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*An Ethnographic Study of
The Philadelphia S•M•A•R•T Households*



by

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Greystone Communications

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A Methodological Research Report for

S•M•A•R•T

(System for Measuring And Reporting Television)

Foreword

An important component of the S•M•A•R•T™ (System for Measuring And Reporting Television) Philadelphia TV Measurement Laboratory is a quality assurance program. The program includes quantitative monitoring on a macro and micro level and periodic qualitative reviews.

The application of statistical principles and techniques is the primary element in quality assurance. Statistical Research, Inc. (SRI) has designed and implemented several programs to track the information that makes up the S•M•A•R•T measurement. The creation of a full statistical quality control facility is key to producing consistent and reliable audience estimates. This work continues along with complementary, independent qualitative studies. These projects provide the feeling for the measurement process.

The most recent qualitative effort is an Ethnographic Study of the Philadelphia S•M•A•R•T households. It was completed by John Carey and his colleague, Lee Ann Draud. John has been a consultant for the S•M•A•R•T project since 1992. John specializes in ethnographic studies which seek to understand how people interact with new technologies. He serves many clients in the consumer electronics and telecommunications industries, and helped establish SRI's ergonomic design goals for the S•M•A•R•T metering system.

The following report, authored by John, is a product of many hours spent with S•M•A•R•T household members observing and discussing their use of television and their participation in the S•M•A•R•T panel. It contains new and valuable information. As appropriate, he has framed recommendations to be considered.

Consistent with S•M•A•R•T's commitment to industry participation, a complete, multi-media presentation of the findings will be provided to S•M•A•R•T subscribers. Both the quantitative and qualitative elements of quality control are critical to the goal of understanding and improving the measurement process. We appreciate John's and Lee Ann's contribution to that end.

Statistical Research, Inc. 

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Introduction

An ethnographic study was conducted of households in the greater Philadelphia area that are participating in the S•M•A•R•T test of a new audience measurement system. Ethnography is a qualitative research tool that attempts to capture behavior in natural settings through in-depth interviews and observations. It is a form of research that emerged from anthropology where it has been used to document and describe basic characteristics of a culture, typically, foreign cultures. Although this form of research is over 100 years old, it has been applied in limited ways to the study of behavior that involves television and the use of audience measurement systems. The ethnographic study in Philadelphia involved going into homes and “getting close” to television viewing behavior. It complemented other research undertaken by SRI that has made the Philadelphia test a research laboratory to better understand television viewing and audience measurement.

The in-home interviews and observations took place over a four-week period during October - November, 1996. The average visit lasted slightly over an hour and included an interview with each household member who was present as well as observations of TV viewing behavior and relevant household lifestyle factors. A total of 24 households were visited and 62 people were interviewed. The sample of 24 households contained a mix of household sizes, income levels, high and low TV viewing, and a range of participation levels in using the audience measuring system. An audio recording was made of each interview and still photographs (35mm slides) were shot of each person interviewed as well as each household TV and the setting for TV viewing.

The ethnographic research had four principal objectives: (1) to better understand the TV viewing context and how lifestyle patterns might affect the use of an audience measurement system; (2) to discover patterns of behavior in the use of the audience measurement system that might not be captured in other research; (3) to assess how well the new system met its design objectives; and (4) to make recommendations for improving the system.

The Subjects

The subjects for the Ethnographic Study of Philadelphia Test Households were selected to provide geographic dispersion and a range of demographic profiles. A few of the homes included a person or persons where there was some question about the individual's cooperation with the entry of personal viewing.

In total, 62 persons from 24 households were interviewed.

Geography

- The 24 households were spread throughout nine counties in three states and represented both metropolitan and outlying areas.

Demography

- Household incomes ranged from under \$20K to over \$125K, with the highest concentration falling between \$20K and \$60K.
- In ten of the households, the highest level of education attained was a high school degree or less. The remainder reported that a member had attended college or reported at least a college degree.
- Most (22) of the households were classified as white; one was classified as African-American; and one was classified as a mix of white and African-American.
- Household composition was diverse, representing a mix of one-, two- and three-plus-person households, child and nonchild households, and households headed by younger and older adults. Additionally, in many of the households, adult children, elderly parents, unrelated children, and unrelated adults were present as secondary household members.
- Eight households were classified as light television users, 12 as medium television users, and four as heavy television users.

All of the homes had participated in the meter panel for eight months or more.

The TV Viewing Context

Our study of Philadelphia test homes indicated that there are a number of elements in the TV viewing context that can affect the adoption and use of a TV audience measurement system. Perhaps the most important element to understand is that people have firm patterns for using TV. For example, they may sit in a particular chair; have a pet at their feet and the remote control in a specific spot; eat and drink in specific ways while watching TV; etc. An audience measurement system must work in these existing contexts, which vary considerably. There were no observed or reported changes in these existing viewing patterns to accommodate SRI's new audience measurement system. No one changed chairs, sat closer or farther, or watched TV in a different way because of the presence of the PEDS (Persons Entry Device) or DCB (Data Collection Box).

There were some impacts on the effectiveness of the audience measurement system due to the physical and lifestyle context of households. These included: a dog in one household who chewed-up the remote; TV sets that were left on (with no one present) to keep a pet company during the day or to ward off burglars; a messy bedroom in which the remote was often misplaced and lost for days; and furniture that blocked the viewing path between a viewer and the DCB display. However, most of the problems related specifically to the Confirm process, discussed later.

There were a number of other notable elements in the TV viewing context of many Philadelphia test households that can have an impact on an audience measurement system. For example, many people commented that they use TV to relax. An audience measurement system requires people to do some work but this work should be minimized. This may seem obvious but it was brought home by a roofer who was interviewed and who explained that he worked 7 days a week, 10 hours a day. When he came home, he turned on TV and watched wrestling to relax. However, he and many others said that the system was hardly any work -- you just press an extra button.

A distinction should be drawn, however, between the work required to enter an icon when first turning on the TV set and the work required to hit Confirm later. People in the test households felt that there was little work involved in making the initial entry, since they were already doing some activity to begin TV viewing; i.e., they turned on the TV, tuned to a specific channel and then had to hit one button on the PEDS for each person watching/using the TV. The work was minimal. However, later when they were relaxed and simply watching TV, the work involved in hitting a Confirm key or changing the icons was perceived as greater.

*An Ethnographic Study of
The Philadelphia Test Households*

For many households, a TV set is wallpaper or background that is on whenever anyone is in the household. Often under these conditions, people move freely in and out of the room where the TV is located. Further, it was not uncommon in the Philadelphia households for two TV sets to be on and for a person to watch both sets interchangeably as he/she moved about the house.

Watching multiple programs simultaneously was also reported and observed. There were a few variations to this phenomenon. First, so-called channel surfers flipped back and forth between two programs using the remote control. In a few households, people used picture-in-picture TVs to watch two programs simultaneously. And, in at least one household, two TVs were kept in the same room in order to watch two programs simultaneously.

Nearly every household had one or more devices hooked up to the main household TV; many had a VCR or videogame hooked up to other household TVs as well. Associated with this, multiple remotes were nearly always present in these rooms. It was not uncommon to observe 3-5 remotes (exclusive of the PEDS remote) in the room with the main household TV. The top of the TV is prime real estate that was filled with other devices or family pictures. This meant that in some cases the placement of the DCB was less than ideal.

In the Philadelphia households, males controlled the remote control most of the time during group TV viewing. Males also used remote controls more than females in individual or group settings (i.e., males changed channels more frequently). In some households, however, the remote was controlled by the first person to turn on the TV set or the person who sat closest to where the remote was placed.

More group viewing on the main household TV set was reported (typically, in the living room) compared with TVs in other rooms. Group viewing often splits into individual viewing when a sporting event comes on. In a number of households, the female head-of-household said that she watches TV with her spouse until a sporting event comes on; she then leaves and watches something else in another room.

In addition, a number of people in the Philadelphia test households reported that TV is a common topic of conversation. Many discuss TV programs (especially the news) as they watch them together over dinner. Teens reported discussing TV shows with their friends -- one female teen said that she calls a girlfriend during soap operas to discuss what had happened and what the characters in the program should do next. Many people make comments about TV programs while they watch, directing those comments to a spouse or another household member or even a household pet.

The S•M•A•R•T Procedures

The Recruiting Process & Motivations To Participate

Reactions to the recruiting process were positive. It should be noted, however, that we interviewed only those who had agreed to become a participating household. Further, most could describe the recruiting process in some detail, even though a year had passed in many cases. The series of post cards stood out in descriptions about the recruiting process. They appeared to have built curiosity.

The post cards were complemented effectively by a financial incentive, a gift (chocolates) and persistent field representatives in getting SRI in the door. The two biggest obstacles that had to be overcome were suspicions that this might be a telemarketing effort and concerns about privacy. There were a few comments about privacy concerns, such as how would the information be used, was SRI what it represented itself to be, and would information about viewing habits be identified with the specific household. In each case, the SRI rep had satisfied these concerns. Again, it should be noted that these “moderate” privacy concerns were from people who agreed to participate. It also raises a question that cannot be answered in this study: is privacy a stronger concern among households that declined to participate in the audience measurement project?

The principal motivation to participate in every household was money. Even some apparently well-to-do households mentioned that the financial incentive was what hooked them. There were some additional motivations such as “helping out,” “trying something different,” and “participating in a research project.” People were aware that they were participating in a “research” project, though many did not understand the objectives of the research.

Nonetheless, the word “research” seemed to have positive connotations. In addition, participation was helped by the absence of a lot of work -- one person said that she agreed to participate in part because she wouldn't have to write anything down; several indicated that the amount of perceived button-pushing was minimal. However, the absence of any other strong motivations (other than money) may be a concern. What will motivate non-cooperating households if the financial incentive is not attractive?

In a few cases it was reported that male teen visitors found the system to be “cool” on their first visit, but showed less interest on subsequent visits. Participation by female teen visitors and both male and female children was reported to be better.

In group viewing settings, the PEDS remote is controlled more frequently by a male. It is also generally controlled by whomever controls the regular remote, which is usually a male. However, in cases where a male is weak in pressing his icon or Confirm, a female head-of-household often controls the PEDS remote and makes entries for everyone who is present. A secondary rule appears to be that the PEDS remote is controlled by the first person who turned the TV on or the person sitting closest to it.

TV-On Entries, Fatigue & the Emergence of “Cops”

One of the more interesting findings in the ethnographic study was the discovery of “cops” or individuals who monitor the behaviors of other household members and encourage them to make appropriate entries. This role emerged in approximately half the households. It appeared to be equally divided between men and women (always an adult) and was typically the person who was first recruited into the study. In addition, a few people indicated that they became the person to do the reminding (i.e., became a “cop”) because of their personality, e.g., one person said that he is “detail oriented.”

People were aware that there was a sound if they did not enter the icons for people in the room once they turned on the TV. There were no negative reactions to the sound. It was considered a “reminder.” One young child who could not read indicated that she entered her icon by waiting for the sound -- the sound, not the text message, triggered her response.

Repeated inquiries about any fatigue over time in pressing buttons yielded little indication that the system became tiring. Even people who had it for over a year, said that they were not becoming tired of pressing buttons. The concerns expressed were not fatigue but annoyance at the frequency of Confirm, as discussed below.

Confirm Issues

For a majority of households visited during the ethnographic study, the Confirm process was not a problem. Most reported that they entered Confirm (or changed the entries if someone entered or left the room) regularly and did not find it bothersome. However, there were some problems reported or expressions of displeasure about Confirm. These ranged from low to high levels of concern.

Annoyed by Frequency of Confirms. A large group of those interviewed said that they were annoyed by the frequency of the Confirm queries. Some thought that the queries were more frequent than every half hour. This may relate to the sequence of the message if a response is not entered -- it repeats the message which could lead to the perception that it is happening more frequently than every half hour (i.e., it is more frequent if a person does not respond). Context also appears to play a role. A couple of people mentioned that it seems to come on just when they are sitting down to dinner. In addition, a few people felt that it came on more frequently during movies or other programs in which they were intensely involved and did not want to be interrupted.

Physical Obstacle Gets in the Way. A few households reported that the PEDS for one of the TVs was missing. This appeared to happen most often in bedrooms that had piles of clothing scattered around the room. People commented that the remote was not truly missing but probably under a pile of clothing.

A few households indicated that if two spouses are watching TV in bed and one falls asleep (the one who controls the remote), the other partner has to crawl over the first to get the remote and respond to the query. Some overcame this problem by having two remotes available -- one on each of the night tables at either side of the bed. In another case, a couple kept the remote in between them while watching TV in bed together, so that either one could respond to a query.

One person observed that you cannot hit Confirm while playing a videogame, unless you pause the game. Another person observed that it is difficult to respond to queries if you are on the floor doing exercises in response to an exercise program or videocassette. One woman noted that when she is caring for her infant, she cannot easily (and does not) hit the Confirm button.

Contact with SRI, Customer Service & Technical Problems

Test participants gave high marks to SRI's customer service personnel. They were described as friendly, professional and helpful. Nearly everyone could name their SRI representative.

The amount of contact with SRI or its representatives was viewed as "just right" -- neither too much nor too little contact. There were a few spontaneous and positive comments about birthday cards that had been received and one person remembered a charitable donation made in the family name. Unaided recall of monthly messages was low -- many said that they received monthly notices from SRI but few could say what was in them other than "reminders."

Discussion and Recommendations

It is important to note, first, that the S•M•A•R•T audience measurement system is working well. While there are a few obstacles (such as the Confirm process) and a need for some fine tuning, the system and process are functioning well in several areas, e.g., positive responses to the recruiting process (by those who agreed to participate); ease of use; acceptance of icons; understanding of visitor entries; responses to initial query; and positive reactions to SRI's customer service.

The following discussion and recommendations cover areas where fine tuning or simply a better understanding of behavioral patterns in households may help to improve the audience measurement system. They also include some adjustments or changes that may not be feasible in the near term. However, it is useful to put them on the table for consideration, as they may lead to alternative suggestions that are feasible.

- Give the system a name. Currently, users do not have a name for it -- they call it “the box” and “the remote.” Given the success of icons in personalizing the system and (it appears) creating some loyalty to perform the tasks, a name for the system might also make it friendlier. There are many possibilities. One suggestion is to give it a female name (it could be an acronym or just a name); e.g., AMY (Audience Measurement Yardstick). Other possibilities are an animal/pet name, a practical acronym (e.g., TVM for TV Meter), or an abstract name and symbol (e.g., Excel).
- Be aware of the important association in many households between pets and TV viewing as well as the placement of family photographs near TV sets. There may be an opportunity to build loyalty and encourage accurate key pressing by identifying with these household symbols, e.g., mentioning the pet by name in some monthly mailings/reminders to the household.
- Develop a stronger identification for SRI in households. Most people did not know who they were dealing with other than “the company.” (They did know the name of their Rep and this was perceived in a positive way.) In addition, personalize SRI by showing photographs of employees in occasional mailings to households.

not understand the system (he sometimes keys in as a visitor, sometimes as one of the sons and at other times randomly presses keys) and a female head-of-household who exhibits signs of being a drug user.

This raises the question of screening out some households or eliminating some households as these problems are identified. In this case, it would likely have been difficult to identify these problems during recruiting.

More generally, it may be useful to inquire during recruiting if anyone is on medications that might make it difficult for them to participate and then eliminating that person.

- At the next stage of implementation, build experimental test groups into the population of S•M•A•R•T households who will be used to test alternative strategies for dealing with key challenges such as Confirm.
- If possible, reduce the number of Confirm inquiries to once per hour. If Confirm could be reduced to once per hour, consideration should be given to eliminating Confirm and simply repeating “Who's There?” This would reduce the system to one dimension -- all queries would be the same.

In addition, it should be noted that people were less hassled in making an initial entry than in pressing Confirm or making changes later. This was because the initial entry accompanied other activity (i.e., turning on the TV and tuning to a channel) -- it was just an extra button press. Later, when they were relaxed and just watching a program, the pressing of a button was perceived as “work.” People may perceive a Confirm/Change query as less work if it accompanies changing channels. Since they have already initiated some button pressing, pushing one or two extra buttons at this time would (presumably) be perceived as less of an effort. However, this would likely become a problem if it accompanied all channel changing activity, especially for “channel surfers” who change channels frequently.*

* Under the current system, the Confirm/Change message is triggered by elapsed time and not tied to behavior in the home. When a Universal Television Program Code (UTPC) is in place, SRI intends to link the message to a program change.

- During installation, offer extra remotes for any TV that is used frequently for group viewing.
- Provide instructions about why it is necessary to hit Confirm.

It is also important to recognize that there are many aspects to people's lifestyles that do not lend themselves to consistent key pressing, especially the Confirm key. While fine tuning may be able to boost participation, a large component of tuning but not viewing must simply be explained by these lifestyle issues.

At the same time, the ethnographic study of the Philadelphia homes suggests that there is much use of television which may not fall under traditional definitions of "TV viewing." Specifically, many people listen to and monitor TV from adjoining spaces; e.g., a person who listens to the living room TV from the kitchen and occasionally views the screen when something grabs his/her attention.

Findings from the ethnographic study also underscore the human factors principles that guided the development of the audience measurement system; i.e., to reduce the work in making entries and to make the entry process intuitive. People in the Philadelphia households were sensitive to "work" in making entries. The PEDS remote was viewed favorably in terms of minimizing the effort in initial entries and visitor entries. Further, the entry process was seen as intuitive. The Confirm entry was perceived as requiring more work (even though it only requires pressing one key in many instances) since the task was in isolation from other key pressing and it interrupted TV viewing. While it may not be possible to reduce the work in Confirming any further, it may be possible to reduce the perception by placing Confirm actions in a context (such as channel changing).

Finally, the ethnographic study of the Philadelphia test homes reinforces findings from other SRI research about the importance of the social context for TV viewing. Understanding this social context helps to explain how people use TV and provides a more comprehensive base of knowledge upon which to create an accurate and user-friendly audience measurement system.