

Ratings and Audience Measurement

Philip M. Napoli

One commonly used, though controversial, approach to conducting research on media audiences involves ratings analysis. Ratings analysis is the analysis of the audience size and composition data produced by audience measurement firms for use in both the commercial and noncommercial media sectors. Ratings data primarily are used by media outlets and advertisers to determine advertising rates, to assess the performance of media content, and to develop and assess strategies related to the production and placement of content. Ratings data are also used by policy makers to assess media market dynamics and (most important to this chapter) by academics to develop and test theoretical perspectives regarding the dynamics of how audiences consume media and how media institutions navigate the audience marketplace (Stavitsky 2000; Napoli 2003; Webster, Phalen, and Lichty 2005).

Perhaps the best-known types of audience ratings that have been used in academic research are the television ratings produced by measurement firms such as The Nielsen Company and TNS Media Intelligence, and the radio ratings produced by measurement firms such as Arbitron and RAJAR (Radio Joint Audience Research). And, increasingly, internet audience ratings, produced by firms such as comScore and Nielsen//NetRatings, are being utilized in academic research (see e.g. Webster and Lin 2002; Bermejo 2007).

As these examples suggest, the term *ratings* is most often associated with audiences for the electronic media, though print media also utilize audience data produced by commercial measurement firms that indicate the number and demographic characteristics of readers of individual publications. Firms such as Simmons and MRI (Mediamark Research Inc.) produce data for a wide range of print publications. However, for whatever reason (perhaps a comparative lack of academic interest in print media audiences), academic ratings analyses have overwhelmingly focused on electronic media audiences. Thus, electronic media ratings,

and the mechanisms for the measurement of electronic media audiences, will be the focus of this chapter.

In considering ratings analysis as a tool for studying media audiences, this chapter will first provide an overview of the methodologies employed by the audience measurement firms. Unlike other academic approaches to researching audiences, ratings analysis involves the analysis of data previously gathered by third parties (audience measurement organizations). Consequently, it is important to understand how these data are gathered, as well as the strengths and weaknesses of these data. As this discussion will make clear, ratings data have been criticized on both methodological and theoretical grounds. These critiques will illustrate how some dimensions of audience behavior have been well illuminated by ratings data, while others have not.

This chapter will then provide an overview of the types of academic analyses that have been conducted using ratings data. As this discussion will illustrate, ratings data can be employed not only to understand certain aspects of media audiences, but also to understand certain aspects of media institutions and how they approach their audiences. That is, ratings data can be used not only to gain insights into the dynamics of audience behavior, but also to gain insights into the institutional dynamics surrounding the various marketplaces for audiences and the behaviors of various marketplace participants under changing competitive conditions (e.g. Napoli 2003). In this discussion of the analytical paths that have been pursued via ratings data, this section also will draw particular attention to the issue of access and the challenges associated with obtaining ratings data for use in academic research.

Finally, this chapter will consider the future of ratings analysis in an era in which the media environment is undergoing dramatic technological change, and, consequently, in which analytical approaches to audiences employed by media outlets, advertisers, and audience measurement firms are undergoing dramatic change as well. This section will consider the potentially diminishing analytical utility of traditional ratings data and the resultant new directions in audience measurement that are being pursued.

The Production of Ratings Data

There is a long and interesting history surrounding media industries' efforts to understand their audiences (see Napoli 2011). For the purposes of this chapter, the key element of this history is the emergence of ratings services, which first came into being during the development and commercialization of radio in the 1930s, as radio programmers and advertisers sought to accurately assess the size of the radio listening audience (Chappell and Hooper 1944). Many of the techniques and terminologies associated with radio ratings subsequently were

transferred to television in the 1940s and 1950s (Beville 1988) and have since migrated to the internet as well (Bermejo 2007).

Today we are in something of a period of flux in relation to the methodologies for producing audience ratings. New technologies that are increasingly fragmenting media audiences and that are increasingly empowering audiences in terms of how, when, and where they consume content – and the advertisements embedded within this content – are making the production of sufficiently accurate and reliable audience ratings more difficult. At the same time, these technological developments are presenting alternative approaches to the measurement of media audiences and the production of ratings data (Napoli 2008). These technological developments will be discussed in greater detail below. The focus here is on the current state of affairs in the production of audience ratings.

Sampling

First, it is perhaps most important to recognize that ratings traditionally have been produced via the observation of a (presumably) representative sample of the population as a whole. Electronic media ratings have been, and largely continue to be, produced via the recruitment of a sample of individuals to take part in the measurement process. Samples are generated for each relevant unit of analysis. Thus, for instance, the measurement of international or national radio, television, and internet audiences is accompanied by the generation of international and national audience samples. Local samples similarly are generated for the measurement of local markets (in the United States, the Nielsen Company is working toward merging its local and national television audience samples). Of course, for any sample to accurately reflect the behavior of the population as a whole, it is essential that this sample be sufficiently large and representative of the population as a whole across as many key attributes as possible. Audience measurement firms expend substantial resources in their efforts to recruit representative samples to take part in the measurement process. According to basic sampling theory, samples need not be particularly large to be sufficiently generalizable to the population as a whole. Thus, for instance, Nielsen's sample of US television households for use in its national television audience ratings service consists of 12,000 of the over 100 million television households in the United States. Nielsen plans to expand this sample size to 37,000 homes by 2011.

Questions surrounding the extent to which such samples are sufficiently representative of the population as a whole have been a focal point of critiques of contemporary ratings services. The implications of nonrepresentative samples in audience measurement are of particular significance given that ratings data are the key tool that media outlets use to judge the performance of their content, and to eliminate content that is underperforming. Therefore, if certain audience segments are not adequately represented in the sample, then the ratings for the content

preferred by these segments are likely to underrepresent that content's true popularity. As a result, certain audience segments can find themselves in a situation in which content serving their particular needs and interests is no longer available.

These concerns have been at the core of stakeholder battles over the Nielsen Company's ongoing introduction of the local people meter in the United States for the measurement of television audiences (Napoli 2005), as well as Arbitron's ongoing effort to introduce its portable people meter for the measurement of radio audiences. Both devices introduce electronic measurement technologies into local markets that previously were measured via paper diaries that participants filled out and returned for tabulation on a weekly basis. In both instances, however, the new ratings data produced by the new measurement technologies indicate levels of popularity for stations and programming targeting minority audiences that are in some instances significantly lower than those depicted via the old measurement system (see Napoli 2005). Debate persists as to whether the new ratings are a function of inadequate samples of minority audiences, or whether they simply represent a correction to inflated ratings data produced by the shortcomings of the paper diary methodology. In either case, these debates illustrate the strong connection between audience ratings, audience representation, and the availability of content serving a diverse array of audience interests. These debates also illustrate a fundamental aspect of audience ratings – as the technologies and methodologies for generating ratings data change, so to do the portraits of the audience contained within these data, a phenomenon that poses challenges for both academic researchers and industry decision makers (Napoli and Andrews 2008).

As this discussion suggests, effective sampling often is integral to accurate and reliable ratings data. Today, however, we are seeing the development of systems capable of moving beyond samples and measuring the media consumption of the population as a whole – essentially conducting a census of media consumption. Consider, for instance, the technique of *server log analysis* employed in some circles for the measurement of online audiences (Bermejo 2007). With server log analysis, the data come not from individual panelists, but from the servers of individual websites, which retain information about each individual visitor to the websites. In this way, every web surfer who visits a site is contributing to the site's ratings data, not just those individuals who are part of a measurement service's panel. Similarly, in television, efforts are underway to gather viewing data via the set-top boxes that are integral to virtually all multichannel video-programming delivery services (e.g. cable, DBS, etc.). Every set-top box can provide data back to the service provider about the viewing patterns taking place in every home receiving programming.

There are shortcomings to such approaches as well. One is that, unlike with panels, it is much more difficult to gather the highly desirable demographic data from audience members when data are being gathered via web server logs or television set-top boxes (Bermejo 2007). Under these approaches, the typical audience member is often not even aware that she is taking part in the audience measurement process, and may or may not be willing to provide accurate demographic

information if asked. But without an accompanying effort to gather demographic data, set-top boxes and server logs provide only very basic information about audience exposure – essentially, how many computers visited a particular websites, or how many televisions tuned into a particular program.

A second significant issue that arises from such measurement approaches involves privacy. Web server logs and television set-top boxes have the capacity to gather basic media consumption data (if not demographic data) from all web and television users, regardless of whether they approve of having such data gathered about them; and techniques are being developed to ascertain more detailed demographic data – in many cases, once again, without the audience members' knowledge or permission. Particularly online, privacy concerns related to the gathering of web usage data are becoming increasingly pronounced, and we may see regulations put in place that directly address (and perhaps curtail) this kind of audience data gathering (Napoli 2011). The key, at this point, however, is to recognize that alternatives to the traditional sample-based panel approach to audience measurement are emerging, with many current measurement efforts oriented toward developing ways of integrating panel and census data.

Measurement technologies

Moving beyond sampling, the other key aspect of the audience measurement process that affects the accuracy and reliability of the underlying data involves the technology employed for gathering the data. A wide variety of data-gathering tools are employed around the world today to gather ratings data, ranging from paper diaries to television set-top meters (i.e. people meters), to wristwatch- and pager-style devices (often called *portable people meters*) that pick up audio signals. The different technologies for gathering data have different strengths and weaknesses, particularly in terms of the types of audience members for which they are best able to gather data. Older audience members, for instance, do quite well with traditional methods such as paper diaries, but have difficulties interacting with more technologically sophisticated systems such as people meters. Younger audience members, in contrast, tend not to be as conscientious in their keeping of paper diaries, but are more comfortable with more technologically sophisticated systems. Such tendencies again illustrate the means by which different measurement systems can produce very different ratings estimates.

More sophisticated ratings systems generally involve higher costs. Set-top and portable people meters are much more expensive to deploy and maintain than paper diaries. Generally, the greater the subscriber revenue potential for the measurement firm in any particular media market, the more advanced will be the measurement system deployed. Lower revenue media markets tend to have measurement systems that are less advanced, and thus less accurate and reliable, than higher revenue markets (Webster and Phalen 1997).

There are a number of elements to an effective data-gathering system that have been identified over time. Perhaps most important is the extent to which the system is “passive,” that is, the extent to which it requires minimal work and input on the part of the participant. Thus, for instance, the time, effort, and recall involved in the completion of paper diaries are generally seen as sources of measurement error, as participants may inaccurately recall their viewing or listening behaviors, or may intentionally misrepresent them. Systems such as those used in online audience measurement, in which the participant needs only to download measurement software that records all of the participant’s online activity, require much less of the participant and therefore offer far fewer opportunities for participant-induced error.

But even more advanced systems, such as people meters or portable devices, do require some work on the part of the participant. In the case of people meters, the participant must, at minimum, remember to log in and log out appropriately, so that a people meter can accurately record the demographic characteristics of the television viewers. Portable meters require that the participant remember to carry the meter around all day, so that all media exposure is accurately recorded. A related concern involves the issue of *fatigue* – the extent to which participants tire of taking part in the measurement process over time. Obviously, the more time and effort required by the participant, the greater the likelihood of fatigue. Generally, there is a reasonably rapid turnover in audience measurement samples in order to combat such fatigue.

As should be clear, ratings data are likely far from perfect in terms of the extent to which they accurately represent the size and composition of the audiences consuming electronic media content. However, they do gather such data on a scale that seldom, if ever, can be matched in academic research; and so in many instances they represent by far the best available option when it comes to information on audience exposure to electronic media content, particularly if the researcher is seeking to conduct analyses that compare audience behavior patterns across multiple media markets and/or over time.

Theoretical Critiques

Many critics have argued that the emphasis on audience size and demographics in the measurement of electronic media audiences is itself a fundamental problem (e.g. Ang 1991). According to this perspective, the reduction of the complex dynamics of media consumption into simplistic exposure metrics, in which demographic characteristics are used as proxies for product purchasing behaviors, represents a myopic conceptualization of the media audience. As many of these critics note, this reductionism reflects the economic imperatives of the commercial media industries, and is particularly reflective of the needs of advertisers and media buyers, who long have measured success in terms of ad *exposures* or *impressions*,

and seek first and foremost to maximize such exposures and impressions amongst those segments of the audience that they perceive as likely to respond to their particular advertising message (Meehan 1984). It is from this perspective that the well-known notion of the audience as “commodity” emerged, with scholars recognizing that not only is the production of audiences a key objective of advertising-supported media (Smythe 1977), but also, more narrowly, it is the production of ratings that is in fact their key objective, with those audiences that contribute to the calculation of ratings data being the only audience members of real concern to ad-supported media (Meehan 1984).

As should be clear, the approach to the media audience reflected in ratings data is one in which questions of how or if audiences interpret, appreciate, are affected by, or respond to the content they consume have traditionally been marginal, at best. In some instances, ratings data have been analyzed in ways that seek to infer some of these dimensions of audience behavior (see e.g. Barwise and Ehrenberg 1988). In other instances, there have been efforts to construct ratings services that simultaneously capture not only traditional audience demographic and exposure data, but also data on aspects of media consumption such as audience appreciation of the content they consume (Mitgang 2002). Such efforts have, however, gained traction in only a few countries.

Ratings Analysis

Clearly, there are many aspects of audience behavior that are not well captured by ratings data. Nonetheless, there are a wide range of analyses related to the processes of audience exposure to media content that can be fruitfully conducted using ratings data. In addition, to the extent that ratings data reflect the strategic and economic imperatives of media institutions, they also can be used to glean insights into the behavior of these institutions. It is important to emphasize that the discussion below focuses on the uses of ratings data in academic research (see Webster, Phalen and Lichty [2005] for an overview of the uses of ratings data in industry settings). Although it is beyond the scope of this chapter to provide a comprehensive review of this literature, this section will provide a basic overview of the types of analyses that have been conducted. For a more detailed typology of the uses of ratings data in academic research, see Stavitsky (2000).

Audience behavior research via ratings analysis

Ratings analyses have been used in a wide range of studies related to audience exposure to media content. Many ratings analyses involve identifying stable and predictable patterns of audience behavior, in an effort to better understand the

dynamics of media consumption. Scholars across a variety of disciplines, including sociology, communications, and economics, long have been interested in developing predictive and explanatory models of audience behavior that identify persistent patterns related to audience exposure to media content (Webster and Phalen 1997). Work in this vein, for instance, has empirically identified persistent patterns such as the “double jeopardy effect” (Barwise and Ehrenberg 1988), which depicts how content that attracts a small audience (source of jeopardy #1) also tends to attract audiences that are not particularly loyal, in terms of the frequency with which they consume the content (source of jeopardy #2).

Much of this work has been concerned with examining how content characteristics are related to exposure patterns. Thus, for instance, research in the media economics tradition has looked at how factors such as production budgets relate to audience exposure patterns in an effort to develop theoretical models of program choice (see Owen and Wildman 1992). One particularly important finding of this line of research is the extent to which media consumption appears to be first and foremost a function of audience availability, with general consumption patterns (i.e. the percentage of the population using television, radio, or the internet at a particular point in time) proving relatively stable and predictable, but the distribution of audience attention across available content options proving much more difficult to predict (Webster and Phalen 1997).

Other studies examining patterns of audience exposure have focused on “audience flows” across content options (see Cooper 1996), in an effort to understand the factors that affect if and how audiences transition from one content option to the next. Such analyses have illuminated behavioral patterns that are at the core of much of the “programming theory” employed by content providers (Eastman 1998). Examples of this type of work include studies of inheritance effects (analyses of the extent to which audiences for one program flow into the next program) and channel loyalty (the extent to which audiences return to individual channels) (Dick and McDowell 2004). Research in this vein is, of course, highly reflective of efforts by programmers to develop strategies to aid in the scheduling of programming in ways that maximize audience exposure.

Another important point of focus of ratings analyses has been on how audience exposure patterns are affected by technological change. A deeper understanding of the effects of new communications technologies can be obtained by examining how new technologies affect the dynamics of audience exposure to media content. Thus, for instance, ratings analyses have been used to examine how the introduction of cable television, and the associated growth of television channel capacity, affected the dynamics of audiences’ television consumption (see Heeter and Greenberg 1988). More recently, a number of studies have examined how the distribution of audience attention is affected by the tremendous fragmentation of the media environment (particularly in the online realm), and have sought to determine whether audiences’ behavioral patterns exhibit similarities across old and new media platforms (Webster and Lin 2002; Hindman 2007).

Such analyses can inform not only our basic understanding of the dynamics of the consumption of media products, but also policy questions related to how new technologies affect audience exposure patterns to content considered socially beneficial, such as news or public affairs programming (Webster 1984), or, for that matter, content considered harmful, such as violent programming (Hamilton 1998). The question of how the new media environment affects *exposure diversity* – the extent to which audiences are exposed to a diverse array of content types and/or sources (Napoli 1997) – has been a particular point of focus of recent ratings analyses (Yim 2003; Webster 2007; Yuan 2008). This issue has become an increasingly common component of contemporary media policy debates (see Napoli and Gillis 2006), given the widely held presumption that the diversity of content offerings available in the new media environment only achieves their full social value if audiences partake of the diversity of viewpoints, ideas, and content forms available to them.

Media institutions research via ratings analysis

Ratings data are useful not only for understanding media audiences, but also for understanding the institutions involved in the attracting and monetizing of media audiences. To the extent that ratings serve as the currency in the marketplace for media audiences, analyzing how these data are used by participants in this marketplace is a useful window into the operation of media outlets, content producers, advertisers, and media buyers. For example, a key use of ratings data for understanding media institutions has been the growing body of research that has examined the value that media industry stakeholders place on different audience segments (Koschat and Putsis 2000; Coffey 2008). Research in this vein typically melds ratings data with revenue or ad rate data in an effort to determine the valuations that are assigned to different audience groups. Such analyses not only provide insights into the logics that are guiding the audience marketplace, but also can illuminate patterns that may raise or inform policy issues. Thus, for instance, studies indicating low valuations of minority audience segments have been a focal point of policy discussions about possible mechanisms for promoting or preserving minority-targeted media outlets (Napoli 2003). Here again, as was the case in regard to the issue of minority representation in audience measurement panels (see above), the key concern involves the effect on the availability of minority-targeted content. If advertisers tend to undervalue minority audiences, then media outlets will not have sufficient economic incentives to provide content of interest to minority audiences, and the diversity of available content is subsequently diminished. Analyses of ratings data also have been used to explore the underlying economic logic of the production of violent programming (Hamilton 1998), as well as to investigate how variations in competitive conditions affect the distribution of audience attention and advertising revenues within individual media markets (Webster and Phalen 1997).

Access to Ratings Data

Regardless of whether a researcher is looking to examine media audiences or media institutions via the analysis of ratings data, a key hurdle that the researcher needs to overcome is obtaining such data. As was noted above, ratings data are produced by commercial audience measurement firms. The primary revenue stream for these firms is subscriptions from media outlets, content producers, advertisers, and media buyers. That is, these measurement firms typically are in the business of producing and selling syndicated ratings reports – aggregations of ratings data in a unified format to all subscribers. Increasingly, measurement firms also are providing subscribers with access to the underlying raw data in addition to standardized ratings reports.

The price that subscribers pay for the data, however, is anything but uniform. Pricing for commercial audience data is opaque. It is a function of factors such as the size of the organization seeking the data, the number of users of the data within the organization, or the number of computer terminals via which the data will be accessible (Napoli and Karaganis 2007). Thus, the amount paid by different subscribing organizations for the same data can vary widely. And, because there has historically been very little competition in the provision of ratings data, prices tend to be quite high. Because ratings function as the “currency” in the audience marketplace, there seldom has been sufficient commitment from media outlets or advertisers to financially support competing measurement services to provide alternative currencies. The lower prices arising from the arrival of competitors would likely be offset by the corresponding costs of having to subscribe to multiple ratings services. The need to analyze, and haggle over, multiple potentially conflicting ratings reports for the same piece of content would add greater uncertainty and analytical burdens to the audience marketplace. Based on these tendencies, one might even argue that the ratings business is a natural monopoly.

Typically, a subscription to a commercial audience ratings service (or even the purchase of a single data set) includes a contract that prohibits the subscriber from even discussing the terms under which she received access to the data. Such non-disclosure clauses facilitate maximum price discrimination by the measurement firm amongst its client base (i.e., the less a potential subscriber knows about how much others paid for the data, the easier it is for that measurement firm to charge that potential subscriber as much as possible). These contracts also typically prohibit the sharing of data with nonsubscribers (see Napoli and Seaton 2007).

Academic researchers, needless to say, seldom have substantial resources with which to purchase ratings data. Thus, if they are to obtain ratings data, they are most likely to do so via receiving the data for free or at a substantially discounted price from a sympathetic representative of the audience measurement firm. In some instances, the data provider may provide access primarily out of an interest in supporting academic research, out of a desire to see the data implicitly validated

or endorsed by its use in academic research, or out of the desire to capture the additional, relatively small amount of revenue associated with serving an academic client. However, data access may be conditional upon the nature of the research project being proposed. Proposed projects that have the potential to produce results that would be unflattering to the measurement firm or to its clients are less likely to result in access to the data. Ratings firms recognize the problems that can arise for them should their more important clients learn that their high subscription fees essentially are subsidizing discounted access to ratings data for academics producing work critical of their activities.

It should be noted that this bottleneck of control over ratings data has most likely limited the nature of the academic analyses that have historically been conducted with ratings data. It is probably in part for this reason that much of the audience research that has been conducted utilizing ratings data has frequently been described as “administrative” research (i.e. research focused primarily on providing insights useful to the various sectors of the media industry; see Webster and Phalen 1997). Academic research projects of this type are much more likely to obtain access to ratings data.

The Future of Ratings Analysis

Technological changes have been gradually damaging the foundations upon which the traditional markets for audiences (i.e. ratings) have operated (Napoli 2003). Factors such as the increasing fragmentation of the media environment and the increasing control audiences have over the process of media consumption are serving to simultaneously undermine traditional audience ratings systems and, ironically, facilitate the creation and adoption of alternatives to this system.

In understanding this process, first, it is important to note that the greater the number content options (i.e. channels) available, the more challenging it is to accurately and reliably determine the ratings for these channels when relying on traditional panel-based measurement systems. This is because panels need to become larger and larger to adequately account for the number of channels. Consider, for instance, that Nielsen/NetRatings’ web audience measurement panel for Australia consists of 4000 people. There are, in contrast, literally millions of websites available to these 4000 people. The odds are that many of these websites are not being visited by any of the members of the Nielsen panel, which would therefore mean that these sites would generate a rating of zero in Australia, despite the many Australians who might actually be visiting these sites. This is an extreme example meant to illustrate that as audiences become more widely dispersed across available content options, the ratings are less likely to accurately or reliably reflect the size or composition of the audience consuming the content. This same problem has become quite pronounced in the television realm, where channel capacity has expanded

faster than sample sizes can keep up. Many of the over 500 television networks available in the United States today have average ratings that are too small for Nielsen to even report.

And, while one could argue that the measurement firms simply should increase their sample sizes, we must keep in mind that increasing sample sizes is costly. The addition of these new channels, with their very small audiences (and thus very small revenue streams), does not always add enough subscription revenues to the measurement firms' bottom line to sufficiently incentivize such sample size increases.

This situation is further complicated by the fact that content can now be consumed across multiple media platforms. Thus, for instance, a television program can be watched on television when it is aired by a broadcast or cable network, recorded on a DVR and watched later, watched online via a streaming media service, downloaded and watched on an iPod, or even watched via a cellular phone. The point here is that the platforms via which audiences consume media are increasing, and it is becoming increasingly difficult for ratings services to accurately and reliably capture all of these contact points, particularly given the traditional history of ratings firms operating in individual silos, with different firms and different methodological approaches independently handling the measurement of different content delivery platforms.

For the academic researcher, this situation means that ratings data likely are becoming an increasingly inadequate representation of audiences' media consumption – particularly if the researcher is interested in audience attention across the full range of content options, as opposed to just the most popular ones (which still are measured comparatively well by traditional measurement approaches).

The counterbalance to this decline in the reliability and comprehensiveness of traditional ratings data as a result of media and audience fragmentation is the institutionalization of alternative metrics for media consumption resulting from the increased interactivity of the new media environment. That is, while the new media environment makes it increasingly difficult to determine exposure-based audience ratings, it makes it easier to capture and aggregate other aspects of media consumption, such as audience engagement, audience appreciation, or audience recall of the content they have consumed.

Because new media technologies are increasingly interactive, various forms of audience response can now be captured and analyzed. Now, audience feedback and participation via interactive television set-top boxes, audience discussion in online forums and chat rooms, and behavioral responses in terms of ad-clicking or product-purchasing behaviors can be immediately gathered, aggregated, analyzed, and, ultimately, used as criteria for setting advertising rates and making strategic decisions about content production and placement.

Measurement firms are developing measures of audience engagement with media content that are beginning to be used in addition to traditional exposure-based audience ratings in the analysis of content performance and in the setting and

negotiation of advertising rates (Napoli 2011). One recent trade publication described how smaller, niche cable networks – exactly those networks that are not well served by traditional exposure data – are beginning to employ “engagement” data as an “alternative currency” with advertisers (Crupi 2008, p. 12). Another recent analysis boldly declared that ratings “no longer matter” (Pilotta 2008, p. 1). Such developments suggest that we may be entering into what Napoli (2011) has described as a postexposure media environment, in which the basic criteria for success upon which the marketplace for media audiences operates are changing dramatically, and in which traditional exposure-focused audience ratings data likely will play a diminished role.

Redefining Ratings Analysis?

The obvious question that arises, then, is how do these developments affect our definition of ratings analysis? Is the focal point of the definition the aspect of media consumption that is being analyzed? That is, is ratings analysis defined in terms of the measurement and analysis of audience exposure via syndicated data sources? If so, then the academic utility of ratings analysis may be in decline, given the developments described above. Or, should ratings analysis be defined in terms of the source and purpose of the data being analyzed? That is, is ratings analysis defined as the analysis of the data (whatever their orientation) used by media industry stakeholders to assess performance and success in the audience marketplace? If this is the case, then we simply are at the beginning of an evolutionary stage in ratings analysis. The nature of the ratings is likely changing – or, more accurately, expanding – and the nature of the questions that can be investigated by ratings analysis will need to expand accordingly. In light of this, this is a very exciting time to be engaged in ratings analysis, as this research tradition is essentially in a period of reinvention.

What is particularly striking about this ongoing transition is the extent to which the media industry appears to be moving toward embracing dimensions of media consumption that have been the province of those scholars who have been critical of traditional ratings analysis and its use in both industry and academic settings (e.g. Ang 1991). Concepts such as engagement, appreciation, and response may soon challenge the primacy of exposure. This transition suggests that a window of opportunity may be open for those scholars who have been examining these aspects of audience behavior that traditionally have resided at the margins of media industry concerns to offer input into how the industry’s ongoing reconceptualization of media audiences should take shape.

From an academic standpoint, these developments would also seem to represent an opportunity for a bridging of the gulf that has developed between those audience researchers who engage in ratings analysis and those who engage in more qualitative approaches to audience behavior, given the greater congruence (at least

superficially) that appears to be developing in the aspects of audience behavior under examination in these historically divergent research traditions. If the nature of this gulf is purely methodological (i.e. quantitative versus qualitative), then the developments taking place likely will have no effect in terms of unifying the audience research field, as the “new” ratings systems still will cater to the media and advertising industries’ established (and likely unchangeable) desire for quantitative data and performance metrics. Similarly, if the nature of the gulf is primarily ideological (i.e. focused around opposition to, versus cooperation with, the interests of commercial media organizations), then there is once again relatively little likelihood of seeing a coming together of these research traditions, as the data utilized in ratings analysis still will reflect the commercial imperatives of media industries.

However, if the nature of this gulf is more theoretical (i.e. involving the appropriate conceptualizations of audiences’ media consumption), then it would seem that the move within the media industries and audience measurement organizations to look beyond exposure has the potential to narrow, at least somewhat, the divide separating these two research traditions. This prediction presumes that scholars currently engaged in ratings analysis will be flexible and adaptable in response to changes taking place in the realm of audience measurement, and will embrace the new audience metrics emerging alongside the declining exposure metrics. To the extent that such researchers tend to often approach their subject from a standpoint grounded in the economics of media industries or the behavior of media institutions, this would seem to be a safe presumption. Scholars with such an analytical orientation often are concerned less with understanding the audience per se than in understanding media industries and institutions via their engagement with audiences – whatever analytical form these audiences take.

In any case, the future of ratings analysis seems to be in a state of flux. New audience ratings are emerging to stand alongside the old. Opportunities are developing for the academic researcher to work with very different forms of ratings data; to investigate new and different questions related to both media audiences and media institutions with these data; and, ultimately, to expand the parameters of ratings analysis in the years to come.

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