

The anarchic audience: A case study

Gail Phillips and Mark Balnaves

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Abstract

The new media environment has brought with it increasing dissatisfaction with the information which quantitative analysis of audience numbers gives to those most interested – and this includes program makers, their bosses (be they in commercial or public broadcasting), and the advertisers. For all these interest groups conventional ratings methodologies have allowed them to assess the size of the audience they can reach, however numbers on their own haven't been able to tell them whether the audience members physically present for a broadcast are actually registering the content in a meaningful way. This paper describes a qualitative study of the radio audience in Perth, Western Australia which trialled a new methodology to allow the listeners themselves to be heard. In the process it also tested some of the assumptions that media professionals make about listener reaction to programs. The study indicates that radio listeners, no less than television viewers or Internet users, are anarchic and untamable, and furthermore have a far more sophisticated grasp of the medium than planners and programmers may give them credit for.

Introduction

What do we really know about radio audiences? We know how big they are because conventional ratings methodologies are focused on numerical measurement. We know who the listeners are, where they live, their age, occupation, and gender; the same numerical ratings data are a treasure trove of demographic information. But do we know how they listen and what they think of the services they access?

It is not just radio station management who want to know or, indeed, need

to know, these things. As Kerry Green points out, such knowledge is equally relevant to journalists and other content producers working in news, current affairs, or talkback radio:

Extensive research on both sides of the Pacific, and to a lesser extent in the United Kingdom, indicates that journalists generally are not well informed about the nature of their audiences. The research shows that journalists have little in common with members of their audiences, are not well informed about them and have difficulty relating to them (Green, 2002, p. 215).

Effective targeting of a committed audience is the goal of advertisers as well, even more so in the new media environment which is seeing a shift in focus from broadcasting to narrowcasting, from mass audiences to specialised niches (Webster & Phalen, 1997). In this context the challenge is to find a cheap and effective way of getting valid and reliable information on audience response.

This paper describes a pilot study in Perth which aimed to trial such a qualitative methodology. In the process, it also tested assumptions that media professionals make about listener reaction to programs. The study indicates that radio listeners, no less than television viewers or Internet users, are unpredictable and untameable; "anarchic" in the sense that they refuse to conform to any reliable rule of behaviour. While there may be reasons for their choices, there do not appear to be any rules that categorically govern their behaviour. Furthermore they have a far more sophisticated grasp of the medium than planners and programmers may give them credit for.

Quantitative versus qualitative

The problem with conventional audience measurement is that, as Ien Ang (1991; 1996) and others have shown, numbers do not tell the whole story: They cannot tell us whether audience members physically present for a broadcast are actually registering the content in a meaningful way. As Gunter and Wober (1992, p. 2) point out with regard to television, "the fact that a programme or an advertisement reaches the home screen is no guarantee that it actually reaches the viewer." They suggest the crucial factor that ratings data overlook is audience involvement:

Two programmes with audiences of roughly the same size may rate very differently in terms of audience involvement, and a programme with a relatively small audience may be a far better performer than it looks, when the involvement factor is taken into account (1992, p.3).

For program makers and advertisers alike, the mass demographic is of less relevance than the involved and committed listeners: the ones who will actively tune in to a specific program, and consequently are likely to be especially receptive to any targeted advertising embedded within it. Analysing the "how"

and "why" requires as much focus on the action as the reaction – on the program maker's intention as well as the audience's response – yet audience studies have tended to focus on one or the other, rather than on both. For example, studies by David Morley (1986) and Shaun Moores (1993) focus on the television audience, and their studies of viewing habits involved researchers observing and talking to audience members as they watched television in their living rooms. This provided useful information on how audiences access television, but there was no attempt to check the audience reaction against the program makers' intentions. Instead it was checked against the researchers' own reading of the programs, creating a situation which Virginia Nightingale identified as "the problem of reading the audience reading the texts as read by the researcher" (1986, p. 21).

In studies of radio audiences, for example by Higgins and Moss (1982) and Paddy Scannell (1996), we notice this same tendency to analyse the program as finished product, as if the program maker's intention could be inferred from the content alone.

Where audience-focused studies such as these have left the program team out, conversely program-focused studies have left the audience out. Dorothy Hobson (1982) went behind the scenes to view the production process of the television soap opera *Crossroads*, and Muriel Cantor (1988) and Horace Newcomb and Robert C. Alley (1983) likewise gave us insights into the view American television producers had of their own work. Philip Bell and Theo Van Leeuwen (1994), in their work on broadcast interviewing techniques, tested their critical analysis of a series of interviews against the intentions of the interviewers themselves. However, these studies all take place within a closed loop that involves critic and program maker, but does not extend to the audience. Grant Noble, in his 1975 study of children and television, devoted a chapter to comparing production assumptions and audience reaction in the context of the British children's program *Blue Peter* and concluded:

[P]roducers tend to make programmes which will be applauded by their workmates and which conform to the ethos into which they are socialised. In spite of the primitive feedback they receive in terms of audience numbers this ethos may not always work in the best interests of the child viewer. How can the gap be filled, and mass communications made an effective two-way process? It would seem that the mass communicator researcher might be able to help but it should be the responsibility of the production agencies both to fund and conduct research which helps to fill the gap. It will be money well spent (pp. 203-204).

The Perth study sought to fill this gap by devising a workable and relatively inexpensive model for getting reliable qualitative audience data. The results provide an alternative means of assessing the "success" of a program judged

not in terms of numbers of people listening, but in terms of whether it succeeded in getting the audience it was aiming for.

Background

In the approach to the new millennium, ABC metropolitan radio faced key challenges. In common with other media services dealing with news and current affairs, it experienced audience reduction in recent years. The reason for this is unknown, though it is speculated that as people focus more on family comfort zones, they have less appetite for politics and more interest in issues relating directly to their personal situations and lifestyles. While commercial talkback radio has retained mass appeal, this has been through programming that stresses entertainment above information, with shock jocks relying on personality and populism rather than straight information delivery and serious analysis to gain audience attention. At the younger end of the market, stand-up comedians have had similar success with their blend of satirical, often crude, humour. In the light of these trends, the view grew within the ABC that in order for its metropolitan talk stations to remain viable they had to:

1. Redefine their position within the broader radio market;
2. Redefine their target audience; and
3. Redefine their product.

In 1999, Perth ABC talk station 720 6WF embarked on a major project attempting to address those issues. This provided the research team with the opportunity to track the process from the planning stages, through to implementation, and execution across the year. At the same time the team conducted a series of three audience-monitoring exercises in order to check how existing listeners received the changes, and how far they succeeded in attracting new listeners to the service.

Stakeholder interviews

The ABC program team (the station manager, program director, and new morning program production team of presenter and two producers) was interviewed before the first ratings period with the aim of determining program providers' key issues as they started the 1999 season. Crucial changes in the on-air line-up and program style were being introduced in an attempt to address perceived weaknesses that had emerged from a detailed analysis of station output conducted earlier in the year.

The interviews brought out a series of main concerns which were grouped under headings and which would later provide structure for focus group interviews:

- Audience composition: The program makers were curious to see whether changes would impact audience composition in

terms of bringing in new listeners. Audience movement from the rival talk commercial station 6PR was one area to watch, though this would tend to be from the 55+ demographic rather than the younger end, which the station was particularly keen to attract. In terms of younger listeners (40-54) the movement from FM music stations and Triple J was particularly relevant to the station's goals.

- **Format:** Format changes were being driven by audience research that indicated audience boredom with talk, particularly politics. There was to be a move toward shorter interviews, bite-sized segments as opposed to extended features, varied mix, the emotional rather than the dry, "ordinary" people as opposed to authoritative voices. There were concerns about the role of talkback in the format and what role, if any, it should have in a program.
- **The presenter role:** As a result of variable success in recent years when using journalists in the presenter role, there was an attempt now to foreground presentation skills. The aim was to select presenters who had strong appeal as performers and/or entertainers and who could revive a heretofore worthy-but-dull format with a more assertive style. The two new presenters joining the station team in 1999 had potentially controversial backgrounds. Though both had previous ABC incarnations, one was most recently a local federal politician and the other a commercial drivetime host. The issue for the program makers was whether this background would trigger an adverse reaction from the public and whether a shift from a traditionally more low-key, neutral ABC style to a more "commercial" sound would create audience backlash.
- **Content:** The importance of news and current affairs was acknowledged as the cornerstone of the ABC's traditional appeal. The challenge for program makers was to find a way of delivering information in a more entertaining way in terms of approach and talent to avoid the boring and predictable.
- **Music:** The program makers were concerned about the role of music in the format, acknowledging its importance in a commercial-free environment to provide breathing spaces and add to the entertainment value, while also being con-

cerned about the appropriate mix. More music was going to be included and the aim was to give as much of a "baby-boomer" focus as possible in a nationally programmed playlist.

- **Marketing:** The station had invested money in a more high-profile marketing campaign on commercial television in an attempt to pull in non-traditional audiences. There were questions as to its impact and effectiveness.

Creating a new methodology: Domain expert interviews (DEI)

The project featured two methodological innovations over the construction and conduct of traditional focus groups:

1. Focus group selection

Qualitative audience analysis has traditionally been labour-intensive and expensive, so the challenge faced by the researchers was to devise a cheap and simple way of gathering reliable qualitative information to supplement the quantitative data. They did this by using conventional ratings methodology as a starting point for the selection of participants for a focus group.

Focus group methodology originated with the work of Merton and Kendall in the 1940s in their studies of democracy and propaganda (Merton, Fiske, & Kendall, 1990). The methodology is used extensively in media and other professional areas (Morrison, 1998). Facilitators interview a group on a specific topic and the transcribed accounts are then examined for relevant clues about that topic. Prompts, in Merton and Kendall's initial design, were non-directive.

Whereas such groups are normally constructed by using easy-to-find or ready-to-hand people who are willing to participate, the researchers used the same sampling areas as ratings agencies and applied a similar stratified random sampling procedure in order to target the over-40 age cohort, the most fertile pool of listeners to talk radio.

The letter drop of 1,450 survey invitations covered collectors' districts in Booragoon, Shenton Park, and Bicton. The probability sample, while small, constituted a classic theory sample in terms of "hearing the voices" of people who may be "below the radar" in normal ratings terms. A theory sample assumes that it is possible for a study to generalize from very small samples, indeed potentially a sample of one, because the theoretical sampling frame is only met by one person. For example, a study on the attitudes of Adolf Hitler toward Jews could not be criticized on sampling grounds if Hitler was the only interviewee. Similarly, in this study, the theoretical sampling frame involves specific groups in the over-40 age group and who are "committed listeners." Following the ratings sample selection path ensures that radio listeners over 40 are included. The suburbs of Booragoon, Shenton Park, and Bicton had collec-

tors' districts with above-average numbers of over-40 ABC listeners and were chosen precisely because they fitted the theoretical purpose.

2. The domain expert interviewer

Merton and Kendall (1990), in their early work, also raised the possibility of having facilitators who were experts in their specific domains. One of the researchers, Gail Phillips, is a programming expert with a background in radio broadcasting. She facilitated both the generation of questions and interviews with audience participants in the groups. Her industry knowledge was helpful in setting comments that emerged from the semi-structured interviews into context. The integration of domain experts introduces a level of professional expertise otherwise absent from traditional audience research methodologies.

Listener interview format

The stakeholder interviews were used to generate a set of key areas to be covered by listener interviews. These included: listener profile (What kind of radio listener are you?); turning on (What do you get from radio?); value (What makes good radio for you?); radio service accessed (Do you listen to commercial radio? Do you listen to the ABC? Which do you prefer and why?); habits (What makes you try different services? Have your habits changed recently?); format (Do you like talk radio? What subjects interest you?); interview length (Do you like long formats or prefer information in smaller chunks?); presenters (What do you look for in a presenter?); presentation style (Do you expect presenters to ask the hard questions or do you prefer a softer approach?); change (Is the ABC's sound and approach changing? In what way?); content (How important is news and current affairs coverage? What makes radio boring for you? Where does it fail?); music (How important is it? Which formats do you prefer? Should there be more/less music?); and marketing (Does advertising and marketing make a difference to your listening habits? Have you seen an ABC television ad and did it influence your listening habits?).

Results

The results from the three focus groups were as follows:

Group 1 – Booragoon (13 respondents: 5 female, 55+; 8 male, 55+).

The 720 6WF listeners in this group, all in the 55+ age bracket, were a classic representation of the core audience for ABC local radio at a time when the program makers were trying to pull the age range down toward a more youthful demographic. Their loyalty was unswerving: most were committed to the station and listened for extended periods of time. They were knowledgeable about the presenters and remarkably sensitive to elements that they felt impacted the service to which they felt entitled. These included:

- Budget cuts, which they felt resulted in low-maintenance formats such as talkback.
- Reliance on networked content, which did not address local interests.

They picked up the station's change of style and tone and were slow to warm to it, bemoaning declining presentation standards and the tendency toward a more "commercial" and aggressive approach. However, as far as the new morning program was concerned, listeners were becoming accustomed to the presenter's more assertive style.

In relation to content, the group's interests were diverse and they welcomed variety including more regionally focused stories. Though the program makers were working on the basis that audiences were impatient with longer formats, the move toward shorter packages was not universally welcomed by this group. Some members felt interviews were being cut off too early. Program makers' doubts about the intrinsic interest value of talkback were backed up by similar doubts expressed by some group members who saw it as a time-filler.

This older demographic liked music as part of the format and expressed a preference for a broad mix ranging from classical to easy listening contemporary hits, but expressed universal hatred of ultra-contemporary "bang bang" music. The "baby-boomer" music focus that the program makers envisaged as part of the push toward younger audiences probably would not go far enough down the nostalgia track for this group, but at least would avoid the worst excesses of contemporary music.

Despite the station's investment in advertising, group members seemed unaware of the television campaign. Their reaction to advertising campaigns, generally, and the local radio campaign, specifically, indicated these strategies were unlikely to impact much on listening habits.

Group 2 – Shenton Park (4 respondents: 1 male, 40-54; 1 male, 55+; 2 females, 40-54).

This group of listeners, though small in number, nevertheless showed an interesting disparity in listening habits along age lines. The three members from the 40-54 age bracket showed greater eclecticism in their choice of radio listening, compared to the 55+ members of the first focus group, and the solitary 55+ member of this group. Where the older group tended to listen exclusively to their preferred channel, these younger listeners tended to channel hop as they searched for the program to suit their mood. They used word-of-mouth, experimentation, and the ABC's printed publicity to gain information about programs, and were prepared to give them a go on a trial-and-error basis before absorbing them into their regular listening routines.

Music tastes were similarly eclectic, and while all shunned the commercial music stations, these younger listeners ranged across all ABC services to expe-

rience a wide variety of music styles, ranging from the classical through to Triple-J contemporary.

They expressed irritation and boredom with repetitive news formats and bite-size-chunk radio, preferring formats that gave interesting people scope to talk about interesting things.

They also showed some conservatism in their reaction to the breakfast format, which they saw as aiming rather self-consciously for a younger demographic, and the morning program, which they saw as going down the commercial shock-jock path.

However, radio was an important part of their routine, being built into their daily lives and in some cases determining the structure of their activities. In this regard it is interesting to observe how long it takes for listening habits to entrench themselves. One participant was still coping with the fact that the move of one presenter from morning to afternoon meant she had to change the time when she went for her daily walk. Three months was not a long enough period for people to react confidently to new formats and new personalities.

Group 3 – Bicton (5 respondents: 1 male 40-54; 2 male 55+; 1 female 40-54; 1 female 55+).

All the members of this group were predominantly ABC listeners, though they accessed a variety of ABC services.

There is further evidence in this group of how listening habits change through life, confirming differences noted earlier between the 40-54 age group and those over 55. Where older listeners tended to select a service and stick with it, younger listeners were more eclectic. They were quick to change stations if the content did not suit them and demonstrated detailed knowledge of other station formats and schedules. Even where they might be ignorant of the services, they were prepared to hunt around the dial until they found something that captured their attention and their interest. Word-of-mouth rather than advertising had most influence on their listening habits; in fact, advertising did not appear to have any impact at all.

On the other hand, children had considerable influence on adult listening habits. When they were young, household noise militated against concentrated listening to the radio by the adult and undemanding music formats might be preferred. However, mothers confined to the home also found the radio a lifeline to the outside world and accessed talk services to be able to keep up with news and information. When children grew older they contributed actively to the listening habits of their parents by exposing them to stations serving the youth end of the market. Evidence from all the groups indicated parents in this day and age like to keep in touch with modern music trends, even if they may access golden oldies programs on specialist music stations to indulge in nostalgia from their own eras.

The ABC was treasured by these demographics as a valuable national resource. It was esteemed for its non-commercial nature, not just in terms of format, but more importantly in terms of programming. However, listeners expressed concerns about threats to its viability in an age of funding cuts and pressures for the ABC to attract large audiences. These pressures were already deemed to have compromised service, with presenters being perceived as sounding more commercial and losing some of the balance and authority they had in days gone by.

There was a dislike of abrasive presenters who allowed themselves to be part of the fray instead of facilitating discussion. What was valued above all was knowledgeableness and there was a feeling that the new presenters were less well prepared than their predecessors, relying less on research and more on force of personality.

There was tolerance for longer formats, and sometimes impatience with shorter, more fragmented formats. The key concern for these listeners was whether the topic was developed in an intelligent, informative, and entertaining way. They became impatient with talkback when it was ill informed, though they enjoyed more structured talkback formats where listeners were discouraged from prolonged grandstanding. They expressed dislike for commercial-style shock jock talkback, which was seen as abrasive, combative, and aggressive.

They showed a sophisticated awareness of formatting tricks such as when music was used as filler or to give the presenter a bit of a break. They showed a capacity for analysing changes to formats and did not always approve of the result. For example, at one stage the gardening segment on one program had been curtailed and broken up with music. In the view of these listeners, changes broke the flow and allowed unwelcome distractions to intrude.

These ABC listeners liked news, sport, and information. They enjoyed the rigour of good analysis and the stimulus of informed debate. They decried the diminishing of local sport coverage and were swift to feel hurt if national announcers did not do the right thing by Western Australia.

Linking audiences to program makers

The aim of this year-long study of Perth radio audiences was to give a qualitative dimension to the quantitative data, which is the prime regular source of information that radio stations rely on in making programming decisions and for judging performance. It is interesting now to set audience reactions against program makers' assumptions.

Audience composition

The program makers had brought in program changes with the explicit aim of attracting younger listeners, yet the focus group exercise demonstrates the

strength of the bond the older listeners have with the station. Though it had been the intention of the researchers to capture listeners of all ages from a broad range of services, the respondents were all in the over-40 age group and were predominantly ABC listeners. While the age, income, and education profile might also be indicative of a greater propensity in this demographic to give up time for this sort of public service exercise, all the respondents were committed radio listeners, interested in the product, thoughtful in their responses, and took seriously the opportunity the discussion group gave them to reflect on their pattern of listening and the services they accessed.

One striking element to emerge concerned listening habits. The over-55 audience listened to radio with the same dedication as younger demographics. They would turn the radio on first thing in the morning and listen, usually tuned to a single service (720 6WF was the most popular), for most of the day, including periods spent outdoors, in the shed or garden. Radio followed them from room to room. They showed an intimate knowledge of the station, its personalities, and programs, and were remarkably insightful in terms of understanding the rationale for program formatting. They were very sensitive to personnel changes and to the impact of budget cuts as contributing to a reduction in quality of output.

The 40-54 age group was much more eclectic in its listening, flipping from station to station depending on needs at any given time of day. Members demonstrated detailed knowledge of timetables and formats for different services, and station-hopped to seek out programs to suit their needs or moods at any given time.

Another point to note about this age group was the way their listening habits changed over the years. The impact of small children was evident, with mothers specifically commenting on how they either turned to talk radio for adult relief, or else ignored it altogether, seeking out music as an escape from the household din. As children got older, parents were able to find more time for radio. Furthermore, they tended to experiment with the services their teenage children accessed, and would add them to their list of services they might tune in to on a regular basis.

The issue this raises for program makers is how far they can go in aggressively recruiting a new audience. Here was a service with a loyal and dedicated niche market. In its race to garner a new listenership, did the station risk sacrificing its old and loyal one? There was no evidence from the focus group data that the changes had as yet resulted in any change to the traditional listener cohort.

Format

The program makers were concerned that audiences were becoming bored with talk, in particular politics, and had worries about the value of talkback.

They were therefore moving to livelier formats with shorter segments and a more people-oriented focus. However, the focus group had different points of view. Far from getting bored with longer interviews, several participants expressed impatience with the rapid-fire formats that barely gave enough time for adequate coverage of a topic. They had no problem with longer interviews, providing the topic was intrinsically interesting and the interviewer was skilled in bringing the best out of the talent and the topic. In this regard, some lamented the lack of talent amongst the local presenters, who they felt did not have the interviewing skills or the knowledge base to be able to perform to a similar standard.

Program makers had been correct in viewing talkback as a problem. While some listeners liked the talkback format because it exposed them to a variety of views, many hated it, getting impatient with the calibre of the contributions and the propensity to simplify complex issues into black versus white.

Program makers and listeners were obviously at odds in their views on format, with the program makers seeking a structural solution to what was, for their listeners, primarily an issue of quality. From the listeners' point of view, a fancy format would do little to compensate for content that was uninformed and unengaged.

The presenter role

The program makers deliberately opted for a change in presentation style, with focus on entertainment value that was a break from the more neutral traditional ABC sound.

The reaction from the listeners was not altogether favourable. Where the program makers were concerned with surface, the audience was focused on substance, and style was a poor substitute for intelligent reflective content. As would be expected, bonding with the presenter was important and when shifts were changed it could often result in a feeling of dislocation to listeners' routine. It was clear people needed time to get to know presenters. Earlier focus group interviews indicated people were still getting used to the new breakfast team after one year, and what these listeners perceived as the more downmarket sound of breakfast. By the end of the year (the second year for breakfast), the participants were much more positive and it appeared the program was developing a clear following. Similarly, where earlier in the year participants had strong reservations about the morning program new presenter's abrasive style, opinions were more positive by the year's end.

This was another "quality" issue: For the listeners no amount of tinkering with the surface would make up for lack of intellectual depth at the core. However, the results here also tend to suggest that in radio, longevity, as much as anything else, may be a prime predictor of a program's success. Listening is a habit, and if presenters stay around long enough, even recalcitrant audiences

can get used to them. When ratings are the sole indicator of a program's success, program makers may rush to make changes at any sign of a downturn thereby nipping what may turn out to be a winner in the bud.

Content

For the program makers, entertainment value was a primary concern. The listeners highlighted another: localism. All participants bemoaned any reduction in local output, noticed particularly in the area of sport. There was considerable hostility in the older listeners to networked evening programs, though the younger demographic tended to be more tolerant. However, they were sensitive to elements that betrayed networked origins of programs, such as mispronunciation of local names.

Networking is an attractive option for program makers since it is the most cost-effective way of filling the airwaves. The issue this raises is whether they do so at the risk of alienating local audiences.

Music

The program makers saw music as a useful formatting tool, providing breathing spaces within the talk and adding to the entertainment value. They tended to assume an equal concern in the audience; however, focus group participants were largely neutral. Their music tastes varied with ages. Older listeners were agreeable to music being part of the format, but their preferences were out of line with the station's contemporary play list. Younger listeners appeared merely to tolerate it, and went to specialist services to satisfy their music needs. All were fully aware of its use as a programming convenience which gave the presenter a bit of a break.

The issue this raises for program makers is what role music should play in their format. If the listeners do not particularly want or need it, if it serves primarily as a programming convenience rather than as an integrated part of the content, should it be there at all?

Marketing

The program makers, while unsure of the effectiveness of marketing campaigns, had nevertheless seen them as a way of wooing new listeners. It was clear, however, that these sorts of marketing initiatives made no impact at all on the focus group participants. None were aware of the 1999 television campaign that had been run for the breakfast program. According to these listeners, they discovered new services by trial and error, or most frequently as a result of word-of-mouth recommendations from family or friends. None of the participants had ever been persuaded to change listening habits as a result of any particular campaign.

This suggests program makers may not be able to rely on advertising as a

reliable way of boosting audience numbers and that strategies that activate audience networks might have greater success.

Conclusion

Whereas up to now radio broadcasters have had to justify their approaches to program making on the basis of vague and non-specific "gut feelings," this pilot study tested a methodology that might help them check the accuracy of their assumptions. The authors call this new methodology "domain expert interviews." It is new because it:

- Uses traditional probability sampling, following the ratings track, for sample selection,
- Combines theoretical sampling with probability sampling in deciding on the sampling frame,
- Uses a domain expert – the media professional – as the facilitator for stakeholder and audience interviews.

The results confirm what other studies are beginning to show about audiences in all media, including the Internet. People are discriminating in what they choose to access and have a sophisticated grasp of the conventions, routines, and ploys by which media product-makers attempt to seduce them. They are hungry for stimulating information with high quality content, rather than slick formatting. Above all they are anarchic, tending to defy any attempt to capture and tame them. They know what they want and how to find it, relying as much on their own contacts and networks as on media publicity to get the information they need. And they are impatient; unlike older audiences who demonstrate strong station loyalty, younger demographics will not stick around unless given good reason to do so. At a time when the role of public broadcasting is undergoing intense scrutiny, these conclusions may be a useful starting point in pinning down elusive elements that represent quality for the Australian public, with implications for programmers in all broadcasting sectors as they contemplate future planning strategies.

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Authors

Dr Gail Phillips is head of the School of Media Communication and Culture at Murdoch University, Western Australia.

Email gphillip@central.murdoch.edu.au. Dr Mark Balnaves is associate professor of public relations at Edith Cowan University, Western Australia. Email m.balnaves@ecu.edu.au.