

How did you like it?

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The proliferation of television channels is leading programme-planners, schedulers, and advertisers to re-think their research strategies for the future.

In this increasingly complex and competitive media environment, reliance on standard audience measurement data will no longer be sufficient. Even enhancements to panel sizes and electronic data-gathering, or speedier analysis technologies, will not alter the fact that traditional audience ratings *per se* cannot answer all the pertinent questions broadcasters and advertisers will need to have answered if they are to ensure that they satisfy their customers' needs and do so better than their competitors.

Requirements stemming from broadcast regulators and increased acknowledgement of the relevance of research among programme-makers are adding to the pressure for broadcasters to become better informed, not simply about whether viewers are watching television, but how involved they are in what they are watching.

The traditional television 'ratings' which measure the size and demographic characteristics of a pro-

gramme's audience, although still important, do not necessarily indicate the degree to which viewers are involved in – and receptive to – what they are watching.

In the early days of television, there was relatively little perceived need for systematic measures of audience involvement. In embryonic television markets, served by just one or two television channels, estimates of the total number of households or individuals tuned in to a programme were regarded as providing a satisfactory indication of the success of the programme service and of how valuable it was as an advertising vehicle.

Fast-expanding modern television markets, however, may offer the viewer a choice of 20, 30 or even more television channels. New reception technologies and the expanded television menus they are bringing will alter people's viewing patterns. Such changes will also call into question the wisdom of relying solely on audience measurement-based 'ratings' reflecting audience size when making marketplace decisions or judgments about channel performance. Why should this be so?

As the number of channels to which people have access increases, the amount of television they watch may also increase, but not generally to an extent whereby traditional channels retain their original audience share. One implication of this development might be that the provision of extra channels will produce more selectivity, with viewers deliberating more carefully about how to share out their limited viewing-time budget among many more channels. Despite the time that people spend watching television, they do not completely forsake other social and leisure activities for it. The growing popularity of remote control devices, meanwhile, has made channel-switching easier and encourages more frequent channel-hopping – a phenomenon that has come to be known as grazing.

Increased programme choices may result in fragmentation of the mass audiences which have for so long been taken for granted as an accepted feature of the television market environment

In those markets where there are numerous channels to choose from, early research shows that viewers appear to be sampling more and planning less. They watch more channels than they used to and show somewhat less loyalty to particular networks and even particular programmes. Even so, viewers tend not to watch more than half a dozen or so channels on a regular basis. Many new channels are thematic and will attract relatively small (compared to major networks) audiences.

How can executives plan, produce, programme, and advertise in this changing and more volatile media environment? How can they distinguish between programmes that have an audience of distracted, restless viewers and programmes that are more effective at capturing an attentive, involved, and loyal audience?

Standard measures of audience size make no distinctions between viewers in terms of their measured involvement with programmes because they impartially measure all 'viewing' equally. While these misleadingly named 'ratings' of pro-

grammes based on audience size will continue to provide important marketplace information, a growing body of research is demonstrating that when programmes are also evaluated according to 'qualitative' measures which deal with the audience's response to programmes, far more subtle information can emerge about their value to viewers that can be of use to programme-makers, broadcasters, and advertisers. How programmes are in fact 'rated' by viewers could provide an essential evaluative currency in the future in assessing the performance of television services.

Audience reaction indices have been measured for many years in the United Kingdom although their availability has been restricted to the broadcasters. Reaction is measured in terms of viewers' stated appreciation of the programmes they watch. What do these alternative, evaluative ratings reveal about audiences that traditional 'ratings' do not?

Appreciation scores for programmes have been found to relate in systematic and reliable ways to aspects of viewing behaviour. Research in the UK has shown, for instance, that viewers who rate one episode of a television series high in terms of appreciation are more likely to watch another episode from the same series than those who gave the earlier episode a relatively low appreciation score.

Appreciation is related to likelihood of viewing a continuation of a programme shown in two parts on the same evening. Viewers of the first part who return to watch the second part accord both parts of an episode far higher appreciation than viewers who watch only part one or part two.

Appreciation level is not only associated with loyalty to different parts of the same programme or television series/serial, but also apparently to degree of loyalty to programmes of the same type. Thus, viewers who show high appreciation for a programme of a given type will be more likely to watch another programme of the same type which is televised on a different evening during peak time, provided, that is, they are watching television again at that time. This relationship,

however, does not have the same strength across all programme types. It has been demonstrated to occur for soap operas and news, and somewhat less for action-adventure and sport. For other types of programming, however, no clear-cut relationships have been consistently forthcoming.

In the context of television advertising, there is suggestive evidence that audiences' varying responses to programmes may have a knock-on effect for the impact of any advertising carried in those programmes. A high rating of a programme in terms of its 'strength of impression' on viewers has been shown to relate to the impact of television advertising, as assessed by awareness and recall of advertising messages, and even reported intention to purchase.

In a number of European countries, data about audience size and viewing behaviour have been supplemented for some time by qualitative assessments of audience reaction. In some cases, these two kinds of data are collected within the same audience research service, for example, in the Netherlands, Belgium, and Ireland. Even so, in examining future orientations for audience research, consideration needs to be given to ways of using these data more effectively and to modes of enhancement of data quality to increase their sensitivity to user needs in the more complex media scenarios which lie ahead.

The implementation of complementary 'ratings' data reflecting audience reactions to television will involve developments which comprise more than simply the introduction of upgraded research hardware. Electronic systems of appreciation data collection are growing in popularity, but open up fresh concerns about the workload placed on viewing panellists who may also be required to supply regular information about their viewing behaviour. Quite apart from such methodological issues, though, there is room for significant progress at a conceptual level with regard to the types of audience reactions that are measured

and how they are used to explain or predict viewing behaviour.

What then are the kinds of developments which could enhance the value of what is known about viewers' involvement with television programmes? There are four areas in particular worth considering further by broadcasters and advertisers:

- 1 new scales for reaction measurement;
- 2 motivation measurement;
- 3 viewing context;
- 4 programme context.

First, one of the fundamental problems facing any system of audience reaction measurement is whether any single scale is capable of expressing and encapsulating the full range of complexity and variation in viewers' responses to programmes or advertisements. Established audience reaction services have tended to be based upon a single measure or sometimes on two measures of audience response (e.g. enjoyment, interest, liking, impact, perceived quality). Not all these scales seem to represent exactly the same meaning for viewers, even though they may be highly inter-correlated.

The impact or strength of impression of a programme, together with its perceived quality, are not the same as programme enjoyment or degree of interest in it

The overall level which these responses attain, the differential nature of their application to programmes, and the range over which they vary across and within programme types, all point to the fact that these different scales have different meanings for viewers and are sensitive to different kinds of audience reaction.

Another area of proposed development in the UK is the introduction of programme-genre-specific audience reaction measures, which will assess viewers' opinions about idiosyncratic features of particular types of programme. Thus, there might be three or four scales to measure responses to key ingredients of soap operas, which would differ from those used with quiz and game shows,

news or sport. Developmental qualitative and quantitative research is already under way to discover the key dimensions in terms of which particular programme genres can usefully be assessed by viewers.

Second, viewers' motives for watching television in general, or for tuning in to specific programmes, are known to be related to their reactions and viewing behaviour. Some motives can be long-lasting while others are transient. Viewers can develop different expectations of programmes, and their response to and continued viewing of a programme may depend upon the extent to which crucial expectations are met by their viewing experience.

Third, the social context in which viewers watch television can make a significant difference to their viewing experience. Viewers who watch television in the company of others may not always choose for themselves what to watch. That choice may be made for them by some other member of the household. This is a factor which needs to be related to the reactions of viewers as well as to the nature of their viewing behaviour. It will be important for future audience research systems to take this variable into regular account.

Fourth, viewers' reactions to programmes tend to be considered in terms of a global response to a programme in its entirety. While genre-specific indicators may get around this limitation in part, they may not reflect the full range of responses to a programme during the act of watching. As a supplementary component to routine reaction assessment, valuable additional insights could be gleaned from monitoring how viewers react to particular features of a programme while watching it.

Already there are promising signs that a more sophisticated diagnosis of the viewing experience may provide workable parallel or supplementary currencies to audience size measurement with potentially valuable benefits for programme-makers, schedulers, and those involved in negotiating the placement of television advertisements. The next few years promise to be a period of significant developments in sophistication and quality of audience research, as research techniques race to keep pace with the rapidly evolving broadcasting environment. ■

This article is based on the latest ITC Television Research Monograph, The Reactive Viewer, written by Barrie Gunter and Mallory Wober and published by John Libbey in September 1992.