers and as a workforce for the ratings provider. Instead, the audience is forced into agreeing to participate in these services as a means of getting access to the services offered. This inevitably gives rise to a sense among audiences that knowledge aggregators are operating with, at best, only weak consent from them. In not being as centrally involved in the transaction they are likely to feel exploited in that someone else is making money out of them and their behaviour (so are increasingly likely to not respond to arguments of civic duty in other contexts); and they are likely to experience themselves as being treated as a commodity and a number more than as a representative population who is being respected by the process.

Knowledge aggregation takes many forms on the internet. User tracking is only one form. The term *news aggregator* describes websites or search engines that select, retrieve and link news from anywhere on the internet. Google News is an aggregator of news from thousands of sources. An RSS (Really Simple Syndication) is an aggregator as it pulls together threads relevant to the person who has subscribed to it. Knowledge aggregators like Google, as we know, are keen to be the ratings providers of the future. This is not surprising. The monetization

of internet audiences is now well established. RSVP, an internet dating site, had 600,000 members in 2005 when Fairfax bought it for AUS\$38.92 million. Fairfax group executive Alan Revell told the media that online dating had become a mainstream classifieds market (Australian Associated Press 2005). Jupiter Research estimated that in the United States alone, online dating will increase from US\$900 million in 2007 to US\$1.9 billion in 2012. This comes as no surprise, with internet advertising spending growing six-fold from 2004–9 (IBISWorld 2009). Advertisers and marketers have been quick to recognize that online sites have the potential to deliver rich data about audiences and the negative effects of this have also been recognized (Andrejevic 2002; Andrejevic 2003; Andrejevic 2005; Andrejevic 2006).

Audiences, though, have reacted negatively to attempts to retrieve their data from their sites (Fogel and Nehmad 2009). As discussed in Chapter 4, in 2009 Facebook planned to exploit the private information of its 150 million members (now 500 million) by creating one of the world's largest market research databases. Facebook would have allowed multinational companies to selectively target its members in order to research the appeal of new products (Musil 2009). Users were outraged and Facebook had to revert back to its old privacy policies (Walters 2009). The willingness of people to put intimate details about themselves on the internet is not the same as giving consent to have that data harvested and used by the service providers who store the data. Raynes-Goldie conducted a study to understand how Facebook users under 30 understood privacy by conducting a year-long ethnographic study starting in January 2008. The study was undertaken in Toronto, Canada, home to the second largest regional Facebook network. Raynes-Goldie concluded that:

Contrary to much of the mainstream rhetoric, my participants *did* care about privacy. Specifically, my participants were more concerned with what I call their *social* privacy when using Facebook, rather their *institutional* privacy. In other words, they were more concerned about controlling access to personal information rather than how the company behind Facebook (which I will call Facebook Inc. for simplicity's sake) and its partners might use that information ... The importance of social privacy was further demonstrated by the lengths to which some participants would go to maintain their social privacy, and in some cases, violate the privacy of others. (Raynes-Goldie 2010)

One of the main subversive ways that users were trying to protect their social privacy was through the use of an alias. The goal of these users, Raynes-Goldie found, was 'to make it difficult for people to find them via search, or to attribute their Facebook activities to their "real" identities'. But in using names in this fashion they were going against the Facebook 'Terms of Service', which stipulates that users

must use their real names and identities when using the site. Indeed, Facebook will delete accounts using algorithms crawling the site to identify fake identities (Breyer and Zuckerberg 2005). The problem of identity is, of course, fundamental to social media, where people need to be able to trust that people are who they say they are, and, in any marketing research, lying about age and other demographics biases results. Facebook wants its online participants to be real people not only to protect other users but also to turn data into a revenue stream.

The ideal advertising situation for the advertiser is where an advertisement can be guaranteed to go to the right target person or group. A real person on Facebook with their real date of birth represents powerful data. The problem of how personal data is collected and how it might be safeguarded in digital contexts has not been missed by regulators. In 2009 a US House of Representatives subcommittee investigated whether Canoe Ventures, created by six cable TV operators, was going to use set-top boxes to monitor and store what people watch and then rollout targeted advertisements based on set-top data to viewers. If Canoe Ventures wanted to use set-top box data for targeted advertising, then it had to comply with existing cable laws protecting private consumer information. Using actual personal information to target advertisements is not allowed, except where an opt-in facility is provided (for example, clicking on a pizza advertisement to order a pizza on an interactive screen). The idea that privacy issues have been fully addressed, however, is far from the case.

The biggest question in the industry, it seems, is not whether data from cable set-tops will be culled and analysed to give greater clarity on who is watching what – and when – but whether it turns into a new revenue stream for the cable operators, satellite companies and telcos who have control over the data. Mediapost is reporting that the advertiser and media company consortium CIMM (Coalition for Innovative Media Measurement) has sent out a questionnaire to the set-top box cabal pointedly asking the question of whether they plan to sell set-top box data, and whether they are setting up a unit that has the aim of eventually making viewership data a revenue stream. But, to me, asking about whether the data might be turned into a revenue stream is getting a bit ahead of itself. Before these companies start dispersing data, they need to focus on the issue of consumer privacy, which is the 800-lb. gorilla in the room, whether the industry is doing enough to safeguard privacy or not. The CIMM questionnaire also asks this: ‘If privacy is currently a concern, how long do you think it will take for privacy issues to dissipate?’ (Taylor 2010)

TiVo is a good example of a company that follows the privacy legislation but where even its subscribers wonder whether their data are protected. TiVo launched

its StopItWatch ratings service in 2007, offering a sortable database of ratings for nationally run programmes and advertisements from cable and broadcast networks, with data going back to September 2006. The service tracks ratings for 93 networks from 5.00 a.m. to 11.30 p.m. In 2009 it launched StopItWatch for local markets, offering a sample of 25,000 TiVo subscribers in the top 20 markets down to 5,000 in the smallest local markets. Markets that are electronically measured by the current panels in comparison use less than 1,000 households. TiVo sporadically conducts random samplings of its subscribers.

TiVo found itself queried by its own audiences after one of its sporadic random samplings of 20,000 viewers, in this case of its Super Bowl broadcast:

Janet Jackson's Super Bowl flash dance was shocking in more ways than one: some TiVo users say the event brought home the realization that their beloved digital video recorders are watching them, too. On Monday, TiVo said the exposure of Jackson's breast during her halftime performance was the most-watched moment to date on its device, which, when combined with the TiVo subscription service, lets viewers pause and 'rewind' live television broadcasts, among other features. TiVo said users had watched the skin-baring incident nearly three times more than any other moment during the Super Bowl broadcast, sparking headlines that dramatically publicized the power of the company's longstanding data-gathering practices. 'It's just sort of creepy,' longtime TiVo subscriber Sandra Munozshe wrote in an e-mail to CNET News.com. (Cnet News 2004)

TiVo has an opt-out number and publicly said that it has disclosed its data-gathering practices in user agreements, stripping out any information that could be traced back to individual viewers. TiVo could investigate an individual's viewing habits but it does not, according to TiVo. It does now and then take data from a random sampling of 20,000 homes viewing a particular programme. "I can understand people's concerns," said spokesman Scott Sutherland. "But when weighted against reality, they are unfounded" (Cnet News 2004).

'Make no mistake, I do clearly love the box,' engineer and longtime TiVo user Jerrell Wilson wrote in an e-mail to CNET News.com. 'I have been a tireless sales rep with all my friends. I should be on commission from TiVo. Thus arises the most severe form of anger: that deriving from a perceived betrayal of trust.' (Cnet News 2004)

What is occurring at present among audiences is the same phenomenon that occurred in Project Apollo. It is not that gathering extensive information from audiences is morally wrong or that companies like TiVo have breached regulations.

What is happening at present is the growing recognition among audiences about what is, indeed, happening with their data, identified or de-identified. The very act of them ‘feeling watched’ or that they feel they have to subvert the very services they join signal that these audiences are not in an audience-ratings convention that satisfies them – indeed, not in a ratings convention at all. The authors argue that the combination of increasing non-response rates and audience sensitivity about how data about them is collected and used through electronic means is a toxic mix. More than any other issue in the audience-ratings convention, it is this one that needs an agreement that guarantees audience participation in research in future.

Summary

Audiences are represented by statistics and those statistics are used as a representation of audience behaviour. The optimum delivery of an advertising message is one that goes exactly to the target group or individual concerned. In traditional media planning this would often mean there would be an element of waste in a media plan. Audience ratings statistics would give an indication when a particular target group was watching a particular programme. An advertisement placed at the same time, however, might or might not reach all of its audience. Repetition of an advertisement, therefore, guaranteed that a certain proportion of the target group would have at least seen the advertisement once. Set-top box and online audience data promise the tantalizing opportunity of placing an advertisement much more precisely with target individuals or groups.

The temptation to go what must seem a small step further and use the personal identity of the audience in media planning is enormous and should not be underestimated. The audience, however, remains one of the most important, if not the most important, player in the audience measurement. Its consent is still sought and needs to be sought. Its reactions to how it is represented are still important in decisions made about them. There have been several trends that are affecting the position that audience consent has in the audience-ratings convention.

Intimate publics: Audiences are now putting intimate details online and those data are of interest to knowledge aggregators. Just as there has become in the audience mind a blurring between telemarketing and real research, so has there become a blurring between big systems harvesting data from individuals and groups and the public interest side of audience ratings. The TiVo example is instructive here. TiVo might have covered all its privacy bases in drawing data from its 20,000 panel who watched the Super Bowl. But what is of interest for our purposes is the reaction of the audience, even those who had given consent. The idea that TiVo had broken

trust reflected a deep seated feeling among the audience that something had gone wrong in the arrangement.

Non-response: The trends towards non-participation in survey research are likely to continue. This raises a broader societal concern about how data about individuals are going to be collected for the planning and delivery of services, let alone audience ratings. It is not within the compass of this book to go into detail about the problems of a survey-research-saturated public but there can be little doubt that audiences, where possible, are starting to use means to (i) distort their identity in order to protect their identity, and (ii) use technological tools to limit the access of researchers.

Limits to intrusion: The advantage of the earlier regimes of audience ratings was in their capacity to limit the intrusion of research into the lives of all individuals in society, by virtue of a representative sample. The amount of information sought was, likewise, limited. However, the demands for more information about individuals have escalated with no equivalent change to the audience-ratings convention and the role of audiences. Much of the literature focuses on how to collect more data, not on how to create new ways of enhancing audience consent. Project Apollo could have and should have foreseen what would happen with its audience. Audiences, as we have long known, put limits on intrusion, physical and mental.