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Philip M. Napoli
Fordham University

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WORKING PAPER

**TOWARD A MODEL OF AUDIENCE EVOLUTION:
NEW TECHNOLOGIES AND THE
TRANSFORMATION OF MEDIA AUDIENCES**

Philip M. Napoli

Director
The Donald McGannon Communication Research Center

July, 2008

This paper is derived from the forthcoming book,
*Audience Evolution: New Technologies and the
Transformation of Media Audiences.*

The Donald McGannon Communication Research Center
Faculty Memorial Hall, 4th fl.
Fordham University
Bronx, NY 10458
718.817.4195
www.fordham.edu/mcgannon
mcgctr@fordham.edu

Abstract

This paper proposes and develops a model of *audience evolution*. The concept of audience evolution in this case refers to the notion that the dominant framework employed by media industry stakeholders (content producers, distributors, advertisers, media buyers, etc.) to conceptualize the audience evolves in response to environmental changes. These environmental changes primarily involve technological changes that simultaneously transform the dynamics of media consumption as well as the dynamics of gathering information on various dimensions of audience behavior. These technological changes also interact with one another, in that the technological changes that affect the dynamics of media consumption also simultaneously provide new means of gathering information on previously unmeasurable aspects of audience behavior. These technological changes, and their economic and strategic implications, are then filtered through a process of stakeholder resistance and negotiation, out of which new institutionalized conceptualizations of the media audience emerge. This paper asserts a causal relationship between the decline of traditional exposure metrics and the emergence of alternative conceptualizations of audience behavior. That is, the extent to which the fragmentation of the media environment is undermining the long-institutionalized exposure-focused conceptualization of the audience is creating an environment of exploration of – and receptivity toward – alternative conceptualizations of the audience that are derived from dimensions of audience behavior that are better capturable in today’s increasingly fragmented, increasingly interactive media environment. This pattern suggests that the *institutionalized audience* is a very malleable construct; something that evolves in response to environmental conditions in order to facilitate the continued functioning of the audience marketplace.

Toward a Model of Audience Evolution:
New Technologies and the Transformation of Media Audiences

Introduction

Media audiences are changing. The dynamics of how audiences consume (and now, even produce) media are changing, as are the ways that media industries make sense of, and define, their audiences. New technologies are at the heart of all of these changes. New media technologies that give audiences increased control and increased choice over when, where, and how they consume media are transforming the relationship between audiences and the media. At the same time, new technologies for measuring and monitoring audience behavior are revealing aspects of how and why audiences consume media that previously were unknown (Napoli, forthcoming).

These technological changes are compelling media industries to think differently about their audiences, undermining traditional conceptual and analytical approaches, while at the same time opening up new dimensions for conceptualizing audiences. Thus, while in some ways audiences are becoming more elusive and more unpredictable, in other ways, new systems of measuring media audiences, of gathering feedback from them, and of anticipating their tastes and preferences, are making it possible for media industries to fundamentally redefine what media audiences mean to them and how they factor into the economics and strategy of their businesses. Thus, we are in the midst of an evolution in the nature of media audiences. Just as a growing body of scholarship has shown how media evolve in response to changing environmental conditions (see, e.g., Dimmick, 2002, Noll, 2006), so too do *audiences* evolve in response to such changes.

Analysts of the media industries frequently have emphasized the idea that the audience is a socially constructed phenomenon; that these industries define audiences in a particular way that tends to reflect their particular needs and interests; and that as a result, many significant dimensions of what it means to be part of the audience are neglected (see, e.g., Ang, 1991). To the extent that this is the case, when we talk about the evolution of audiences, we are essentially talking about the evolution of *how they are perceived*. However, in moving beyond the fundamental notion of audiences as a socially constructed

phenomenon, we need to devote more attention to questions such as: how do these social constructions of media audiences change over time? What are the technological and institutional forces that can effect such change? How are such changes negotiated, and resisted, within the complex dynamics of the various stakeholders involved in attracting and monetizing media audiences? And, finally, what are the broader socio-cultural implications of the changes taking place in the social construction of media audiences? These questions are at the heart of developing a deeper understanding of audience evolution, which in turn helps us to develop a deeper understanding of the process that affect the production, marketing, distribution, exhibition, and consumption of cultural products. These are the questions that this paper, and the broader project of which it is a part, seek to address.

The first section of this paper contextualizes the concept of audience evolution within the associated phenomena of media evolution and what is termed here the rationalization of audience understanding. Both of these processes are central to the concept of audience evolution being developed here in terms of the historical and theoretical framework that they provide. The second section outlines the three primary components of the model of audience evolution being developed here. The first of these is the transformation in the dynamics of media consumption that is taking place. The key aspects of this transformation that are integral to the process of audience evolution are the increasing fragmentation of the media environment and the increasing autonomy that media audiences have over their interaction with media. These transformations interact not only with each other, but also with the second major component of the model – the changing nature of audience information systems. The term audience information systems is used here in reference to the wide-ranging and consistently evolving mechanisms via which information is gathered about a growing array of dimensions of audience behavior. The changing nature of audience information systems provides important new inputs into how media organizations can conceptualize (and monetize) their audience (see, e.g., Anand & Peterson, 2000). Finally, the third key component of this model involves what is termed here stakeholder resistance and negotiation. It is through this often contentious process, involving stakeholders ranging from content providers and advertisers to citizens groups and policymakers, that a new conceptualization of the

audience emerges and is embraced by a sufficient majority of industry stakeholders to allow the audience marketplace to continue functioning effectively. The concluding section summarizes the paper's main points and considers avenues for future research.

Media Evolution and the Rationalization of Audience Understanding

Two distinct analytical frames are useful for contextualizing the model of audience evolution being developed here. The first involves the process of media evolution, wherein researchers have illustrated how media industries have evolved in response to changing environmental conditions. The second involves the rationalization of audience understanding, which involves the consistent historical progression toward bringing greater empirical and statistical rigor to efforts to understand media audiences. Both of these analytical frames represent historical processes into which the process of audience evolution can very easily be placed.

Media Evolution

As various analyses of media institutions and technologies have illustrated, it is useful to examine media systems and media industries through an evolutionary analytical lens (Napoli, 1998; Noll, 2006). From this perspective, we see that media industry sectors tend to follow specific evolutionary patterns in response to changes in their external environment. These environmental changes can come in the form of changing socio-cultural conditions, or in the form of changes in the technological environment (Dimmick, 2002).

Thus, for instance, researchers have illustrated how changing socio-cultural conditions, such as increased literacy, or increased per capita income, can alter the environmental conditions for media in ways that not only impact the extent to which a particular medium is utilized, but also how it is utilized, and even the nature of the content it provides. Increased literacy, for instance, helped book publishing move from serving only the highly educated – and publishing only content appealing to such an audience – to an industry serving a much wider range of audience interests. Such patterns, which have been exhibited in other media as well, such as television and the Internet, represent what has been termed the elite to popular/mass stage of media evolution (see Napoli, 1998).

Technological changes – particularly changes in available media technologies – also have been a fundamental driver of media evolution. Most often, such changes have been instrumental in moving media from the popular/mass stage to what has been termed the “specialized” stage, when more mature media technologies often find themselves struggling to remain viable in the face of competition from new media (see Napoli, 1998). Thus, for instance, the arrival of television forced fundamental changes to the motion picture industry, leading the industry to focus much more intently on the adolescent and young adult audience (the audience segment exhibiting the greatest continued interest in leaving the house to watch a movie), and to alter its content in ways that would better differentiate it from what could be found on television at that time (better special effects, more sex, violence, and foul language, color, etc.).

Dimmick (2002) has termed this process “competitive displacement” and it is important to note that the process does not come without substantial institutional resistance, as industry sectors engage in various efforts to preserve their established position, whether it be by attacking the emerging media through legal or economic means, or through attempting to adopt the characteristics of the new, threatening medium (Lehman-Wilzig & Cohen-Avigdor, 2004). And, as Winston (1999) illustrates, such efforts at resistance can substantially reduce the destabilizing effects of new media.

Perhaps most relevant to this paper is research illustrating how changes in the nature of information about media audiences have contributed to the process of media evolution. Thus, for instance, Barnes and Thomson (1988, 1994) illustrate how increased, more affordable, and more widely available computing power played a fundamental role in transforming magazines from a traditional “mass” medium to a medium in which stakeholders became much more focused on attracting and monetizing more narrowly defined niche audiences. In this way, the nature of audience perceptions impacts the nature of the media. This evolution in audience perceptions, and its underlying causes, is the focus of this analysis.

The Rationalization of Audience Understanding

Within the context of media industries and media audiences, the notion of the rationalization of audience understanding primarily involves efforts to bring greater empirical rigor and (primarily)

quantitative methods to the processes of understanding a wide range of dimensions of audience behavior, including awareness, and appreciation of, as well as exposure and responses to available content (see Bogart, 1957; Carey, 1980; Maxwell, 2000), under the presumption that these analyses facilitate greater predictability and greater control of audience behavior (see, e.g., Ahlqvist, 2001). As market researcher Leo Bogart (1957) noted over 60 years ago, such tendencies “seem to have emerged as part of the same wave of rationalization that has produced, since Frederick Taylor, several generations of industrial efficiency experts. The drive toward ‘scientific management’ has emphasized research in marketing as much as it has revolutionized cost accounting, perfected time and motion study, and automated manufacturing” (p. 133; see also Bogart, 1986). Within the context of media, a key element of this process is the extent to which it has spurred the development of a broad array of what are labeled here *audience information systems* – mechanisms of empirically assessing these dimensions of audience behavior.

The Early Intuitive Model

Most historical accounts of the evolution of audience understanding within various sectors of the media industry emphasize the early reliance on what is perhaps best termed the *intuitive model*. Under this approach, the subjective, often instinctive judgments of content producers, distributors, exhibitors regarding audience tastes, preferences, and reactions were the primary mechanisms via which organizational decisions were made. Historical accounts of early mass media, such as motion pictures, books, and newspapers, frequently highlight this analytical approach (see, e.g., Eaman, 1994; Hagen, 1999; Handel, 1950; Powell, 1978; Silvey, 1974). Austin (1989), for instance, presents the well-known story of Harry Cohn, President of Columbia Pictures in the 1930s and 40s, “who claimed he had a ‘foolproof’ method for predicting the success of a movie: ‘If my fanny squirms, it’s bad. If my fanny doesn’t squirm, it’s good’” (p. 1).

The result of this approach was something of an information vacuum in terms of the nature of the interaction between content and audience. One account of this time period notes the observation of a 1920s-era motion picture director, how complained that “production departments of the major companies

‘have not the slightest idea what happens to our pictures,’ and a director had no way of finding out ‘why his picture didn’t do well in the South, why his picture didn’t do well in England, why his picture could not be shown in Germany’” (Maltby, 1999, p. 23).

Some analysts have suggested that the fact that the economic conditions for these early mass media were relatively favorable created little demand for more rigorous empirical analyses to guide strategic decision-making (see, e.g., Austin, 1989; Bakker, 2003). For instance, according to early film audience researcher Leo Handel (1950), “The young industry, which could readily finance research projects, found little motivation to do so because the new, expanding market was active enough to provide a highly satisfactory volume of business for the leading firms. Most motion picture executives were content to let product improvement and sales policies rest on their intuitive insight of what the public wanted, rather than on direct contact with the consumer” (pp. 3-4).

Early Steps Beyond the Intuitive Model

The description above is not intended to suggest that early media organizations and industries were completely lacking in information about their audiences, or that the relationship between media organizations and their audiences has ever been a pure one-way, one-to-many model. Basic data such as box office grosses, sales, and circulation figures were available for analysis; though the analytical limitations of such data were, for the most part, readily apparent. Early motion picture audience researchers, for instance, were well aware that box office figures could not be interpreted purely as an indicator of a film’s audience appeal, as these figures could be a function of other factors such as advertising and promotional strategies (see, e.g., Handel, 1950). This consequently undermined the analytical utility of box office figures as a tool for explicitly gauging audience preferences, and thus as a tool for guiding future production decisions. In addition, the extent to which the box figures were, at the time, completely dependent upon distributor and exhibitor cooperation (in terms of the reporting of box office grosses) raised questions about their accuracy, further limiting their analytical value (Fiske & Handel, 1946).

Other feedback mechanisms, such as audience correspondence with the content provider, have a long history, ranging from letters to newspaper editors, to motion picture fan mail, to complaints to broadcast programmers (see, e.g., Lenthall, 2007; Turow, 1977-78). Such correspondence was utilized in audience assessment and strategic decision-making across early mass media such as motion pictures, newspapers, magazines, and eventually broadcasting (see Ohmer, 2006; Silvey, 1974). Movie studios, for instance, would measure and weigh the amount of fan mail received by their performers and “deduce from its increase or decrease the rise or fall in the popularity of the recipient” (Handel, 1950, p. 10). Most of the studios had dedicated fan mail departments engaged in such tasks, even going so far as to organize the mail according to the writer’s estimated age, gender, and geographic location (Bakker, 2003).

Early efforts to more rigorously assess audiences were perhaps most pronounced in the nascent broadcasting sector. The introduction of broadcasting as a pure ad-supported medium (at least in the U.S.) represented a somewhat different context from established media such as motion pictures and newspapers, in that the economic model provided an immediate, powerful incentive for more rationalized approaches to audience understanding – at least in terms of quantifying the size of the audience being reached by radio programming and its embedded advertising messages (Silvey, 1974). Thus, in the early days of radio, stations utilized a variety of approaches to providing advertisers with audience estimates. One approach involved mapping the station’s coverage area against the area’s population size and demographic data (Chappell & Hooper, 1944; Kingson, 1953); another involved gathering data on the number of radios sold in a listening area (Chappell & Hooper, 1944; Kingson, 1953). Of course, such approaches provided neither the station nor the advertiser with any concrete information about the size or composition of the *actual* listening audience; rather, they simply provided a rough estimate of the potential audience for any radio program. Yet the economic model of advertiser-supported broadcasting was able to take sufficiently firm hold in an environment of such imprecision.

As was the case with motion pictures and newspapers, letters to the stations figured prominently in efforts to understand radio audiences (see, e.g., Chappell & Hooper, 1944). British audience researcher Robert Silvey (1974) provides one of the more detailed discussions of how early broadcasters dealt with

audience mail as a feedback mechanism in his history of audience research at the BBC. Silvey (1974) notes that, within the BBC, “seeds of doubt” about the analytical value of audience letters were quickly sown “when it became quite apparent that the overwhelming majority of letters came from middle-class writers; that some issues . . . provoked far more letters than others . . . that while many letters began ‘I have never written to the BBC before,’ others came from people who wrote so often that they might be called BBC pen’ friends. . . . In a word, no one knows what any letter or bunch of letters is a sample of” (pp. 28-29). In 1955, the BBC went so far in its assessment of audience letters to conduct a survey in the wake of a broadcast of George Orwell’s *1984*, in which the distribution of opinions in the letters received was compared to the distribution of opinions of a broader sample of the viewing audience. The results indicated that, across groups, the ratio of approving versus disapproving audience members was similar; however, only the viewer survey sample captured the perspective of the large majority of viewers, who did not have a strong opinion about the broadcast in either direction (Silvey, 1974).

Early Stages of Rationalization

The time period of the 1930s frequently is identified as a key starting point in the progression to more rationalized approaches to audience understanding (see, e.g., Hurwitz, 1984; Ohmer, 1999). There are a number of key developments during this time period that are worth noting. The economic hardships of the Depression have been identified in many historical accounts as a key driver in the development of marketing, advertising, and audience research, as marketers, advertisers, and, ultimately, media organizations, found themselves under more intense pressure to maximize the efficiency of their resource allocations and to provide “tangible” evidence that money was being spent logically and effectively (James, 1937; Kreshel, 1993; Lenthall, 2007; Ohmer, 2006). As NBC executive E.P.H. James noted in 1937, “when the depression descended upon us, advertisers and their agencies immediately began to check over their advertising expenditures and sought justification for every dollar spent. In so far as it was possible, sales were traced to the mediums [sic] being used, or other strong evidence was accumulated to justify the continuance of the use of each advertising medium” (p. 141).

Looking beyond the Depression, another important cultural shift taking place during this time period involved the transition from a *production culture* to a *consumption culture* that many scholars assert began to take place during the early part of the 20th century (see Lenthall, 2007). This transition brought with it the need for goods manufacturers to know much more about their potential consumers, how best to identify and reach them, and how best to appeal to them (Buzzard, 1990; Ward, 1996). It is perhaps also worth noting that both the *Journal of Marketing* and the journal *Public Opinion Quarterly* were established during this time period (both were launched in 1936), which provides an indicator of the extent to which the intellectual infrastructure underlying these more rationalized analytical approaches to understanding the public, both as citizens and as consumers, were becoming institutionalized (see Bogart, 1957).

A number of historical analyses also have identified a variety of industry-specific factors that also were drivers toward greater rationalization of audience understanding. For instance, one analysis of the motion picture industry points to factors such as rising production costs, extended contract terms with stars, and the transition from fixed fee to percentage based rental contracts, as key motivators within Hollywood to more enthusiastically embrace audience research (Bakker, 2003). Later, the rise of television dramatically altered the competitive landscape for motion pictures, and further compelled the utilization of audience research in an effort to maximize box office grosses, as studios desperately sought information to help them retain their shrinking audience (Austin, 1989). Moreover, the (at that time) relatively short product life cycle for a single motion picture was seen as compelling studios to closely track changes in consumer preferences (Bakker, 2003).

As was noted briefly above, the widespread commercialization of radio that took place in the aftermath of the passage of the Radio Act of 1927 (see McChesney, 1993) provided a particularly powerful impetus for radio programmers and advertisers to aggressively invest in, support, and utilize systematic ratings systems that could bring the desired empirical rigor to the processes of buying and selling audience attention.

This process of the rationalization of audience understanding involved the integration of new types of professionals into the operation of the media industries – obviously those with strong research backgrounds and/or quantitative analytical skills. Psychologists, for instance, became increasingly integrated into the work of advertising agencies (Kreshel, 1993; Turow, 2006). Renowned public opinion pollster George Gallup (a psychologist by training) spent the early part of his career conducting newspaper audience research (Chaffee, 2000; Wood, 1962). This work grew from his doctoral dissertation, which was titled *A New Technique for Objective Methods for Measuring Reader Interest in Newspapers* (Gallup, 1928). Gallup later moved on to motion picture audience research and became a pioneering figure in that field as well (Handel, 1950; Ohmer, 1999, 2006). A number of scholars from the famed “Chicago School” of sociology, such as Lloyd Warner and Ira Glick, played an integral role in the establishment of the field of news consulting – which traditionally relies very heavily on various forms of audience research (Allen, 2005). And perhaps most influential was sociologist Paul Lazarsfeld (in actuality a mathematician by training), who played an integral role in the development of many areas of commercial audience research, via his work with the Lazarsfeld-Stanton Program Analyzer, which was a device that was used to gather and aggregate data on audience appreciation for media products ranging from radio and television programs to motion pictures. Lazarsfeld also proved tremendously influential to the development of commercial audience research via the wide-ranging radio audience research conducted by his Bureau of Applied Social Research during the 1930s and 1940s (Morrison, 1978; Lenthall, 2007; see also Lazarsfeld & Field, 1946).

During this time period, we see the development of a number of advancements in the systematic empirical assessment of audiences (though detailed discussions of audience research methodologies are beyond the scope of this paper). For instance, in magazine publishing, we see the beginnings of detailed readership reports that went beyond basic circulation statistics to also include demographic and behavioral characteristics of magazine readers (Hall, 1996). It is also during this time period that we see the beginnings of the systematic charting and reporting of the popularity of recorded music (Hesbacher, Downing, & Berger, 1975).

Perhaps most important, we also see the beginnings of ratings services in radio (Beville, 1940; Buzzard, 1990; Karol, 1938). As one early account noted, “Fan mail was once the measure of a broadcaster’s popularity. . . These happy, innocent days came to an abrupt end when Arhibald Crossley announced a scientific audience-measurement system which would count the non-letter writing part of the audience, too” (Kingson, 1953, p. 291). Early methodological approaches to measuring radio audiences included “telephone coincidentals” (in which homes were called and asked what programs they were currently listening to), meters (electronic devices attached to radios), and paper listening diaries. It is this latter method that ultimately emerged as the standard approach to the measurement of radio audiences, and that continues to be the primary approach to radio audience measurement to this day (see Beville, 1988; Buzzard, 1990).

Stage Two in the Rationalization of Audience Understanding

If the 1930s can be identified as essentially the starting point in the process of the rationalization of audience understanding, then it appears that the 1970s represent the second major stage of advancement in this process. Many accounts of the role of audience research in the operation of the media industries point to the 1970s as a pivotal point in time, when a pronounced push toward greater rationalization of audience understanding took place (see, e.g., Balnaves & Regan, 2002; Hesmondhalgh, 2007; Schultz, 1979). Motion picture industry historians have identified the 1970s as the point in time at which Hollywood finally fully embraced a wide range of audience information systems (Austin, 1989). Analyses of the recorded music industry also have pointed to the 1970s as the point at which strategic decision-making moved away from more intuitive approaches toward audience understanding and began to rely heavily on various audience data sources, ranging from sales monitoring systems to radio ratings data (Negus, 1999).

Analyses of this analytical transition often point to enabling factors such as the reduction in cost and rise in power of computer systems, which brought with them an increased capacity to gather and analyze large quantities of statistical data (Goss, 1995; Hesmondhalgh, 2007; Starr & Corson, 1987). Specifically, not only were large quantities of data able to be gathered, tabulated, and analyzed in a timely

manner, but (with the diffusion of the personal computer and data analysis software) such information also was able to be analyzed by individual users (Balnaves & O'Regan, 2002; Barnes & Thomson, 1994; McKenna, 1988). These developments both facilitated and encouraged the adoption of more quantitatively oriented “scientific” approaches to organizational management and decision-making (Starr & Corson, 1987).

In addition, broader socio-demographic changes – changes that essentially led to an enhancement in the diversity of the audience – cultivated demand for increasingly granular audience data, thereby further propelling the rationalization of audience understanding. According to one assessment of the radio industry:

during the 1960s and early 1970s both the radio market and the needs of advertisers began to change. Due to rapid shifts in income, education, and mobility, the demographic data provided by ratings research became less useful. . . . The advertisers found that they needed to evaluate stations on more than market share: an evaluation of each station was needed in terms of its ability to reach relevant markets. In other words, there was a need to evaluate the degree to which each station's listeners matched the client's customers. (Reese & Stanton, 1980, p. 25)

In television, audience measurement was being further rationalized via the introduction of set-top meters that not only provided a daily flow of audience data, but also provided detailed demographic information about the composition of the audiences for individual programs (see, e.g., Buck, 1987; Wilcox, 2000). News consulting also became a firmly institutionalized practice during this time period (Allen, 1995), as television news outlets came to increasingly rely on various forms of quantitative audience research in order to calibrate their news content and on-air news staffs in an effort to attract larger audiences. These consultants proved enormously influential altering the form and structure of television newscasts (Allen, 2007). Entertainment programs during this time period also began to undergo more rigorous pre-testing in an effort by programmers to predict the audience appeal of the programs they were considering airing (Gitlin, 2000).

As James Carey (1980) has noted within the context of the evolution of the newspaper industry, the process of rationalization that characterized that industry (as well as other media industry sectors) was one in which first it was necessary to be able to construct the audience into a tangible, measurable mass; and then to effectively segment this mass into discrete, homogeneous sub-units in order to best satisfy the needs of marketers and advertisers, who have historically demanded ever greater levels of granularity and comprehensiveness in relation to certain dimensions of audience information – particularly exposure (see, e.g., Bogart, 1956; Keller, 1966; Politz, 1943; Sen, et al., 1998; Smythe, 1986; Turow, 2006). In this regard, it is important to recognize that the increased technological fragmentation that has characterized the evolution of media (see Napoli, 2003), and that began its dramatic increase in the 1970s (with the arrival of technologies such as satellite and cable television), and that would become dramatically more pronounced in the decades to follow, is another important contributor to the increased rationalization of audience understanding that took place during this time period, as it facilitated the greater granularity in audience composition (and audience data) that advertisers (and thus, by association, content providers) have traditionally desired (Turow, 1997).

Resistance

This process of rationalization of audience understanding has not proceeded smoothly. At various points in the process, resistance to this transition has been intense. Studies across a variety of organizational contexts, including newsrooms (Berkowitz & Allen, 1996; Gans, 1979), arts organizations (DiMaggio & Useem, 1979; O'Regan, 2002), motion picture studios (Handel, 1953), publishing houses (Andrews & Napoli, 2006), and advertising agencies (Kreshel, 1993) have identified a tendency amongst some stakeholders to be hostile towards efforts to rationalize the process of developing audience understanding.

Often, this resistance broke along professional lines, with those in more creative positions resisting the process and those in more analytical positions embracing and promoting it. Thus, for instance, in advertising, the influx of research in the early part of the 20th century was resisted by creative staff such as copywriters, while being embraced by those involved in media buying activities (Kreshel,

1993). Such resistance typically involved the prioritization of traits such as “experience, intuition, and common sense” (Kreshel, 1993, p. 61). In his assessment of early resistance in Hollywood to audience research, Leo Handel (1953) recalls that “Hollywood, by and large, resisted the development of high-level audience research. In the race between intuition and the IBM machine the latter came in a poor second. The reasons for the reluctance to use reliable audience research in the film industry are manifold. Most frequently, we hear that movie making is basically an artistic endeavor” (p. 304). During the 1940s, as audience research grew in prominence and influence in the motion picture industry, creative personnel such as actors and writers came to the conclusion that such research “muzzled innovation” (Ohmer, 2006, p. 10). Other objections included the viability of making any kind of organizational decisions based on what one motion picture executive described as the “whimsies of public opinion” (Ohmer, 2006, p. 152) and the stifling of risk-taking likely to result from more research-driven decision-making (Ohmer, 2006).

This tension within the motion picture industry in terms of the conceptualization of motion picture production, distribution, and exhibition as art versus science persisted throughout the 1940s and 1950s (Ohmer, 2006). Interestingly, within the context of this industry, such resistance was sufficiently effective that, by the late 1940s, the studios began to move away from the research being conducted by Gallup’s Audience Research, Inc. and the other firms that had established a foothold in this area (Garrison, 1972; Handel, 1953; Ohmer, 2006).

Debates about the appropriateness of relying upon systematic audience data have historically been particularly pronounced within the journalistic community, where concerns about the appropriate dividing line between “church” and “state” have a long history (see, e.g., McManus, 1994). Questions related to the utilization of audience research have mapped onto this persistent tension in such a way that journalists and editors often have expressed concern that reliance upon audience research in the production of news inevitably undermines established news values, as well as the subjective news judgments of journalists (see Beam, 1995). One study posited that journalists’ resistance to audience research has stemmed from four factors: a) the liberal arts education background (and associated

discomfort with statistics) that typifies most journalists; b) insufficient evidence, from journalists' perspective, that such data are useful; c) the doubts that such research may cast on journalists' news judgments and professional autonomy; and d) the fact that audience research frequently is conducted by non-journalists (see Gans, 1979). A more recent study of Australian newsrooms found a "defensive culture resistant to readership and audience research" (Green, 2002).

Another important point of delineation as it relates to resistance involves the divide between commercial and public service media. A number of accounts of the operation of public service media (e.g., public broadcasting) have highlighted the extent to which professionals within such organizations have resisted and, in many cases, succumbed, to the pressures to conduct, and rely upon, sophisticated audience research.ⁱ As British audience researcher Robert Silvey (1974) notes in his history of audience research at the BBC, "the BBC did not set about studying its public systematically until ten years after it had become a public corporation" (p. 28). Once, however, the transition toward rationalized audience understanding was initiated at the BBC, the shift in that direction was extensive, and some observers saw that as antithetical to the BBC's mission. Born (2002), for instance, chronicles the changing organizational culture of the BBC, in which the rise of what she terms the "new managerialism" (p. 69) in the 1980s and 1990s led to a heavy reliance on audience research in programming decisions and, consequently, less creative autonomy for individual production departments – a transition which caused substantial tension within the organization. Indeed, as public service media sectors have become privatized and commercialized, their demand for, and utilization of, audience data has increased (Hagen, 1999).

It is also important to note that, in many cases, resistance has arisen from concerns over how new and (presumably) improved approaches to understanding audiences might affect the competitive dynamics within a particular industry sector. Thus, for instance, the evolution of audience measurement in television has been accompanied, at various stages, by resistance from those stakeholders who were most likely benefiting from whatever methodological biases were inherent in the status quo system. The move from paper diaries to set top people meters by Nielsen Media Research (see Buzzard, 2002) was

challenged in the U.S. at both the national level in the 1980s and the local level in the 2000s, in the face of clear indicators that the people meters removed biases in the diary method that were inflating broadcast ratings relative to cable ratings (see Napoli, 2003, 2005).

Even some from within the audience research community have at times offered critiques of this trend. Pioneering market researcher Leo Bogart (1986) criticized what he described as “formula thinking,” which he sees as “demand[ing] ever greater amounts of marketing and media information extracted from single samples of overloaded respondents in the form of syndicated research” (p. 102). Such research, he argues, “tends to deflect advertising research from a confrontation with significant issues in communication. Instead, it favors bovine mastication of transient data that are already obsolete by the time they are published. Formula thinking also increases the pressure for proof of performance, as though the advertiser could put in dollars at one end of the sausage grinder, with proven evaluation of effects emerging at the other end. And formula thinking resists the argument that real life is complicated and that things don’t work that way” (Bogart, 1986, p. 102).

In an earlier piece in the *Harvard Business Review*, Bogart (1976) argued that “Those who evaluate advertising should spend less time counting the house. Instead, they should concentrate their energies on the fundamental questions of what makes a message persuasive” (p. 107). “Advertisers rely on the same data sources, simply because of the economy of syndicated research . . . over customized research. The same numbers, applied by the same formulas, produce similar strategies and decisions. There is, as a result, a disproportionate demand for the media at the top of the list and a disproportionate handicap for those that rate low” (Bogart, 1976, p. 109).

As these critiques suggest, it is important to recognize that this rationalization of audience understanding evolved in very specific directions, to the neglect of other potential directions. For instance, within the context of advertising-supported media in particular, the overwhelming tendency has been one of the quantification of audience size and (later) composition, to the neglect of other dimensions of the audience. As radio research pioneer Paul Lazarsfeld noted as early as 1947, “Questions of preference in radio research have been almost discarded in favor of actual listening figures. But this is

not necessarily the best solution. It may be just as important to know that a person likes a certain program, although it happens to be on the air at a time when he or she cannot listen” (pp. 165-166).ⁱⁱ We find such critiques even earlier in the history of audience research. As one analysis pointed out in 1936, Kingson (1953) describes an early radio audience measurement service launched by the Schewerin Research Corporation, which employed an audience panel and a program analyzer type of device to measure not only the size of the audience, but also audience reactions to individual radio programs. This service was subsequently expanded to television, but in neither context did it displace established exposure-based systems. In the 1980s, similar efforts within the context of television by the Markle Foundation-funded enterprise, Television Audience Assessment, Inc., similarly failed to take hold (Mitgang, 2002).ⁱⁱⁱ An even earlier critique noted the emphasis on exposure over response: “We have lost sight of our primary purpose for measuring radio programs. What we really want to know is not how many persons are listening . . . the real information that we desire is just how much influence the program in question is exerting on sales” (Likert, 1936, p. 175).

These observations from the 1930s and 1940s have carried through to today – at least within the United States – and in fact reflects one of the defining characteristics of the rationalization of audience understanding in the realm of ad-supported media – its prioritization of exposure metrics over various other dimensions of audience behavior and response. . . . This issue is of particular relevance in light of findings indicating little meaningful relationship between audience size and the intensity of audience appreciation of the content (see, e.g., Hagen, 1999; Silvey, 1951). In this regard, the term “ratings” has been described as “implicitly and misleadingly conveying the impression of an evaluative response to programmes . . . when all they represent is a measure of presence” (Gunter & Wober, 1992, p. 101). Market research Leo Bogart summed up the situation as follows: “variations in the intensity and character of the reading experience (as of the radio listening experience) have conventionally been ignored by both buyers and sellers of advertising. The advent and growth of television only added to the emphasis on ‘boxcar’ figures that showed the largest possible potential exposure” (Bogart, 1976, p. 110).

At various points in the history of the rationalization of audience understanding there have been calls, both from within academic and industry sectors, for systems of audience measurement to move beyond exposure and consider other aspects of audience-hood, such as appreciation (see, e.g., Hoffman & Batra, 1991; Philport, 1993). Such calls have, however, were only meaningfully embraced in fairly narrow contexts, such as in the realm of non-commercial broadcasting, for instance, where the organizational mission is often less about maximizing audience size and more about maximizing audience satisfaction (Emmett, 1968; Jeffrey, 1994; Silvey, 1951, 1974), as well as in the realm of consumer-supported media (e.g., motion pictures), where there traditionally has been, and continues to be, greater emphasis on probing the more “qualitative” aspects of an audience’s interaction with content (see above).

Toward a Model of Audience Evolution: Assessing the New Media Environment

These accounts of the processes of media evolution and the rationalization of audience understanding provide the building blocks for developing a model of audience evolution that can be used to understand contemporary developments. The discussion thus far has illustrated how various technological changes have altered the media environment in ways that have facilitated new approaches to understanding audiences, and how, in many instances, these new approaches are met with, but generally overcome, various forms of institutional resistance. In the sections that follow, the focus is on developing a more explicit model of audience evolution via an examination of the contemporary media environment, the changes that are currently taking place, and their implications for media industries’ conceptualization of their audiences.

Transformation of Media Consumption

One key driver of contemporary audience evolution is the technological changes that are transforming how audiences consume media. The media environment is changing in ways that are dramatically reconfiguring how, when, and where audiences consume media, and, consequently, forcing media industries to reconceptualize their audiences. The two key phenomena that these changes have produced, and thus the two key phenomena that media industries must integrate into their

reconceptualization of their audiences, are *media/audience fragmentation* and *audience autonomy* (see Napoli, 2003).

Media/Audience Fragmentation

Many observers have noted the ever-growing fragmentation of the media environment, in which an increased array of content options are provided across an increased array of distribution platforms; while at the same time, within many of these distribution platforms, the capacity for providing more choices continues to expand dramatically (see, e.g., Anderson, 2006; Napoli, 2003). This phenomenon involves the continued disintegration of traditional “mass” audiences (Neuman, 1991), and the increasing prominence of “Long Tail” scenarios, in which audience attention is clustered around a select few content options, followed by a long tail, in which the remaining multitude of content options each attracts very small audiences that, in the aggregate can exceed the audience for the “hits” (Anderson, 2006). Figure 1 provides a conceptual model of the process, in which media fragmentation and audience fragmentation are parsed out as separate, though inter-related, phenomena. Media fragmentation in this case refers to the technological processes via which the range of content options available to media consumers grows more pronounced. This, in turn, can be broken down further. First, we need to consider inter-media fragmentation, which involves the growth of new delivery platforms, which serve to not only facilitate the delivery of additional content options, but also to multiply the platforms via which any one piece of content can be accessed (think, for instance, of the variety of options [broadcast network, cable network re-run; Internet stream, iPod download, cable system on-demand service] available for consuming a particular episode of a first-run, broadcast network television program today). Intra-media fragmentation, on the other hand, refers to the processes via which choices are subdividing within particular media technologies. At the most obvious level this includes increases in bandwidth and channel capacity that we see not only in broadcast television and radio (via digitization), but also in cable, satellite, and on-line. Equally important, if less discussed, is the phenomenon wherein individual content options are disaggregated into smaller, discrete components (think, for instance, of the ability to watch television clips, rather than entire episodes, on YouTube, or the return of the singles model to the recorded music

industry as a result of the advent of music downloads). This too is a form of intra-media fragmentation, as the content unit itself becomes fragmented.

As Figure 1 indicates, these fragmentation processes then have the effect of fragmenting the audience, in terms of spreading their attention out across a greater array of delivery platforms and content options. The most well-known recent discussion of this phenomenon is certainly Chris Anderson's (2006) Long Tail scenario, in which he documents how the new media environment is facilitating unprecedented levels of disaggregation of audience attention, as a result of the massive storage capacity and enhanced search functionalities of the new media environment.

The key implication of this process is the extent to which it is undermining traditional approaches to conceptualizing media audiences. Specifically, the fragmentation of media and audiences is straining and undermining the traditional, exposure-based audience information systems that have long served as the core of the audience marketplace (see, e.g., Webster, in press). Increased media and audience fragmentation is making it increasingly difficult to quantify audience attention via traditional measurement systems. In particular, the extent to which audiences today can be spread across a much wider range of content options, and across a much wider range of delivery platforms, undermines traditional sample-driven approaches to the creation, and systematic measurement of, a sufficiently large and representative sample of the audience (see, e.g., Napoli 2003). As a result, inaccuracy of basic exposure data increases, as do unpredictable fluctuations in the data (Kirkham, 1996). These patterns undermine both the descriptive and the analytical (i.e., for predicting future audience behavior) uses of such data (Kirkham, 1996). One recent industry analysis claims that "the extent to which the media landscape has changed over the past 15 years [has placed] far more stress on audience measurement than ever before" (Harris & Chasin, 2006, p. 3). Another has announced "the fall of exposure" (Jaffe, 2005, p. 172). Approaching media audiences primarily in terms of their exposure to content is therefore becoming a much more difficult and, ultimately, potentially less viable proposition than it was in years past.

The irony here, of course, is that the increasingly fragmented media environment was expected to bring much greater efficiency to the exposure model upon which the economics of the audience

marketplace were predicated. That is, the greater fragmentation of the media environment would facilitate better separation of audiences into homogeneous segments, which would make them more appealing to advertisers. The extent to which this transformation in the dynamics of the audience marketplace largely failed to produce substantial economic benefits is a strangely under-discussed irony. The audience marketplace did not thrive on fragmentation. CPMs for niche cable audiences largely failed to match or exceed those of more heterogeneous broadcast audiences. Content provided by niche cable networks is largely recycled material originally produced for traditional mass audiences (e.g., motion pictures, prime-time network television programs). On-line advertising dollars still cluster very heavily amongst the most popular web sites (see Napoli, 2008). And, it could be argued that this underachievement of the fragmented media environment is due, in large part, to the inability of exposure-based audience measurement services to capture the distribution of audience attention across the full range of content options with a sufficient degree of accuracy and reliability to satisfy the needs of media buyers.

There are, of course, a wide range of initiatives currently underway to combat this strain that the new media environment is imposing on traditional exposure-focused approaches to audience understanding. Efforts such as Nielsen Media Research's local people meter initiative are attempting to introduce advanced set-top meter technologies into local television markets in response to the inability of the paper diary to effectively facilitate the gathering of audience exposure data in a highly fragmented television environment. Arbitron's Portable People Meter initiative is a similar effort to combat the growing inadequacies of paper diaries in a more fragmented radio environment characterized by additions such as Low Power FM radio, digital audio broadcasting, and satellite radio (see Robinson, 2000). On-line audience measurement services similarly are working to enhance their sample sizes and develop alternative mechanisms for capturing accurate and reliable measures of on-line media exposure (Bermejo, 2007). And, of course, such measurement firms are working to expand their analytical reach, and bolster their analytical rigor, in newer media contexts such as cell phones, personal video recorders, Web download and streaming services, and social networking sites, as the range of platforms through which

any form of media content can be consumed multiplies, further fragmenting the audience and imposing new, and often unique, challenges to the measurement of audience exposure (see Webster, in press).

Despite these efforts, this stress on traditional audience information systems continues to generate substantial concern and discontent among advertisers, media buyers, and content providers (Harris & Chassin, 2006; Starkey, 2002). This is particularly significant given that, as Starkey (2004) has observed, “the media industries are accustomed to working with, rather than against [audience] data. Usually they have no choice, because of the importance placed on the data by others” (p. 12). But when we see a situation as is emerging now, in which something closer to a consensus is emerging amongst various stakeholder groups that established approaches to conceptualizing media audiences are inadequate, then the institutional conditions are likely right for an evolutionary change to take place.

Audience Autonomy

The term audience autonomy in this case refers to how contemporary characteristics of the media environment, ranging from interactivity to mobility to on-demand functionality to the increased capacity for user-generated content, all serve to enhance the extent to which audiences have control over the process of media consumption. Figure 2 outlines the various aspects of audience autonomy, illustrating the mechanisms that can today be employed to influence when, where, what, and how media are consumed. One industry analyst has described the contemporary media environment as one in which the consumer is “devastatingly in control” (Jaffe, 2005, p. 43). The use of the term devastating in this statement is particularly telling, as it suggests that audience autonomy, like fragmentation, may be having destructive effects on the traditional dynamics of the audience marketplace. And, indeed, this is the case.

Perhaps the most dramatic impact, in this regard, is the increased interactive capabilities of the new media environment, and the way they can blur traditional boundaries between content provider and audience (see, e.g., Cover, 2006; Stewart & Pavlou, 2002; Svoen, 2007). According to Cover (2006), “Such interactivity . . . has resulted in new tensions in the author-text-audience relationship, predominantly by blurring the distinction between author and audience” (p. 140). As audience researcher Sonia Livingstone (2003) thus notes, the end result is a transformation of the audience from “passive

observer to active participant in a virtual world” (p. 338; see also Svoen, 2007). She goes on to suggest that the implications of this evolutionary process extend so far as to mean the end of the concept of the audience (Livingstone, 2003), with the concept of “users” as potentially better able to capture the current range of means by which consumers engage with media in the new media environment. In developing a similar critique, Roscoe (1999) notes that “The idea of an audience presupposes a binary opposition between producers and consumers, between the creators, providers and purveyors of content, and the ‘audience’ itself, which views, browses and ‘consumes’ the content” (p. 678). This transition, like the transition to an increasingly fragmented media environment, also has undermined traditional approaches to audience understanding. As one analysis has noted, “Traditional measures that were designed for passive media fail to capture the important and differentiating dimensions of response to interactive communication” (Stewart & Pavlou, 2002, p. 382).

However, as much as the autonomy facilitated by the new media environment is undermining the traditional passive, exposure-focused conceptualization of audiences, it also is opening up new avenues of audience understanding. That is, the various interactive components of the new media environment illuminate previously concealed dimensions of audiences, many of which are being judged to have significant economic and strategic value, and, perhaps most important, can facilitate the gathering of types of information that previously could not have been gathered.

This point is reflected in Figure 3, which, at the top, illustrates the traditional form of information that has flowed from the audience to the content provider (that being information on exposure to the content). Below the exposure arrow, however, are arrows representing the various new audience information flows that are today reaching content providers. Search activities, whether they be through on-line search engines or interactive television program guides, or digital video recorder menu interfaces, represent an important source of information about audience wants and interests. Audience appreciation of the content they consume can today be expressed through a variety of means, whether it be through the ratings and recommendations systems that audiences participate in via on-line content providers such as NetFlix or Amazon, or via community review and ratings sites such as RottenTomatoes.com or

IMDB.com, or via “thumbs up/thumbs down” functionalities such as those provided by TiVo. Audience participation can today take a variety of forms (see Nightingale & Dwyer, 2006), ranging from voting on-line or via cell phones in ways that affect the outcomes of programming such as American Idol, to emailing or instant-messaging radio hosts, to posting comments on discussion boards or blogs. Audience responses to content can now take a number of forms, ranging from direct, immediate behavioral responses to on-line advertisements (be they in the form of a click-through or an actual purchase), to commentary or feedback that can be placed directly alongside individual on-line news stories or blog entries. And, of course, many of these new forms of interactivity, in addition to various other forms of user-generated content (e.g., blogs, social networking sites), represent mechanisms via which audiences are taking part in the production of content as much as they are taking part in the consumption of content. The point here is that these new audience information flows bring with them the potential to broaden the notion of the audience well-beyond its traditional passive, exposure-oriented model.

This point is elaborated further in Figure 4, which seeks to conceptualize audience-hood as a multi-component process, one in which exposure has traditionally resided at the core, but which has various other components that both precede and follow exposure. Today’s media environment is one in which, thanks largely to its increasingly interactive nature, more components of this process can be monitored, and, as a result, more components of this process can potentially be monetized (see below).

It is important to emphasize, however, that the point here is not to suggest that these various dimensions of audience engagement with content did not come into existence until now. Indeed there has been much research illustrating how various points in the history of audiences have included substantially opportunities for participation, feedback, and interaction (see, e.g., Butsch, 2008). The point here is that such opportunities are becoming more widespread and, perhaps most important, more amenable to measurement, aggregation, and analysis, and thus better able to contribute to the ongoing rationalization of audience understanding (see below).

Transformations in Audience Information Systems

As was noted above, the contemporary media environment is one in which there are substantial opportunities for audiences to interact with media, whether it be at the most basic level of searching for content, or at more advanced levels such as providing feedback, participating in outcomes, or generating parallel content. What is perhaps most important about this transition is the extent to which it is accompanied by the capacity to monitor, aggregate, and analyze various elements of these interactions. As the media environment has grown more interactive, and facilitated new mechanisms of feedback, participation, and response, this has facilitated the gathering of new streams of data about audience members' media consumption habits, content preferences, degree of engagement, and levels of anticipation for, and appreciation of, the content they consume.

The key here is that these data streams then can become the basis for audience information systems that offer gateways into entirely new dimensions of rationalized audience understanding (see Harris & Chasin, 2006; Sen, et al., 1998). The Internet has been described by one marketer as making it "possible to record data about individual consumers at an unprecedented level of detail" (Mullarkey, 2004, p. 42). One industry analyst has even gone so far as to describe the Internet as "*too* measurable . . . [It] is measurable in terms of audience delivery; it is measurable in terms of audience interaction; it is even measurable on the transactional/ROI front" (Jaffe, 2005, pp. 113-114). This statement reflects the key point here, the transition taking place is not simply one of being able to monitor media exposure. Most media have, until recently, been able to have audience exposure monitored with the necessary levels of effectiveness. Rather, the key here is that aspects of the audience other than exposure are now capturable via the measurement techniques facilitated by the new, highly interactive media environment, in which most of the ways via which audiences interact with media leave some sort of measurable data trail that can be aggregated and analyzed.

In the current stage of media and audience evolution, this is less often the case. Various dimensions of participation, appreciation, and feedback are now expressed in very public forms online that are accessible to, and are being readily accessed and analyzed, by both commercial and academic researchers (Harris & Chasin, 2006; Livingstone, 2003; Lotz, & Ross, 2004). For instance, Web-scraping

services such as Nielsen's BuzzMetrics can aggregate and assess on-line "chatter" about individual pieces of content (new movies, new TV shows, etc.), and determine the intensity of appreciation for that content, or, for that matter, the intensity of anticipation for content yet to be consumed. Other services are linking media consumption with on-line quizzes to capture the extent to which viewers recall the ads and/or product placements contained within the content. On-line audience measurement services such as comScore provide subscribers with data not just on the audience size and composition for individual Web sites, but also on behavioral patterns such as purchasing and search activities (comScore, n.d.)

According to one participant in a recent industry study, "Technology is . . . allowing us to measure just about anything" (Harris & Chasin, 2006, p. 18). Thus, for instance, academic analyses of the level of audience "connectedness" (i.e., intensity of the relationship) with individual television programs have been conducted via content analyses of on-line fan forums (Russell & Puto, 1999). In the commercial context, systematic, syndicated research products using these and other methodological approaches are being offered by firms such as Nielsen, Simmons and Optimedia, for media ranging from television to magazines to Web sites (Advertising Research Foundation, 2006b; Vasquez, 2008).

It is within this context that concepts such as engagement are increasingly taking hold. As one recent analysis from within the advertising community noted, "A dominant trend is the movement away from assuming that media exposure equals advertising effectiveness to considering the role of media engagement on effectiveness" (Calder & Malthouse, 2005, p. 356). The concept of engagement has been subject to myriad definitions (see Advertising Research Foundation, 2006a, 2006b, 2007), and it is beyond the scope of this paper to consider them all. For the purposes of this analysis, the key point is to recognize that concepts such as engagement or "connectedness" (see Russell & Puto, 1999) represent a move beyond the question of whether an audience member was exposed to a particular piece of media content, into questions involving the nature of that exposure experience.

A recent trade publication story noted that one cable network was using its "engagement" data as an "alternative currency as it heads into the upfront push" (Crupi, 2008a, p. 12). Another recent article noted that "It's no longer enough to look simply at ratings when judging the worth of a TV show"

(Vasquez, 2008, p. 1). In these statements we see another key aspect of the ongoing evolutionary process that needs to be emphasized. It is the undermining of the traditional exposure model via the fragmentation of the contemporary media environment, as much as it is the capacity of the new media environment to capture alternative audience information, that is motivating this process of audience evolution. Media trade publications are filled with similar stories of cable networks, magazines, or Web sites essentially seeking to move beyond their (often quite small) exposure metrics in order to succeed in the new audience marketplace where criteria such as the extent to which the content affects attitudes towards advertised products, or the extent to which content has an established brand identity serve as increasingly viable alternatives in an environment in which the exposure metric is on the wane (see, e.g., Crupi, 2008a, 2008b; Story, 2008). Some researchers have argued for the value of systematic measures of constructs such as “connectedness” or “experiences” within the commercial media sector, and that such constructs should therefore be incorporated into the established repertoire of syndicated audience research products and services (see, e.g., Calder & Malthouse, 2005; Russell & Puto, 1999). One recent analysis of the radio and television industries operated from the bold title, “Why Ratings No Longer Matter” (Pilotta, 2008). Again, the key point here is that the pressures undermining the traditional exposure model, *combined* with the new audience information obtainable in the new media environment, are *together* propelling the current process of media evolution. The dynamics of this process are represented in Figure 5, in which the exposure dimension becomes a diminished proportion of a much broader, more multi-dimensional, conceptualization of the audience.

Resistance & Negotiation

As was noted previously, both the process of media evolution and the process of the rationalization of audience understanding have been accompanied by various forms of resistance from relevant stakeholder groups. Stakeholder resistance therefore factors prominently in this model of audience evolution as well. The process of audience evolution essentially involves a redefinition of what is, in many ways, the currency upon which many media industry sectors operate. For such a redefinition to take place, a broad array of stakeholders need to, to some degree, endorse the transition.

From this standpoint, the technological changes affecting both the media and audience information systems need to be placed within their broader institutional context, where various stakeholder interests and pressures frequently are brought to bear in an effort to influence, or even to prevent, the evolutionary processes taking place. It is important to recognize that dominant conceptualizations of audiences are, in fact, often negotiated outcomes between key institutional stakeholders, including media firms, advertisers, audience measurement firms, and even policymakers and advocacy groups.

Building from the model outlined thus far, the nature of the resistance at issue is focused on either the technological processes that are transforming the dynamics of media consumption, or the new audience information systems. Resistance to the former is perhaps more pronounced at this point. We see this, for instance, in various attempts by media organizations to limit the reconfiguration of the audience-content provider relationship. Ongoing legal battles over fair use and copyright represent a focal point of this resistance. As Cover (2006) notes, tensions in the author-text-audience relationship “result in a struggle for control over the authorial ‘purity’ or ‘authenticity’ of the text through intellectual property management or digital programming protections, or limited, channeled or ‘permitted’ forms of interactivity” (p. 140). The blurring of the audience-content provider relationship also has been resisted via mechanisms such as limiting on-line upload speeds relative to download speeds – a strategy that essentially seeks to preserve the traditional sender-receiver dynamic. Similar industry resistance has taken place in relation to technologies that simply enhance audience autonomy in the consumption of traditional media content. Thus, for instance, various sectors of the media industry initially posed substantial resistance, via litigation, to the personal video recorder, which has the capacity to undermine fundamental dynamics of the exposure model upon which advertising-supported media have been built by facilitating commercial avoidance (see Carlson, 2006).

In terms of resistance to new audience information systems, perhaps the most visible form can be found in the policymaking sector, where privacy issues surrounding new mechanisms for gathering data about media consumption, and about the demographic characteristics of the consumer, have become

increasingly pronounced. An early example of this (relative to the current transition being discussed) involved a U.S. Federal Trade Commission (FTC) investigation into the privacy practices of TiVo, which was gathering a wide range of television viewing data that could be linked to personally identifiable information about TiVo subscribers (see Carlson, 2006). More recently, the FTC has been inquiring into the nature of what it terms “behavioral advertising,” which involves sophisticated forms of on-line data gathering, aggregation, and analysis, many of which facilitate exactly the kinds of expansions beyond the traditional exposure metric described above (see, e.g., Federal Trade Commission, 2007). Not surprisingly, this issue has become a significant area of contention between various media industry trade groups and public interest and advocacy organizations (see, e.g., American Advertising Federation, 2008; Consumer Federation of America, 2008).

Ultimately, for markets for audiences to function, there needs to be a reasonable degree of consensus surrounding how audiences are defined. However, it is often the case that particular reconceptualizations of audiences can be beneficial to certain stakeholder interests, while harmful to others. Thus, the power dynamics surrounding the key institutional actors play a central role in the determination of any reconceptualization of audiences. These stakeholder dynamics require further inquiry, ideally with the end result of developing the basic contours of a political economy of audience evolution. In any case, the momentum toward a significantly reconceptualized notion of the media audience seems quite powerful; and the predominance of the traditional exposure model seems very much in jeopardy. It remains to be seen exactly what kinds of constraints on the process of audience evolution emerge out of this process of resistance and negotiation between these various stakeholders. Media history tells us stakeholders seeking to preserve the status quo generally are unable to do so, but that processes of resistance and negotiation do tend to suppress the extent to which innovations can radically reconfigure existing institutional structures and processes (see Winston, 1999).

Conclusion

This paper has outlined a model of audience evolution that extends and integrates processes of media evolution and the rationalization of audience understanding. This model is represented visually in

Figure 6. As should be clear from this discussion, the concept of the audience is very much a malleable one – one that can evolve in response to changing environmental conditions. The specific process at work today is one in which the predominant conceptualization of the audience employed by media industry stakeholders is moving away from the traditional exposure-focused approach and is broadening into other dimensions of the audience experience, ranging from engagement to appreciation to response. Perhaps most important, the nature of the process being outlined here is one in which the increasing audience fragmentation and increasing audience autonomy imposed by the contemporary media environment are simultaneously undermining the traditional exposure model while also providing the tools for the migration to alternative audience conceptualizations.

Moving forward, the next obvious step is to begin a systematic inquiry into the implications of this transformative process for the nature of the content that is produced and that audiences receive. What will a *post-exposure* media environment look like? How might content change in an environment in which audience size and demographic characteristics diminish relative to alternative audience characteristics such as engagement, recall, appreciation, and response? How might different audience interests be better (or worse) served? Addressing these questions is the next step in developing our understanding of the process of audience evolution.

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Figure 1: The Fragmentation of the Media Environment

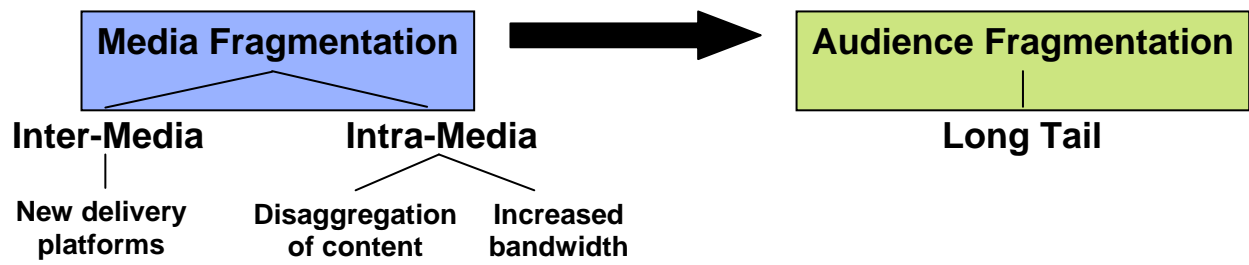


Figure 2: Components of Audience Autonomy

Autonomy

<u>What</u>	<u>When</u>	<u>Where</u>	<u>How</u>
On-Demand	On-Demand	Mobile	Ad-skipping/ blocking
Search	Mobile	Portable	Community participation/ discussion
Informed Recommendations	Time-Shifting		Affect Outcome
Personalization			User-Generated

Figure 3: New Audience Information Flows.

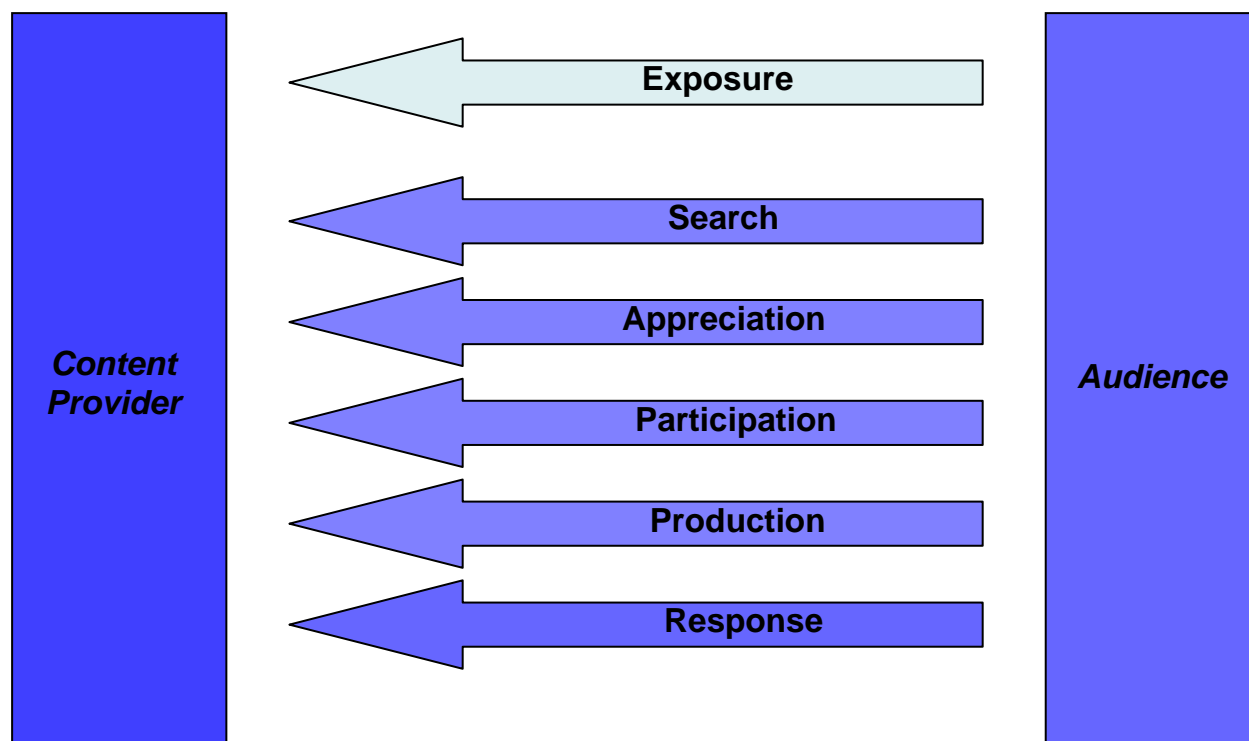


Figure 4: Audience Process

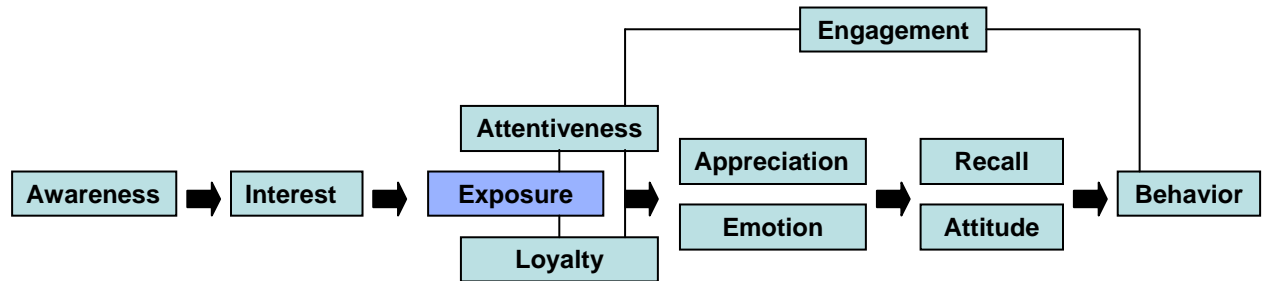
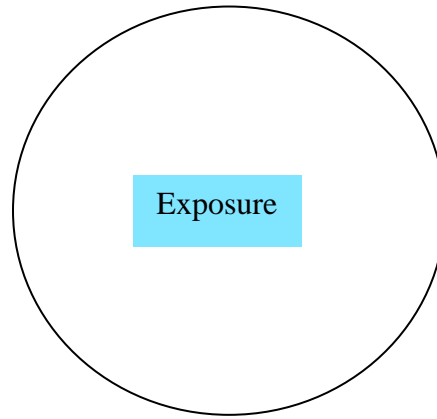


Figure 5: The Decline of Exposure and the Rise of Alternative Audience Components.

Traditional Audience Concept



Evolving Audience Concept

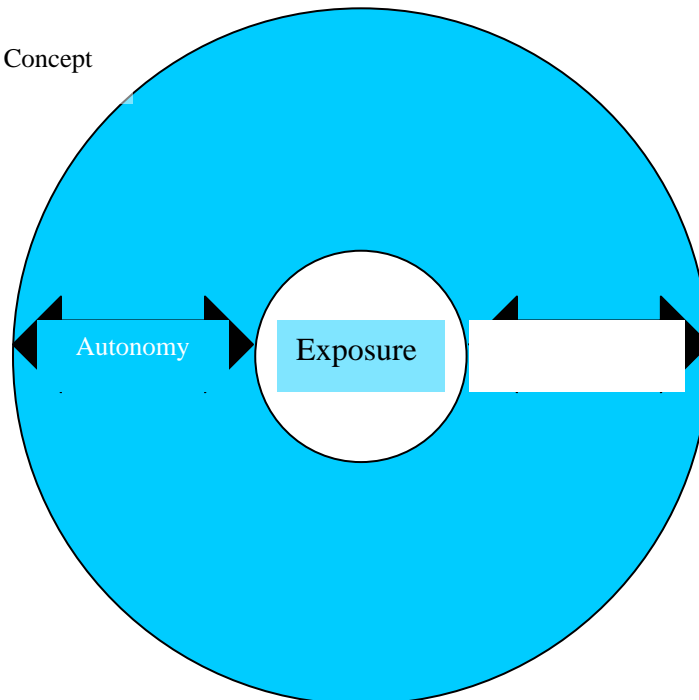


Figure 6: A Model of Audience Evolution



Notes

ⁱ As BBC audience researcher Robert Silvey (1974) notes, “The demand for audience measurement was, of course, far less clamant in countries served by non-commercial broadcasting. They had no advertisers to satisfy or persuade to buy time. There was also far less demand for moment-to-moment audience measurement for this mainly derived for the need to know how many people heard the commercials. In the context of public service broadcasting the need for audience measurement came mainly from the programme planners’ concern to assess the effect, in terms of consumption, of the pattern of broadcasting they had devised” (p. 77). Armand Mattelart (1991) documents this pattern across a number of different nations, including the U.S., the U.K., Canada, France, Brazil, and Venezuela.

ⁱⁱ A similar critique during this time period argued that there is a “fundamental weakness of today’s audience research: failure to study the listener except in terms of his numbers. It has long been realized in psychological research that in social situations measurement of itself rarely produces knowledge, either useful or theoretical. It is in the combination of statistical and motivational research that most meaningful socio-psychological knowledge is made” (Robinson, 1947, p. 50).

ⁱⁱⁱ For a very detailed overview of both the academic and commercial research initiatives related to audience appreciation of media content, across a variety of national contexts, see Gunter and Wober (1992).