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<td><strong>Author(s)</strong></td>
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Audience Research In Australia

By

Peggy McDonald
AUDIENCE RESEARCH IN AUSTRALIA

Research in Australia is conducted on 3, possibly 4, levels. But before I outline them I must remind you that Australia is a country of fifteen million people with an area that allows just over one person per square kilometre; It has three time zones and is on the one hand the most sparsely settled and on the other, the most urbanised country in the world. More than half of the entire population lives in two cities.

In radio, there are 37 commercial metropolitan radio stations, 100 commercial country radio stations and 52 public broadcasting stations. The national network has - 16 am city and 79 am regional stations, 5 domestic short-wave and radio Australia, plus a youth FM network and a general FM network. The capital cities have three commercial television stations, one National and one National Ethnic, and there are many commercial and national regional stations. The Australian Aussat satellite has just started operation - previously satellite was used only for remote broadcasting, through there is legislation to prevent too much cross media ownership in fact the commercial media, including newspapers, is in the hands of a few.

Back to the three, perhaps four, levels of Audience Research.

(1) Academic:

In Australia, the Universities have a unique function in the research equation, the need for which will become obvious as I go on. They do not undertake programmes which are used to any great extent by the networks, nor do they have apparent, direct effect on legislation although ultimately what they provide certainly does have influence. But the studies undertaken by universities outside of small undergraduate course exercises which usually look at questions which broadcasters are solving elsewhere are studies which involve a great deal of time. Longitudinal effects studies, comparisons of areas before and after particular events (such as introduction of television) occur, links with violence or pro-social effects,
portrayal of women, are all the province of universities, and I believe properly so, because in all probability, no-one else is going to do them. Lately government agencies have begun commissioning "social" market research companies to work in this area and some good research people have moved into this area, but that is a comparatively new phenomenon.

The second level is the legislative level - the Australian Broadcasting Tribunal. This is the body which sets standards and grants licences to the commercial sector - not the National which theoretically is independent from any form of pressure though governments have found that manipulating a budget can have restrictive effects on some forms of programming (regrettably in-house drama). This body has a competent research department which looks at matters of taste, public acceptance of violence or other controversial matter, standards of advertising, appropriateness of programmes watched by children, music usage and so on, in fact any short term audience research that government policy may dictate is properly the Tribunal's task, but it does other work too, into appreciation of programmes and analysis of viewing patterns. University work is available to everyone but often poorly publicised so that people don't know how to get it; the Tribunal's also is free to anyone who wants it.

The third level is network's audience research and in this group, I class the ABC's research department. Most radio stations and all television stations make use of research. Some, like the ABC, have an in-house research unit, others not. But all subscribe to a syndicated commercial ratings system, either radio or television. So let me get that out of the way first. Despite the fact that there are deficiencies, the service is honest in our country, audited by respected academics, the samples provided by one of the leaders in the field. The deficiencies are ones that all of us as researchers know, such as those of insufficient call-backs resulting in doubtful response rate, but in some category levels only. More money,
more call backs, greater accuracy - we all know that problem! Use of time shift with VCR I'll address later.

The system is a diary based one, two weeks or one week, with a sample, using television as the example, of over four hundred households per week in the major cities. The figures one obtained allow a rating, i.e., percentage of homes with television, and a share, i.e., percentage of homes using television, with audience characteristics in terms of age, sex and geographical location, and for a fee, occupation for each programme. Reach, which is the total number of people using a programme in a given period and flow which is audience movement, is also part of the service. So you can tell what proportion of people watched the news on one channel and stayed on for the drama, what proportion moved to another channel's news, and who came from badminton to a serial and then went to the Pacific Song Competition thus avoiding a news altogether. You can also tell who watched the first of a series aimed, for instance, to change community attitudes to mentally retarded people in the workforce and then watched each subsequent programme. And, of course, knowing that more people who watch badminton watch current affairs than drama is a great help to progammers in a competitive society.

So much for the syndicated ratings service. You may wonder why there is no electronic system operating in Australia. The techniques are available, obviously, and there are companies ready to go. The problem is the cost, and an inbuilt fear in the minds of the commercial stations who would be the main users that it is, as a method, open to corruption. The advantages are obvious - not only is there a check in that the set's being on is monitored immediately by computer but the available technology allows registration of viewers, and interface questions. I don't believe we have access to the radio meter devices in Australia that have been invented, but I may be wrong.

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Now let us put ratings aside. They are important commercially and a measure of size is essential to a broadcaster anyway - however, rough and ready it may be, I'll only say further that the syndicated surveys in Australia cover only the capital cities, and though there is the occasional regional radio survey, and a rudimentary once a year television one, one of the tasks of my audience research department is to measure outside the capital cities. That is one of its two one-going quantative functions. The other is a measure of reaction to programmes, akin to the BBC's appreciation index, but done by the ABC, weekly, using self-enumeration forms delivered and collected. All programmes included cover commercial as well as our own product, demographic and lifestyle data, suitable questions we need to ask and, from mid-March, video cassette-recorder time shift recording. These reports which are available thirty six hours after the questionnaires come from the field are, at this time, available free for anyone.

The ABC's research department is a registered company so it surveys under the company name. Since mid 1960, it was Radio and Television Audience Research; in 1982, it became Media Scan. Both names serve the same purpose, to avoid telling the respondent who wants to know. We tested matched samples from time to time, one being ABC and the other the company - there was no significant differences in results. But the acceptance in the organisation was quite different - our people tended to believe the "company" report; they were sure lies were told to the "ABC" survey.

Other quantitative work is done from time to time, often commissioned outside. I believe that in the best of all possible worlds, we use outside measures and in-house measures. Outsiders bring a fresh approach and "in-house" has the experience. But my main interest is in qualitative techniques. And now, with apologies for moving from Australia to the ABC, I'll go back to the broader issue.

- contd. -
What I've been talking about, of course, relies on formal interviews, pretested and plotted schedules, samples selected with integrity either random or in our case, dwelling based with population proportioned to size. Many of the broadcasters rely in this type of survey to supplement the ratings. Some have research departments of their own. And in my own case, quantitative methods are used from time to time to establish a baseline in a particular study.

But the proliferation of stations and channels in Australia has led, in the case of radio, into definite narrow casting with stations establishing a particular target audience and programming for that audience. In television the intention is still to broadcast, but outside of the purely entertainment purpose of some networks, the availability of choice programmes on VCR on the one hand (estimated upwards of 40% penetration) and the availability of services such as teletext on the other has led to an awareness of the need to cater for various groups. Children and farmers have always been recognised as special need groups and those such as the deaf are obvious, but women, migrants, aborigines and the aged have emerged more recently. Developing programmes for these groups doesn't require techniques of random sampling so much as sensitive qualitative work. A great deal of work involving group discussion, depth interview and observation techniques is starting to take place, to assess the requirements of such groups of people, to develop programmes to meet these needs, to see how well or poorly one has succeeded.

Granted, this type of qualitative work has been used to develop entertainment programmes for many years. Pilot programmes have been developed and tested using group discussion or simple semi-structured questionnaires, or larger groups with dials that they use for registering reaction into a single computer graph. Series have been developed this way, and the tool is definitely a suitable one. Most television organisations either
employ their own researchers or use one of the specialised companies. But the necessity to reach what might be called media-disadvantaged groups in the audience has led to an increase in the use of qualitative methods on their own beyond the mere testing of pilot radio or television programmes. Where possible, qualitative data can be quantified - should be "quantified one might say" - but often it is being used because the technique itself has value in certain circumstances.

Another trend in Audience Research at the broadcaster level is the use of projective techniques to identify people who are innovative by nature. Panels of these people make up purposive samples for testing and eliciting new ideas - not all the time, but from time to time. Panels in other cases tend to be avoided because of attention and the fear that they become specialised in reaction, unless the universe is so small, that a panel is the only way of finding people.

And so this leads to the fourth level of audience research. I hesitate to call it a level at all. This is the secondary data base level. All too recently in Australia, the need for a readily accessible data base of information, papers, research previously done, has been acknowledged and some attempts at providing this have been made. There are one or two commercial organisations and a semi-government one started by the Film and Television school assisted by the government-funded media and arts organisations. This latter one is connected with the quarterly MIA (Media Information Australia) which tries to keep a research bibliography plus press clipping service as part of its brief. Advances in computer technology have helped but there are still problems.

Thinking about computers leads me to the last aspect of this brief overview. Being able to access and manipulate data, be it audience size or appreciation reaction has produced complicated prediction systems for programme layout planning. Now stations...
interested in one city (the whole country becomes too complex) can model one programme type wire, say, a moderate star, followed by another type, with a particular type of programme combination on each of the opposition and estimate the audience size, given that lifestyle availability is known. So instead of asking when a farmer's wife would like to watch the agricultural programme, getting the answer "twelve noon" and discovering that what she does at twelve noon is to watch the music variety programme from across the border, the computer tells you that, based on past experience, if there is music and agriculture in conflict and the farmer's wife is alone, she'll watch the music programme no matter what she says. These systems are not perfect, and ABC TV doesn't use one. (The ABC networks across Australia, and, as I've said the variables both in opposition, and indeed in lifestyle, are numerous. This so far has made such a model too hard.

Another advance computer has made is in enabling standard telephone interviews to take place - the computer dials the number, displays the question and all the interviewer does is read it out, punch in the number and ask the next question which the computer displays. This keeps surveys constant, and in our case, will allow (has not yet) regional radio station managers to conduct surveys of local importance in a standard fashion. It will still, however, not save him from needing the researcher's advice in forming the questions, interpreting the results and possibly, in putting those results to those in power.

And finally, where next? Certainly to metered ratings surveys. To an increasing sophistication of computer scheduling techniques for entertainment television. To an even more detailed understanding of the small target audiences for radio, using qualitative techniques, do-it-yourself phone surveys and specialist panels. And as the split between commercial and national broadcasting objectives widen, as they inevitably will, an increasing use of non-quantitative techniques to approach particular problems - our current one being satellite television and remote tribal aborigines and further ongoing studies of VCR usage, both in terms of time-shift recording for the stations and lifestyles implications, of importance to everyone.