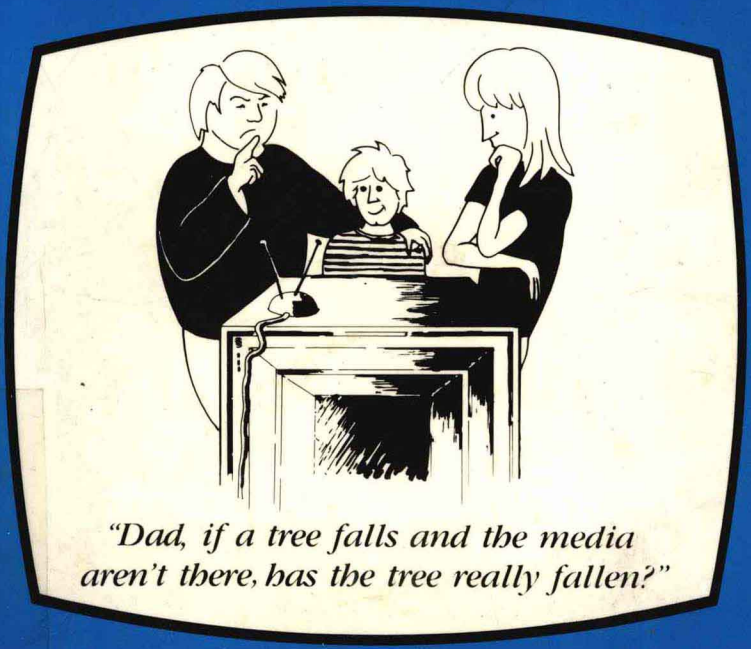
TELEVISION AND ITS AUDIENCE

Patrick Barwise & Andrew Ehrenberg



"Dad, if a tree falls and the media aren't there, has the tree really fallen?"

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Television and its Audience

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and
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Preface

Television as a medium is rarely considered in the light of how we as viewers actually use it. Discussions of the effects of television, its funding, its future, or its programs are seldom related to any real and detailed knowledge of people's patterns of viewing and program choice.

Nonetheless, implicit assumptions are often made about how people watch. For instance, it is widely thought that programs and channels each have their regular viewers, that people mainly want to watch the most popular programs, that public service channels appeal to only a small or elitist minority, and that people want their television to be free of charge. Such views are formed on the basis of an often totally mistaken understanding of market demand as revealed by the audience's actual viewing behavior and willingness to pay. This lack of understanding matters particularly in the current context of deregulation, of the 'video revolution', and of worldwide funding crises for television.

There is thus a need for a book that makes sense of the nature of television and its problems in terms of the audience's viewing patterns and of the economics of the market. *Television and its Audience* aims to do this for students, teachers, practitioners, and interested members of the public. It draws mostly on research from the USA and Britain, with some results from other countries. The book summarizes technical work in a non-technical style. References and background material are given at the end of each chapter and there is a glossary at the end of the book.

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The research background comprises more than one hundred reports prepared over more than twenty years: in the USA mainly for Arbitron and

the Markle Foundation, and in Britain mainly for the Independent Broadcasting Authority, 1967–84, and more recently for the BBC. Much of this work on audiences was carried out with our colleagues, Professors Gerald Goodhardt and Martin Collins, and was summarized in *The Television Audience: Patterns of Viewing* (Goodhardt et al., 1975, 1987). Our emphasis here is much broader.

Of the many people to whom we are indebted for support and discussion, we single out particularly Lloyd Morrisett, President of the Markle Foundation, and William Phillips, for his informed and painstaking help during the draft stages.

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PART ONE
THE GIANT MEDIUM

By any measure, television today is the giant among media. The amount of time that people give to it, and how and why they do so, throws light on the many practical and ethical concerns surrounding television. In Chapter 1 we stress the need to link our thinking about these concerns with how the audience actually uses television. The chapter also gives an overview of how we address this in the five parts of the book.

Chapter 2 looks at how much time people spend in front of their television sets, how this amount varies among individuals, and how people spread their viewing across different times of the day and week. Whereas overall viewing levels follow regular patterns and are fairly steady from week to week, an individual's viewing is typically much more irregular.

Chapter 1
Introduction and Overview

Watching television is a major feature of modern life in developed countries and, increasingly, in developing countries. The 'box' is a frequent topic of conversation although, as viewers, we usually seem to have little to show for the hours that we spend in front of it. Television is also a significant industry in its own right and is a major advertising medium in most countries.

For these reasons, television has always attracted a lot of 'punditry'. Debates rage about whether it is a waste of time; about whether it has to be run in the way that it is or if it might be organized better; about its coverage of sex, violence, profanity, politics, and social issues; about its stereotyping of minority or underprivileged groups; its role in education and cultural improvement; about the effects of television advertising; and so on. These questions also arise in the context of other mass media but the ubiquity, immediacy and vividness of television put it in the center of all these debates. The fact that fairly little is known objectively about the issues has not reduced the amount that is said and written.

The past few years have also seen an intensified commercial and political focus on television. The growing interest in market forces and deregulation, which often implies that television should increasingly be funded by advertising (as traditionally in the USA), has recently brought advertising into many previously non-commercial television systems from Italy to India. In addition there is the impact or potential of the new video technologies, especially cable, satellites, and video cassette recorders, with the promise of more to come. Some enthusiasts are already proclaiming a new age of television, with untold program choice that is controlled by the viewer rather than by channel schedulers.

What often seems to be missing from these debates is any real reference to the *audience*, other than perhaps a mention of the ratings – the numbers of people who watch a program. How the viewers actually consume television throws light not only on the practical policy issues but also on the overall nature of the medium. That is the focus of this book.

As we will describe, there are predictable patterns in the way that people

watch television: the range and variety of different types of program that people choose to watch, the extent to which viewers watch a series regularly, their loyalty to a channel, and so on. These patterns can affect how programs are produced, how they might be scheduled across the evening, and how television can be funded.

Would starting each episode of a series with a recap of the story so far be tiresome or useful? Can schedulers 'catch the audience young' early in the evening and keep them watching their channel all evening? Does concentrating on programs that attract the highest ratings really give viewers what they want? What is the impact of television violence? Are the more highbrow programs watched merely by some elitist minority? What is the best way to position the programming of a new television channel – to capture high ratings and revenues or to give viewers more effective or satisfying choices?

In addressing such issues, perhaps the most important background knowledge that is needed is the overall picture of how people watch television. We watch a lot but it is mostly at a fairly low level of involvement, often at a lower level of attention than in a cinema or theater, at a live concert or sporting contest, or for most books or magazines. We are not even always watching the screen when the set is on. Yet many participants in debates about the effects, the organization, and the future of television seem implicitly to assume a continuously *high* level of audience involvement.

Some enthusiasts of new technology have, for instance, described a future world of individuals who start every evening actively designing their own tailored viewing schedule by searching through a limitless cornucopia of program information. Another widespread belief is that, by at least the year 2020, the patterns of distribution, production, and consumption of television or video will be much the same as those of the print media today. It is thought that today's mass audience channels will be supplemented or even supplanted by a flowering of highly targeted 'narrowcast' channels analogous to books and to specialist or local print media. These narrowcast channels are expected to reach small, well-defined, and highly involved audiences and to be profitable because, compared with today's few mass channels, they will be able to earn much more revenue per viewer from relevant advertisers or from direct pay-TV subscriptions or indeed from both.

Such scenarios seem to us unlikely to occur on anything like the scale that is often assumed. We do expect that more new channels will evolve but also that the total time spent watching them will be fairly small compared

with the vast amount of time that people spend viewing television as a whole. The main reason is that watchable new programming is unlikely to become available on a sufficiently dramatic scale. For the more revolutionary scenarios to occur, there would also have to be big changes in the patterns of viewing seen to date, in how television acts as a communication medium, in the costs of program production, and in how revenues are generated. Yet no such big changes have been predicted by anyone involved. Nor do we ourselves regard them as at all likely, with the possible exception of marked increases in what we pay.

There will be change, but we think it will have only a limited impact on the bulk of future viewing. Because of this difference of opinions about the future, we present here the existing evidence about the present and past so that readers may judge for themselves.

AN OVERVIEW

The book is divided into five main parts. The first three are concerned with people's viewing behavior: how we use television.

The second chapter in Part One describes how much and when we watch television. Most people watch a lot, often more than twenty hours per week, although some of us watch less. There are many regular patterns in this, the most obvious being that peak viewing or 'prime time' is always in mid-evening. However, as individuals we are often very irregular from day to day or week to week as regards when we watch. Viewing mostly seems to occur when we have nothing more compelling to do.

Part Two deals with people's choice of programs. Most people watch a wide variety of different types of program, as discussed in Chapter 3. This is so for viewers of all kinds. There is no special tendency for viewers of a particular program to choose other programs of the same type. Perhaps surprisingly, viewers of *Dallas* are no more likely to watch *Dynasty* than are viewers who do not watch *Dallas*. The audience of *Dallas* is not a collection of soap opera addicts, nor is that of *Dynasty*.

Each of us cares enough about some programs to make some effort to see them. But in Chapter 4 we note how (as with television generally) our viewing of specific television series is mostly rather erratic; only about *half* of those who watch a peak-time program this week will have seen last week's episode. The proportion for lower-rating programs is even smaller. Hence very few viewers watch all of even a limited-run serial.

The converse is that many people will get to know some part of it. For example, half of the UK population saw at least one episode of the

acclaimed weekly series, *Jewel in the Crown*. But despite each episode being shown twice per week, only two in a hundred saw all fourteen episodes, and not very many more saw twelve or thirteen. Such irregular viewing is typical for all regular series. It is predictable in detail and is little affected by having a VCR.

These two patterns in people's viewing – spreading across different types of program and rarely watching any one of them very regularly – do not mean that their viewing is just random or that they do not care what they see. People have real preferences. But watching a particular program right then is not always enormously important to them, so long as there is a good degree of choice available over the week. In Chapter 5, we explore this in terms of audiences' expressed appreciation of television programs. The evidence is that people mostly quite like what they watch, enough to go on watching the program in question, and definitely more than they like the programs that they know about but do *not* choose to watch. There are some programs that some of the viewers like especially, but this differs greatly from person to person; while one person's meat may not be another's poison (otherwise they would hardly watch the program), it may well not be as palatable. So the average viewer of a program typically only *quite* likes it rather than regarding it as a preferred favorite. Television is a mass medium because it is so widely watched, not because everyone likes or watches the same thing.

Low-rating programs, those that are watched by few people, tend if anything to be liked *less* by their few viewers than are high-rating programs by their many viewers. A partial but important exception to this pattern occurs for programs which are emotionally or intellectually more demanding and not classifiable as 'mere entertainment'. These are usually watched by fewer (although often numerous) people than the top-rating entertainment shows but tend to be appreciated just about as highly as the latter.

There is, however, almost no evidence to back up the commonly held expectations about true 'minority interest' programs: that programs exist which have very few viewers but are liked exceptionally well by most of these. Television programs do not appear to work like that. This matters when we are concerned with the range of programs that might be produced or with alternative ways of paying for programs or with the possible 'segmentation' of the mass audience.

In Part Three (Chapters 6 and 7) we turn from program choice to the distribution channels through which programs reach us. We usually choose to watch programs, not channels, and we are not always very aware of which channel we are watching. We are not glued to one channel if there is choice.

Even on a single day, the average viewer tunes in for significant periods to almost three channels in the UK or four in the USA, and this pattern predates the advent of remote switches. There is a degree of channel preference or loyalty but this is weak and divided: most viewers watch all or most of the larger channels.

The 1980s have seen a proliferation of distribution channels based on new technologies, as we review in Chapter 7. Many homes now have more than one television set. Large numbers of people have video cassette recorders (VCRs), a very different kind of channel for distributing, or redistributing, programs. Cable television is widespread in some countries such as the USA, Canada and Belgium, either to replace over-air transmissions for better quality pictures or to give additional choice, but it is hardly used at all in most other countries. VCRs and cable-only programming are each viewed for several hours per week by their users, which makes them significant leisure activities in absolute terms, but this is relatively small *compared with the 20-plus hours per week* that people watch programs available over the air via traditional broadcast channels.

The new distribution channels are mostly used to give us some extra freedom of choice over and above the main channels. This extra choice is largely a question of timing: users of the new channels tend to watch a rather similar range of programs, or even re-runs of the same programs, as are on the over-air channels. The new channels are therefore not revolutionizing our viewing choices or our viewing behavior: television is still television.

In summary, Parts One to Three focus on how we watch television and on our choices of particular programs and channels. Parts Four and Five then deal with the economics of television and with the nature of the medium more generally.

Part Four discusses what television costs and how we pay for it. Making watchable programs is very expensive and Chapter 8 explains why this is so. Paradoxically, *watching* television (i.e. receiving programs) is mostly very cheap. It costs only a few pennies per viewing hour for channels funded by taxes or license fees, such as most European channels, or is even apparently free if funded by advertising. It may seem odd to spend over $1 million on making one episode of *Dallas* but, if some 100 million people around the world see it, that amounts to only one cent per viewer –some of the cheapest television there is.

The way that television is paid for, together with both the good and bad effects of competition, influences the kind of programming that is produced and watched in different countries. Under the right conditions,