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Carrying Forward the Uses and Grats 2.0 Agenda: An Affordance-Driven Measure of Social Media Uses and Gratifications

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The notion of social media affordances has not been fully integrated into the uses and gratifications literature. Building on the MAIN (modality, agency, interactivity, and navigability) model, this study develops and tests a social media uses and gratifications scale with a sample of 393 college students. Results of the study support the MAIN model, as conceptualizing social media uses and gratifications as a second-order factor structure with 4 different types of affordances displays similar goodness-of-fit to a single-order factor structure. A confirmatory factor analysis with a second sample of 313 adults further confirms the applicability of the scale among the general population.

Uses and Gratifications (U&G) is a much-debated theoretical approach that has its origins in media effects studies (Ruggiero, 2000). This approach has direct implications for understanding the dynamics of social media consumption. Examining social media uses and gratifications requires identifying unique uses and gratifications, developing and validating measures, and testing them across different user groups and platforms. Several early studies highlighted the importance of examining uses and gratifications in the context of computer-mediated communication (e.g., Ruggiero, 2000). There is a growing body of literature examining various aspects of uses and gratifications in different online settings, such as social network sites (e.g., Alhabash, Chiang, & Huang, 2014; Apaolaza, He, & Hartmann, 2014; Chen & Kim, 2013; Huang, Hsieh, & Wu, 2014; Pai & Arnott, 2013; Smock, Ellison, Lampe, & Wohn, 2011), online games (e.g., Wu, Wang, & Tsai, 2010), micro-blogs (e.g., Chen, 2011), crowd-sourced business review sites (e.g., Hicks et al., 2012), social recommendation systems (e.g., Kim, 2014), Web-based information services (e.g., Luo &

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Remus, 2014), and social media in general (e.g., Leung, 2013; Wang, Tchernev, & Solloway, 2012).

Although the body of social media U&G literature is diverse in terms of measures used and platforms and populations examined, many studies tend to use more user-centered measures such as socializing, entertainment, information sharing, escapism, need to connect, and convenience (e.g., Apaolaza et al., 2014; Chen, 2011; Hicks et al., 2012; Huang, Hsieh, & Wu, 2014; Smock et al., 2011). Sundar and Limperos (2013) identify this issue and claim that new media studies tend to be biased towards social and psychological factors rather than medium-related factors. They suggest that researchers need to focus on the technologies themselves and the new uses and gratifications they create. They suggest 16 types of gratifications based on 4 classes of social media affordances (modality, agency, interactivity, and navigability) and items that can be used to measure those gratifications under the MAIN model.

This study develops a measure of social media uses and gratifications using the conceptualizations suggested by Sundar and Limperos (2013). The scope of the study extends beyond a mere validation of the original model and items suggested, building on the original framework by refining the items, introducing new items specifically tailored to social media, and testing them to develop a measure of social media uses and gratifications.

Social Media Uses and Gratifications

Social media literature includes a considerable number of studies that examine different types of uses and gratifications perceived by the users. Pai and Arnott (2013) highlight the need to differentiate social network sites from other online communities and claim that users adopt them to attain four values (belonging, hedonism, self-esteem, and reciprocity). Ancu and Cozma (2009) claim that social interaction is the primary motive for accessing profiles of political candidates, while entertainment and information-seeking are secondary. Quan-Haase and Young (2010) argue that Facebook users tend to seek enjoyment and knowledge about social activities within their networks, while instant messaging is focused more on relationship building and maintenance. Smock et al. (2011) suggest that, while only three motivations predict general Facebook use, a relatively higher number of variables can predict motivations for using specific features such as status updates, comments, chat, and groups. Krause, North, and Heritage (2014) examine motives for listening to music on Facebook and identify three gratifications: entertainment, communication, and habitual diversion.

The Need for Platform-Oriented Measures

As social media are different from traditional media, they may be able to generate new uses and gratifications. Accordingly, social media U&G studies need to focus on

at least two aspects. First, it is necessary to evaluate recent social media U&G literature in terms of its coverage of unique uses and gratifications. Second, uses and gratifications measures need to be evaluated in terms of their coverage of user-based and platform-based gratifications.

The notion of social media affordances has recently gained more research attention. Generally defined, affordances relate to the mutuality between social media users and features of the platforms that enable or constrain behavior. Majchrzak, Faraj, Kane, and Azad (2013) identify technology affordances as “the mutuality of actor intentions and technology capabilities that provide the potential for a particular action” (p. 39). According to boyd (2011), affordances can destabilize core assumptions related to engaging in social life and reshape publics directly and indirectly. boyd notes that affordances such as persistence, replicability, scalability, and searchability of online content can play a significant role and help scholars understand why people engage the way they do.

Sundar and Limperos (2013) stress the importance of conceptualizing affordance-based uses and gratifications. They highlight that new media U&G studies have only slightly modified older media gratifications to suit new media, and examine 20 studies published between 1940 and 2011 to reveal overlaps in measures across different types of new media. Sundar and Limperos argue that nuanced, and perhaps new, gratifications have not been fully specified. The collection of studies they reviewed covers a broad range of technologies or media, such as radio talk shows, telephone, newspapers, TV, video games, and social network sites. While these studies help the authors to argue that affordance-based measures are necessary, they may not represent what is commonly known as social media.

Social media U&G measures should take into consideration the interactive nature of social media platforms, the ability of users to create and manage content, and the wide variety of features available. Measures such as socializing (Apaolaza et al., 2014), virtual community (Chen & Kim, 2013), socialization-seeking (Kim, 2014), interpersonal utility (Luo & Remus, 2014), reciprocity (Pai & Arnott, 2013), expressive information sharing, companionship, professional advancement, social interaction, meeting new people (Smock et al., 2011), career opportunities, global exchange (Roy, 2009), surveillance (Zhang & Zhang, 2013), self-status seeking (Park, Kee, & Valenzuela, 2009), and spiritual support, psychological support, and networking (Anderson, 2011) cover a broad range of unique gratifications.

Social media uses and gratifications can be classified as either user-oriented or platform-oriented. User-orientation puts less emphasis on the features or affordances of the platform. For instance, many of the aforementioned gratifications focus only on the user. Platform-oriented uses and gratifications take into consideration the features of the platform or the affordances they offer. For example, blog ambience gratification (Kaye, 2010) acknowledges that the users enjoy the overall atmosphere of a blog. Although the measures used in previous studies adequately cover user-oriented uses and gratifications (e.g., socializing, psychological support, and surveillance) that have social and psychological origins, they lack coverage of social media/platform-oriented measures.

The MAIN model (Sundar, 2008) suggests that four affordances (Modality, Agency, Interactivity, and Navigability) are prevalent in contemporary digital media, and they are able to cue cognitive heuristics (i.e., judgment rules) that can shape user assessment of the medium. The MAIN model rejects the idea that all gratifications relate to innate needs and argues that distinctive gratifications can emerge from new media affordances. In particular, Modality, defined by Sundar and Limperos as “different methods of presentation (e.g., audio or pictures) of media content, appealing to different aspects of the human perceptual system (e.g., hearing, seeing),” acknowledges that the Internet can provide users with content in multiple modalities and some of them can be considered unique (e.g., pop-up ads) (p. 512). The Agency affordance of the MAIN model suggests that the Internet allows users to be agents or sources of information, and this view recognizes the ability of users to be gatekeepers of content, build communities, and contribute. Interactivity, according to Sundar (2008), is the most distinctive affordance of digital media, and it relates to interaction and activity on a given medium. Sundar and Limperos (2013) define *Interactivity* as “the affordance that allows the user to make real-time changes to the content in the medium” (p. 515), and *Navigability* as “the affordance that allows user movement through the medium” (p. 516). Sundar (2008) notes that metaphors like “site” and “cyberspace,” the availability of navigational aids and content generated—and even the mere presence of navigational aids such as hyperlinks—can trigger certain heuristics.

The MAIN model is suitable to examine social media uses and gratifications for several reasons. First, it focuses on the capacity of the Internet-based platforms to provide a range of usage or engagement options. Second, it suggests platform-oriented gratifications that have not been discussed in previous studies. Third, the model is comprehensive. Therefore, the MAIN model provides a rich approach to understand new media uses and gratifications. However, it has not yet been subject to adequate academic inquiry, validated, and tested across different populations.

Method

Item Development

For this study, *social media* were defined as online platforms where users can interact with each other, build networks, share and create content, publish, and make comments. Social media include a range of platforms, such as Facebook, Twitter, YouTube, Instagram, Tumblr, Reddit, and WordPress. The survey instrument provided a definition of social media to respondents to ensure that they reflected on interactive platforms without restricting their responses to a specific platform.

The set of 57 items suggested by Sundar and Limperos (2013) was used as the initial pool of items to develop the suggested scale. As these items were not targeted towards a particular technology, contain general statements, and focus on devices, they were re-written specifically to focus on social media. For instance, the item “I feel like I am able to experience things without actually

being there” was re-worded as “Social media provide quality information that makes me feel like I am able to experience things as they are without actually being there.” In addition, 15 original items were introduced. For instance, items such as “Social media help me to have real interactions with people although I am not in physical proximity” and “Social media allow me to actively contribute to communities that make an impact on society” were added to capture the uniqueness of social media. The final set of items included 72 statements tailored to measure the constructs in the context of social media. These items were checked by three independent readers to evaluate the clarity and meaning.

Data Collection

Two online surveys were conducted to collect data for the study. The first survey was conducted among students in 15 classes at a national research university and two other four-year campuses in the State of Hawaii. The respondents were recruited through instructors who agreed to distribute the survey among their students. Surveys with missing entries were excluded, yielding a sample for analysis consisting of 393 respondents. The demographics of the sample paralleled the demographics of the universities, including undergraduate and graduate students. The sample was appropriate for examining social media uses and gratifications, as more than 90% of the respondents indicated that they use social media at least once a day. A second survey was conducted through Qualtrics Research Services to collect data from a more diverse and representative sample. The second sample included 313 adults who represented different age groups, education levels, and ethnic groups.

Identification and Refinement of Latent Constructs

Four exploratory factor analyses (maximum likelihood with Varimax rotation) were conducted using the first sample to identify the best items to measure constructs representing each class of affordance. Factor analysis was repeated, after dropping items with low factor loadings, until an acceptable solution was reached. This analysis resulted in a reduced pool of 42 items that had high correlations (at least .5, except for a few items) with the factors that they were hypothesized to operationalize. Several items with loadings below .50 were retained as they had loadings close to .50 and at least three items were used to operationalize each construct. Items that loaded on to a different factor and had low cross-loadings were identified as new items that could operationalize the latter factor.

Assessment of the Latent Factor Structure

The items used for exploratory factor analysis (EFA) were hypothesized to exhibit a latent factor structure that corresponds to Sundar and Limperos's (2013) conceptualization of affordance-based uses and gratifications. The EFA provides a preliminary test to determine the items that best reveal latent factor structure for each MAIN dimension. These results were verified by conducting a confirmatory factor analysis (CFA), ensuring that a factor structure that includes all constructs shows reasonable fit. The theoretical foundation provided by the MAIN model extends beyond a first-order factor structure, as the constructs represent four different classes of affordances. Therefore, a second-order factor structure was tested to examine whether the constructs suggested by initial analysis correspond with the MAIN model. CFAs focused on validating the scale along two dimensions: 1) social media uses and gratifications as a first-order factor structure that examined the goodness-of-fit of the operationalization of constructs, and 2) a second-order factor structure that examines the goodness-of-fit of classifying constructs tested in the first model under the four classes of affordances suggested in the MAIN model. This two-step analysis allowed examination of the suitability of individual items to operationalize each construct as well as constructs to represent each class of affordance. An additional CFA was conducted with the second sample to further test the validity of the scale.

Results and Discussion

Identification of Latent Constructs

Factor loadings provided in Table 1 show that the factors identified in each solution suggest several distinct dimensions for each class of affordance. While these models support the original conceptualization, they indicate some deviations from the original factors and items suggested by Sundar and Limperos (2013). The first factor analysis provided a three-factor solution (Realism, Coolness, and Being There) that included two newly introduced items (REAL 4: I can experience the real world through social media, and BEIN 5: Social media help me to have real interactions with people although I am not in physical proximity). BEIN 5 was retained despite low loading, as it can allow more modifications in the CFA.

The survey included five and four items to measure Coolness and Novelty, respectively; two Coolness items and three Novelty items loaded into one factor. While both Coolness items suggested by Sundar and Limperos (2013) and the newly introduced items capture aspects of Coolness, Novelty items triggered a very similar perception among respondents. This might result from the striking similarity between the two factors. Sundar, Tamul, and Wu (2014) note that "an interface is cool if it is novel" (p. 177). For instance, distinctiveness (COOL2) and differences in interface

Table 1
Factor Loading, Reliability, and Descriptive Statistics (Sample 1)

Construct	Item	Item mean	Item SD	Factor loading	Construct mean, SD, and α
EFA 1					
Realism	REAL2—Communicating using social media is not that different from face-to-face communication.	1.924	.886	.580	Mean: 2.03 SD: .738 α : .705
	REAL3—The experience in social media is very much like real life.	1.939	.936	.857	
	REAL4—I can experience the real world through social media.	2.215	1.020	.556	
Coolness	COOL1—Social media platforms are unique compared to other media.	3.697	.826	.816	Mean: 3.75 SD: .589 α : .762
	Social media platforms are distinctive compared to other media.	3.711	0.726	.740	
	Social media platforms are new compared to other media.	3.708	.821	.459	
	Social media platforms have innovative features.	3.841	.674	.508	
	Social media interfaces are different than traditional Web sites.	3.844	.684	.506	
Being there	Social media help me immerse myself in places that I cannot physically experience.	3.443	1.009	.722	Mean: 3.25 SD: .886 α : .802
	Social media create the experience of being present in distant environments.	3.314	1.032	.811	
	Social media provide quality information that makes me feel like I am able to experience things as they are without actually being there.	2.991	1.016	.723	
EFA 2					
Agency	BEIN5—Social media help me to have real interactions with people although I am not in physical proximity.	3.373	1.049	.423	Mean: 3.58 SD: .759 α : .832
	AGNC1—Social media allow me to freely express my opinions.	3.566	.918	.839	
	AGNC2—Social media allow me to freely assert my identity.	3.483	.897	.774	
	AGNC5—Social media allow me to have my say.	3.696	.812	.612	

(continued)

Table 1
(Continued)

Construct	Item	Item mean	Item SD	Factor loading	Construct mean, SD, and α
Community building	CMNB2—Social media help me to be part of a community that I would not otherwise have been part of.	3.710	.896	.715	Mean: 3.68 SD: .712 α : .787
	CMNB3—Social media allow me to build a network that could bring me social support.	3.775	.807	.793	
	CMNB4—Social media allow me to actively contribute to communities that make an impact on society.	3.554	.859	.535	
	BAND2—Social media comfort me by letting me know the thoughts and opinions of others.	3.399	.930	.495	
Bandwagon	BAND4—Reading others comments on social media before I make comments helps me to avoid potential conflicts.	3.636	.893	.684	Mean: 3.36 SD: .749 α : .684
	BAND5—I try to adjust my reactions to social media posts based on comments made by others.	3.056	1.037	.723	
	FILT3—Social media allow me to sort through information before I share it with others.	3.688	.768	.560	
Filtering	FILT4—Social media allow me to limit the visibility of information I post to a small group.	3.741	.889	.709	Mean: 3.83 SD: .545 α : .640
	OWNN3—My friends have their own ways of using social media.	4.064	.637	.484	
	INTR1—Social media rely on user interaction.	4.130	.755	.560	
EFA 3 Interaction	INTR2—When I use social media, I frequently interact with the platform.	3.470	.896	.536	Mean: 3.70 SD: .603 α : .570
	INTR3—On social media, I can specify my needs and preferences on an ongoing basis.	3.500	.829	.386	

Activity	ACTV1—I can perform a number of tasks on social media.	3.680	.765	.526	Mean: 3.08 SD: .801 α : .775
	ACTV2—I feel active when I use social media.	2.910	1.069	.679	
	ACTV3—My Interaction on social media is not passive.	3.019	.912	.606	
	ACTV4—I get to do a lot of things on social media.	3.309	.960	.655	
Responsiveness	RESP2—Social media are responsive to my commands.	3.202	.856	.706	Mean: 3.12 SD: .744 α : .835
	RESP3—Social media respond well to my requests.	3.201	.822	.783	
	DYNM1—Social media allow me to be in charge.	2.971	.947	.595	
	DYNM2—Social media give me more control over information I post.	3.550	.817	.568	
EFA 4 Browsing	DYNM3—I am able to control my interaction with the interfaces of the social media platforms I use.	3.550	.771	.605	Mean: 3.80 SD: .629 α : .880
	BROW1—Social media allow me to obtain a wide variety of information.	3.776	.844	.782	
	BROW2—Social media can link me to sites that have different types of information.	3.933	.702	.758	
	BROW3—Social media allow me to surf for things that I am interested in.	3.645	.766	.774	
Play	BROW4—Social media allow me to browse freely.	3.736	.828	.590	Mean: 3.50 SD: .778 α : .805
	SCAF2—Social media allow me to link to other pieces of information.	3.805	.678	.663	
	SCAF3—Social media offer a number of visual aids for more effective use.	3.815	.741	.682	
	PLAY3—I enjoy escaping into a different world through social media.	3.347	1.006	.525	
	PLAY4—Social media provide more entertaining information than other media.	3.546	.888	.865	
	PLAY5—Social media offer more entertaining features than other media.	3.609	.852	.857	

(NOVL3) are highly related so that they load into one factor. Accordingly, combining Coolness and Novelty into one factor does not jeopardize the quality of the model.

To measure agency-based social media uses and gratifications, the survey generated a four-factor solution (Agency, Community Building, Bandwagon, and Filtering), which is slightly different from the original five-factor conceptualization. This solution builds on the work of Sundar and Limperos (2013), as the items retained include five items that were newly introduced to the scale (AGNC1: social media allow me to freely express my opinions, CMNB3: social media allow me to build a network that could bring me social support, BAND4: reading others comments on social media before I make comments helps me to avoid potential conflicts, BAND5: I try to adjust my reactions to social media posts based on comments made by others, FILT4: social media allow me to limit the visibility of information I post to a small group). These items were created to capture social media's ability to engage users and facilitate action. Several items were also revised for the current study context, including the ability to facilitate formation of social groups beyond geographic boundaries.

A main difference between the original conceptualization and this factor structure was that Filtering and Ownness did not load into distinct factors. Most of the Ownness items had high cross-loadings and were removed to improve the factor solution. However, OWNN 3 (my friends have their own ways of using social media) loaded into Filtering with a reasonable value and very low cross-loadings. This item was retained despite its low loading, as it helps operationalize the construct with at least three items and had a higher loading than other Filtering items. This is not a limitation, as it guides further discussion on differences between Filtering and Ownness. As with Coolness and Novelty, it is difficult to distinguish between Filtering and Ownness. Filtering may result in a sense of Ownness, as the facility to sort through information (FILT3) and limit the visibility of information (FILT4) can result in unique uses that make users feel like their friends have their own ways of using social media (OWNN3).

While most of the items in the interactivity-based uses and gratification factor model were either adopted or adapted from Sundar and Limperos (2013), three new items—ACTV1: I can perform a number of tasks on social media, ACTV4: I get to do a lot of things on social media, and DYNM2: social media give me more control over information I post—had high loadings to support the factor structure. In contrast to the original four-factor conceptualization, this model suggested three latent factors to operationalize interactivity-related uses and gratifications of social media. Activity had clear and reasonably high loadings that make it a distinct factor in the model. However, the model did not support identifying Responsiveness and Dynamic Control as two separate factors. This does not undermine the validity of the model, as it is reasonable to use both to operationalize a single factor since Responsiveness is a necessary condition for Dynamic Control. Responsiveness of social media to commands (RESP2) and requests (RESP3) can trigger the perception that users are in charge (DYNM1), have more control over information (DYNM2), and are able to control the interaction (DYNM3).

Uses and gratifications related to Navigability cover Browsing, Scaffolding/Navigation Aids, and Play/Fun aspects. While the first two aspects are related, Play shows a different dimension of navigation. Results reflect those nuances in that respondents' evaluation of the two is not different, as Browsing/Variety Seeking and Scaffolding/Navigation Aids converged into one factor. This is not conceptually counter-intuitive, as Scaffolding can be part of Browsing. For instance, the ability of social media to link users to sites that have different types of information (BROW2) and other pieces of information (SCAF2) are very similar. Visual aids available on social media (SCAF3) help users to obtain a variety of information (BROW1). Due to the highly related nature of these two concepts, and with the support of factor loadings given in Table 1, they can be conceptualized as a single factor. Play, being a distinct dimension, loaded into a different factor. Consequently, the solution was a two-factor solution that was different from the hypothesized three-factor solution. Three out of nine items in the model (BROW2: social media can link me to sites that have different types of information, PLAY4: social media provide more entertaining information than other media, and PLAY5: social media offer more entertaining features than other media) were newly introduced, and these items focus on accessibility of information, entertainment provided by information and social media features.

A correlation analysis showed that, except for four relationships (Realism and Coolness, Realism and Filtering, Realism and Interaction, and Realism and Browsing), latent constructs identified by the separate factor analyses significantly correlated with each other. These correlations, however, were low to moderate, ranging from 0.120 to 0.568. This shows that the constructs have reasonable convergent validity in terms of representing the broad class of affordance hypothesized for measurement. Low to moderate correlations between constructs also support discriminant validity, as they are not overly correlated. Significant correlations among constructs across classes of affordances also indicate that the constructs and items can represent a single scale that has multiple dimensions to measure social media uses and gratifications. This supports conducting an all-inclusive factor analysis to support the validity of the model.

Assessment of the Latent Factor Structure

The above EFA analysis supports, subject to the revisions discussed above, Sundar and Limperos' (2013) conceptualization of uses and gratifications under each class of affordance. Although the results did not distinguish between several factors, no items loaded into factors that represent a different class of affordance. This indicates that, while there is some room to refine the measures within each affordance, the distinction between affordances can be supported. As this was not accomplished in the separate EFAs, further analysis was necessary to test the validity of the whole model. Therefore, the revised conceptual framework was used to test several CFA models to evaluate goodness-of-fit of the latent factor structure.

Table 2
Latent Factor Structure

Modality	Agency	Interactivity	Navigability
Realism Being there	Agency-enhancement Community building Bandwagon Filtering	Interaction Activity Responsiveness	Browsing Play

The latent factor structure summarized in Table 2 was evaluated in two steps using three CFA models: 1) social media uses and gratifications constructs as a first-order factor structure, 2) the MAIN dimensions as a second-order factor structure, and 3) a model that tests the resultant second-order factor structure with the second sample. The first model situates the results of the four separate EFAs discussed above in a single factor structure—to support the validity of an all-inclusive model and show the suitability of individual items—to operationalize each construct regardless of the affordance they represent. The second model tests perhaps the most important contribution made by the original model (i.e., that uses and gratifications can represent four main types of affordances), in terms of the suitability of each construct suggested by Sundar and Limperos (2013). Results of the EFAs were used to build an all-inclusive first-order confirmatory factor model and a second-order factor model. Three criteria were used to further improve the model fit: 1) standardized regression weights, 2) standardized residuals, and 3) modification indices. Several items with high standardized residuals and low standardized regression weights were dropped and covariances were drawn between two adjacent items to further improve the model fit. Subject to modifications both CFA models showed acceptable results—standardized regression weights ranged between plus and minus one, standard errors were greater than zero and less than 0.20 for almost all parameters, and all parameters in both models were statistically significant ($p \leq 0.05$).

According to Hu and Bentler (1999), cut-off values close to .95 for the Tucker Lewis Index (TLI) and Comparative Fit Index (CFI) and .06 for the Root Mean Square Error Approximation (RMSEA) indicate a reasonable fit. The first CFA model, testing a single-order factor structure and including 33 items, indicated a weak but acceptable fit: root mean square residual (RMR): 0.049, Goodness-of-Fit Index (GFI): 0.878, Adjusted Goodness-of-Fit Index (AGFI): 0.844, Incremental Fit Index (IFI): 0.910, TLI: 0.892, CFI: 0.910, RMSEA: 0.052. The model had high standardized regression weights for each item. These results support using the factors identified in the four separate EFAs above as distinct constructs in an all-inclusive model. Given the acceptable fit of the first CFA model, a second CFA was conducted to examine the suitability of the constructs to represent each affordance in the MAIN model. Items used in the first CFA were used to develop this model, and second-order constructs were introduced to operationalize the MAIN dimensions. The items with high

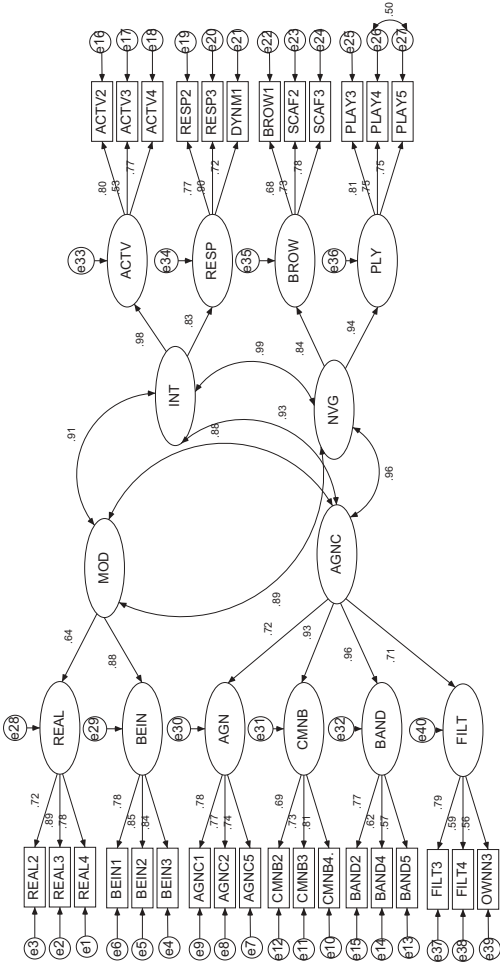
standardized residuals and low standardized regression weights were dropped to further improve the model fit. This model also consisted of 33 items and showed a weak but acceptable fit (RMR: 0.056, GFI: 0.854, AGFI: 0.828, IFI: 0.888, TLI: 0.875, CFI: 0.887, RMSEA: 0.056). This indicates that Sundar and Limperos's (2013) conceptualization of affordance-based uses and gratifications is generally valid as a second-order factor structure. It is notable that there are no major differences in regression weights between the two models. However, one weak item in this model (INTR1) negatively affected the overall model fit. This item was retained in the EFA and in this CFA, as operationalizing Interaction with at least three items could help future studies that use this scale to further refine the items that represent the construct.

For each model, all but two relationships had weights lower than 0.50. Most of the effects in the models had weights higher than 0.60. In general, standardized regression weights and the model-fit indices show that conceptualizing social media uses and gratifications under the four types of affordances suggested by Sundar and Limperos (2013) does not jeopardize the statistical validity of the measure. Coolness and Novelty items were excluded from the model, as Coolness included two Novelty items and users may not perceive many of the social media platforms as novel anymore. This can be particularly true with college students that are generally viewed as heavy social media users. The resultant factor structure was further tested with the second sample to ensure that it can be applied for different populations. We excluded Interaction from the final model to maximize the validity of the model. This, however, does not mean that this construct should be excluded in future applications of the scale, as larger samples and refined items can help improve the construct. The revised model (see Figure 1) showed slight improvement (RMSEA: 0.054, RMR: 0.048, GFI: 0.852, AGFI: 0.822, IFI: 0.931, TLI: 0.922, CFI: 0.931), indicating that the measure suggested can produce similar results when tested with a different, and more diverse, sample.

Table 1 shows means, standard deviations, and Cronbach's alpha values for each construct (based on the first sample). The results indicate that, while respondents disagree that social media is similar to real life ($M = 2.03$ on a 5-item Likert scale), their perception of other uses and gratifications constructs range between 3 ("neither agree nor disagree") and 4 ("agree"). However, the fact that the mean values of these responses gravitate towards 4 shows that the revised items capture uses and gratifications relevant to social media. Moreover, alpha values above 0.64 indicate that all items have minimum internal consistency.

A Multivariate Analysis of Variance (MANOVA) was conducted using the first sample to provide a perspective on the effects of demographic variables. This test examined the effects of gender, age, ethnicity, and education of respondents on their perception of uses and gratifications. The results showed that, while gender, age, and ethnicity have no significant effect, the perception of social media uses and gratifications can be affected by education level (Pillai's Trace: 0.223, $F: 1.431$, $p \leq 0.05$). The between-subjects effects showed that perception of Agency and Filtering can depend on education level (Agency: $F: 3.35$, $p \leq 0.05$, and

Figure 1
Social Media Uses and Gratifications Scale as a Second-Order Factor Structure
Model Fit (Second Sample): Chi-square = 740.944, *df*: 388, *p*: 0.000, RMR: 0.048, GFI: 0.852, AGFI: 0.822, IFI: 0.931, TLI: 0.922, CFI: 0.931, RMSEA: 0.054



Filtering: $F = 4.328$, $p \leq 0.05$). This is possible, given the presence of graduate students in the sample.

The 2 interaction effects tested in the model (Age $\times$ Education and Age $\times$ Ethnicity) were significant, indicating that the impact of age on perception of social media uses and gratifications depends on the education level (Pillai's Trace: 0.603, $F = 1.659$, $p \leq 0.05$) and ethnicity of respondents (Pillai's Trace: 0.386, $F = 1.248$, $p \leq 0.05$). According to between-subjects effects, the impact of age on several uses and gratifications constructs (e.g., Being There: $F = 2.30$, $p \leq 0.05$, Agency: $F = 3.43$, $p \leq 0.05$, Filtering: $F = 2.55$, $p \leq 0.05$, Responsiveness: $F = 2.13$, $p \leq 0.05$, Play: $F = 1.83$, $p \leq 0.05$) also depends on education level. The impact of age on two dependent variables (Realism: $F = 2.07$, $p \leq 0.05$, Agency: $F = 2.54$; $p \leq 0.05$) was also found to depend on respondent ethnicity.

The fact that basic demographic variables have no direct effect on uses and gratifications indicates that the perception of constructs is consistent within the sample. However, the results show that there can be nuances in the perception of social media uses and gratifications. For instance, significant interaction effects show that the impact of age on perception of uses and gratifications depends on the educational level and ethnicity of respondents for some constructs. This leaves room for further examination of social media uses and gratifications in different settings with special attention on effects of demographic variables on specific constructs.

Discussion

This study tested an affordance-driven measure of social media uses and gratifications using the conceptual framework and items suggested by Sundar and Limperos (2013), using two different samples. The results of this study support the conceptual accuracy of the MAIN model, as they indicate that conceptualizing social media uses and gratifications as a second-order factor structure—by classifying constructs into four different types of affordances—does not jeopardize the statistical validity of the measure. The distinction between the two factor structures is mainly theoretical, as the objective this study is to add the notion of social media affordances to uses and gratifications studies. This does not mean that the scale suggested should not be used as first-order factor structure. Such use still provides a more comprehensive measure of uses and gratifications, as it has been developed based on social media affordances. Using this scale as a second-order structure allows for more advanced analysis that includes affordances as second-order factors.

Rather than treating the results of the present study as a mere validation of the items suggested by Sundar and Limperos (2013), the factor structure and the measures tested can be considered an improved scale to measure social media uses and gratifications. This is appropriate for several reasons: 1) the original items suggested by Sundar and Limperos (2013) were not targeted towards social media; 2) the original items were subject to substantive revisions in this study to tailor them to

social media users; 3) a reasonable number of new items were added, and 10 of them were included in the final 30-item scale; and 4) several constructs suggested by the original study were combined to create new constructs, making the present framework a reduced version of the original conceptualization. Therefore, the scale validated in this study should be considered as a contribution towards advancing the Uses & Grats 2.0 agenda put forward by Sundar and Limperos (2013), by situating the original items in a more strictly defined social media context.

The revised model has some deviations from the original framework. For instance, the results did not display several gratifications as distinct factors, suggesting the need to combine some factors. However, the combined factors did not include items from other affordances, supporting the conceptual accuracy of the original model. The question of operationalizing Coolness and Novelty emerges as a main topic for future investigation, as this study did not identify distinct factors for these two constructs. There are studies (e.g., Sundar et al., 2014) that show that Coolness is a complex construct that includes several dimensions. Possibly, a multi-dimensional Coolness measure can be integrated to the present model. Moreover, there is a lack of conceptualization of the meaning of Novelty of social media. Accordingly, there is a need for a precise definition of Novelty and empirical work that can establish differences between Coolness and Novelty. Although Coolness and Novelty were excluded from the final scale, based on the argument that social media may not be novel anymore, these constructs can be applied in other settings. For instance, future work that examines uses and gratifications of new social media platforms as well as applications that integrate social media with technologies that users may perceive novel (e.g., virtual and augmented reality) can use Coolness and Novelty items as part of the scale.

A similar issue arises with regard to Browsing and Scaffolding, two constructs that this study did not differentiate between. However, as the focus of the scale here is to test an all-inclusive model, conceptualizing Coolness and Novelty, and Browsing and Scaffolding/Navigation Aids, as single constructs do not jeopardize the value of the conceptualization. The fact that Ownness and Filtering were combined to form a single factor requires further study, as it is possible that these two constructs may form distinct factors if the measures are further refined. The scale can also benefit from further work that adds new constructs to the measure. For instance, device-based affordances, such as mobility, can be added to the conceptual framework, as mobile devices are frequently used to access social media. This can lead to unique gratifications, such as immediacy, and broaden the scope of the scale. Moreover, new constructs, such as social surveillance, can be added to the scale to capture the full potential of social media.

Despite the contribution this study makes by building on Sundar and Limperos's (2013) work, Cronbach's Alpha values lower than 0.7 for Bandwagon and Filtering indicate that these constructs should be tested further with different populations and larger samples to improve the internal consistency. Moreover, the items removed in the data reduction process can be revised and tested with different samples. However, removal of these items does not affect the quality of the measure, as each latent construct was represented by at least three items. Items that measure

Interaction, INTR1 and INTR3 in particular, should be subject to further revision and testing for two reasons. First, Interaction is a main characteristic of social media and ignoring this construct may result in the scale not capturing the gratification of interaction. Further, two out of three items in the measure suggested indicated need for improvement (INTR1 low regression weight in the CFA model, and INTR low factor loading). We have included Interaction items in the EFA and reported results of the first two CFAs with Interaction as it could provide a starting point for future researchers to refine the construct.

This study can form the foundation for a number of other studies. Future work should focus on differences in perception of social media uses and gratifications across different actors, such as political actors, and organizations. Similarly, effects of attributes, such as efficacy, tolerance, community engagement, openness, sociability, political orientation, and cynicism on social media uses and gratifications can be examined. Moreover, moderating effects of constructs such as Internet skills, social media adoption, perceived Internet controls, social surveillance, and privacy concerns can be tested to uncover nuances in relationships between actors, attributes, and social media uses and gratifications.

Conclusion

Future studies that examine social media uses and gratifications also need to consider differences between platforms. The current study, as mentioned before, situates uses and gratifications in the context of social media that include several types of platforms. This is appropriate, as the MAIN framework considers new media as a single category that offers unique affordances that can lead to unique gratifications. Future studies can examine how platform type affects those gratifications. For instance, some social network sites may provide more community-building and interactivity-related gratifications than others. Moreover, the measure tested in this study can be further refined to develop uses and gratifications measures tailored to different types of platforms.

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Media Substitution in Cable Cord-Cutting: The Adoption of Web-Streaming Television

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Media Substitution in Cable Cord-Cutting: The Adoption of Web-Streaming Television

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This study sought to better understand what factors best predict consumers' intention to cut the cord on cable television and adopt video streaming as their primary source of television. Utilizing media substitution theory as the conceptual framework, this study conducted a nationwide survey (N = 200). Findings show that perceived advantages of streaming applications over traditional television best predicted intentions to cut the cord on cable and adopt Web streaming; these perceptions mediated the relation between user frustrations with using older television technology and intentions to cut the cord. Entertainment needs were not significant predictors of cord-cutting intentions.

In October 2014, pay cable industry titan HBO announced that its popular HBO Go streaming application would be made available to consumers as a standalone service. Previously, the HBO Go service was only available to consumers who subscribed to the HBO network through a traditional cable television service. Circumventing piracy and tapping into the millions of homes that had not yet subscribed to the network were publicly acknowledged as the primary motivators for HBO's decision (Reed, 2014). Still, another phenomenon might have also motivated this innovative move made by this cable programmer of 40-plus years: cord-cutting.

Consumers become cord cutters when they cancel their traditional cable television or dish subscriptions and rely on Web-based streaming to provide televised entertainment. While much cable television is delivered via satellite and most cord-cutters maintain their connection to telecom providers to provide broadband Internet access, the term "cord-cutting" is used to metaphorically evoke an image of severing the connection between traditional cable access and the consumer. This process is facilitated by consumers' broadband Internet connections and subscriptions to Web-streaming services such as Netflix, Hulu, and Amazon Prime. The rise of such streaming services, along with Web-enabled televisions and popular streaming devices such as the Roku, AppleTV, Google Chromecast, and Amazon Fire TV, have provided users with a viable alternative to accessing television content through traditional pay television outlets. Increasingly, consumers are turning to cord-cutting for their televised entertainment needs.

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In 2015, U.S. cable subscriptions declined by 1.13 million, while 2014 saw a loss of only 283,000 subscribers (Convergence Research Group, 2016). A total of 24.6 million households (20.4% of U.S. households) did not have a traditional cable or satellite subscription in 2015. In addition, 2015 added 2.1 million cord-cutter households, up from 1.27 million cord-cutter households in 2014. According to Nielsen (The Nielsen Company, 2016), 40% of Generation Z (ages 15–20), 38% of Millennials (ages 21–34), and 30% of Generation X (ages 35–49) plan to cut the cord on their cable subscriptions. For both Generation Z and Millennials, 31% subscribe to online content providers such as Netflix or Hulu, and 24% of Generation X are online content subscribers.

Analysts suggest possible reasons for the decline of cable subscriptions at the hand of Web-streaming include a rise in cable television subscription rates and the increasing array of streaming services, which had been seen in the entertainment industry as supplements to traditional viewing but are now acting as substitutes (Wallenstein, 2013). However, why those streaming services are able to act as substitutes is not abundantly clear. Using media substitution theory (Krugman, 1985; Laswell, 1948; Lin, 1994) as well as the uses and gratifications framework (Katz, Blumler, & Gurevitch, 1973, 1974; Ruggiero, 2000), this study seeks to better understand what particular factors motivate the cord-cutting decision. Since cord-cutting represents a transition from one medium, traditional cable, to another, Web-based streaming, there are theoretical implications for understanding media substitution as a substitution process, rather than a complimentary process, where a new medium is added to a consumer's regular media diet rather than supplanting a previous medium. In addition, new insights into the uses and gratifications of television may be discovered. Using a survey of current cable subscribers, this study seeks to understand what factors motivate an individual's intention to adopt Web-based, streaming television in place of traditional cable television.

Literature Review

Netflix and YouTube, along with other Web-based streaming services, are changing the media landscape by providing not only existing programming—consistent with what is provided through cable and television outlets—but also original content delivered across an array of devices (Ellingsen, 2014). As such, these Web-based services are positioning themselves to compete directly with traditional cable television providers. The response from the media industry has varied, as the main conglomerates have watched their control of the distribution process dissolve (Perren, 2010). In the wake of these new technologies, consumers have embraced cord-cutting for its compatibility with their digital lifestyle and its ability to refine viewing options (Crawford, 2015).

From the early days of widespread Internet use, researchers have been interested in what might motivate the adoption of computer-based video viewing technology. Understanding technology adoption is key to understanding the media substitution process, since the adoption of new media technology is a part of a steady erosion of

older media technology, a media substitution mechanism (Lin, 2004). Early examinations of Internet video service adoption suggested that the innovativeness of the user was the most significant factor in predicting the adoption of Internet television, dubbed *Web casting* (Lin, 2004, 2006). Given that many popular Web-streaming technologies were new or did not yet exist, it should not be surprising that those most interested in Web casting adoption were those who could best be described as *innovators*, typically the earliest adopters of new technology (Rogers, 2003). Given the availability of streaming content, both through services and on a wide variety of devices, it is worth examining motivations for cord-cutting beyond innovativeness.

Media Substitution Theory

Borrowing from Laswell's (1948) ideas that radio would give way to television as the dominant mass communication medium, Lin (1994) argued that "when a new medium is regarded as more functionally desirable than the old medium, the audience may abandon the old medium and replace it with the new" (p. 24). The introduction of new technology has been demonstrated to have an effect on viewers' expectations and uses of traditional media. The diffusion of cable television altered viewers' relationship with traditional television (Krugman, 1985), and the introduction of video cassette recorders (VCRs) changed and displaced viewers' use of traditional media such as television and theatrical film viewing (Henke & Donohue, 1989). New technology substitutes for older technology when it offers a method of delivering content that is more advantageous than the older method; in particular, technical abilities and value advantages have been noted as factors that promote media substitution (Lin, 2004). The perceived relative advantage of a technology is best defined as "the degree to which an innovation is perceived as better than the idea it supersedes" (Rogers, 2003, p. 15). Cha (2013) has suggested that a consumer's perception that online viewing is more advantageous than traditional viewing options not only predicts online viewing, but also negatively correlates with traditional television viewing. In addition, Lin (2001) recognized cost advantages and value as a key displacement variable when it comes to the adoption of home entertainment. Thus, the following hypotheses are proposed:

H₁: Perceived advantages will predict users' intention to cord-cut.

H₂: Perceived value will predict users' intention to cord-cut.

Compatibility. Research aimed at determining the substitutability of Web casting for traditional television has suggested that the public does not see Web casting as a viable alternative to television (Book & Barnett, 2006; Cha & Chan-Olmsted, 2012; Lin, 2008). This is most likely because Web casting or PC-based television viewing have been presented in research as being markedly different from the traditional television experience. The content studied was typical of Web-based broadcasts at the time, such as local newscasts, city tours, weather forecasts, and restaurant tours (Lin, 2006,

2008), and not consistent with the online broadcasting of popular movies and television shows, such as what is available through current services such as Netflix.

In addition, these studies specifically identified Web casting and online viewing as an activity confined to personal computers and not a practice consistent with audiences' current conceptualization of television viewing (Book & Barnett, 2006; Cha & Chan-Olmsted, 2012).

Consistent with Rogers' (2003) conceptualization of compatibility as a predictor of innovation adoption, Cha (2013) suggests that for a medium to be compatible with another, it must be consistent with both past experiences and current needs. In other words, the new experience afforded by the technology must be compatible with the user's current lifestyle and expectations of the medium. Because consumers now have access to Web-enabled, traditional devices such as disc players and televisions in addition to new means of television viewing through mobile devices and tablets, Web-viewing may be viewed as a more compatible experience than what was explored in previous research. As such, the following hypothesis is proposed:

H₃: Perceived compatibility will predict users' intention to cord-cut.

Perceived Substitutability. Flavián and Gurrea (2007) recognized that new media do not necessarily replace older media; their relationship may be complementary. In other words, a new medium may not completely replace an older medium, but rather only act as a substitute for certain uses. Flavián and Gurrea suggested "two products are substitutive when they satisfy the same need, although in different ways" (p. 797). Since cord-cutting suggests the replacement of one media with another, it is expected that perceived substitutability will be an important motivating factor. However, Cha (2013) found that compatibility and perceived advantages better predicted online viewing over television viewing than perceived substitutability. Cha suggested that while Web streaming may be fundamentally the same as cable television, audiences may consider it to be functionally unique. As such, while perceived substitutability is expected to positively relate to cord-cutting intention, substitutability may be less associated with substitution than other factors. The following hypotheses are proposed:

H₄: Perceived substitutability will predict users' intention to cord-cut.

H₅: Other substitution factors will be better predictors of cord-cutting than perceived substitutability.

Uses and Gratifications

The uses and gratifications framework suggests that audiences use media to satisfy particular needs and that they are active in choosing the media they use to meet those needs (Katz et al., 1974). Uses and gratifications researchers have paid particular attention to the need gratifications provided by various media, such as

television (Greenburg, 1974; Rubin, 1981, 1983), cinema (Austin, 1986; Palmgreen, Cook, Harvill, & Helm, 1988), the Internet (Diddi & LaRose, 2006; Ferguson & Perse, 2000; LaRose & Eastin, 2004), and most recently social media (Ancu & Cozma, 2009; Cheng, Liang, & Leung, 2015; Quinn, 2016).

Beyond the initial research of Web casting, subsequent examinations revealed that while innovative traits were still predictive of adoption, there was a significant relationship between expectations of entertainment, escape, and Web casting adoption intention (Lin, 2006, 2008). These findings were consistent with earlier research exploring Web-based multimedia adoption, which suggested that more than other factors typically associated with the adoption of new technology, such as demographics and previous technology adoption, entertainment is the key motivating factor (Kang & Atkin, 1999). That needs for entertainment and escape would be identified as key motivators for the adoption of a Web-based television service is not unexpected, because needs for entertainment, escape, and time-killing repeatedly have been shown to be important gratifications provided by the television medium (Katz, Haas, & Gurevitch, 1973; Rubin, 1981, 1983).

Gratifications of Television. Though the needs met by media consumption may be specific, most uses and gratifications research has grouped gratifications sought from media into broad categories (Sundar & Limperos, 2013). Needs can be cognitive, such as needs for knowledge and information; affective, such as needs for entertainment; or integrative, which includes needs for social connection and acceptance (Katz et al., 1973). While Rubin (1981, 1983) identified specific gratifications provided by television, such as companionship, escape, and information seeking, television was most noteworthy in its ability to provide entertainment and time killing, an assertion supported by earlier cross-media research (Katz et al., 1973). Thus, it should come as no surprise that entertainment would be identified as a key motivator for the adoption of Web-streaming (Kang & Atkin, 1999; Lin, 2006, 2008), which leads to this hypothesis:

H₆: Needs for entertainment better predict cord-cutting intention than information seeking and companionship needs.

The Active Audience. The uses and gratifications framework perceives audiences to be active in their use of media; rather than passively consuming media, audiences are goal-oriented in their efforts to meet needs using media (Katz, Blumler, & Gurevitch, 1973). Audience activity has been identified as perhaps the most important concept of the uses and gratifications framework because it acknowledges the choice patterns of the audience (Rubin, 1993). Audiences are selective and intentional in their media choices (Blumler, 1979). With the arrival of digital media, Ruggiero (2000) argued that three concepts closely related to Web technology would facilitate audience behaviors related to gratification seeking: interactivity, demassification, and asynchronicity. *Interactivity* allows the user to control the medium in real time (Sundar & Limperos, 2013). *Demassification* is

best defined as “the ability of the media user to select from a wide menu” (Ruggiero, 2000, p. 16). *Asynchronicity* is best described as the ability of users to control when they receive a message (Chamberlain, 1994). A cursory examination of Web-streaming entertainment channels such as Netflix, Hulu, and Amazon Prime reveals that consumers are allowed control over search, selection, and playback of a wide array of potential programs, all available to watch at a time determined by the consumer. As Web-based applications, these channels take advantage of the interactive nature of digital technology.

While these concepts are not exclusive to new media—cable television, VCRs, and remote controls certainly provided users a wider array of programming, control, and the ability to time-shift viewing—new media provides users with a much more refined level of control (Kilker, 2003) and flow (Lin, 2008). In fact, Sundar and Limperos (2013) have suggested that while new media satisfy traditional gratifications such as entertainment and information-seeking, they may be creating new categories of gratifications. Whether these concepts constitute new gratifications, or merely facilitate increased gratification expectations, it is expected that interactive technology is cultivating new audience behaviors, which can be defined as *technical activity*. While earlier media technologies such as cable, VCRs, and remote controls did not produce a markedly better television experience (Perse & Ferguson, 1993), users of those technologies did not yet have the interactive experience provided by Internet technologies. It is expected that users will bring their expectations from Web-use to Web-based television. Thus, the following hypothesis is proposed:

H₇: Technical activity will predict users' intention to cord-cut.

Method

To test the hypotheses, an online survey was administered to a population of cable and streaming subscribers, accessed via Amazon's Mechanical Turk service. Mechanical Turk has been shown to provide research samples that are more demographically diverse than Internet or college samples. The data obtained using Mechanical Turk have been reported as being as reliable as data obtained using traditional sampling methods (Buhrmester, Kwang, & Gosling, 2011). In order to capture those who were most likely to be familiar with streaming services, the sample was pre-screened to include only those who subscribe to a streaming service such as Netflix, Hulu, or Amazon Prime in addition to those who are cable television subscribers. Based on established rules of thumb, it was determined that a sample between 150–200 participants would be adequate for both factor analysis (Pedhazur & Schmelkin, 2013; Vanvoorhis & Morgan, 2007) and multiple regression (Green, 1991) statistics to be used in analysis. The resulting sample ($N = 200$) had an average age of 33 ($SD = 9.90$), represented by more men ($N = 107$) than women ($N = 91$), and was predominantly Caucasian ($N = 147$). A pre-test of the survey did not identify any issues with survey statements.

Independent Variables

Gratification Variables. Gratifications from streaming television were measured using an index of gratifications drawn from Rubin's (1983) study. Participants were asked to evaluate statements regarding their use of streaming television, using a 7-point Likert-type scale ranging from *Strongly Disagree* to *Strongly Agree*. Items included statements such as, "I watch streaming television because it entertains me," and, "I watch streaming television because it helps me learn things about myself and others." The 18-item scale was broken into 5 groups of gratification factors related to television viewing identified by Rubin: pass time/habit (5 statements, $\alpha = .79$), information (4 statements, $\alpha = .81$), entertainment (3 statements, $\alpha = .85$), companionship (3 statements, $\alpha = .85$), and escape (3 statements, $\alpha = .79$).

To measure technical activity, which is encompassed by the concepts of interactivity, demassification, and asynchronicity, no specific measure existed in the literature as it relates to interactive television. As such, a new scale consisting of common television behaviors related to these concepts was created. Participants were asked to what extent they agree with 15 statements, using a 7-point Likert scale ranging from *Strongly Disagree* to *Strongly Agree*. The 15 statements are included in Table 1. Using principal component analysis with varimax rotation, three factor groupings were identified (see Table 1). As recommended by Hair Black, Babin, Anderson, and Tatham (2006) for a sample of 200, factor loadings of .4 or greater were included in factor groupings. The three factors were *Interactive Control* ($\alpha = .84$), which relates to interactivity with the television medium, in particular control over playback and selection, *Technical Enjoyment* ($\alpha = .86$), which relates to enjoyment using technical features afforded by newer means of watching television, and *Frustration with Technical Deficiency* ($\alpha = .77$), which relates to frustration when interactive features are not available, as is the case with older means of television viewing.

Substitution Variables. Before measuring the variables related to media substitution, respondents were given the definition of both traditional cable television viewing and Web streaming. The questions utilized in the subsequent scales then compared streaming to traditional cable. For all items, respondents were asked to indicate their agreement with each statement on a 7-point Likert-type scale ranging from *Strongly Disagree* to *Strongly Agree*.

The measure of perceived value was adapted from a 4-item scale ($\alpha = .78$) utilized by Yang and Peterson (2004). Items included statements such as, "Comparing what I pay to what I might get from traditional cable, I think streaming provides me with good value." Measures of compatibility and perceived advantages were adapted from Cha's (2013) study. For compatibility, a 3-item measure was utilized ($\alpha = .81$), including items such as, "Using streaming to watch television content fits my lifestyle." A 3-item scale was utilized to measure perceived advantages, with items including, "Using streaming to watch television is better than traditional cable." One statement, "Using streaming to watch television improves my lifestyle," was eliminated from the final

Table 1
Factor Analysis for Technical Activity Measures (N = 200)

Variables	Factor loadings		
	1	2	3
Factor one: Interactive control			
It is important to me to be able to stop, fast-forward, or rewind televised content.	.74		
Watching live television is frustrating when I cannot pause or review the broadcast.	.60		
I enjoy giving playback commands to the television while viewing.	.74		
I enjoy building a list or queue of programs I can watch when I choose.	.69		
It is important for me to be able to build and easily access a list of shows I want to watch at a later time.	.77		
Factor two: Technical enjoyment			
I enjoy controlling the playback of televised content.		.64	
I enjoy using a search feature to find the exact program I wish to watch.		.50	
It is important for me to be able to browse or search for the program I wish to watch.		.64	
I enjoy having a large catalog of programs from which I can choose the exact program I wish to watch.		.77	
I enjoy watching programs when it is convenient.		.80	
I like to be able to choose when I watch a television program.		.71	
Factor three: Frustration with technical deficiency			
It is frustrating when my program choices are confined to a small list in which I am not interested.			.79
I am frustrated when the television does not offer me the specific program I want to watch.			.80
I do not like waiting to watch a program at a time I did not choose.			.67
It is important to me that I control when and where I watch a television program.			.49
Eigenvalue	3.49	3.36	2.61
Percentage of variance explained	23.30	22.37	17.40

Note. Factor loadings were considered significant at the .40 level.

measure to improve reliability (α of the remaining scale items = .80). Finally, perceived substitutability was measured using items adapted from the 4-item measure (α = .76) developed by Flavián and Gurrea (2007). Items included statements such as, "I think

that streaming services and traditional cable do not offer different services," and, "I think that streaming services and traditional cable do not satisfy different needs."

Dependent Variable

The dependent variable, intention to cut the cord on cable, was measured using a 2-item measure. As with the independent variables, a 7-point Likert scale ranging from *Strongly Disagree* to *Strongly Agree* was utilized to test respondents' agreement with each statement. The two statements were, "I intend to cancel my cable subscription in order to use Web streaming to access television," and, "I plan to cut the cord on my cable subscription so that I can use Web streaming to view television content." The two statements were strongly correlated ($N = 189$, $r = .97$, $p < .001$). Based on feedback provided during the pre-test and to help alleviate confusion regarding the flow of the survey, respondents were asked to indicate whether or not they had already cut the cord on cable, and cord-cutters were then informed that they did not need to answer the two intention questions.

Results

To test the hypotheses, a hierarchical regression was employed to examine the relations between the independent variables and subjects' intention to cut the cord on their cable television subscription. Variables that did not significantly correlate with the dependent variable were not included in the hierarchical regression. See Table 2 for correlations between each variable. Table 3 presents the hierarchical regression. No tolerance for any variable entered in the regression was below .4, and no variable inflation factor was above 2.5, suggesting a lack of multicollinearity. A post-hoc power analysis of the final step of the regression, which included 9 predictor variables, suggested a calculated power of 0.999 with an alpha of .05.

Entered into the first step of the regression were variables related to expected gratifications from streaming television. Step 1 of the regression explained 11% of the variance, $F(4,184) = 5.55$, $p < .001$, with both entertainment ($B = .42$, $SE B = .17$, $p < .05$) and companionship ($B = .26$, $SE B = .11$, $p < .05$) exerting significant influence on cord-cutting intention. Step 2, which included two of the technical activity variables, explained 5% of the variance, $\Delta F(2,182) = 5.90$, $p < .001$. Frustration with technical deficiency ($B = .46$, $SE B = .16$, $p < .01$) was the only significant predictor in this step. The addition of the media substitution variables in step 3 explained 15% of the variance, $\Delta F(3,179) = 12.69$, $p < .001$, with two variables, companionship ($B = .28$, $SE B = .10$, $p < .01$) and perceived advantages ($B = .68$, $SE B = .15$, $p < .001$) significantly influencing intention to cut the cord on cable.

H_1 , H_2 , and H_3 suggested that perceived advantages, perceived value, and compatibility would predict users' intention to cord-cut. Only perceived advantages was a significant predictor of intention to cord-cut ($B = .68$, $SE B = .15$, $p < .001$), thus H_1

Table 2
Pearson Correlations of Independent and Dependent Variables (N = 189)

	1	2	3	4	5	6	7	8	9	10	11	12	13
<i>M</i>	4.88	3.34	6.20	3.40	3.90	5.31	6.02	5.59	5.65	5.81	5.86	2.86	4.25
<i>SD</i>	1.17	1.43	.88	1.62	1.54	1.27	.91	1.13	1.32	1.04	1.05	1.23	2.07
1. Pass time /Habit	1												
2. Information	.12												
3. Entertainment	.17*	-.04											
4. Companionship	.48 ⁺	.41 ⁺	-.02										
5. Escape	.44 ⁺	.35 ⁺	.14	.54 ⁺									
6. Interactive control	.17*	.16*	.35 ⁺	.19**	.12								
7. Technical enjoyment	.03	-.02	.51 ⁺	-.02	-.01	.65 ⁺							
8. Frustration with tech.	.002	.005	.34 ⁺	.13	.08	.55 ⁺	.62 ⁺						
Deficiency													
9. Perceived advantages	.12	.09	.33 ⁺	.01	.13	.36 ⁺	.31 ⁺	.43 ⁺					
10. Perceived value	.11	.04	.48 ⁺	-.02	.09	.33 ⁺	.37 ⁺	.39 ⁺	.65 ⁺				
11. Compatibility	.12	.02	.52 ⁺	.03	.15*	.38 ⁺	.47 ⁺	.42 ⁺	.67 ⁺	.63 ⁺			
12. Perceived substitut.	-.01	.33 ⁺	-.31 ⁺	.16*	.03	-.16*	-.36 ⁺	-.36 ⁺	-.20**	-.27 ⁺	-.22**		
13. Cord cutting intention	.11	.21**	.17*	.25**	.17*	.24**	.08	.31 ⁺	.49 ⁺	.34 ⁺	.33 ⁺	-.02	1

Note. * $p < .05$, ** $p < .01$, ⁺ $p < .001$. Entertain. = Entertainment; Companion. = Companionship; Tech. = Technical; Compat. = Compatibility; Substitut. = Substitutability.

Table 3
Summary of Hierarchical Regression of Variables Predicting Intent to Cord-Cut
(N = 200)

Variables	Step 1			Step 2			Step 3		
	<i>B</i>	<i>SE B</i>	β	<i>B</i>	<i>SE B</i>	β	<i>B</i>	<i>SE B</i>	β
Gratifications									
Information	.20	.11	.14	.22	.11	.15	.17	.10	.12
Entertainment	.42	.17	.18*	.19	.18	.08	.04	.18	.02
Companionship	.26	.11	.20*	.19	.11	.15	.28	.10	.22**
Escape	-.03	.12	-.02	-.01	.11	-.01	-.10	.11	-.07
Technical activity									
Interactive control				.03	.14	.02	-.06	.13	-.03
Frustration—tech. def.				.46	.16	.25**	.20	.15	.11
Media substitution									
Perceived advantages							.68	.15	.44 ⁺
Perceived Value							.06	.18	.03
Compatibility							-.05	.18	-.03

Note. * $p < .05$, ** $p < .01$, ⁺ $p < .001$. Tech. Def. = Technical Deficiency.

Step 1: $R^2 = .11$, $F(4, 184) = 5.55$, $p < .001$.

Step 2: $\Delta R^2 = .05$, $\Delta F(2, 182) = 5.90$, $p < .01$.

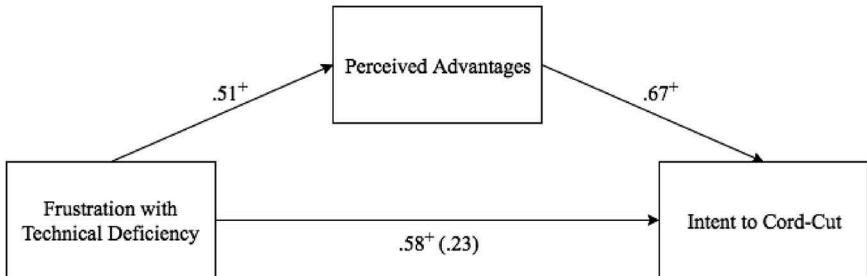
Step 3: $\Delta R^2 = .15$, $\Delta F(3, 179) = 12.69$, $p < .001$.

was the only hypothesis of the three supported. H_4 stated that perceived substitutability predicts users' intention to cord-cut. Perceived substitutability did not significantly positively correlate with intention to cord-cut, $r = -.02$, $p > .05$, and as such was not entered in the regression model. This hypothesis was not supported. In addition, H_5 suggested that other substitution factors better predict cord-cutting than perceived substitutability. As perceived advantages was a significant predictor, this hypothesis was supported.

H_6 suggested needs for entertainment better explain cord-cutting intention than information seeking and companionship needs. However, only companionship exerted significant influence with the addition of the final step ($B = .28$, $SE B = .10$, $p < .01$). As such, this hypothesis was not supported. H_7 stated that technical activity predicts users' intention to cord-cut. No technical activity measures were significant predictors in the final step of the regression, though frustration with technical deficiency was significant in step 2 ($B = .46$, $SE B = .16$, $p < .01$). Given that the "frustration with technical deficiency" variable measured respondents' frustration with missing functionality from traditional television, and given that the perceived advantages measure positioned streaming as a superior method of experiencing television than traditional television, it was determined that secondary analysis was needed to determine if perceived advantages mediated the relationship between frustration with technical deficiency and intent to cord-cut.

Figure 1

Unstandardized Regression Coefficients for the Relationship between Frustration with Technical Deficiency and Intent to Cord-Cut Mediated by Perceived Advantages. The Regression Coefficient between Frustration with Technical Deficiency and Intent to Cord-Cut, Controlling for Perceived Advantages, Is in Parenthesis. $^+P < .001$.



Using Model 4 of the PROCESS macro by Hayes (2013), it was determined that the relationship between frustration with technical deficiency and intent to cut the cord on cable was mediated by perceived advantages. Figure 1 illustrates this relationship. The unstandardized regression coefficient between frustration with technical deficiency and perceived advantages was statistically significant, $B = .51$, $SE = .08$, $p < .001$, as was the unstandardized regression coefficient between perceived advantages and intent to cord-cut, $B = .67$, $SE = .11$, $p < .001$. The unstandardized indirect effect was $(.51)(.67) = .34$. Using 1,000 bootstrap estimates to construct the 95% confidence interval, it was determined that the indirect effect was significant, as the confidence interval excluded zero, upper CI = .50, lower CI = .23. There was not a significant direct effect of frustration with technical deficiency on cord-cutting intention once the indirect effect was taken into account, $B = .23$, $SE = .13$, $p > .05$. Therefore, H_7 was partially supported.

Discussion

The purpose of this study was to better understand what factors best predict consumers' intention to cancel their traditional cable television subscriptions and adopt Web-based streaming services, such as Netflix, as their primary source of televised content. Using a nationwide survey driven through Amazon's Mechanical Turk, this study found that while a variety of gratifications, factors related to technical audience activity, and media substitution factors had positive relationships with cord-cutting intentions, it was the perceived advantages of

streaming applications over traditional television that best predicted consumers' intentions to cut the cord on cable and adopt Web streaming when controlling for the other variables. Furthermore, these perceived advantages mediated frustrations users feel when interactivity is not available through older technology and users' intention to cord-cut.

This study found that perceived substitutability did not relate to nor predict cord-cutting intention. This is consistent with Cha's (2013) findings. Cha suggested that "functional uniqueness" is necessary beyond "fundamental functional similarity" to motivate media substitution (p. 305). This study supports this finding, and suggests that perceived substitutability may be a non-factor in the media substitution process. From a consumer perspective, it may not seem necessary to replace one medium with another if there is no perceived difference between the two. Given the statistically significant predictive relationship between perceived advantages and cord-cutting when controlling for other substitution variables suggested by this study, coupled with the non-relationship between substitutability and cord-cutting, it would seem that the new medium's ability to provide advantages over the old medium is necessary to drive media substitution, not the new medium's ability to offer the same experience.

While there was a positive relationship between both value and compatibility and cord-cutting intention, when controlling for the other variables, these relationships were not significant. It would appear that the variance between value, compatibility, and cord-cutting intention was best explained by perceived advantages. This is consistent with previous media substitution research (Agarwal & Prasad, 1997; Leung & Wei, 1999; Lin, 2001, 2004), which suggested the new medium must provide instrumental advantages to supplant the older medium. While Cha (2013) found that compatibility was a key predictor of the adoption of Web-based television, the suggestion was that "compatibility of online video platforms is critical in influencing consumers' intention to use online video platforms during their introductory and growth diffusion stages" (p. 305). As argued earlier, the technology behind cord-cutting has been available for almost a decade. In particular, the introduction of Netflix's streaming application in 2007 and its ubiquitous rollout through Web-enabled game consoles, disc-players, and smart televisions suggests that perhaps the technology itself has passed the introductory phase. Perhaps compatibility is a given, thus explaining its lack of influence on cord-cutting intention when controlling for perceived advantages.

In the same vein, based on prior research (Kang & Atkin, 1999; Lin, 2006, 2008), this study expected entertainment gratifications to be a better predictor of cord-cutting intention than other gratification behaviors. Instead, it was companionship that best predicted cord-cutting intention when controlling for the other gratification factors. Given that streaming channels such as Netflix and Hulu primarily provide programming that was typically first available in movie theaters and on television, consumers may not see much difference between the entertainment value of streaming and legacy entertainment media.

While two of the identified technical activity factors had positive, significant relationships with cord-cutting intention, and one of the factors, frustration with technical deficiency, best explained cord-cutting intention when controlling for gratification and other technical activity factors, the technical activity factors were not significant predictors in the complete regression model. However, it was determined that the relationship between frustration with technical deficiency and cord-cutting intention was mediated by the perceived advantages of streaming television. This suggests that understanding the specific technical features of a new media technology is an important part of understanding audience activity, how it might relate to intentions to adopt the new technology, and how it might predict intentions to substitute the technology for older media. This is consistent with Rogers (2003) assertion that the adoption of a new innovation is fueled by both a familiarity with the new technology—through specific trial and observation—and a perception that the new technology is sufficiently easy to use. If experience with the new technology suggests the older technology is lacking in its technical ability and the new technology can more easily meet consumers' needs, then consumers will adopt the newer technology.

Understanding the role technical audience activity plays in decisions to adopt new modes of media contributes to a growing body of research aimed at understanding how interactive control is reshaping audience experiences. Recent research suggests that while computers and social network services contribute to a sense of information overload, the passive nature of television predicts a negative association with overload (Holton & Chyi, 2012). As audiences demand a television experience that mirrors an online experience, it is possible that similar struggles with overload will become commonplace. However, the increased media repertoires facilitated by digital technology are managed by social contexts and the patterns of daily lives (Taneja, Webster, Malthouse, & Ksiazek, 2012). Perhaps new approaches to television will enable audiences to more easily incorporate the television experience into the patterns of everyday life, rather than becoming yet another source of noise. Finally, the growth of cord-cutting is concurrent with the rise of other audience behaviors, specifically second screen activity during television viewing. Research suggests viewers use second screens to interact with others during live viewing (Doughty, Rowland, & Lawson, 2012), though levels of engagement may not differ for traditional broadcast and asynchronous streaming models (Pittman & Tefertiller, 2015). The intersection of streaming adoption with second screen activity may yield new audience behaviors along with new expectations from media technology.

Limitations and Future Research

While consistent with study measures, a key limitation of this study was its focus on only cable subscribers as its target population. In addition, a relatively small but statistically adequate convenience sample—acquired using Amazon

M-Turk participants from across the United States—suggests that care should be taken in generalizing the study's findings to the larger population. Additional research should attempt to construct a larger, nationally representative random sample. In addition, the dependent statements were highly correlated. As such, future research should seek to refine a more accurate multi-item measure of substitution intention beyond the current approach.

Furthermore, substitution research should seek to identify the behaviors that specifically relate to the new media experience versus what is provided through traditional media, as it is expected these technical features may relate to substitution intention through their contribution to the overall assessment of the new medium's advantages. As this study did not find entertainment to be a predictor of cord-cutting intention, but it did suggest companionship may be a predictor, future research should also address the specific gratifications associated with the use of streaming television. Emphasis should be placed on the ability of streaming television to provide companionship and alleviate loneliness, as streaming provides the ability to watch a show on a tablet computer while on the bus, experience a favorite program on a smartphone while having a solitary meal, or watch a movie on a laptop computer in the corner of a dorm. While Rubin's (1983) study was useful in providing a known and established scale of television gratifications, it does not allow for additional or different gratifications made possible through streaming television. An exploratory study that specifically targets the current television experience may yield a different or updated set of specific gratifications related to that experience.

Future research should also seek to better understand the relationship between perceived advantages and perceived substitutability. While this study found no relationship between substitutability and the media substitution behavior of cord-cutting, it is still assumed that fundamental functional similarity must be present in some form to facilitate true media substitution. In addition, future research should focus on the relationship between compatibility and media substitution, given the difference in findings between this study and previous research (e.g., Cha, 2013).

Finally, more research should seek to better understand complimentary approaches to adopting streaming television. Specifically, this research should address cord-shaving, or the process of reducing cable subscriptions to a limited channel selection that is complimented by online streaming services. The consumer retains their cable subscription, but on a very limited basis. Recent reports suggest cord-shaving is having an impact on the household penetration of cable networks (Fitzgerald, 2016). The underlying motivations for cord-shaving and other possible complimentary behaviors warrant investigation.

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Why Do We Indulge? Exploring Motivations for Binge Watching

Yoon Hi Sung, Eun Yeon Kang, and Wei-Na Lee

This study explored an expanded definition and motivations for binge-watching behavior. In addition to the number of episodes, the amount of time, frequency, and engagement in binge-watched programs were considered for the binge-watching definition. Study findings revealed that over half of the respondents of this study were light binge viewers. In addition, among a total of seven motivations identified in literature, only the entertainment motivation is a significant predictor of binge watching for those with a low level of binge watching, while both passing time and entertainment were found to be significant predictors for those with a high level of binge watching.

Technology developments over the years have almost always changed the way we consume broadcast media. Remote controls made it easy to channel surf, while personal video recorders moved people away from real-time viewing. Binge watching, also known as “marathon viewing” or “binge viewing,” has increased in popularity in recent years. According to a Deloitte survey (2016) conducted in 2015, 70% of their respondents had experienced binge watching and 31% of all respondents did so on a weekly basis. To some extent, binge watching owes its popularity to media digitalization. The recent digital revolution together with broadband communication has significantly altered our TV-watching patterns. These days, a program can be delivered in any digital medium, such as the Internet and mobile on demand. With advancements in technology, binge watching can now take place through a multitude of devices.

Binge behavior of any kind is usually associated with an extreme, devoted, and time-consuming experience. Past research suggests that emotions such as

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depression, loneliness, and self-regulation deficiency are likely indicators of binge behaviors (Bonin, McCreary, & Sadava, 2000; LaRose & Eastin, 2004). Binge-watching behavior may share some of those psychological antecedents and responses. On the other hand, there are reports that suggest positive aspects of binge watching. Harris Interactive (2013) found that viewers were more engaged and immersive when they binge watched.

Content providers and advertisers have proactively facilitated binge watching as a new venue to engage consumers. Binge watching is said to enhance a viewer's commitment to a program series, which may lead to a greater interest in watching future seasons of the program (Exelmans & Van den Bulck, 2017; MarketCast, 2013; Mikos, 2016). Binge watching helps capture viewers with high loyalty, which translates into secured viewership. It is for this reason that Netflix released the first season of *House of Cards* in its entirety on February 1, 2013.

With the exception of studies such as those reviewed above, however, limited research on binge watching has been conducted. The current study aims to identify factors that motivate people to binge watch and examine how they influence the viewing experience. Findings from this exploratory study should help establish a better understanding of the binge-watching behavior and offer content providers insights for better communication strategies.

Literature Review

Adopted from phrases such as "binge drinking" and "binge eating," binge watching signifies the behavioral practice of watching multiple episodes of a television program in rapid succession. Annalect (2014) defined binge watching as "watching at least three episodes of the same show in one sitting." Pittman and Sheehan (2015) employed a binge-watching definition of watching "two or more episodes of the same series in a single sitting." While there is no consensus as to the number of episodes that would constitute a threshold for this phenomenon, it is evident that binge watching refers to watching a series of a single program for several straight hours in one sitting (MarketCast, 2013; MarketWatch, 2013).

The concept of binge watching is similar to the notion of TV marathons in which people watch several episodes at once via the rental of DVDs (Tadena, 2014). Research by Annalect (2014) indicates that almost 60% of binge viewers reported that their binge watching occurred more than once a week, and over 50% were positive toward continuing their binge-watching behavior. The same study also found that the younger generation and females were more likely to binge watch programs.

The emergence of new media services such as Netflix, Hulu, and Amazon Prime has greatly facilitated binge watching (Tadena, 2014). These services provide customers with access to both new and old TV shows in a simple, customized format. A survey by eMarketer (2013) found that the most popular way to marathon through programs was "Netflix on a smart TV or connected TV" (58%), followed by "a DVD

box set of a season of a show" (48%), "marathon of a program on live TV" (44%), "on-demand content from provider" (32%), and "episodes recorded on an individual's DVR" (30%).

Conceptualizing Binge Watching

While there is no agreement on a clear definition for binge watching, the prevailing definitions appear to focus on the number of episodes of a program that viewers watch in one sitting. Past studies on binge or extreme behaviors suggest that factors such as the amount of time, frequency, and level of engagement may also be important indicators of binge watching (Cassin & von Ranson, 2007; Fillmore & Jude, 2011). Therefore, the first goal of this study is to review and incorporate those elements for a comprehensive definition of binge watching.

Activities in which people indulge, such as binge drinking, are measured in terms of both drinking quantity and duration (Fillmore & Jude, 2011). Binge eating is also assessed by both the amount of food intake and time spent on the behavior (Cassin & von Ranson, 2007). Given these examples of binge behaviors, the amount of time spent binge watching should be taken into account when defining the concept. In situations where two viewers who watch the same number of episodes of different programs, such as three episodes of a sitcom (e.g., 20-minute running time) versus three episodes of a drama (e.g., 1-hour running time), they would spend different amounts of time watching.

Also, it may be necessary to distinguish between those who rarely engage in binge behaviors and those who frequently do. For example, the diagnostic criteria suggested by Cassin and von Ranson (2007) for binge eating illustrate that binge eaters tend to go on a binge more frequently than intended. Similar concern may hold true for binge-watching behavior as well. An individual may occasionally endeavor to watch a program series in one sitting, when he or she has sufficient leisure time at their disposal; whereas another individual may do so frequently, such as several times a week. In this respect, the frequency of binge watching should be included in the definition.

Given that binge viewers are generally considered to be highly engaged (MarketCast, 2013; Pang, 2014), they share the "devotion" factor common to other extreme behaviors. The concept of "transportation" (Green & Brock, 2000) may help explain binge-watching engagement. Green and Brock (2000) defined transportation as "a convergent process, where all mental systems and capacities become focused on events occurring in the narrative" (p. 701). Narratives can be in the form of a book or a television program. Individuals in a state of high transportation are fully immersed in the story, sometimes at a loss of access to real-world information for the duration of such media consumption. These symptoms could be physical, such as not noticing others entering the room, or psychological, such as distancing themselves from reality. While watching a program, binge viewers may feel they cannot help but continue the engagement by hitting the "next" or "play" button

(Dvorak, 2013; *The New Yorker*, 2013). Their enjoyment of the program and need to know what happens next prompt the prolonged engagement (Ascharya, 2014). The higher the engagement, the more likely the viewer will continue to watch the program.

Motivations to Binge Watch

Scholars have continuously queried why people exhibit certain media use behaviors. Whenever a new media format emerges, whether it is a device or content—typically parallel to the development of new technology—scholars seek to identify and understand the motivations for its use (Haridakis & Hanson, 2009; Kim & Lee, 2013; Papacharissi & Rubin, 2000). Past studies have studied motivations for watching TV as a medium, as well as those for attending to specific TV genres. Rubin (1981) examined motivations of TV viewing and suggested that people watched TV primarily for passing time, companionship, arousal, content, relaxation, information, escape, entertainment, and social interaction. Frank and Greenberg (1980, 1982) identified orientation, avoidance, diversion, and social utility as motivations for watching soap operas. Conway and Rubin (1991) further delineated six motivations for watching TV: passing time, entertainment, information, escape, relaxation, and status-enhancement.

More recently, as Internet Protocol TV (IPTV) entered people's daily lives, Kim and Lee (2013) suggested five motivations for using IPTV: permanent access, entertainment, information, pastime, and fashion/status. Among them, permanent access and fashion/status are distinct from motivations for traditional TV viewing. Permanent access is about being able to access IPTV at any time. Meanwhile, fashion/status motivation suggests that using IPTV is stylish and enhances a person's status. Research on motivations for new media use (Haridakis & Hanson, 2009; Papacharissi & Rubin, 2000; Quan-Haase & Young, 2010; Song, LaRose, Eastin, & Lin, 2004) also identified the fashion/status motivation for accessing the Internet (Song et al., 2004) and social networking sites (Quan-Haase & Young, 2010). Collectively, the media-use motivations discussed above are helpful for understanding binge-watching behavior, as this viewing behavior is not limited to a specific genre of programs or a media platform.

Since binge watching involves "extreme" TV watching, literature on extreme media usage should provide insights for its motivations. Previous studies suggest that viewers tended to become addicted to TV watching to escape from negative feelings, to regulate moods, and to fill time (McIlwraith, 1998; Sussman & Moran, 2013). In addition, researchers found a variety of motivations for extreme Internet usage. For example, Song and colleagues (2004) showed that virtual community, monetary compensation, diversion, and personal status gratifications were significant predictors of Internet misuse tendency. Their findings support other research that suggests people tend to overuse media to reduce pressure, to shift toward positive

feelings, and to entertain themselves (Anderson, 2001; Morahan-Martin & Schumacher, 2003). Given that binge watching is a form of extreme media consumption, those motivations further help us understand the binge-watching behavior.

While binge-watching motivations are likely similar to those for general TV viewing, motivations distinct to the binge-watching behavior need to be examined. For example, after a major project or assignment, people may spend an entire day in a completely different place, ignoring everything around them, and binge watch a program (Pang, 2014). The escape motivation has also been identified as a predictor of other media consumption such as online games (Yee, 2006), YouTube (Haridakis & Hanson, 2009), and iPod (Ferguson, Greer, & Reardon, 2007). Additionally, findings from Mikos (2016) suggest that binge watching tends to make viewers more immersed into the story. Understandably, watching a program series straight through helps viewers to better follow plotlines and characters, which makes the experience more enjoyable (*The New Yorker*, 2013).

Peer influence may also play a role in binge watching. Indeed, binge viewers' program choices tend to depend on word-of-mouth (Pang, 2014). It appears that binge viewers enjoy talking about their programs in person, online, or via mobile while watching. Even those who have not previously watched a program that others around them talk about can participate in the conversation, after catching up on the story via binge watching (*The New Yorker*, 2013). This type of experience can create a community, a sense of excitement around the program, fandom, and buzz (Murphy, 2014), which may attract additional binge viewers. In this sense, binge watching could be social-interaction oriented (Pang, 2014). Social interaction has also been found to be a primary motivation for using YouTube (Haridakis & Hanson, 2009; Shao, 2009) and mobile phones (Leung & Wei, 2000).

In sum, people may binge watch programs in order to break away from the daily grind, to enhance enjoyment, and/or to reinforce social interaction. These motivations overlap with motivations of general TV watching identified in past literature. However, additional empirical evidence is needed to confirm these observations for binge watching. Thus, the following research questions are raised in this study:

RQ₁: What motivational factors are significantly related to binge-watching behavior?

RQ₂: Do motivations differ depending on the level of binge watching?

Study Method

Sampling Procedure

In order to answer the research questions, an online survey was conducted. According to Dvorak (2013), college students are the pioneers of binge watching. Similarly, 80% of people aged from 14 to 25 regularly engage in binge watching (Deloitte, 2015). Focusing on binge watching behavior among young adult viewers,

participants for the study were recruited from students enrolled in a southwestern university in the United States. After reading a brief description about the study, participants were asked to review an IRB consent form and, upon agreement, to indicate their voluntary participation in the survey. Participants received extra course credit for completing the survey.

Survey Instrument Development

The survey instrument included three major sections: (1) general TV-watching behavior, (2) binge-watching-specific behavior, and (3) motivations to binge watch.

General TV-Watching Behavior. Participant's general TV-watching behavior was measured. Time spent on watching TV on an average weekday and the weekend were gauged through the following categories: "less than one hour," "one to two hours," "two to three hours," "three to four hours," and "over four hours."

Binge-Watching-Specific Behavior. This study applied the definition of binge watching developed by Pittman and Sheehan (2015): "watching two or more episodes of the same TV series in one sitting." Participants were asked how many episodes of a program they usually watched in one sitting: one episode at a time, two to three episodes, four to five episodes, and over six episodes. This question was used as a primary screening method to identify binge viewers from non-binge viewers.

Next, the expanded definition of binge watching including three other elements (the amount of time, frequency, and binge-watching engagement) was applied as a further measure of the phenomenon. Participants were asked the amount of hours they usually binge watched: less than one hour, one to three hours, three to five hours, and over five hours. In addition, the frequency with which a participant binge watched in the space of a month was assessed: once, two to three times, four to five times, and over six times. Adopted from the transportation theory, media transportation was employed to help understand to what extent participants were engaged with the program they binge watched. Respondents were asked for their extent of agreement with seven items on a 7-point scale from *strongly disagree* (1) to *strongly agree* (7) (Wang & Calder, 2009). The specific items included "I felt caught up in the program," "Watching the program was relaxing," "My mind was only on the program and not on other things," "The program improved my mood, made me feel happier," "I lost myself in the story while watching this program," "I thought the program was entertaining," and "The program captured my attention" (Cronbach's $\alpha = .80$).

Following this series of questions, binge viewers responded to questions regarding the media platforms they often used for binge watching (e.g., program sites or Internet streaming service), favorite types of programs to binge watch, days of the week for binge watching, and a TV program they most recently binge watched.

Motivations to Binge Watch. The motivation scales refined by Rubin (1976, 1979), Conway and Rubin (1991), and Frank and Greenberg (1980) for TV watching were adopted in this study. Seven motivations were included: passing time, habit, relaxation, information/learning, entertainment/enjoyment, escape, and social interaction. Items measuring passing time, habit, relaxation, information/learning, entertainment/enjoyment, and escape (three items each) were adopted from Rubin's (1976, 1979) and Conway and Rubin's studies (1991). Social interaction was measured with five items originally termed *status-enhancement* in Frank and Greenberg's study (1980). The idea of "status-enhancement" is about people's tendency to watch TV to promote their self-esteem or gain approval by others. Also, as Frank and Greenberg (1980) explained, it implies that people pursue a certain behavior because they are concerned about how others perceive them and attempt to impress them. In terms of binge watching, viewers may binge watch a program in order to take part in conversations with others. Therefore, the variable was renamed "social interaction" to appropriately reflect the nature of this factor in the context of binge watching. Specifically, participants were asked to indicate their extent of agreement with each statement shown in Table 3 on a 5-point scale from *not at all* (1) to *exactly* (5).

Results and Discussion

Sample Profile

After incomplete responses were excluded, a total of 292 responses were included in subsequent analyses. Among those participants, 76.4% ($n = 223$) were female. Almost all participants were either under the age of 19 (50.0%) or in their 20s (48.3%). Regarding ethnicity, 59.4% ($n = 174$) were white, followed by Asian/Pacific Islander 18.2% ($n = 53$), Hispanics/Latino origin 17.8% ($n = 52$), African American 1.7% ($n = 5$), and "other" 2.7% ($n = 8$). More than one-third of the respondents ($n = 95$) did not indicate their household income. Of those who did so, 30% ($n = 89$) reported a household income of \$100,000 or more.

Binge-Watching Behavior

Queried as to the number of episodes of a favorite program watched in one sitting, study participants responded as follows: 71 (24.3%) watched only one episode of their favorite program; 171 (58.6%) usually watched two to three episodes; 40 (13.7%) watched four to five episodes; and 10 (3.4%) watched over six episodes. In terms of the average number of hours spent on binge watching, 169 (76.5%) of the binge viewers indicated 1 to 3 hours, while 26 (11.8%) spent 3 to 5 hours. Among binge viewers, 83 participants (37.6%) were found to binge watch two or three times per month, followed by 63 (28.5%) who binge watched once, 41 (18.6%) who binge

watched four to five times, and 34 (15.4%) who binge watched over six times. About 56% ($n = 124$) of binge viewers usually binge watched during weekends, while 36.2% ($n = 80$) would do so any day of the week. Only 7.7% ($n = 17$) binge watched on weekdays. Lastly, the analysis revealed that participants mostly binge watched by themselves (83.3%, $n = 184$) rather than with others (16.7%, $n = 37$).

The most popular media channels for binge watching were Internet streaming services such as Netflix or Hulu (91.9%, $n = 203$). TV program Web sites (19.9%, $n = 44$) and download services (11.8%, $n = 26$) were also accessed for binge watching. Participants further identified DVDs or marathon sessions on TV as channels for binge watching.

These results suggest that Internet streaming services such as Netflix and Hulu may serve as a catalyst for binge watching. The titles of programs recently binge watched by study respondents support these findings. All of the top ten binge-watched programs are season-based dramas (e.g., *Grey's Anatomy*, *Orange Is the New Black*, *One Tree Hill*, *Desperate Housewives*, *Breaking Bad*). These dramas have in common ongoing stories that extend not only from one episode to the next within a season, but from one season to the next, such that people are drawn into continuing to watch.

Binge Watching and Four Elements

The study explored what characteristics binge viewers have according to the four elements for binge watching: the number of episodes, the amount of time, frequency, and binge-watching engagement. Applying the binge-watching definition by Pittman and Sheehan (2015) of watching over two episodes of the same TV show in one sitting, 221 (75.8%) participants in this study were classified as binge viewers. A series of cross-tabs and correlation analyses was then performed to examine relationships between the number of episodes watched by binge viewers and the other three elements (the amount of time, frequency, binge-watching engagement).

As shown in Table 1, results of a cross-tab demonstrated a significant difference in the amount of time spent on binge watching depending on the number of episodes watched (Fisher's Exact Test, $p < .05$). About 85% of binge viewers watching two to three episodes tended to watch for 1 to 3 hours. In addition, for the group who typically watched four to five episodes, binge viewers watching for 1 to 3 hours accounted for 60%, compared to approximately 38% for those watching for 3 to 5 hours. Furthermore, a majority of recipients in the group of viewing over six episodes binge watched a program for either 3 to 5 hours (50.0%) or over 5 hours (40.0%). Results of an additional correlation analysis supported the differences. The number of episodes had a positive relationship with the amount of time ($r(221) = .58$, $p < .05$).

This finding would appear to hold true in terms of the relationship between the number of episodes and binge-watching frequency. A cross-tab evidenced that while 90% of binge viewers watching two to three episodes tended to binge watch either

once or two to three times per month, 70% of binge viewers watching four to five episodes tended to binge watch either two to three times or four to five times per month. In addition, one half of those who binge watched over six episodes engaged in this activity four to five times per month. Furthermore, a correlation analysis demonstrated a significantly positive relationship between the number of episodes and binge-watching frequency ($r(221) = .16, p < .05$). This indicates that the more episodes an individual watches, the more frequently he or she tends to binge watch.

Lastly, a correlation analysis was conducted to examine the relationship between the number of episodes and media transportation. Results indicate that the number of episodes binge watched was significantly and positively related to respondents' levels of media transportation ($r(221) = .14, p < .05$). In other words, the more episodes participants binge watched, the more they tended to experience engagement with the program. This confirms previous research on transportation (Green & Brock, 2000; Wang & Calder, 2009). Given that binge viewers watch several episodes in one sitting, they are likely to be immersed in the story of the program. Therefore, binge viewers may not want to be disrupted in the fictional fantasy (Vedantam, 2015). Researchers have suggested that the high transportation state may explain why people move away from or ignore real-world information (Feeney, 2014; Kiefer, 2016). This in turn may lead to prolonged watching. Although results from this study do not extend this far in terms of a definitive explanation, it is a direction worth considering.

These results demonstrate that the number of episodes watched has a positive relationship with factors such as the amount of time spent watching a program, the frequency with which a program is watched, and binge-watching engagement. These four elements together thus formed the basis for assessing levels of binge watching in this study. Given that the four variables (the number of episodes, the amount of time, frequency, engagement) have different units of measurement, each variable was categorized into four levels by quadrisection, with each level receiving a score from "1" (low) to "4" (high). The scores were then added to provide a summary score for the level of binge watching. The descriptive statistics of the level of binge watching are shown in Table 2.

Motivations for Binge Watching

Based on motivation items from earlier research, a confirmatory factor analysis (CFA) was conducted to verify that all items in the measurement indeed measured the same construct. Among a series of models, the model with seven factors was determined to have the best fit ($\chi^2 = 3364.65, df = 209, p < .05$; CFI = .95, TLI = .94, RMSEA = .06). The factors, in order, were social interaction, entertainment, passing time, relaxation, escape, information, and habit. The social interaction factor accounted for 19% of the variance with an eigenvalue of 4.28. Entertainment explained 12% of the variance with a 2.75 eigenvalue. Each of the next three factors of passing time, relaxation, and escape explained about 10% of the variance with an eigenvalue of about 2.40, 2.40, and 2.20, respectively. The last two factors of

Table 2
The Descriptive Statistics of Level of Binge Watching

Level of Binge Watching*	n	%
5	3	1.4
6	20	9.0
7	29	13.1
8	39	17.6
9	36	16.3
10	43	19.5
11	24	10.9
12	15	6.8
13	8	3.6
14	2	.9
15	1	.5
16	1	.5
Total	221	100

**Note: Level of binge watching = the number of episodes + the amount of time + frequency + engagement*

information and habit, had eigenvalues of 2.06 and 1.98, respectively, and each accounted for 9% of the variance. Items from this analysis and each construct's mean and standard deviation are shown in [Table 3](#).

Next, a multiple regression analysis was conducted to examine the relationship between motivations and binge watching, addressing RQ₁. The independent variables were the seven motivations of binge watching, and the dependent variable was the level of binge watching. The corresponding items for each motivation were summed and averaged for this analysis. Altogether, the seven variables explained 19.6% of the variance ($R^2_{adj.} = .20$, $F(7, 213) = 8.65$, $p < .01$). Results indicate that only entertainment ($B = .24$, $\beta = .32$, $t(213) = 4.39$, $p < .05$) proved a significant predictor in binge watching—i.e., respondents in this study binge watched because of their desire to be entertained.

Based on a mean split ($M = 9.10$), participants in this study were classified into low vs. high level of binge watching. Approximately 57% of binge viewers were light binge viewers with a low level of binge watching. To address RQ₂, a multiple regression analysis was performed to examine motivations that predict binge watching for those with a low and a high level of binge watching, respectively (see [Table 4](#)). For those with a low level of binge watching, the seven motivations explained 13.2% of the variance ($R^2_{adj.} = .13$, $F(7, 119) = 3.73$, $p < .01$). In addition, only entertainment ($B = .13$, $\beta = .33$, $t(119) = 3.33$, $p < .05$) proved to be a significant predictor for those with a low level of binge watching. For those with a high level of binge watching, 13.3% of the variance was explained by the seven motivations ($R^2_{adj.} = .13$, $F(7, 86) = 3.04$, $p < .01$). Unlike those with a low level of

Table 3
Confirmatory Factor Analysis of Binge Watching Motivations

Items	Social Interaction*	Entertain- ment	Passing Time	Relaxa- tion	Escape	Informa- tion	Habit
To have more influence on other people.	.888	-.078	.057	-.007	.091	.118	.116
To compete against others.	.884	-.040	.007	.019	.044	.213	.091
To feel more important than I really am.	.880	-.156	-.001	-.034	.052	.143	-.031
To be like other people.	.862	-.054	.020	-.037	.070	.172	.033
To impress people.	.841	-.144	.005	-.015	.111	.238	.097
Because it amuses me.	-.032	.890	-.003	.150	.096	.001	.090
Because it entertains me.	-.203	.880	.104	.245	.025	-.039	.034
Because it is enjoyable.	-.212	.877	.074	.241	.072	-.019	.048
Because it passes the time away, particularly when I am bored.	.009	.061	.884	.064	.164	-.091	.127
When I have nothing better to do.	-.011	.102	.851	.070	.049	.096	.137
Because it gives me something to do to occupy my time.	.061	-.013	.848	.024	.076	-.118	.090
Because it allows me to unwind.	.003	.183	.122	.859	.118	.096	.117
Because it relaxes me.	-.097	.230	-.009	.800	.218	.022	.124
Because it pleasant rest.	.033	.252	.073	.794	.204	.163	.171
So I can get away from what I am doing.	.074	.103	.115	.144	.892	.058	.115
So I can forget about school, work, or other things.	.038	.212	.053	.236	.795	.048	.097
So I can get away from the rest of the family or others.	.198	-.100	.134	.114	.742	.132	.045
So I could learn about what could happen to me.	.333	-.163	-.020	.098	.108	.789	.110

(continued)

Table 3
(Continued)

Items	Social Interaction*	Entertain- ment	Passing Time	Relaxa- tion	Escape	Informa- tion	Habit
So I can learn how to do things, which I haven't done before.	.241	.080	-.094	-.016	.140	.764	.156
Because it helps me learn things about myself and others.	.349	.020	-.011	.239	.010	.728	.031
Because it is a habit. Just something to do.	.196	-.012	.115	.121	.209	.048	.835
Just because it is there.	.062	-.012	.351	.107	.002	.060	.798
Because I just like to watch.	.008	.304	.001	.211	.075	.238	.659
Mean (Standard Deviation)	1.40 (.76)	4.38 (.68)	3.59 (.98)	3.78 (.88)	3.24 (1.06)	1.93 (.92)	2.84 (.99)
Composite reliability	.941	.921	.856	.864	.809	.789	.758
Eigenvalue after rotation	4.276	2.746	2.445	2.389	2.244	2.058	1.978
% Total variance accounted for	18.589	11.939	10.632	10.386	9.755	8.947	8.598

$\chi^2 = 3364.65$, $df = 209$, $p < .05$; CFI = .95, TLI = .94, RMSEA = .06
*Note: This is originally "Status-enhancement" motivation. It was re-named for the context of binge watching.

Table 4
Motivation Difference by Level of Binge Watching

Independent variable	Level of binge watching Standardized β (t statistic)	
	Low	High
Passing time	.03 (.34)	.23 (2.06)*
Habit	.14 (1.43)	.07 (.56)
Relaxation	-.08 (-.74)	.03 (.26)
Information	.05 (.40)	-.09 (-.76)
Entertainment	.33 (3.33)*	.30 (2.77)*
Escape	.11 (1.14)	.03 (.22)
Social interaction	.19 (.16)	-.02 (-.21)
N	127	94
Model F Statistics	3.73	3.04
df	7, 119	7, 86
Model R^2	.18	.20
R^2 adjusted	.13	.13

* $p < .05$

binge watching, passing time ($B = .07$, $\beta = .23$, $t(86) = 2.06$, $p < .05$) and entertainment ($B = .18$, $\beta = .30$, $t(86) = 2.77$, $p < .05$) were both significant predictors for those with a high level of binge watching.

Implications and Suggestions for Future Research

This study investigated binge-watching behavior by examining what behavioral motivations may serve to provide an expanded definition of the phenomenon. Four key characteristics of binge watching were identified: the number of episodes, the amount of time spent watching programs, frequency, and the level of engagement in binge-watched programs. It was found that the more episodes an individual binge watches, (1) the more time he or she spends on binge watching, (2) the higher the frequency of binge watching, and (3) the more engaged he or she is with binge-watched programs. Given these findings, the study defined the level of binge watching as the sum of all four of these elements. Results from the study demonstrated that over half the recipients were light binge viewers.

Additionally, among a total of seven motivations identified in literature of general TV watching, this study found entertainment to be the only significant predictor of binge watching. Traditionally, viewers watch a short segment of a complete story and then wait until the next scheduled airing of the program according to TV guide to learn what happens next. One main difference between traditional TV watching

and binge watching is that binge-watching viewers are able to enjoy a relatively long story by watching a series of episodes in one sitting. It may be that an individual's excitement is more enhanced by watching a long story than with a short one (McCracken, 2013; *The New Yorker*, 2013), which is likely to lead to further binge watching.

Furthermore, this study examined differences in motivations based on the level of binge watching. In addition to its entertainment value, passing time is a motivation for the high binge-watching group. Individuals with a high level of binge watching may do so because they have a lot of leisure time or because TV viewing, instead of other activities, is a default choice of entertainment.

Next, a majority of individuals in this study tended to watch programs alone (83%) rather than with others (17%). The motivational impulses for binge watching (e.g., enjoyment, engagement) may well be different for those who binge watch alone than for those who binge watch with others. Such an analysis must incorporate the possibility that those who binge watch alone may nonetheless share their opinions and feelings with distant others even though they are physically alone. Viewers can talk with their friends and other viewers via digital devices such as cell phones and tablets (i.e., second screens) while binge watching. Indeed, several surveys show that many people use mobile devices while watching TV (Investopedia, 2014; Millward Brown, 2014). In such instances, attention to programs would invariably fluctuate between distraction and engagement (Moses, 2013). Second screens may therefore also influence the binge-watching experience. The relationship between binge watching and other media usage merits further exploration in future studies.

This research found that the more an individual binge watched, the more deeply he or she was engaged with the content. This finding coincides with speculations that binge watching is an immersive experience, the implications of which could lead to engagement serving as an ideal context for transference to advertising engagement (Wang & Calder, 2009). Drawing from the transportation theory, Wang and Calder (2009) suggested the concept of transportation transfer, demonstrating that transportation from a medium such as an article or a program (media transportation) would influence transportation with an ad placed in the medium (ad transportation) (Wang & Calder, 2009). Findings from this study, which evidence that binge watching may present a high level of media transportation, imply that deep immersion in a binge-watched program has the potential to exert a positive influence on attitudes toward the ad placed in the program. Therefore, the inclusion of advertising in binge-watched programs is possible and should be examined.

Although this exploratory study is expected to provide insights for understanding binge-watching behavior and motivations, there are a few limitations. First, this study surveyed college students. Although college students constitute the primary group that engages in binge-watching behavior (Statista, 2016), this phenomenon is not exclusive to them (Bercovici, 2013). Motivations for binge watching could differ by age. Previous studies on media consumption reveal that media behaviors may be different for different segments of the population. For example, two studies (LaRose & Eastin, 2004; LaRose, Mastro, & Eastin, 2001) show that outcome expectations for

Internet usage are different between undergraduate students and the general population. In terms of binge watching, while a few field studies suggest that the need to escape from reality could be a major motivation (Pang, 2014; Stelter, 2013), the escape motivation was not found to be a significant predictor in this study for this segment of the population. This could be due to the limited sampling. The escape motivation may be significant in older individuals who are more likely to be stressed from life's many demands. In addition, while the Internet streaming service was found to be a major medium for binge watching in this study, there may be binge viewers who prefer media platforms that are not Internet-based. Given that motivations for consuming video content could be different by the media that viewers use (Bondad-Brown, Rice, & Pearce, 2012), an examination of groups using a variety of media for binge watching also will be needed in future research.

In addition, since only the entertainment motivation was found to be a significant factor of binge watching in this study, the regression analysis showed low explained variance. This implies that there could be other motivations that predict binge watching. Alternative methods such as focus groups or in-depth interviews should be considered for future research to explore motivations that were not found in this study.

Similar to other binge behaviors, some binge viewers may sense a loss of control (Cooper, 2013; MarketCast, 2013; Murphy, 2014). Previous research suggests that negative emotions such as loneliness, depression, and a lack of self-regulation can also influence addictive behaviors (Bonin et al., 2000; LaRose & Eastin, 2004). The impact of these additional factors on binge watching merits consideration in future research.

Finally, since survey research is based on self-reporting, future research may well benefit from employing an experimental research design to more precisely examine the relationship between binge watching, and its antecedents and consequences.

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Verbal Aggression, Race, and Sex on Reality TV: Is This Really the Way It Is?

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Verbal Aggression, Race, and Sex on Reality TV: Is This Really the Way It Is?

Jack Glascock and Catherine Preston-Schreck

This content analysis examines verbal aggression, race, and gender presented in a composite week of popular reality TV programming on cable and broadcast television. Results show that African Americans were found to be over-represented and depicted disproportionately as more verbally aggressive and more likely to be victims of verbal aggression than other races/ethnicities. African American women were more likely than men to be involved in verbal aggression, both as aggressor and victim. The results are discussed in terms of the potential effects of exposure to verbal aggression and the accompanying contextual factors found in reality TV programming.

Past studies have examined a variety of dimensions in reality programming. Examples include subgenre categorization (Barton, 2013; Beck, Hellmueller, & Aeschbacher, 2012; Nabi, Stitt, Halford, & Finnerty, 2006; Orbe, 2008), tracking stereotypes (Bell-Jordan, 2008; Tyree, 2011), and the presence of physical aggression (Smith, Nathanson, & Wilson, 2002). One noteworthy exception is verbal aggression.

Hence, the objectives of this study are to track the prevalence of verbal aggression in reality programs, document the social contexts in which it occurs, and investigate whether the representations of sex and race/ethnicity play a significant role in these dynamics. By considering the contextual foundation of verbal aggression within reality programming, this research helps to further map the behavioral content and context of popular reality television programming, and to illuminate potential sources for wider social attitudes about sex, race, and verbal aggression.

Reality TV

Although a standard definition of reality programming is lacking, scholars who have offered definitions have typically agreed upon two common characteristics as

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noted by Godlewski and Perse (2010): that non-actors, or real people, serve as characters and the content is unscripted. Oft-cited criteria by Nabi, Biely, Morgan, and Stitt (2003) offer more specifics: (1) people playing themselves, (2) filmed in either a work or living environment, as opposed to on a set, (3) without a script, (4) in a narrative format, (5) with the primary purpose of entertainment. According to Nabi et al. (2003) this would exclude shows such as news programming, talk shows, documentaries, and shows featuring reenactments (*America's Most Wanted*) and unrelated video clips (*America's Funniest Home Videos*) but include shows such as *Cops* (police performing job-related duties) and *Survivor* (participants competing for a prize in a contrived living environment).

Given the growing popularity of reality programming, its possible influence on a rather large segment of the viewing public seems significant. At the turn of the century shows such as CBS's *Survivor* and shortly thereafter Fox's *American Idol* debuted and began to dominate the ratings, ushering in the modern era of reality TV (Albiniak, 2015). By the end of the decade reality shows accounted for 40% of TV's prime time schedule and a broadcast audience share of over 56% (Barnhart, 2010; Nielsen, 2011). The genre is seen as playing a key role in television audiences migrating from network TV to cable, where an estimated 90% of reality TV is seen (Barnhart, 2010).

One contributing factor to reality programming's popularity is the low cost of production, generally less than half as much as scripted shows (Carter, 2009). Production costs are limited in reality programming due to a variety of factors. Many of the shows are filmed in natural locations so there are no sets to build; the shows are unscripted so there's less need for unionized writers; and the participants are typically non-actors as opposed to more expensive unionized actors (Orbe, 2008).

With the growth of reality TV researchers have attempted to categorize the various subgenres (Barton, 2013; Beck et al., 2012; Nabi et al., 2006; Orbe, 2008; Ouellette & Murray, 2004). These have ranged from four to six categories, typically defined by referring to specific show exemplars. In general six categories seem to be somewhat common. These include talent (*American Idol*), competition (*Survivor*), dating/romance (*The Bachelor*), makeover/self-improvement (*Biggest Loser*), docu-soaps (*Jersey Shore*), and crime/law (*Cops*). There are a few disparities. For example, Beck et al. (2012) distinguish reality soaps, which take place in an artificial setting (*Big Brother*, *Real World*), from docu-soaps, which usually take place in an actual living environment (*Jersey Shore*). However other researchers (Nabi et al., 2006; Ouellette & Murray, 2004) would categorize both types as docu-soaps. One additional category is described by Orbe (2008): hidden camera (*Cheaters*, *Punk'd*), which, although perhaps not that common, seems to stand alone.

Numerous studies have examined the content of reality television, but they have either examined one show in particular (Papacharissi & Fernback, 2008; Wilson, Robinson, & Callister, 2011), or a select subset of shows based either on genre (Ferris, Smith, Greenberg, & Smith, 2007), popularity (Coyne, Robinson, & Nelson,

2010), or research objectives (Bell-Jordan, 2008; Tyree, 2011). As such, no study yet has attempted to analyze a representative sample of the entire genre.

Verbal Aggression

Infante defines verbal aggression as an attack on the self-image of another (Infante & Wigley, 1986). Examples include personal insults, sarcasm, shouting at, and name calling (Coyne & Archer, 2004; Infante & Wigley, 1986). From a communication perspective, verbal aggression serves no real useful purpose; in other words, no positive outcomes accrue from its usage, only negative ones (Infante & Rancer, 1996).

Two negative outcomes have been postulated by Infante and his colleagues: verbal aggression is often a precursor to physical aggression, with verbal attacks escalating into physical violence (Infante, Chandler, & Rudd, 1989), and victims of verbal aggression suffer psychological harm, perhaps more harmful and longer lasting than a physical attack. For example, a child teased about his or her physical condition could suffer a lifetime of psychological repercussions (Infante & Wigley, 1986).

Early on Greenberg, Edison, Korzeny, Fernandez-Collado, and Atkin (1980) reported about 23 verbally aggressive acts per hour for prime time programming, a rate which has been found somewhat consistently over the years in TV entertainment programming, including professional wrestling (Tamborini, Chory, Lachlan, Westerman, & Skalski, 2008), British reality TV programs (Coyne et al., 2010), prime time broadcast TV (Glascock, 2008), and children's programming (Glascock, 2013).

A couple of content analyses have examined verbal aggression in reality programming. In a study of seven seasons of *Survivor*, Wilson et al. (2011) found that verbal aggression on the show had increased from 5.4 acts per episode to about 12 acts during the time period studied (2000–2007). In Coyne et al.'s (2010) study of popular British reality shows, the five reality programs examined were found to contain almost 27 acts of verbal aggression per hour. As in entertainment programming, it seems likely that the number of acts per hour may vary according to subgenre.

Theoretical Perspectives

One theoretical approach that can be used to explain the potential effects of verbal aggression in the media is social cognitive theory, which proposes that individuals learn vicariously by observing behaviors in the media that are positively rewarded and modeled by attractive or identifiable models (Bandura, 2002; Pajares, Prestin, Chen, & Nabi, 2009). Smith and Donnerstein (1998) argue that viewers more easily identify with realistic portrayals, and real-life depictions may lower inhibitions toward aggression. However, just how realistic reality TV is actually perceived by viewers to be is still somewhat open to debate, as survey studies of adolescents and the general public have reported low to moderate levels of perceived realism for the

genre (Nabi et al., 2003; Ward & Carlson, 2013). For example Nabi et al. (2003) found viewers considered reality-based TV more realistic than fictionalized dramas and sitcoms, but less true to life than talk shows and news magazine programs.

Cultivation theory suggests that viewers who spend more time with television have views that reflect what they see on television. For example, heavy viewers of television and its overrepresentation of violence could perceive the real world as a more dangerous place than lighter viewers (Gerbner, Gross, Jackson-Beeck, Jeffries-Fox, & Signorielli, 1978). Similar arguments could be made for the representation of verbal aggression, as well as racial and gender stereotypes (Shanahan, Signorielli, & Morgan, 2008; Signorielli, 2009).

A few studies have examined the effects of TV verbal aggression. Glascock (2015) found that male subjects reported an increase in verbal aggression after exposure to a verbally aggressive TV show, and Chory-Assad (2004) found that exposure to a verbally aggressive TV sitcom increased viewers' verbally aggressive thoughts. In addition, a couple of survey studies have found a relation between verbally aggressive media and viewers' verbal aggression (Glascock, 2014; Linder & Gentile, 2009). Also, a growing body of research, including both experimental and survey studies, has shown an association between exposure to socially aggressive media, a construct that includes some forms of verbal aggression, and socially aggressive behavior (Coyne, 2008, 2016; Linder & Werner, 2012; Ward & Carlson, 2013).

Race and Gender

In terms of overall numbers, the representation of African Americans on network prime-time programming appears to have achieved parity with their actual numbers in the U.S. population (13%); however other minority groups such as Hispanic and Asian Americans remain notably underrepresented, 5% on TV vs. 16% in real life (Signorielli, 2009). The parity in African American representation is somewhat tempered by the tendency of prime time programming to segregate characters by race. For example, Signorielli (2009) found 37% of African American characters to be in prime time programs with mostly minority casts, typically situation comedies. Such depictions, researchers argue, reinforce racial isolation as well as connote a lack of status and importance for groups who are underrepresented (Greenberg & Baptista-Fernandez, 1980; Signorielli, 2009).

In her analysis of 10 reality television shows, Tyree (2011) determined that more than half of African American participants fit into at least one stereotype, including the "angry Black woman," described variously as argumentative, engaging in verbal threats, and exhibiting "harsh" facial and body mannerisms. In a textual analysis of three self-selected reality shows, Bell-Jordan (2008) discussed how media construct race in problematic ways by promoting intra-racial conflict and reinforcing racial stereotypes such as the Black male often depicted as inherently angry and threatening.

In terms of gender, female characters have traditionally been underrepresented in prime time programming compared to their actual numbers in the U.S. population. Signorielli (2009) found 42% of central characters in network prime time programming to be female

during an 8-year time frame in the early 2000s. A comparable percentage (40%) was found for major female characters during the 2005–06 TV season by Lauzen, Dozier, and Horan (2008). In a more recent content analysis of prime time programming, which also included children's shows, Smith, Choueiti, Prescott, and Pieper (2012) found females accounted for about 39% of all characters with a speaking role.

For race and gender of aggressors and victims of verbal aggression, the results have been mixed, perhaps contingent on sampling. For example, Coyne et al. (2010) found no differences between genders for a sample of British reality programs. However in programs popular among British adolescents, Coyne and Archer (2004) found females more verbally aggressive. Tamborini et al. (2008) found Caucasian males to be both the primary aggressors and targets of verbal aggression in professional wrestling programs. In a sample of broadcast prime time programming, weighted for overall character representation, Glascok (2008) found Caucasians more likely to be both the aggressors and targets of verbal aggression, but no differences between genders.

Research Questions

In the past, the role of race and gender and their relation to verbal aggression has gone largely unexplored. This study examines the prevalence and context of verbal aggression, as well as the interrelated role of race and gender, using a sample representative of the entirety of reality TV. Specifically, the current study poses the following research questions:

- RQ₁: What subgenres do the most popular broadcast and cable reality TV shows fall into?
- RQ₂: Are there any differences among the subgenres in terms of verbal aggression?
- RQ₃: What is the prevalence and context of verbal aggression on popular broadcast and cable reality TV shows?
- RQ₄: How are characters represented on popular reality TV shows in terms of gender, race/ethnicity, attractiveness, and as victims and aggressors of verbal aggression?

Method

Sample

A composite week of the most popular prime-time broadcast and cable reality TV shows was sampled during the beginning of the 2013 fall television season. One episode of each show included in the sample was recorded for coding during a month-long time period beginning in mid-September. The time period was dictated

by the number of weeks it took to record all 42 shows included in the sample (see Appendix for a list of shows and networks).

To be included, a show had to air at least twice during the time period sampled and have a total audience of over 1 million viewers and/or a rating of .5 based on the daily Nielsen ratings for broadcast and cable. These ratings by Nielsen are posted daily by the website Zap2it (Zap2it.com), a part of Tribune Media Services. Based on the criteria described above, 10 broadcast reality shows and 32 cable reality shows that aired at least twice during the month-long time period were included in the sample.

Measures and Coding

The shows were coded in three waves. The first wave recorded the name, length, and type of show. The type of show (talent, dating, makeover, docu-soaps, crime, reality soap, competition, and hidden camera) was compiled from categories used by previous researchers (Barton, 2013; Beck et al., 2012; Nabi et al., 2006; Orbe, 2008). A docu-soap was defined as a “day in the life” of a cast of characters in a natural setting, at work (*Fast & Loud*), or a home environment (*Keeping Up with the Kardashians*). A reality soap was similar in format (day in the life) but produced in an artificial setting (*Big Brother*). Other types of show include: talent (*The Voice*), competition (*Amazing Race*), dating/romance (*The Bachelor*), makeover (*The Biggest Loser*), police (*Cops*), and hidden camera (*Cheaters*).

A second wave coded physical qualities of all characters with a speaking part. Physical quality categories included gender, race/ethnicity (Caucasian, African American, Hispanic, Asian American, Native American and other) and attractiveness level (attractive, average, unattractive). Attractiveness level was coded using Coyne and Archer’s (2004) definition. An attractive female, for example, would be defined by large eyes, an hourglass figure, a small nose and chin, prominent cheekbones, and a slim or athletic figure. A similar attractiveness definition was used for coding male characters, including a tapering V-shaped physique, large eyes, prominent cheekbones, average body weight, and good muscle tone.

A third wave coded verbal aggression and the context of its occurrence. Variables coded included type of verbal aggression: swearing, sarcasm, threats, maledictions, yelling or shouting at, mocking/ridiculing, nonverbal emblems, and attacks on competence, character, background, and appearance. Maledictions were defined as “saying one hopes something bad happens to another.” A nonverbal emblem was described as “facial expressions, gestures which attack the victim’s self-concept, e.g., rolling ones eyes.” These categories were compiled from previous research (Coyne & Archer, 2004; Glascock, 2013; Greenberg et al., 1980; Infante, Riddle, Horvath, & Tumlin, 1992; Tamborini et al., 2008). Each instance of verbal aggression was coded as an act of verbal aggression. So, for example, each expletive in a string of expletives was counted as an act of verbal aggression. It is possible that a verbally aggressive act could fall into more than one category. If that was the case, a

hierarchy in the reverse order of the types listed above was used. For example, if a character shouted at another, "You're a f__king moron!" that would be coded only as a personal competence attack. Swearing that was bleeped out was coded, as long as it was clear what the character said. Other variables included whether the act was direct or indirect, a natural part of the show or artificially induced by producers, rewarded or punished, type of reward or punishment (Coyne & Archer, 2004; Wilson et al., 2002), aggressor, victim, and if the act was justified or unjustified (Potter & Ware, 1987).

More specifically, a verbally aggressive act that was directed toward another character without that person being present, for example during a producer's cut-away, was coded as indirect. Otherwise the act was coded as direct verbal aggression. An act was counted as rewarded, if the aggressor benefited in some way from committing the act. Following Coyne and Archer's (2004) coding scheme, rewards were further broken down by type, including tangible (the aggressor received something physical like money or a gift), reduction of annoyance (someone stops complaining when shouted at), peer approval (others laugh at the insult), increase in self-esteem (the aggressor feels better about someone else's loss), increase in control (victim does what aggressor wants), victim suffering (victim cries), and victim apology (victim apologizes). An act was coded as punishment, if the aggressor suffered adverse consequences as a result of the verbal aggression. For example, a tangible punishment might involve the aggressor receiving an insult in return, peer disapproval instead of approval, or a decrease in control over the victim (the victim does the opposite of what the aggressor wanted). The aggressor and victim of each act was coded by name or character description and then matched later with the character demographics (gender, race/ethnicity, and attractiveness).

An act was coded as justified if the aggressor felt they had a valid reason for the aggression or was responding to something another character did or said. An act was coded as not justified if the aggressor showed remorse or apologized for committing the act. Otherwise an act was coded as neither justified nor unjustified.

Two research assistants and one of the researchers served as coders for the study. Coders were given coding sheets, which included definitions for most of the variables in the study (attractiveness level, reward, punishment, justification); they also received DVDs containing 3–5 shows from a separate subsample of reality shows. The three coders conducted their coding independently; when the coding was completed, inter-coder reliabilities were calculated and coders met to discuss any discrepancies. This process was repeated until at least a .70 level of inter-coder reliability was achieved using Krippendorff's alpha (Greenberg et al., 1980; Tamborini et al., 2008). The reliabilities for the program-level variables were calculated cumulatively. Alphas for the individual variables assessed were: length of program, 1.0; genre, .78; number of characters per program, .84; number of verbally aggressive acts per program, .93; character sex, .99; character race, .86; character attractiveness, .79; type of verbal aggression, .85; direct (or indirect), .95; producer cutaway, .94; reward, .86; type of reward, .80; punishment, .81; type of punishment, .82; and justification, .81. Aggressor and victim name were string variables, and

reliabilities were assessed using percent agreement, which was .98 and .96 respectively. Once the desired reliability level was reached, the main sample of 42 reality TV episodes was coded independently with each coder undertaking a comparable proportion of the coding.

Results

Overall

Docu-soaps was the largest sub-genre category with 57.1% of all shows, followed by talent (19%), competition (9.5%), makeover and hidden camera (4.8% each), reality soap and dating (2.4% each). The shows ranged from a half hour in length to 2 hours (*The Voice*) and totaled 40 hours of programming. Significant differences were found between cable and broadcast for reality show subgenres, $\chi^2 = (5, N = 42) = 22.02, p < .01$, due primarily to docu-soaps, all of which (25) aired on the cable channels. A total of 829 characters with speaking parts were coded along with 732 verbally aggressive acts. For future analysis the docu-soap and reality soap categories were merged since their format is very similar (day-in-the-life) and there was only one reality soap show (*Bad Girls' Club*), which had a relatively high verbal aggression count (84 per hour).

Characters

Women represented 49.2% of all characters with a speaking role, comparable to U.S. census data (50.9%) (U.S. Census Bureau, 2011a). Percentages for race and ethnicity can be seen in Table 1. Since the U.S. Census Bureau (2011b) collects data for Hispanic origin as well as race, figures for reality TV were similarly adjusted. For example, the Census Bureau reports that a little over half of Hispanics identify as Caucasian while about a third identify as other (another race, two or more races). As indicated in Table 1 Caucasians are represented proportionately to real life in reality TV while other ethnicities or races are either overrepresented (African Americans), underrepresented (Hispanic, Asian American,) or, as in the case of Native Americans, not represented at all.

Almost all characters were coded as attractive (55.4%) or average (34.5%) with few considered unattractive (7.4%). The rest were categorized as other or unknown (2.8%), typically someone not visible in the scene. A sizeable number of the shows (38%) had hosts (seen) or narrators (not seen). Interestingly, almost all narrators were male (89%), and almost all hosts (85.7%) were Caucasian, and mostly male (71.4%).

Six shows (all docu-soaps) had primarily African American casts and contained 47.7% of all African American characters in the sample. These six shows ($M = 47.50, SD = 38.29$) portrayed significantly more verbal aggressiveness than both all other shows in the sample ($M = 14.44, SD = 14.84, t(40) = 3.87, p < .001$, as well as all

Table 1
Comparison of Reality TV and Census Bureau Race/Ethnicity Percentages

Race/Ethnicity	Reality TV	2010 U.S. Census
Hispanic origin	5.9	16.3
Caucasian	71.0	72.4
African American	21.1	12.6
Asian American	1.9	4.8
Native American	0.1 ^a	0.9
Other	5.7 ^b	9.3

Note. Percentages for reality TV were adjusted for Census Bureau collection of data in which Hispanic origin is counted separately from race.

^a While there were no Native Americans found in the sample, this negligible percentage comes from the adjustment for the number of Hispanics who, according to the U.S. Census Bureau, identified as Native Americans in the 2010 Census (1.4%).

^b Consists of other races, mixed races, and unknown, the latter of which would include characters not seen but heard, such as a show's narrator.

other shows in the docu-soap subgenre ($M = 17.89$, $SD = 18.23$), $t(23) = 2.62$, $p < .05$. Additionally, in this subset of shows with mostly African American casts, the female was typically the aggressor (74%) as well as target (65.7%) of verbal aggression. This contrasts significantly with all other shows in which the male was typically the aggressor (66.2%), $\chi^2 = (1, N = 732) = 109.02$, $p < .001$, as well as the victim (50.1%), $\chi^2 = (2, N = 732) = 63.77$, $p < .001$. In the latter, the female was the victim 35.5% of the time while "other," many of who were behind the camera, unseen and unheard, accounted for 14.3%.

Verbal Aggression

The average number of verbally aggressive acts per hour was a little over 19 ($M = 19.16$, $SD = 22.44$), varying greatly from 0 (e.g., *Little Couple*) to 97 (*Black Ink Crew*). All but seven shows had at least one act of verbal aggression. A significant difference was found between cable and broadcast for verbally aggressive acts per hour, $t(40) = 2.07$, $p < .05$, as cable reality shows ($M = 21.67$, $SD = 24.91$) contained almost twice as many verbally aggressive acts as broadcast reality shows ($M = 11.15$, $SD = 7.89$). Although docu-soaps had the greatest number of verbally aggressive acts per hour, no significant differences were found between subgenres, likely due to the relatively high variance in the docu-soap category (See Table 2), $F(5, 36) = 0.99$, $p = .44$.

As can be seen in Table 3, the most common type of verbal aggression was swearing, which accounted for almost a third of incidents, followed by character and competence attacks. There was a significant difference between male and female aggressors in terms of the type of verbal aggression utilized, $\chi^2 = (10$,

Table 2
Verbally Aggressive Acts by Genre

Genre	<i>n</i>	<i>M</i>	<i>SD</i>
Talent	8	12.35	9.82
Dating	1	0.0	0.0
Makeover	2	3.0	1.41
Docu-soaps	25	25.0	26.85
Competition	4	9.50	7.19
Hidden camera	2	18.5	4.95

Table 3
Verbally Aggressive Acts by Type and Gender

Type of Act	<i>n</i>	Percent		
		Male	Female	Total
Swearing	222	53.6	46.4	30.3
Sarcasm	18	72.2	27.8	2.5
Threats	44	40.9	59.1	6.0
Maledictions	10	50.0	50.0	1.4
Yelling/Shouting at	50	32.0	68.0	6.8
Mocking/Ridicule	80	57.5	42.5	10.9
Competence attacks	109	69.7	30.3	14.9
Character attacks	136	35.3	64.7	18.6
Background attacks	4	25.0	75.0	.5
Personal appearance attacks	28	64.3	35.7	3.8
Nonverbal emblems	31	58.1	41.9	4.2

$N = 732$) = 46.53, $p < .001$, as males seemed more likely to use sarcasm, mocking, competence and personal appearance attacks, and nonverbal emblems, whereas females were more likely to employ threats, yelling, and character and background attacks. Almost half of all verbally aggressive acts were indirect (46%) which in part may be due to many of them (83.1%) occurring during the producer cutaways (33.2% of all verbally aggressive acts) in which a character is shown talking, typically disparagingly about another character, to an unseen person behind the camera.

In sheer numbers, aggressors were more likely to be male (51.6%), primarily Caucasian (60.9%) or African American (32.2%), and attractive (76%). Proportionately, based on the overall character frequencies, there were no significant differences for sex, $\chi^2(1, N = 732) = .206$, $p = .650$. However African Americans were significantly more likely than expected to be perpetrators of verbal aggression

Table 4
Verbally Aggressive Acts by Race/Ethnicity

Race/Ethnicity	Observed <i>n</i>	Expected <i>n</i>	Residual
Aggressor			
Caucasian	446	497.5	-51.5
African American	236	153.9	82.1
Hispanic/Latino	29	43.2	-14.2
Asian American	5	13.9	-8.9
Other	16	23.4	-7.4
Victim ^a			
Caucasian	365	436.0	-71.0
African American	235	134.9	100.1
Hispanic/Latino	16	37.9	-21.9
Asian American	5	12.2	-7.2

^a Excludes the “Other” category since many of these were behind the camera and neither seen nor heard.

while other races/ethnicities appeared to be underrepresented to varying degrees (see Table 4), $\chi^2 = (4, N = 732) = 61.94, p < .001$. Interestingly, there was a significant race by sex interaction in that Caucasian males were more likely to be the aggressors whereas for other races/ethnicities, particularly African-American, female participants were more often the aggressors (see Table 5), $\chi^2 = (4, N = 732) = 126.63, p < .001$.

Table 5
Race/Ethnicity by Gender Comparison for Aggressors and Victims

Race/Ethnicity	<i>n</i>	Male	Female
Aggressor			
Caucasian	446	68.2%	31.8%
African American	236	27.1%	72.9%
Hispanic	29	24.1%	75.9%
Asian American	5	0%	100%
Other	16	18.8%	83.3%
Victim ^a			
Caucasian	359	66.6%	33.4%
African American	232	22.0%	78.0%
Hispanic	16	12.5%	87.5%
Asian American	5	0%	100%

^a Excludes the “Other” category since many of these were behind the camera and neither seen nor heard.

Overall, victims of verbal aggression were most likely to be females (46.4% vs. 40.6% for males, 13% other), Caucasian (49.9%) or African American (32.1%), and attractive (62.3%). In comparing victim race and sex categories, the “other” category for each was excluded, since a significant number of these were due to producer cutaways in which a character was shown talking to a behind-the-camera person whose identity was unknown. That taken into account, females were significantly more likely than expected to be victims of verbal aggression, $\chi^2 = (1, N = 637) = 4.44, p < .05$. Additionally, African Americans were significantly more likely than expected to be victims of verbal aggression while other races/ethnicities were underrepresented to varying degrees (see Table 4), $\chi^2 = (3, N = 621) = 102.83, p < .001$. A pattern similar to that found for aggressors was found for victims of verbal aggression with Caucasian males more often the victim while for other races/ethnicities, primarily African American, it was the female who was more likely to be victimized (see Table 5), $\chi^2 = (3, N = 612) = 125.27, p < .001$.

Most acts of verbal aggression were not rewarded (82.9%) but of those that were, the most common type of reward consisted of peer approval (73.6%) followed by increase in control (9.6%). A similar finding was made for punishment in that most acts were not punished (90.6%), and of those that were, some form of retaliation (e.g., another putdown) was the most common (72.5%) followed by peer disapproval (14.5%). No significant differences were found for aggressors being either rewarded or punished for either race/ethnicity or sex. Almost all of the acts were either seen as justified (82.4%) or neither justified or unjustified (17.3%). As such, less than 1% were depicted as unjustified, in which the aggressor apologizes or feels remorse for the aggression.

Discussion

Verbal aggression was found to have a strong presence in reality programming, most particularly on cable television in the form of docu-soaps. Overall about 19 verbally aggressive acts per hour were found across all subgenres of reality programming—a frequency comparable to that found for other genres of TV programming (Greenberg et al., 1980; Tamborini et al., 2008). Perhaps most disconcerting was the representation of minorities, with African Americans segregated and disproportionately verbally aggressive, and other minority groups such as Asian Americans and Hispanics noticeably underrepresented or not represented at all (Native Americans).

Cable reality TV shows were found to contain about twice as much verbal aggression as broadcast reality television. Subgenre differentiation highlights a significant factor between cable and broadcast programming. Docu-soaps, the most popular subgenre of reality programming aired exclusively on cable channels and contained some of the highest frequencies of verbal aggression. Defined by their “day in the life” *mise en scène*, docu-soaps and their premise of naturally occurring, less contrived interactions combined with higher levels of verbal aggression would seem to have significant implications for behavior modeling.

A third of verbal aggression was in the form of character and competence attacks, with swearing or the use of profanities accounting for over 30%. Chory-Assad (2004) found character and competence attacks to be the typical form of verbal aggression in sitcoms. Drawing a parallel between professional wrestling and Chory-Assad's research on verbal aggression in sitcoms, Tamborini et al. (2008) noted, "character and competence attacks seem well suited [in televised professional wrestling] for narrative goals such as establishing character dispositions, advancing storylines, and adding humor, just like sitcoms" (p. 253). This narrative structure is reflected in a significant portion of the verbal aggression coded for this study, where characters are asked to respond to leading questions posed by the shows' producers during producer cutaways. Similarly, editorial decisions to have characters "talk behind another's back"—with the viewer either privy to a private conversation between characters or as a passive participant (e.g., a character talks directly into the camera while being interviewed by a producer)—may suggest a normalcy to and validation of associated aggressive behaviors.

The prevalence of profanity in the current study was likely understated since profanities that were used along with another form of verbal aggression were not counted. For example, the phrase, "You are a f***ing idiot" would only be coded as a competence attack. This was done to avoid counting the same incident twice as verbal aggression. A profanity used as a fleeting expletive or verbal enhancer, but not necessarily perceived as an attack on another's self-image, was counted as verbal aggression. Examples might include, "What in the f**k is that?" (*Fast N' Loud*) and "I'm doing fine, and I didn't even f**king finish high school." (*Teen Mom*). This coding approach is consistent with what other researchers described as offensive (Sapolsky & Kaye, 2005), socially unacceptable (Coyne, Callister, Stockdale, Nelson, & Wells, 2012; Kaye & Sapolsky, 2004a), objectionable (Kaye & Sapolsky, 2004b), taboo (Kaye & Sapolsky, 2004a), and inappropriate (Ivory, Williams, Martins, & Consalvo, 2009).

Potter and Ware (1987) noted that mediated behaviors performed by characters with admirable traits, that are justified, and rewarded are more likely to be imitated. Our research found that a clear-cut majority of aggressors were considered attractive or average in appearance. Most verbally aggressive acts were justified or coded more neutrally as neither justified nor unjustified. When an act was rewarded or punished, which was seldom, it was typically met with either peer approval (reward) or retaliation (punishment). Peer approval would typically involve other characters laughing at or agreeing with an insult or putdown, whereas retaliation would usually depict an insult or putdown in response to a verbally aggressive act.

Almost half of all African Americans appeared on six shows, all of which were docu-soaps with almost exclusively African American casts. African Americans were found to be overrepresented as aggressors and, along with females, also overrepresented as victims of verbal aggression. These representations of African Americans on reality TV would seem to support stereotypes of the angry, threatening Black male and female characters found by previous researchers (Bell-Jordan, 2008; Tyree, 2011). By contrast, Hispanics, Asian Americans and Native Americans were woefully

underrepresented on reality TV, consistent with the general lack of presence of these minority groups on TV.

Our findings of females with speaking parts shows that women made up about half of speaking roles, differing only slightly, and not significantly, from actual U.S. Census Data from 2010, a progressive improvement over the decades. However, findings that women were overrepresented as victims of verbal aggression; aggressors were often Caucasian males; all narrators were men; and hosts tended to be male and predominantly Caucasian; seem to reinforce long-running stereotypes of Caucasian male dominance and importance on television.

Limitations

One limitation of the current study is that the sample size might be relatively small. The sampling period was limited to an approximately 1-month period in the fall, which is traditionally when many of the networks' seasonal lineup of shows premieres. The sample was based on audience size and ratings. As such *all* of the broadcast network shows that aired during the time period sampled were included, as well as the top 32 cable shows. Hence, while perhaps not all reality shows that aired during that time frame were included, the sample did include the reality shows that were being watched by a vast majority of the viewing audience.

Another shortcoming might be that all characters with a speaking part were coded without distinguishing between major and minor roles. As such an aggressor with a peripheral role would be given the same weight as one with a major role with whom viewers might identify more. Even so, most, if not almost all, of the verbal aggression in the sample came from main characters. For example, in re-examining one of the shows that had a moderately high number of verbally aggressive acts (26 per hour), *Basketball Wives*, we found that all of the verbal aggression involved the main cast of characters.

Future research should examine how the types of depictions found in reality TV may influence viewers, both from a cultivation and social learning perspective. For example, what impact would the types of depictions found here of African Americans as verbal abusers and victims have on their audiences? How would dominant Caucasian males, and nearly invisible Hispanics and Asian American characters influence viewers' real-life expectations when interacting with individuals from these racial/ethnic groups?

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APPENDIX

List of Reality TV Shows and Networks

TV Show	Network	TV Show	Network
<i>X-Factor</i>	FOX	<i>Preachers of LA</i>	Oxygen
<i>Americas Next Top Model</i>	CW	<i>Ghost Hunters</i>	Syfy
<i>Survivor</i>	CBS	<i>Hardcore Porn</i>	TruTV
<i>The Voice</i>	NBC	<i>Little Couple</i>	TLC
<i>The Biggest Loser</i>	NBC	<i>Tickle</i>	Discovery Channel
<i>Dancing with the Stars</i>	ABC	<i>19 Kids and Counting</i>	TLC
<i>Amazing Race</i>	CBS	<i>Catfish: The TV Show</i>	MTV
<i>Undercover Boss</i>	CBS	<i>I Dream of NeNe: The Wedding</i>	Bravo
<i>Shark Tank</i>	ABC	<i>Face Off</i>	Syfy
<i>Master Chef: Jr. Edition</i>	FOX	<i>Teen Mom 3</i>	MTV
<i>Project Runway</i>	Lifetime	<i>Basketball Wives</i>	VH1
<i>Pawn Stars</i>	History	<i>Black Ink Crew</i>	VH1
<i>Impractical Jokers</i>	TruTV	<i>Fast N' Loud</i>	Discovery Channel
<i>Million Dollar Shoppers</i>	Lifetime	<i>Diners, Drive-ins, Dives</i>	Food Network
<i>Duck Dynasty</i>	A&E	<i>Real Housewives of NJ</i>	Bravo
<i>Bad Ink</i>	A&E	<i>Cutthroat Kitchen</i>	Food Network
<i>American Pickers</i>	History	<i>Keeping Up with the Kardashians</i>	E!
<i>Bad Girls Club</i>	Oxygen	<i>Alaska: The Last Frontier</i>	Discovery Channel
<i>Ghost Mine</i>	Syfy	<i>Long Island Medium</i>	TLC
<i>Top Chef</i>	Bravo	<i>Say Yes to the Dress</i>	TLC
<i>Million Dollar Listing: LA</i>	Bravo	<i>What Not to Wear</i>	TLC



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Mobilizing Youth in the 21st Century: How Digital Media Use Fosters Civic Duty, Information Efficacy, and Political Participation

Judith Moeller, Rinaldo Kühne, and Claes De Vreese

Youth turnout at European Parliamentary elections has been dwindling. This study investigates the impact of news media exposure on electoral participation of first time voters. Relying on a data set that combines content analysis of news stories about the EU (N = 769) and a multiple wave panel survey (N = 994), we analyze the impact of exposure to online and offline coverage of relevant topics on turn out across a period of 6 months. We find that exposure to news in offline media had no significant effect on participation, whereas exposure to relevant news in online media positively affected turnout.

Democracies depend on informed and engaged citizenries. Consequently, a democracy is not sustainable unless it succeeds in continuously fostering norms, cognitions, and behavioral patterns of involved citizenship in new generations of citizens. The mass media and, in particular, the news media, have played an important role in the democratic process (Chaffee & Kanihan, 1997). Serving as information source and market place of ideas, the news media have been a key agent of political socialization in the last century. However, due to the changing and fragmented media environment in the 21st century, the influence of the media on political participation has changed. Many young citizens choose to avoid political information or selectively attend to only the issues that appeal

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Color versions of one or more of the figures in the article can be found online at www.tandfonline.com/hbem.

to them (Mindich, 2005). For those young citizens who still choose to expose themselves to general news, the news effect has become conditional upon parameters of information processing—such as conversation about politics with others (Lee, Shah, & McLeod, 2012)—or internal efficacy (Moeller, De Vreese, Esser, & Kunz, 2014).

A major limitation of extant studies is that they assume the aggregate of all news stories will influence youths' political learning and participation, irrespective of the actual content. This study aimed to conduct an in-depth analysis of the differential effects of message content and news media. For this purpose, we collected data sets that combine content analysis and panel survey data among a representative sample of Dutch first-time voters. In particular, we tested whether information relevant to first-time voters influences their mobilization at the elections and how the mode of news use (online and offline) affects mobilization.

European Youth Vote and Information Environment

Turnout across many western democracies has come under pressure (Dalton, 1996). This holds a true especially in the case of European Parliamentary elections. The 2014 European Parliamentary election marked a new low in youth turnout, with 72% of the electorate aged 18 to 24 failing to vote (Directorate-General for Communication Public Opinion Monitoring Unit, 2014). These numbers solidify a general trend towards less political participation among young voters in the European Union, which has raised concerns among scholars and politicians.

In research and public discourse, the lack of democratic participation in the EU is often blamed on the portrayal of the predominantly negative coverage of the EU in the news media (Gleissner, 2005; Michailidou, 2015). Extant studies have shown that exposure to specific news frames can influence vote choice (Van Spanje & De Vreese, 2014). Yet, it is important to keep in mind that coverage specific to EU issues is still not very common; even during election campaigns, only a small percentage of the new media coverage is devoted to EU issues (Strömbäck et al., 2013).

This means that during a typical election campaign, young citizens would hear or see relatively little about the EU and the parliamentary elections in the news media. If the EU is featured in the news, it is most likely in the context of national developments or general economic trends like the Euro-crisis. Most of the news items that discuss European issues in depth concern international relations and abstract economic processes, which is the type of information that is quite distant from the experiences of a young adult. To sum it up, if young voters encounter the EU in the news coverage at all, the information they find is likely to be negative in tone and of very limited relevance to their daily lives.

Towards a Model of News Use Effects on First-Time Voting

Since information processing is essential in media effects (Tedesco, 2007), we argue that a news diet that includes information particularly relevant to young

citizens would be more effective than news stories dealing with issues aimed at the general adult population. In the case of this study this would be news stories that explicitly link EU policy and EU politics with the problems of the younger generation: for example, youth unemployment, education, or regulation of the labor market. News items that mention the citizenry at large—a group that also includes young voters—may be too abstract to support information processing. Accordingly, first-time young voters should be motivated by news content which explains how elections are related to topics that are directly relevant to them.

H_{1a}: Exposure to youth-relevant news content has a positive effect on political participation among first-time young voters.

Digital Media and Information Processing

We expect the effectiveness of youth-relevant content to be even stronger on digital media platforms due to the affordances of online news media. First, online news media cater to younger users' ways of processing news (Holt, Shehata, Strömbäck, & Ljungberg, 2013). Features such as multi-media presentation and interactivity (Kruikemeier, Van Noort, Vliegenthart, & De Vreese, 2014) stimulate information processing of all users, but the effects of online news use on younger users are particularly strong. Second, online news use also enables online follow-up communication about the news event on social media, which has been shown to be crucial for information processing (Lee et al., 2012). Third, online news allows users to browse the information quickly and select those messages they want to engage at a deeper level. In the past decennia, there has been a shift from general news use to specific issue-related news use (Norris, 2003). Young news users in particular tend to increasingly focus on staying informed on only a couple of issues, while paying very little attention to the general news (Mindich, 2005). This means that if young citizens encounter information online that is of very limited relevance to them, they may be quick to dismiss the message and move on to the next news item. Conversely, this also means that if a message is particularly relevant to them, they may immediately engage with the message via forwarding it through social media, using the comments section to react, or saving the information to re-read at a later stage. Fourth, online news is typically consumed by young people on personal digital devices such as a mobile phone or laptop, compared to the access to offline news media such as newspapers or TV news that are provided by their parents. We can hence expect that young people who access news through a digital media device are more involved with such news content. This higher level of involvement leads to higher levels of information processing, which increases the effectiveness of the message itself (Lee et al., 2012).

H_{1b}: Exposure to youth-relevant news content on digital media has a stronger positive effect on political participation among first time voters than exposure to youth-relevant news content in traditional news media.

Mediating Processes: Efficacy and Habitualization

To consider the question of whether seeing or reading news stories about the EU is related to the decision to participate in the EU elections, we argue that the relationship is mediated by two factors: the development of information efficacy (*cognitive route*) (Mossberger, Tolbert, & McNeal, 2008) and civic norms (*habitualization route*) (McCombs & Poindexter, 1983). We also anticipate that consuming news about the EU over the period of 6 months should help foster young voters' confidence in their understanding of the EU, in addition to establishing the belief that it is their duty to vote. Hence, both processes, independent of each other, are expected to lead to higher levels of mobilization at the time of the election.

Information Efficacy. Repeated exposure to news over an extended period of time has been found to be instrumental in fostering *internal efficacy*, or the "beliefs about one's own competence to understand and to participate effectively in politics" (Niemi, Craig, & Mattei, 1991, p. 1,408), especially among young citizens (Moeller et al., 2014). As young people use news to inform themselves about current events, they also gain insight into the political processes and the role of political institutions like the parliament in a democratic society (Delli Carpini, 2000; Shah, McLeod, & Lee, 2009). Over time they will become increasingly familiar with various political actors and gain confidence in their ability to compare different candidates for a political election and cast a vote. This feeling of internal efficacy, in turn, is crucial in mobilizing young voters at the day of the election. In fact, feeling competent to cast a vote is one of the most important predictors of turnout among young voters (Kaid, McKinney, & Tedesco, 2007). Given the complexity of the European political system, this factor cannot be underestimated in explaining participation of young voters in European Parliamentary elections.

It is important to keep in mind that the development of this information efficacy is contingent upon several factors. First, the information in the news needs to be related to the information that young citizens already understood (Sotirovic & McLeod, 2004). This information must also be presented in a way that allows young news users to learn about the EU's political system. Second, the level of motivation of news users will condition how much information is retained (Elenbaas, De Vreese, Schuck, & Boomgaarden, 2014). In order to learn from the news they need to follow the news stories attentively and actively process the information they encounter. If these conditions are met, then exposure to the EU news may directly affect young voters' faith in their competences as voters and hence raise their efficacy.

H_{2a}: The relationship of youth-relevant news exposure and political participation is mediated by information efficacy.

Civic Norms and Values. Another process linking exposure to the EU news and voter mobilization runs through the development of civic norms and values. In recent years, the diminishing importance of civic norms has contributed to lower levels of turnout, especially among the young generation (Blais & Rubenson, 2013). Young citizens feel less and less obligated to vote, especially during the European Parliamentary elections that are perceived as secondary elections of little importance. News media use can mitigate this steep decline, as consuming news regularly can foster a sense of civic duty (Boyd, Zaff, Phelps, Weiner, & Lerner, 2011).

This is of particular importance in the period leading up to their first elections. The first elections traditionally have a high socializing effect on citizens. It has been shown, for example, that participation in the first two elections has a high predictive power to explain political participation for a lifetime (Sears & Levy, 2003). Consequently, the period leading up to the first elections is a period in which civic norms are formed and young citizens are highly engaged in developing their political identity. Furthermore, exposure to specific items can often spark discussions about politics that deepen the identification as an interested and active citizen. From this perspective, the habitualization of news use can be understood as a first step in becoming a dutiful citizen. This habitualization process is also conditional upon two parameters: The quality of the information provided in the news and the regularity with which first-time voters are exposed to this information. In order to develop strong civic norms, it is important that the news use is indeed habitual and not incidental.

H_{2a}: The relationship of youth-relevant news exposure and political participation is mediated by the sense of civic duty.

Methods

To investigate the influence of relevant news exposure on political participation, we rely on a four-wave panel survey and a content analysis; these studies were conducted in the context of the European Parliamentary election 2014 in the Netherlands.

Content Analysis

A content analysis was conducted with a sample of national news coverage in The Netherlands. This national news coverage was selected from the following electronic media outlets: (1) the most widely watched national evening news broadcasts from a public (NOS) and a commercial (RTL4) television station; and (2) the most widely used online news Web site (Nu.nl). We also included news coverage from two reputable broadsheet newspapers—*de Volkskrant* and *NRC Handelsblad* (comparable to the *New*

York Times)—in addition to a tabloid newspaper *de Telegraaf* (comparable to the *New York Post*).

The data for the content analysis were selected from December 2, 2013 to May 22, 2014 (the election date); the election-day news items from the newspapers and the online news Web site we included in the sample, but not the evening television news. All relevant news items were collected digitally (TV, newspapers, and online news). With regard to story selection, all news items in the main evening news broadcasts were coded. For the newspapers, any news items that appeared on the title page and on one randomly selected page in the Political/News and Editorial/Opinion/Comment sections were coded. Additionally, we coded all stories that pertained particularly to the EU and/or the European Parliament elections on any other page of the newspaper within the Political/News and Editorial/Opinion/Comment sections. As for the online news source, any articles within the political, domestic and foreign news sections that appear as one of the top five most read articles at least once as well as all stories pertaining particularly to the EU and/or the European Parliament elections were coded. In total, 3,679 news stories have been coded; 769 of these news stories dealt specifically with the EU.

In order to be classified as an EU-related story, the EU or any sort of EU institution, policy, or synonym had to be mentioned at least twice in the story. All stories were coded on the same sub-set of variables; if the story was an EU or EU election story, then coding continued for another, EU-specific sub-set of variables. Relevance to a young audience was measured per news item (Krippendorff's Alpha = 0.8) and operationalized as whether or not the EU-related stories mentioned the problems or issues relevant to young people's concerns.

Survey

The survey was administered by a certified opinion pollster (TNS NIPO), who also selected a representative sample of the Dutch population from its database. For the purpose of this study only young Dutch inhabitants who were never eligible to vote in a national election (age 18 or 19) were invited to participate. Respondents were interviewed about 6 months prior ($N = 1433$), 4 months prior ($N = 1013$), and 1 month prior to the May 2014 election for the European Parliament ($N = 836$), and immediately after the elections ($N = 747$). The survey was conducted in Dutch and measured participants' political participation, media exposure, civic duty, information efficacy, and a series of covariates.

Political Participation. The central dependent variable was political participation. In the final panel wave, participants were asked to indicate whether they had cast their vote in the European Parliamentary election. To reduce social desirability bias and overreporting of voting, face-saving options were included in the answer scale (Belli, Traugott, Young, & McGonagle, 1999). Participants could respond that (1) they did not cast a vote, (2) they intended to vote, but did not vote this time, (3) they generally vote, but did not vote this time, (4) they did vote. The variable was recoded

into a dichotomous variable, with "0" indicating that the participant did not vote and "1" indicating the participant did vote. Of the participants in the final wave, 42.7% indicated that they had voted.

Media Exposure. In the first three panel waves, exposure to the same six news outlets that were covered in the content analysis was assessed (i.e., NRC Handelsblad, Volkskrant, Telegraaf, NOS, RTL, and Nu.nl). Participants were asked about how many days during a week they used each of the outlets. The response scale for each exposure item ranged from 0 to 7 days. The results from the first wave show that while first-time voters only use newspapers irregularly ($M_{NRC} = .13$, $SD_{NRC} = .68$; $M_{Volkskrant} = .20$, $SD_{Volkskrant} = .82$; $M_{Telegraaf} = .46$, $SD_{Telegraaf} = 1.44$), they used the two television channels on a regular basis ($M_{NOS} = 1.79$, $SD_{NOS} = 2.02$; $M_{RTL} = 1.54$, $SD_{RTL} = 2.04$). The most frequently used media channel is the digital news outlet Nu.nl ($M_{Nu.nl} = 2.02$, $SD_{Nu.nl} = 2.54$). This news media exposure pattern is stable across all three waves.

Civic Duty. Civic duty was also measured in the three panel waves. The scale included four items that describe the obligation to partake in the political process and the value of political participation to the individual (Chareka, Sears, & O., 2006; Perry, 1996) (e.g., "It is each citizen's obligation to follow political developments in the news"). The items formed a reliable measure at each wave ($\alpha_{Wave1} = .74$; $\alpha_{Wave2} = .76$; $\alpha_{Wave3} = .80$). Thus, a mean index for civic duty was computed for each wave ($M_{Wave1} = 3.64$, $SD_{Wave1} = 1.10$; $M_{Wave2} = 3.61$, $SD_{Wave2} = 1.08$; $M_{Wave3} = 3.34$, $SD_{Wave3} = 1.16$).

Information Efficacy. This concept was measured by adapting Tedesco's (2007) scale, which includes four items and has previously been employed in young adult samples. Two items were modified to accommodate the context of this study (e.g., "I feel that I have a pretty good understanding of the important political issues facing the EU"). These items form a reliable measure at each wave ($\alpha_{Wave1} = .90$; $\alpha_{Wave2} = .89$; $\alpha_{Wave3} = .90$). A mean index for information efficacy was calculated for each wave ($M_{Wave1} = 2.53$, $SD_{Wave1} = 1.26$; $M_{Wave2} = 2.62$, $SD_{Wave2} = 1.30$; $M_{Wave3} = 2.36$, $SD_{Wave3} = 1.26$).

Covariates. A series of covariates were measured in wave 1, including sex (53.5% female), age ($M = 17.9$, $SD = .66$), educational level, and voting intention (1 = *I will certainly vote*, 7 = *I will certainly not vote*).

Integration of Content Analysis and Survey

To measure exposure to youth-relevant news content in television, newspapers, and online media, we employed linkage analysis which has been referred to as "the state-of-

the art analysis of the impact of specific news consumption on political behavior" (Fazekas & Larsen, 2016; see also Scharkow & Bachl, 2016). The approach included three main steps. First, we counted the number of youth-relevant news items (see section on content analysis) that were published in each outlet before each wave of the panel survey. This resulted in 18 scores (6 outlets x 3 waves) which indicated how intensively the news outlets reported on youth-relevant issues during the course of the election campaign. Second, these scores were used to weight the raw media exposure scores and create scores representing exposure to youth-relevant news. That is, for each individual, media exposure scores were multiplied by the number of youth-relevant news items in medium k before wave t .

$$\text{Youth relevant news exposure}_{kt} = \text{exposure to medium}_{kt} * \text{youth relevant news items in medium}_{kt}$$

For example, the exposure to RTL at wave 1 was multiplied with the number of news items on youth-relevant issues on RTL4 before wave 1. Third, to obtain an overall score of exposure to youth-relevant news *per media type*, the mean of the corresponding outlet-specific exposure scores was calculated. For instance, exposure to youth-relevant news on television before wave 1 was calculated by averaging the exposure scores for RTL4 and NOS before wave 1. Note that the exposure score for Nu.nl was treated as the indicator for exposure to youth-relevant news content in online media and weighed to re-scales the exposure measure. Because it was possible that some news outlets did not report on youth-relevant issues in one of the time periods, we added the constant 1 to each count of youth-relevant news items. This precluded any weighting by zero, which would have eliminated any inter-individual differences in media use and would thus have resulted in variables with constant values. Substantively, this approach presupposes that each news outlet includes a minimum amount of youth-relevant news and that the number of unobserved stories relevant for youth is about the same across news outlets. Because of our sampling approach, the measure of youth-relevant news is rather indicative of the differences across media outlets than of the absolute level of youth-relevant news per outlet, and this meaning of the scale is preserved when a constant is added.

Results

Our analytical approach included four steps. First, we inspected the content analytic data to learn how often Dutch news outlets covered youth-relevant issues in the period leading up to the European Parliamentary election 2014. We investigated how voting intention, civic duty, and information efficacy changed in the course of the campaign. Third, we estimated a regression model in which news exposure was used to predict political participation. Fourth, we estimated an autoregressive cross-lagged model to investigate whether the effects of media exposure were mediated by civic duty and information efficacy.

Content Analysis

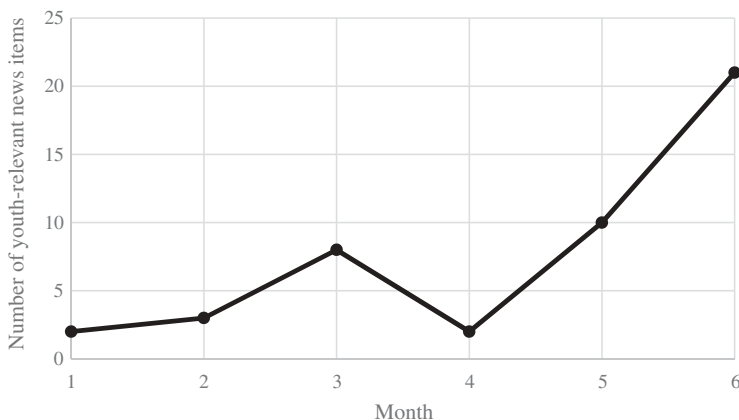
The content analysis of the news coverage in the period leading up to the European Parliamentary election 2014 revealed that there was generally very little information about youth-related topics in the EU context (see Figure 1). In the first 2 months of the election campaign, we find only 2 and 3 youth-relevant news items respectively in our sample. In the third month, the number increases to 8 items, only to fall back to 2 items in the fourth month. In the last two months of the campaign, the numbers increase to 10 and 21 youth-relevant news items, but the absolute volume is still relatively low.

This pattern in the reporting about the European Parliamentary election 2014 might explain a surprising general trend we observe in the survey data. Contrary to other election campaigns, we find that young voters became increasingly demobilized and misinformed during these 6 months. Dependent samples t-tests reveal that there is a significant decrease in vote intention ($t = 6.05, p < .001$), civic duty ($t = 7.89, p < .001$), and information efficacy ($t = 4.46, p < .001$) from wave 1 to wave 3.

Regression Analysis

To assess whether news exposure has an effect on political participation, a logistic regression analysis was conducted. Political participation was regressed on sex, age, educational level, voting intention at wave 1, in addition to the three different mean scores for exposure to youth-relevant news in television, newspapers, and online media in the election campaign computed across the three survey waves.

Figure 1
Number of Youth-Relevant News Pieces in the Course of the Election Campaign



The regression analysis was based on 733 cases which had no missing values on any of the model variables. Results are depicted in Table 1. We find that age had a negative effect on political participation ($p < .05$) and voting intention in the beginning of the election campaign had a substantial positive effect on participation ($p < .001$). While sex and educational level had no significant effect on voting, exposure to youth-relevant news on Nu.nl ($p < .01$) had a positive effect on political participation. In contrast, exposure to youth-relevant news on television and in newspapers had no significant effect on political participation. These results partially corroborate H_{1a} : Exposure to Nu.nl did indeed increase voting among first time voters. Contrary to our expectations, exposure to the television and print news had no effect on voting.

To test H_{1b} , we conducted a series of one-tailed tests that compared the size of the regression coefficient for the effect of the exposure to Nu.nl with the regression coefficients for the other news media exposure measures (Paternoster, Brame, Mazerolle, & Piquero, 1998). We find that the effect of exposure to Nu.nl was more positive than the effect of exposure to television news ($p < .05$) and the effect of exposure to print news ($p < .01$). These findings support H_{1b} , which posits that exposure to youth-relevant news content via an online news outlet has a stronger positive effect on participation than other news media outlets.

Autoregressive Cross-Lagged Model

We estimated an autoregressive cross-lagged model to investigate whether news exposure affected political participation through its effect on civic duty and information efficacy (H_{2a} & H_{2b}). This type of model currently constitutes a standard approach for the estimation of causal relationships between variables in non-experimental settings (e.g., Finkel, 1995). In the model, the three measures of exposure to youth-relevant news, civic duty, and information efficacy at wave 1 were included as predictors of the same set of variables measured in wave 2. Similarly, the measures at wave 3 were regressed on the same variables measured in wave 2. Political participation was eventually regressed on the

Table 1
Effects of Exposure to Youth-Relevant Content on Voting Behavior

Variable	<i>B</i>	<i>SE B</i>	<i>Exp(B)</i>	<i>Wald</i>	<i>p</i>
Sex	-.00	.16	1.00	.00	.991
Age	-.30	.13	.74	5.68	.017
Educational level	.06	.06	1.06	1.02	.312
Voting intention W1	.42	.05	1.52	86.03	.000
Exposure television	-.03	.05	.98	.24	.622
Exposure newspapers	-.08	.05	.93	2.21	.137
Exposure Nu.nl	.11	.04	1.12	8.99	.003

Note. Nagelkerkes $R^2 = .23$ ($N = 733$, $p < .001$)

variables measured in wave 3. Accordingly, the measures in wave 1 functioned as exogenous variables, whereas the measures in the subsequent waves functioned as endogenous variables. Errors terms of all endogenous variables measured in the same wave were correlated (Preacher & Hayes, 2008). In addition, sex, age, education, and voting intention at wave 1 were included as covariates. More precisely, these covariates were included as additional exogenous variables, which were correlated with the other measures of wave 1, and predicted each endogenous variable in the model. Lastly, second-order autoregressive effects were included in the model (i.e., autoregressive effects of a measure at wave 1 on the same measure at wave 3).

The model was estimated using Mplus 6 and weighted least square estimation (WLSMV) to account for the dichotomous dependent variable political participation (Muthén & Muthén, 2012). The model had a good fit to the data: χ^2 (30, $n = 994$) = 50.719, $p = .010$, $\chi^2/df = 1.69$, CFI = .995, RMSEA = .026. Alternative model specifications were employed to assess the robustness and validity of the findings. First, because the distributions of three exposure scores deviated from normality, we also estimated the model using maximum likelihood estimation with robust standard errors (MLR) and Monte Carlo integration (Muthén & Muthén, 2012). This model generally produced the same results with regard to the tests of the hypotheses and thus corroborated the findings from the WLSMV model (discrepancies between the two estimation techniques are addressed in the results). Second, we estimated an alternative cross-lagged model, in which the unweighted media use scores were used to represent media exposure. We expected that the exposure to youth-relevant news should have a more accentuated effect than unweighted media use. However, when comparing the pattern of results across the models, we did not find any indication that the effects were stronger in the model with exposure to youth-relevant news.

To assess the mediation of H_{2a} and H_{2b} , we first checked whether news exposure had a lagged effect on civic duty and information efficacy. When inspecting the effects of news exposure at wave 1 on civic duty and information efficacy at wave 2, we find that the exposure to youth-relevant news on Nu.nl had a significant positive effect on civic duty ($\beta = .07$, $p < .05$) and information efficacy ($\beta = .08$, $p < .01$). Exposure to television news had no consistent effects. When employing WLSMV, the results show that television news had a positive effect on civic duty ($\beta = .06$, $p < .05$). But this effect was only marginally significant when maximum likelihood estimation with robust standard errors (MLR) was used ($p < .10$). The effect of television news on information efficacy was only marginally significant too ($\beta = .05$, $p < .10$). Similarly, exposure to print news had neither a significant effect on civic duty ($\beta = .01$, *ns*) nor on information efficacy ($\beta = .01$, *ns*).

We find a similar pattern when inspecting the effects of exposure to youth-relevant news at wave 2 on civic duty and information efficacy at wave 3. Exposure to television and print news had neither a significant effect on civic duty ($\beta_{tv} = .01$, *ns*; $\beta_{print} = .00$, *ns*) nor on information efficacy ($\beta_{tv} = -.01$, *ns*; $\beta_{print} = .02$, *ns*). In contrast, exposure to youth-relevant news on Nu.nl had a positive effect civic duty ($\beta = .07$, $p < .01$). The effect of exposure to Nu.nl on information efficacy was not significant ($\beta = .02$, *ns*).

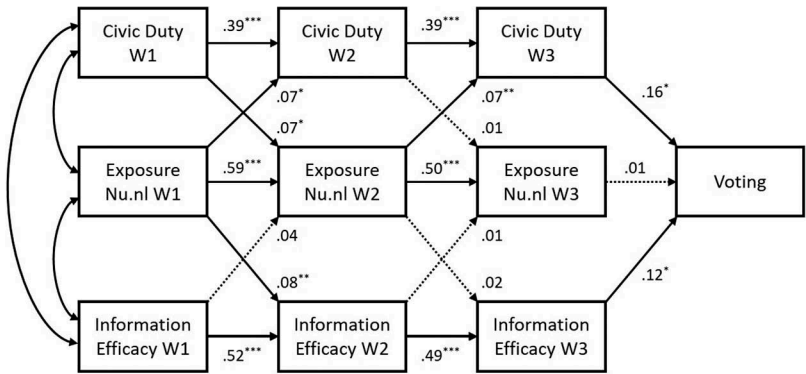
For civic duty and information efficacy to be mediators of the effects of exposure to Nu.nl, the two variables must also influence political participation.

Thus, we inspected the effects of civic duty and information efficacy at wave 3 on political participation at wave 4. The results show that both civic duty ($\beta = .16, p < .05$) and information efficacy ($\beta = .12, p = .05$) increased political participation. In addition, voting intention at wave 1 had a positive effect ($\beta = .36, p < .001$) and exposure to newspapers had a negative effect on participation ($\beta = -.13, p < .05$), respectively.

The relationships between exposure to Nu.nl, civic duty, and information efficacy are summarized in Figure 2. Overall the findings lend partial support to H_{2a} and H_{2b}. Exposure to Nu.nl seems to have an indirect effect on political participation by increasing civic duty and information efficacy. However, exposure to the non-digital news outlets did not foster civic duty or information efficacy.

In the final step, we checked whether civic duty and information efficacy affected the exposure to news outlets (i.e., media choice; Valkenburg & Peter, 2013). We find that information efficacy at wave 1 had a positive effect on exposure to newspapers at wave 2 ($\beta = .07, p < .05$). Similarly, information efficacy at wave 2 positively predicted exposure to newspapers at wave 3 ($\beta = .09, p < .05$). Civic duty at wave 1 increased exposure to Nu.nl at wave 2 ($\beta = .07, p < .05$); civic duty at wave 2 had a marginal negative effect on the exposure to television news at wave 3 ($\beta = -.06, p < .10$).

Figure 2
Effects of Exposure to Youth-Relevant News on Nu.Nl On Civic Duty, Information Efficacy, and Voting. * $P \leq .05$, ** $P \leq .01$, *** $P \leq .001$



Discussion and Conclusion

In this research, we set out to explain whether and how exposure to relevant news affects the decision of young voters in European Parliamentary elections. Considering that the overwhelming majority of citizens that had just reached voting age did not

participate in these elections, it is of high importance to understand the drivers of electoral participation to turn the tide at the next elections. We found that exposure to relevant news contributed to a higher likelihood of turnout. Yet, at the same time there was a remarkable gap of relevant news in the coverage about the EU. The absence of young voters at the voting booth could therefore partially be explained by the fact relevant news for young voters was virtually invisible in the 6 months leading up to the elections. Furthermore, seeing or reading the news in traditional news media, such as newspapers or TV news, did not have a consistent effect on youths' voting behavior.

In contrast, digital news use was found to significantly influence political participation. This relationship is mediated by two factors—the development of civic duty and information efficacy—that link exposure to news and political participation. Our analysis shows that consistent exposure to relevant news online is associated with an individual belief of partaking in the democratic processes and greater confidence in one's ability to do so. Both factors are significant drivers of participating in the elections. The fact that the mediating processes were not statistically significant for offline media is a noteworthy finding. This suggests that, in this study, use of offline news media did not have socializing effects that foster norms of citizenship. This might be attributed to higher effectiveness of online news exposure in this age group (Holt et al., 2013), but it might also be a consequence of the stronger motivation and control young users have over their consumption of online news media. As young people choose to access digital news outlets on their own devices, this self-selection process may influence the beginning of the formation of their political identity (Sears & Levy, 2003).

Considering the importance of relevant information in the news media with regard to the development of civic duty and information efficacy, it is of crucial importance to increase the accessibility of information about the EU in all news media, but most importantly online news media. There were only so many stories about the EU that featured information relevant to a young audience, that most young voters have probably not seen a single news story about the EU that was particularly relevant to them over the course of 6 months. If more stories would illustrate how European policy decision making affects the daily lives of young citizens and, more importantly, what the political alternatives with regard to these decisions are, young voters would feel more obliged to vote and capable to make a voting decision that reflects their interest.

Another important finding of this study is that young audiences approach news differently. The habitual use of a daily newspaper during breakfast has been complemented and perhaps even replaced by digital media that inform in a timely manner and allow users to engage in the stories that seem relevant while merely scanning all other events. This finding is in line with Sundar and Limperos (2013) argument that not only the content of media but also the technological mode of exposure gratifies needs. Consequently, the mode of presentation is crucial for the satisfaction of media related needs and the motivation to process information.

In this study we used an elaborate data set that combined content analysis data with panel survey data to build a strong causal argument (see also Schuck, Vliegenthart, & De Vreese, 2016). This combination of multiple wave panel data and media content data at the individual level is generally seen as the state of

the art of observational media effects research. Despite these qualities, such a design tends, if anything, to *underestimate* actual media effects (Scharkow & Bachl, 2016). Moreover, obviously even such a combination of data does not provide for a clear-cut demonstration of causality, as an exogenous source of variation would to establish causality definitively (Angrist & Pischke, 2014; Morgan & Winship, 2014; Murnane & Willett, 2010; Pearl, 2009). There could be factors we have not measured that influenced the relationship of news use and turnout. Future research might be well advised to investigate the impact of news consumption in social media in a peer network as a factor. This however was beyond the scope of the current study.

Furthermore, it should be noted that the results of the cross-lagged models remained stable when raw media use scores were used instead of weighted media exposure scores. This conflicts with our expectation that media effects are stronger when actual exposure to media content is considered. The finding raises the question of whether the exposure to youth-relevant news, the exposure to other aspects of news reporting, or simply media use is the crucial determinant of civic duty, information efficacy, and voting. This question cannot be conclusively answered in the present study. But future research could employ differential weighting criteria and compare how they influence the strength of the associations between media exposure and political engagement. For instance, it is conceivable that additional aspects of news, such as thematic versus episodic framing, negativity, or emotionality, are related to young people's political engagement, and these content categories could thus be employed for weighting.

Another shortcoming of our research is that we were not able to observe all factors that were important to explain political participation among young voters. When looking at the development of voting intention over time it becomes clear that there was a massive decrease over the course of 6 months. Yet most of the effects of exposure to news we are able to discern are positive. As we are only able to identify that exposure to tabloid media contributed to the decrease in voting intentions to a small extent, our models are under-specified, even though the model fit is very good. Therefore, future research should study this development in depth: What shook the confidence of young voters to such a high extent that the campaign had a demobilizing effect on them? If it was not information they gained from news media or through conversations, what changed their mind about participating in the elections?

On a final note, we observe that due to the schedule of the electoral year, the 2014 European Parliamentary election was preceded by local elections a few months earlier. This means that for a majority of the sample the European elections were not actually the first elections they participated in, but the second. Hence, in future research it would be worthwhile to investigate news effects on first elections and compare between first order and second order elections (Franklin, 2004).

All in all, the European Union cannot rely on news media to cultivate young Europeans into European citizenship and a feeling of duty towards Europe. Instead, it needs to ensure that information about the European Union is available to young citizens in a form that is understandable and relevant to them. This kind of information can build their self-confidence as European citizens which can lead to participation.

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Persistent Misperceptions: Americans' Misplaced Confidence in Privacy Policies, 2003–2015

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Persistent Misperceptions: Americans' Misplaced Confidence in Privacy Policies, 2003–2015

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This paper examines the persistence of Americans' misunderstanding of the function of privacy policies. We also identify groups that have misplaced confidence in the privacy policy label and address whether the groups' patterns of misperception have changed over time. The findings add a new dimension to the argument that the usefulness of privacy policies needs to be reassessed. As a remedy, we call for media literacy programs to address structural features of media systems that lead to broadly held misperceptions such as the one examined here.

Websites and apps contain a legal document—typically called a privacy policy—that describes the extent to which and the ways in which the proprietors will, in the words of the Federal Trade Commission's (FTC) own privacy policy, “collect, use, share, and protect your personal information” (FTC, 2014). Although the FTC strongly encourages privacy policies, no systematic research exists on how people's interpretation of the presence of a privacy policy relates to their confidence that their digital information is adequately protected. Studies do imply that understanding of privacy policies is important because individuals are more likely to share information about themselves with organizations when they are confident that the organization will protect them from unwanted use of that information (Brandimarte, Acquisti, & Loewenstein, 2013). A hypothesis stemming from this idea is that people who believe the presence of a privacy policy limits the extent to which a Web site will share their information will also express satisfaction with the ability of existing laws and organizational practices to protect online privacy.

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This paper evaluates that hypothesis by using the findings from the University of Pennsylvania's Annenberg School's national random surveys of Americans during 2009, 2012, and 2015. Each of these surveys presented respondents with a true-false question that asks: if a Web site has a privacy policy, does it mean the site will not share visitors' information with other sites without their permission. We analyze the relationship between 1) respondents' confidence that the presence of a privacy policy means they are protected from information sharing, and 2) the belief that regulations of privacy by government and other organizations need no change. We also examine the changes in Americans' understanding of *privacy policy* over time and test the extent to which socio-demographics such as gender, age, income, race, and education predict knowledge about the meaning of a privacy policy. The findings shed light on the misplaced confidence most Americans have in a label purportedly used to enlighten them. They also point to new initiatives the FTC might take under its mandate to redress deception in the marketplace—as well as indicating the need for literacy programs—that focus on digital media policy.

Background

The first mention of a Web site privacy policy in an FTC press release is dated 4 June 1998. Titled "FTC Releases Report on Consumers' Online Privacy," it describes a report about privacy online that the Commission had provided to Congress. After three years of study, the Commission concluded that "consumers have little privacy protection on the Internet" and that "industry's efforts to encourage voluntary adoption of the most basic fair information practices have fallen short of what is needed to protect consumers" (FTC, 1998). To this point, Congress had been relying on online advertisers, data brokers, and retailers to regulate their own collection and use of information collected about consumer behaviors. Based on a series of workshops and hearings, the Commission states, "studies have concluded" that there are four information practice principles that "are widely accepted as essential to ensuring that the collection, use, and dissemination of personal information are conducted fairly and in a manner consistent with consumer privacy interests" (FTC, 1998). These principles are notice, choice, access, and security. The FTC emphasized that at the time only 14% of 1,400 U.S. Web sites studied provided information allowing consumers to learn what they do with visitor data and what choices visitors have regarding those uses (FTC, 1998). The years after the release of the FTC report saw increased postings by Web sites of documents that detailed data disclosure practices. One study confirmed the mention of such practices rose from 1999 and 2000, from 66.8% to 86.1%, but the number decreased to 68.6% in 2001. The study found an increase from 48.3% in 1999 to 76.7% in 2001 in the adoption of privacy policy notices (Milne & Culnan, 2002, p. 352); these notices are typically placed in small letters associated with a link at the bottom of the home page.

The Privacy Policy and the Public

Despite the rise in the proportion of Web sites posting privacy policies, academic researchers have argued the public is largely unable to make sense of these documents. Culnan and Milne (2001), for example, found that while a majority of Americans read privacy policies, most found the documents long and the language confusing. Another survey (Turow, Feldman, & Meltzer, 2005) found that 70 percent of respondents disagreed with the statement "privacy policies are easy to understand." This lack of understanding is compounded by the fact that most people skip over the privacy policies or take too little time to read them in enough depth to extract their intended meaning (Obar & Oeldorf-Hirsch, 2016; also Barocas & Nissenbaum, 2009; Reidenberg et al., 2015). Indeed, McDonald and Cranor (2008) determined that if Internet users read every privacy policy they encountered online, they would spend 25 days a year engaged in this activity. Solove concludes that most people do not read privacy policies; that those who read them do not understand them; that those who read and understand them often lack enough background knowledge to make an informed choice; and that even those who can make an informed choice might have that choice skewed by various decision-making difficulties (2013, p. 1888).

But before attempting to read and make sense of privacy policies, Americans must have a reason for clicking on them. Past research has examined whether the public has reason to engage with these documents by presenting questions to see if Americans understand what the presence of a privacy policy signifies. For example, a 2005 Annenberg national survey asked American adults about the following statement: "When a web site has a privacy policy, I know that the site will not share my information with other Web sites or companies" (Turow et al., 2005). Similarly, in 2014 a Pew Research survey asked a representative sample of U.S. adults whether they agreed or disagreed with the following statement: "When a company posts a privacy policy, it ensures that the company keeps confidential all the information it collects on users" (Smith, 2014). In both cases, results showed that the American public overestimates the protections afforded by the presence of these documents on a webpage.

Although certain results of these surveys received wide attention in the popular press, the findings about Americans' understanding of what "privacy policy" means did not. Nor have policymakers or academics taken note of what are consistent findings across the 12 years. One goal of this paper is to integrate the findings of these surveys to address a theoretically guided question regarding the relationship between people's confidence in the meaning of a regulatory label such as "privacy policy" and their satisfaction with existing privacy protections. At issue is whether the confidence in the privacy policy label predicts acceptance of the regulatory status quo.

Although available research doesn't speak directly to the connection between a sense of adequate privacy protection and satisfaction with existing privacy regulation, previous work does provide direction toward a hypothesis. Especially relevant is

literature about *meta-cognition*—the processes involved in knowing what we know (Metcalfe & Shimamura, 1996). An important aspect of this phenomenon is “the illusion of knowing.” That is the circumstance when an individual’s self-assessment of comprehension is high, while a factual assessment of the person’s comprehension reveals it to be low. The consequences can hold important public policy implications. Brandimarte et al. (2013) conducted experiments showing that people are more likely to share data if they are confident that they have control over how their data are released and accessed. They also found that when people have misplaced confidence in controlling the release of their information, it can distract them from the possibility of unwanted uses of their data. Summarizing research on this topic in relation to privacy, Solove adds: “People are also more willing to share personal data when they feel in control, regardless of whether that control is real or illusory” (Solove, 2013, p. 1887). More generally, he notes, “people are more willing to take risks, and judge those risks as less severe, when they feel in control” (2013, p. 1887).

These research streams lead to the hypothesis that people who hold misplaced confidence in the “privacy policy” label are more likely than those who correctly understand the label to state that existing laws and organizational practices for protecting online privacy are adequate. An obvious question is whether the extent of misplaced confidence in the label or opinion about government regulation varies based on sociodemographic differences. Brandimarte and colleagues (2013) imply their experimental results about sharing data in the face of privacy opinions will hold with people of all backgrounds. Yet research over the past couple of decades on people’s understanding how to use computers (their “computer literacy”) as well as their ability to navigate internet browsers and related tasks (their “online fluency”) has sometimes found sociodemographic variables such as age, gender, education, and income significant for distinguishing among those who are successful and unsuccessful (see, for example, Freese, Rivas, & Hargittai, 2006; Hargittai, 2005; Hargittai & Hinnant, 2008; Mossberger, Tolbert, & Stansbury, 2003; Van Dijk, 2005).

Age and gender are the categories that stand out most, though with gender the findings are conflicting. Park (2013), for example, looked at the impact of income, education, age, and gender on two aspects of a national survey of American adults’ personal information-control activities: their social skills (for example, giving a false email address or asking a site not to share personal information with other companies) and technical skills (for example, clearing the Web browser history or erasing some or all cookies on the computer). He found that being male and relatively young (lower than the median age 46) predicted technical skills, while relative youth alone predicted social skills (Park, 2013, pp. 225–228). Litt (2013) found a similar age pattern in studying the predictors of privacy tool use on social networks such as Facebook—but not education, income, and race—noting that older individuals were less likely to use technological strategies than younger individuals. Alternatively, Litt’s study reported that women were more likely than men to use privacy tools. In research on Internet knowledge and activities, the nature of gender differences appear to be quite specific to the topic studied. Fogel and Nehmad (2009) found,

for example, that females used more privacy controls than males, while Hargittai and Hinnant (2008) observed that being female predicts lower self-reported understanding of Internet terms and actions.

Note that these studies tried to predict individuals' Internet activities rather than their policy position—the purpose of this study. Nevertheless, the available evidence does suggest a second hypothesis: that people's misplaced confidence in the privacy policy label and their related opinions about the need for more effective laws and organizational practices to protect privacy will vary, based on age and gender but not by education, income, and/or race.

Methods

We proceeded with our investigation in two steps. First, we gathered all questions about the meaning of "privacy policy" from a Pew Research survey (Smith, 2014) and the national telephone surveys carried out by the University of Pennsylvania's Annenberg School for Communication in 2003, 2005, 2009, 2012, and 2015. Several of the studies that tap the meaning of "privacy policy" have substantially different wording or choices, which impedes an exploration of the patterns in percentages of Americans who make incorrect choices about the meaning of the term "privacy policy." There are, however, three exceptions. The Annenberg School conducted national telephone surveys in 2009, 2012, and 2015 that presented virtually the same true/false statement: In 2009 and 2012 the statement was "If a website has a privacy policy, the site cannot share information about you with other companies, unless you give the website your permission." In 2015 it was "When a website has a privacy policy, it means the site will not share my information with other websites or companies without my permission."

After an overview of the general findings from all the surveys, we chose the 2009, 2012, and 2015 Annenberg surveys for close demographic analysis over time; data for all three surveys were collected by the Princeton Survey Research Associates. The surveys included: (1) 1,000 U.S. Internet users in 2009 (see Turow, King, Hoofnagle, & Hennessy, 2009), (2) 1,503 adult Internet users in 2012 (see Turow, Delli Carpini, Draper, & Howard-Williams, 2012), and (3) 1,506 Internet users in 2015 (Turow, Hennessy, & Draper, 2015). *Internet users* are defined as people who use the Internet or email "at least occasionally." Survey participants were contacted on both landline and wireless phones and the interviews averaged 20 minutes. When it came to asking the privacy-policy question, the response category of "not sure" was included as a choice rather than a volunteered answer. Since our hypotheses center on the "incorrect answers" to the privacy policy questions as indicators of misplaced confidence, we did not include the "unsure" answers in the analysis, which made up 13% of the responses across the three surveys.

The 2009 and 2012 Annenberg surveys both presented the following statement and asked those interviewed if they "agree," "agree strongly," "disagree," or "disagree strongly": "Existing laws and organizational practices provide a reasonable level of protection for consumer privacy today." This question comes from an

attempt to replicate a standard set of questions used by the pioneering privacy theorist Alan Westin (Kumaraguru & Cranor, 2005). Here we used the answers to address our hypothesis that a relationship exists between not knowing the meaning of “privacy policy” and satisfaction with current regulation of the Internet industry’s data sharing practices. Although the phrase “existing laws and organizational practices” combines two realms of action, it reflects a proxy for how the privacy issue is perceived by Internet users at large.

Statistical Analysis

All our analyses were conducted with Stata. We used probit regressions to predict the incorrect (that is, the “True”) response and to identify the relationships between sociodemographic selection of incorrect answers during different years, adjusted for the other variables. Because the probit regression coefficients are Z scores and are nonlinearly related to the underlying probabilities of choosing the incorrect answer, we plot the marginal effects of time and the demographic variables using the Stata command “marginsplot”. These plots are a completely deterministic function of the estimated regression; that is, they are simply a transformation of the estimated probit regression coefficients. To determine if the effects of demographic variables on the incorrect choice changed over time, we look for interaction effects (e.g., moderation) between year of the study, the demographic variables, and the outcome choice. Here plots of demographic effects by year are extremely informative.

Results

Table 1 presents the percentage of incorrect answers to the privacy policy questions asked in surveys of American adults who “use the internet” conducted from 2003 through 2015 (Smith, 2014; Turow, 2003; Turow, Feldman, & Meltzer, 2005; Turow, King, Hoofnagle, & Hennessy, 2009; Turow, Delli Carpini, Draper, & Howard-Williams, 2012; Turow, Hennessy, & Draper, 2015). The phrasings vary somewhat, and the 2003 question asked whether the respondent agreed or disagreed with the statement, as opposed to the true-false formulation of the other years. Nevertheless, over half of the respondents in every year said the statement is true when it is false (or, in the case of 2003, agreed with the statement when it was incorrect). In four of the years, the percentage of people choosing the wrong answer reached above 60%, and in two of those years it passed 70%. The years with relatively lower percentages involved the most unusual approaches to the question: the 2003 request for an agree/disagree answer, and the 2014 Pew statement that used an exceptionally strict formulation of the privacy policy’s meaning via the phrase “ensures that the company keeps confidential all the information it collects” (Smith, 2014). The overall impression is clear, though: Despite differences in the

Table 1
Probit Regression Predicting that Existing Laws Provide Reasonable Protection

	Survey Creator & Sample Size*	Phrasing	% Incorrect Answer
2003	Annenberg (N=1,155)	When a web site has a privacy policy, I know that the site will not share my information with other websites or companies.	59% agree or agree strongly
2005	Annenberg (N=1,257)	When a website has a privacy policy, it means the site will not share my information with other websites or companies.	71% true
2009	Annenberg (N=842)	If a website has a privacy policy, it means that the site cannot share information about you with other companies, unless you give the website your permission.	73% true
2012	Annenberg (N=1,228)	If a website has a privacy policy, it means that the site cannot share information about you with other companies, unless you give the website your permission.	65% true
2014	Pew (N=1,034)	When a company posts a privacy policy, it ensures that the company keeps confidential all the information it collects on users.	54% true
2015	Annenberg (N=1,399)	When a web site has a privacy policy, it means the site will not share my information with other websites or companies without my permission.	63% true

*Does not include Don't Know/Not Sure or No Response

expression of the meaning of a privacy policy, well over half of American adults in six surveys across thirteen years mistake the meaning of a privacy policy.

To get a deeper view of patterns over time and among different population segments, we turn to the three years when the questions and choices were almost the same: 2009, 2012, and 2015. [Table 2](#) presents the true-false responses to the statements in each of the three years. It indicates that there is a statistically significant decrease across the years in the proportion of people who choose "true" over "false"—from 73.4% in 2009 to 65.2% in 2012 and 62.7% in 2015. [Table 3](#) shows that the chances of being wrong were not distributed evenly across key categories of the population; negative coefficients reflect selecting the correct answer, "false." The table shows that men are statistically more likely than women to pick the correct answer; that people with higher education are more likely than those of lower levels (HS graduate or less) to select the correct answer; and that the people making

Table 2
Privacy Policy Responses: 2009–2015

If a Web site has a privacy policy, it means that the site cannot share information about you with other companies, unless you give the Web site your permission.			
	Year		
	2009	2012	2015
True	73.4%	65.2%	62.7%
False*	26.6%	34.8%	37.3%
* Correct answer			
N	842	1228	1399
Pearson χ^2 : = 27.58, df = 2, p < .05			

The 2015 version was “When a web site has a privacy policy, it means the site will not share my information with other Web sites or companies without my permission.”

\$100,000 or more annually are statistically more likely to answer correctly than people making less than \$100,000. White respondents are more likely than others to know the correct answer. Respondents who identify as neither Black nor White (for example, Asians and Native Americans) are likely to get the answer wrong. Black respondents are also likely to answer incorrectly; however, in the case of Black respondents, the relationship is not statistically significant. People of all age categories tend to get the answer wrong; differences between them are also not statistically significant. These relationships are displayed graphically in [Figure 1](#).

To identify changes over time, we investigated the extent to which these five demographic variables interact with the year of the study. F tests show that none of these interactions approached statistical significance. In view of the large sample, this is convincing evidence that relationships among the responses of different demographic groups have not changed over time. [Figure 2](#) displays the results shown in [Table 3](#) by year. The charts show that differences between the demographic categories that we saw in [Figure 1](#) persist in every year. Young adults, people with low income, people with less than a college education, women, Blacks, and ethnic non-whites go down in their misunderstanding (that is, a higher percentage get the answer correct) from 2009 to 2012 to 2015. Because there is no interaction, their improvement in knowledge does not catch up with the improvement that older, richer, male, White respondents, and more highly educated American adults show in their knowledge. Note that even with the general decline in selecting the incorrect answer, the adjusted predicted values for the incorrect answer is always greater than 50% in the samples. It’s a reminder that despite the decline in incorrect answers, most Americans still have misplaced assurance about giving up their data when they see the privacy policy label.

Table 3
Probit Regression Predicting the Incorrect Privacy Policy Choice

	Coefficient	SE	T	P	95% Confidence Interval	
Male	-.137	.056	-2.45	.014	-.248	-.027
Age						
26-40	-.082	.094	-.87	.383	-.267	.103
41-55	-.043	.092	-.47	.638	-.224	.137
56-66	-.144	.102	-1.41	.159	-.344	.056
67+	-.023	.106	-.22	.824	-.231	.184
Income (Ks)						
20 to <30	-.085	.117	-.73	.467	-.314	.144
30 to <40	-.114	.117	-.97	.332	-.343	.116
40 to <50	.002	.122	0.18	.855	-.217	.262
50 to <75	-.165	.108	-1.53	.126	-.378	.046
75 to <100	-.141	.111	-1.26	.207	-.359	.078
100K+	-.207	.105	-1.97	.049	-.413	-.001
Education						
Some college	-.161	.076	-2.12	.034	-.310	-.012
College plus+	-.272	.076	-3.59	.001	-.421	-.123
Race						
Black	.110	.095	1.16	.247	-.076	.226
Non-Black / Non-White	.229	.081	2.82	.005	.071	.389
Year						
2012	-.182	.076	-2.41	.016	-.332	-.034
2015	-.255	.075	-3.41	.001	-.402	-.108
Intercept	.924	.116	7.96	-	.697	1.153

Note. N = 2,803. $F_{17, 2786} = 3.85$, $p < .05$, (McKelvey and Zavoina $R^2 = .055$). Negative coefficients indicate selecting the correct answer, positive coefficients the incorrect answer.

This general high level of misplaced comfort also associates with a belief that “Existing laws and organizational practices provide a reasonable level of protection for consumer privacy today.” As Table 4 indicates, about 60% in 2009 and 2012 who misunderstand the privacy policy label agree or agree strongly with that statement. In contrast, around 58% of those in both years who know the label’s correct meaning disagree or disagree strongly with the statement. This consistent difference applies equally across the demographic categories presented earlier. Table 5 associates the demographics of people who got the label wrong with their belief that laws provide reasonable protection. This table shows that the only statistical difference we found related to age. Specifically, 18–24-year-olds who believe the privacy policy is protective are substantially more likely than other age groups to generalize that existing laws and organizational practices provide reasonable protection.

Figure 1
Probability of Incorrect Privacy Policy Answer by Year and Respondent Characteristics

Note: Dashed line is 50%. Brackets are 95% confidence intervals around the predicted value.

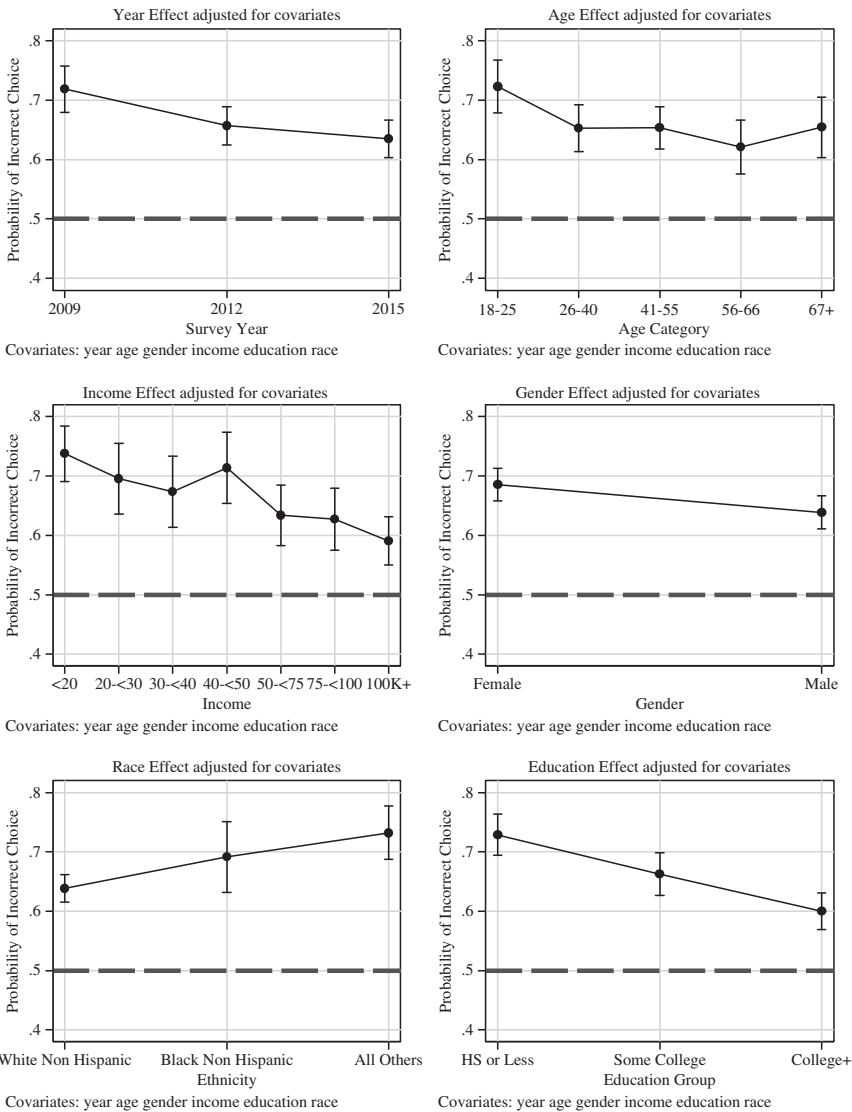


Figure 2
Probability of Incorrect Privacy Policy Answer Choice by Respondent
Characteristic over Time

Note. Dashed line is 50%. Confidence intervals around predicted values not shown for clarity.

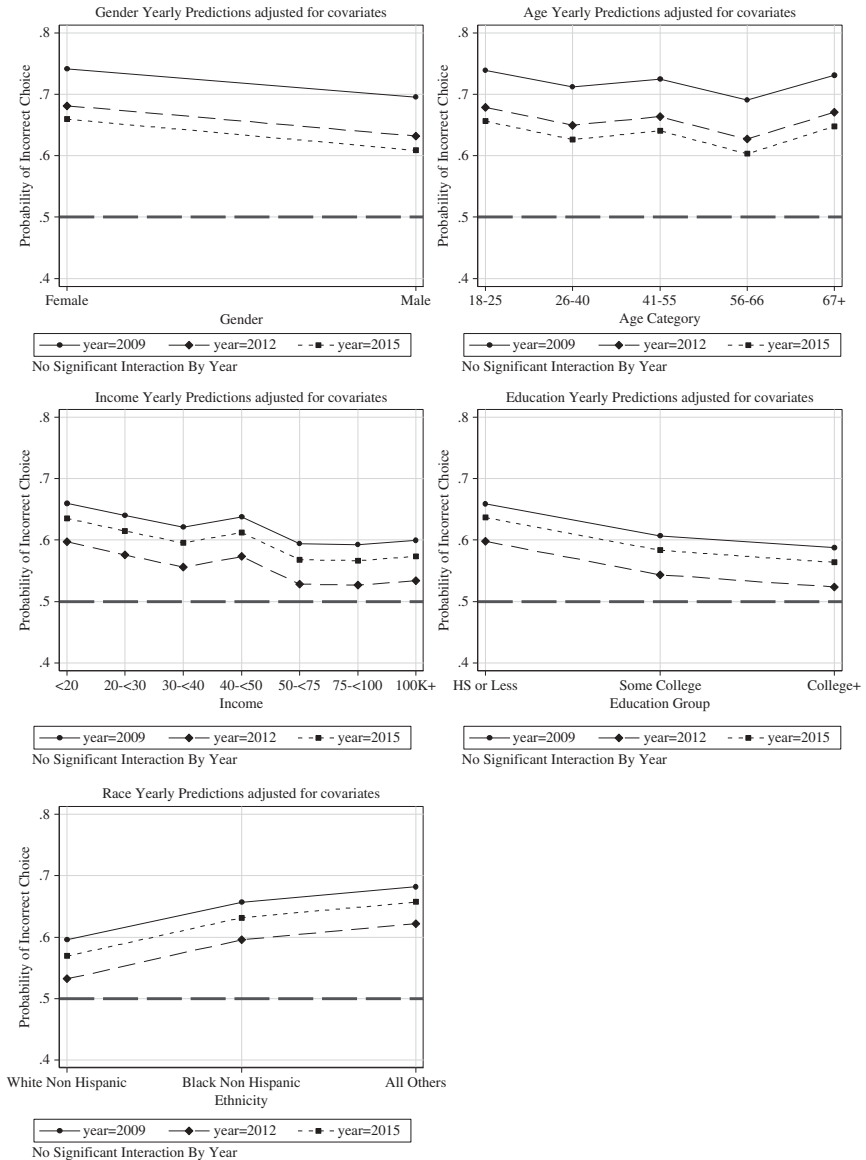


Table 4
Association of True/False Answers regarding Privacy Policy Statement with
Agreeing or Disagreeing that "Existing Laws and Organizational Practices Provide a
Reasonable Level of Protection for Consumer Privacy Today."

	Privacy policies protect personal data			
	2009		2012	
	True (%)	False (%)	True (%)	False (%)
"Existing laws provide protection"				
Agree or agree strongly	62	44	62	40
Disagree or disagree strongly	38	57	38	60
	N = 599	N = 222	N = 776	N = 424
Polychoric correlation	.28 (p < .05)		.34 (p < .05)	

Table 5
Probit Regression Predicting that Existing Laws Provide Reasonable Protection

	Coefficient	SE	T	P	[95% Confidence Interval]	
Male	.014	.091	0.15	0.877	-.164	.192
Age						
25-40	-.4219	.151	-2.78	0.005	-.719	-.124
41-55	-.469	.153	-3.06	0.002	-.770	-.168
56-66	-.592	.164	-3.61	0.000	-.914	-.270
67+	-.420	.188	-2.23	0.026	-.790	-.050
Income (Ks)						
20-<30	-.277	.177	-1.57	0.117	-.625	.069
30-<40	-.155	.178	-0.87	0.382	-.505	.194
40-<50	.068	.184	0.37	0.709	-.293	.431
50-<75	-.164	.172	-0.95	0.341	-.502	.173
75-<100	-.015	.182	-0.09	0.931	-.374	.342
100K+	-.229	.164	-1.39	0.165	-.552	.094
Education						
Some college	-.148	.117	-1.26	0.207	-.378	.082
College+	-.029	.116	-0.26	0.798	-.257	.198
Race						
Black	-.064	.154	-0.42	0.677	-.367	.238
Non-Black / Non-White	.010	.124	0.08	0.935	-.233	.253
Year						
2012	-.003	.091	-0.04	0.967	-.182	.175
Intercept	.914	.175	5.21	0.000	.570	1.259

Note. N = 1075. $F_{16,1059} = 1.61$. $p = 0.06$, (McKelvey and Zavoina $R^2 = .055$). Negative coefficients indicate existing laws not reasonable, and positive coefficients indicate existing laws are reasonable.

Conclusion

That young adults who misunderstand the privacy policy label are more likely than their older adult counterparts to believe current data protection regulations are reasonable is noteworthy because of the great amount of public concern about young adults' willingness to give up too much private information online. It also contradicts the idea that those born in generations with widespread access to digital tools—sometimes called digital natives—have greater knowledge about how to control their online environment. Research has demonstrated that young people have deep concerns about their digital privacy (Turow et al., 2009) and have developed tools and strategies they feel provide them with some, often limited, protections (Berriman & Thomson, 2015; Boyd, 2014). Still, the results presented here suggest young adults share with the broader population a misplaced confidence in the presence of privacy policies as well as in the broader adequacy of regulations and organizational policies relating to them.

Our study has shown remarkable consistency with respect to misplaced understanding of the privacy policy label over a 12-year span. Across our 6-year comparison (2009–2015), it has also shown a consistent overlap between those who misunderstand privacy policies and have a belief that their personal information is adequately protected by existing laws and regulations. Earlier we introduced research that found people are more likely to behave in ways that open them to harm when they feel they are adequately protected rather than when they don't feel that way. The application of this general principle to online behaviors that can introduce risk into the privacy and security of one's personal information highlights the importance of the current study's findings. The substantial percentage of the population that feels it is protected by both privacy policies and existing laws may engage in riskier behaviors regarding their personal information. The fact that tech-conscious young adults are overrepresented in the group that feels privacy policies protect their information from being shared with third parties suggests that misunderstandings are not a function of a lack of familiarity with the technologies themselves, for, as we have seen, other studies associate younger age with higher technological knowledge and more skills than their older counterparts. The misplaced confidence may instead represent a misunderstanding about the ways digital firms manage the information world that underlies these technologies.

The finding that age is a predictor of the second of the two hypotheses resonates with the results of other studies that age is an important variable in understanding people's approaches to the Internet environment—though not necessarily in consistent ways. Gender, the other variable that Internet studies often emphasize as predictive, is also a significant factor in this research: men are more likely than women to know the correct answer about the meaning of the privacy-policy label. The finding meshes with some studies that see men as more knowledgeable or skillful than women on Internet topics, but it runs counter to others that note women as more proactive than men about using privacy controls. Our finding reinforces the observation, made earlier, that in research on Internet knowledge and activities, the

nature of gender differences appears to be quite specific to the topic studied. The current research reinforces the need to conceptualize dynamics of gender through a framework that explains these contrasting findings and suggests research to address their social implications. A conceptual framework of this sort would similarly be useful to understand the contrasting findings regarding age and the Internet.

Our study found other sociodemographic categories operating here that other studies don't note: people with higher education are more likely than those of lower levels (HS graduate or less) to select the correct answer; people making \$100,000 or more annually are statistically more likely to answer correctly than people making less than \$100,000; White respondents are more likely than others to know the correct answer; and respondents who identified as neither Black nor White (for example, Asians and Native Americans) are likely to get the answer wrong. An obvious commonality among many of these classifications is their relation to social status and power. More research is needed about the reasons for these differences. Another point of difference for future exploration relates to whether technological skills, social-environmental factors such as a person's access to multiple Internet devices, ability to use devices in many locations, and the availability of high-speed broadband predict correct understanding of the privacy-policy label. Prior studies (for example Hargittai & Hinnant, 2008; Litt, 2013; Park, 2013) suggest that these considerations might influence people's privacy-related activities and understandings. Although one or another of the Annenberg surveys gathered such information about respondents, the data weren't collected across all of the surveys and so could not be used for this study's analyses.

Consideration of sociodemographic, skill-related, and environmental factors should not, however, detract from the strongest finding of this research: large percentages of Americans irrespective of their backgrounds do not understand the most basic element of privacy notification. Moreover, this error associates with an unsubstantiated belief that "Existing laws and organizational practices provide a reasonable level of protection for consumer privacy today." Improved education around various elements of digital life has been at the heart of calls from those invested in improving safety and security online (see for example Hobbs, 2010; Livingstone, Byrne, & Bulger, 2015). Our findings here suggest that such activities have to start with the most basic features—for example, the very meaning of the label "privacy policy".

The association we found between the misinterpretation of the label and a belief that existing privacy rules are adequate points to another aspect of public education about these issues. Academic researchers have sometimes critiqued digital literacy proponents for focusing on individual knowledge at the expense of encouraging changes to the structural and institutional systems that enable undesirable practices. Livingstone argues that approaches to literacy must incorporate an understanding of the social and institutional structures that encourage certain kinds of awareness of the media system but not others (2004, p. 11). Shade and Shepard (2013) push the point further. They argue that digital-policy literacy, which stresses understanding of

communication policy processes, the political economy of media, and technological infrastructures, is an essential but often overlooked part of digital-literacy campaigns.

Our study points to the importance of this approach. We found that people's misplaced confidence about an Internet feature as basic as a privacy-policy label not only has implications for their personal lives, but also may affect how they act as citizens in favor or against government or corporate activities. Digital literacy programs therefore should find ways to highlight the societal implications of this most basic aspect of the new-media landscape with the knowledge that many people need help understanding the mundane policy features of this new world.

Unfortunately, activities spreading either the individual or the societal orientation toward the meaning of privacy policy are so far rather scarce. Anecdotal evidence suggests that reviews of Web sites in the popular media almost never comment on privacy policies, and journalists who write about privacy issues rarely address privacy policies. The situation appears no better in formal educational settings. According to digital-literacy expert and professor Hobbs (personal communication, 2016), approaches to digital literacy in U.S. elementary, middle, and high schools (grades K through 12) are divided between schoolroom teachers and information-technology administrators. The former see developing students' basic computer and Internet skills as their mandate. The latter have additional concerns about implementing privacy and security in the classroom, especially as school districts choose among the many educational applications being offered to them. Hobbs notes that at recent educational technology conferences some K–12 teachers have shown up as “early adopters” who have aligned themselves with the concerns of the IT administrators and have begun thinking about digital citizenship and privacy as important classroom topics. They are, she emphasizes “a very special group, not typical classroom teachers.” Moreover, when the early adopters get into dialog with the other teachers in their school systems, the basic skills perspective clashes with the larger societal one. “They literally cannot understand each other,” Hobbs reports.

Activities to bridge the gaps between the early adopter and regular classroom teachers about the importance and meaning of privacy policies are clearly necessary. One possible way to spark an interest involves getting them engaged with the privacy policies of the educational apps their districts are evaluating for use in their classrooms. Critics of some of these apps have expressed concern that they can collect massive amounts of student “metadata”—including what students type and click that might include information about the type and times of classroom activities and homework—and resell the data for purposes teachers and administrators may not like (Herold, 2014). In association with a number of school districts, Common Sense Media has come up with a rating system to help administrators and teachers evaluate privacy policies (Common Sense Media, *n.d.*; Herold, 2014). Encouraging teachers in appropriate grades to explore the rating system and discuss its implications with their students can be a useful first step in sensitizing the younger generation to the varied meanings of the very term privacy policy.

One might think that engagement with such privacy policy ratings need not stop with teachers and their students. Yet attempts at ratings have been tried—P3P and Privacy Choice are two prominent ones—without (as this study indicates) wide

success in getting American adults tuned into the meaning and importance of even the meaning of the privacy policy label (Richmond, 2010; Zetter, 2012). A more successful tack might be for journalists and other media practitioners to make privacy policy evaluation part of their routine writing about new sites and apps. Praising and shaming firms might get the attention of audiences and sensitize them to what firms are doing with the information.

Although school-based and media-based privacy-education efforts are certainly important, there is a more direct step to addressing people's misunderstanding the correct meaning of the privacy policy label: Web sites and apps should change the label so that people don't have misplaced confidence in it. The FTC back in 1998 used the phrase "information practice statement" as a suggested title for the document. It didn't take hold, possibly because companies realized that "privacy policy" embodied the ambiguity they wanted. Thirteen years of research show consistently, though, that the label is deceptive. A strong majority of Americans thinks it means that firms will not use their information without their permission. One solution would be for the Federal Trade Commission, which is mandated to police deceptive corporate practices, to rule that only sites and apps that don't share people's information without their permission can use that phrase. Otherwise, they should use a label such as "what we do with your information," which is probably clearer than "information practice statement." Educators and advocates are likely to support this change. Companies are likely to object to it because they don't want the label to serve as a shorthand that alerts people to activities may not like. Yet it is a struggle worth pursuing in the interest of creating transparency around the name of a document that our research shows has been mistitled and misunderstood for over a decade.

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Sexism on the Set: Gendered Expectations of TV Broadcasters in a Social Media World

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Sexism on the Set: Gendered Expectations of TV Broadcasters in a Social Media World

Teri Finneman and Joy Jenkins

This research examines gender performance expectations of television journalists in the era of social media. A qualitative survey found little to no progress in reducing discourse critical of broadcasters' appearance in the 20 years since Engstrom and Ferri's (2000) study, with social media adding another avenue to "correct" rather than challenge gender norms. Nearly all journalist respondents believe viewer criticism has increased with the rise of social media and believe their organizations should provide training and policies addressing this concern. However, 90% of respondents said their organizations provide neither, suggesting news outlets should enhance social media policies.

In early 2016, Just Not Sports released #MoreThanMean, an online video drawing attention to the harassment women broadcasters face. In the video, regular men sat across from sports reporter and radio/TV host Sarah Spain and sports broadcaster/columnist Julie DiCaro and read others' social media posts, which ranged from "Sarah Spain sounds like a nagging wife on TV today" to "One of the players should beat you to death with their hockey stick" (Just Not Sports, 2016).

After the video went viral, Spain and DiCaro encountered another wave of social posts from people telling them to "get a thicker skin" because the comments were "part of the job" (Roy, 2016).

The #MoreThanMean video represents one of a series of recent incidents calling attention to the inappropriate remarks and double standards women in broadcast face. Celebrity business mogul and then-Republican presidential candidate Donald Trump drew widespread criticism in August 2015 with his comments about then-Fox News anchor Megyn Kelly, with many accusing Trump of sexism (Phillips, 2015; Yan, 2015). A year before, an Australian TV anchor wore the same suit to work for a year. During this time, viewers criticized his female co-host's appearance, but no

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one commented about his unchanging wardrobe (Lee, 2014). In yet another occurrence, Chicago-based WGN anchors and reporters publicly read mean viewer emails in March 2016, after one female reporter received a letter criticizing her weight and her inability to “discipline herself in a visual medium” (WGN Web Desk, 2016). For women broadcasters across the country, these experiences are not new and, in fact, represent prolonged and frequent components of the job.

These examples suggest little progress for women broadcasters in the twenty years since a prior study examined obstacles for local TV news anchors. Engstrom and Ferri (2000) found the number one issue for female anchors in 1997 was the amount of emphasis they perceived others placed on their appearance. Since then, social media have opened new arenas for instant communication between journalists and viewers. Researchers have yet to fully examine the influence of social media on audience perception of women broadcasters, including analyzing the types of comments that viewers leave on journalists’ and news organizations’ social media accounts and how journalists respond to them.

This study follows up on Engstrom and Ferri’s (2000) work by surveying local broadcast journalists across the country ($N = 69$) to explore their perceptions of viewers’ emphasis on broadcasters’ appearance and what role they believe social media play in these interactions. In other words, this study considers how female and male television journalists describe viewers’ expectations for gender performance—or what viewers believe to be “correct” appearance behaviors for broadcasters. We begin by examining industry expectations for women in broadcast journalism and then explore the role of gender in newsrooms more broadly. Next, we examine research related to viewer commentary and to social media to contextualize our respondents’ comments and their suggestions for change.

Expectations for Women in Broadcast

Television journalists are tied to a medium that has always required visual presence and personalization, although expectations have shifted over time (Meltzer, 2010). The innovation of color television in the early 1950s launched the initial emphasis on clothing and makeup, primarily to avoid having talent look unattractive under bright, hot studio lights (Meltzer, 2010). Personal attractiveness was not initially emphasized, although early television journalists did feel a need “to come across as credible and likable to viewers at home” (Meltzer, 2010, p. 20). During the late 1960s and 1970s, television rose in prominence in American culture, prompting networks to hire news consultants to help stations become more competitive (Meltzer, 2010). Consultants emphasized celebrity, soft news, and ratings, pointing to audience research highlighting the importance of broadcaster attractiveness (Meltzer, 2010). Print journalists, academics, and Walter Cronkite criticized these consultants and the changing norms of television news (Meltzer, 2010), yet these practices remained.

Differing standards for women have existed since the beginning of television. Until Barbara Walters broke the gender barrier for evening news anchors in 1976, television news was controlled by men. Early women broadcasters have described the challenges of getting a job during the 1970s, as well as encountering sexual harassment (Marlane, 1999). With consultant data in hand, stations hired some women based more on their looks than their journalism skills (Meltzer, 2010). Although villainizing the industry is easy, one must keep in mind that “beauty and appearance are central to American culture” (Meltzer, 2010, p. 50). In other words, American society and audience research have contributed to an emphasis on physical attractiveness (Grabe & Samson, 2011), thus reinforcing this practice. However, “since beauty is subjective, the male-dominant culture sets the standards of acceptance” (Marlane, 1999, p. 30), confining women to male norms. For women, the body expresses and maintains femininity while reflecting normative understandings of acceptable bodily presentations (Bordo, 1997). As a result, women spend more time managing and disciplining their bodies in pursuit of an “ever-changing, homogenizing, elusive ideal of femininity” (Bordo, 1997, p. 91). Women have internalized and accepted these beauty ideals, resulting in a growing homogeneity among female bodies (Gill, 2009). These assumptions are also increasingly shaped by a commodified visual culture emphasizing gender conventions (Jhally, 2015).

These norms were challenged in the early 1980s, when Kansas City anchor Christine Craft filed a lawsuit against station KMBC. Shown a consultant report and told she was “too old, too unattractive, and not deferential to men,” Craft was removed from her anchor job (Nadel, 1982, p. 14). Although Craft ultimately lost her lawsuit, her challenge of the industry spurred other women broadcasters to sue for sex discrimination throughout the 1980s and 1990s (Grabe & Samson, 2011).

Despite this pushback, and in light of new competition from cable, the industry continued to emphasize anchors, personalities, and entertainment in the 1980s and 1990s (Meltzer, 2010). Bock (1986) analyzed the relationship between consultants and anchors in the mid-1980s and found many broadcasters had largely accepted consultants’ advice on appearance as part of the job. A few years later, Sanders and Rock (1988) released *Waiting for Prime Time: The Women of Television News*. Acknowledging that broadcasters’ appearance matters to audience reception, Sanders and Rock (1988) nonetheless argue that “women face more pressure than men do on television” and that appearance “should not be the only criterion by which a female newscaster is judged” (p. 147). A decade after the book’s release, however, female broadcasters of the late 1990s reported that emphasis on their physical appearance continued to be a “major hindrance to their career development” (Engstrom & Ferri, 2000, p. 630). Similarly, in the early 2000s, Steiner (2009) noted that “narrowly defined standards for appearance continue to be crucial in determining who gets hired, how they are used, and how long they last on television” (p. 122). The 1990s and 2000s brought the rise of cosmetic surgery and an obsession with celebrity, and “television journalists’ appearances are increasingly placed under the microscope” (Meltzer, 2010, p. 50).

Evidence suggests these challenges remain. Expectations for women's appearance in broadcast journalism can be so rigid that one Midwestern television station has an 11-page guide of do's and don'ts for its on-air female journalists (personal communication, 17 October 2016). The guide discusses appropriate colors and cuts of clothing, jewelry, hair, and makeup. In the winter clothing section, women are encouraged to "wear a pop of color near your face" and to "invest in a good wool coat." Young reporters are encouraged to wear medium-length haircuts with a slight curl at the bottom but are told not to curl it too much or "it looks TOO fancy" (original emphasis). The guide was created based on feedback from consultants and other newsrooms (personal communication, 17 October 2016), indicating that this station is not alone in providing detailed appearance guidelines.

A number of researchers examined newsroom practices and gender in the 1990s and early 2000s (Beasley & Gibbons, 2003; Chambers, Steiner, & Fleming, 2004; Elmore, 2009; Nilsson, 2010; North, 2009; Ross, 2004). These studies found that male-centered norms continue to dominate newsrooms in terms of decision-making, newsroom culture, and access to promotions. However, despite the presence of what North (2016) calls "ongoing and systemic gender bias that disadvantages women" (p. 315), women in newsrooms tend to seek "equality of opportunity within the existing structures of patriarchy" (Ross, 2004, p. 146). For example, female journalists often receive stereotypical assignments relegating them to "marginal areas of journalism" but must "show in their daily performance that they are good journalists as well as 'real' women" (Van Zoonen, 2002, p. 37). This tension is evident in television newsrooms, where women have encountered challenges associated with "imposed limits of femininity" (p. 133), such as reflecting masculine-oriented norms for language and presentation while refraining from speaking on behalf of women and presenting a feminine style appropriate for "the seriousness of the news" (Holland, 1987, p. 148). These challenges are compounded by the market-driven nature of U.S. journalism, wherein broadcasting practices tend to emphasize style of presentation over substantive content (Gill, 2007), rendering the female body a "key market and product of organizational and occupational structure" (North, 2009, p. 70).

In local-TV journalism, marketing research suggests audiences prefer sensational news and "Ken and Barbie journalism," defined as "the local anchor teams of a woman and a man whose physical attractiveness seems to be more important than their professional qualities as journalists" (Van Zoonen, 2002, p. 40). Steiner (2005) suggested that profit motives and the need to attract audiences have driven media organizations' focus on personalization in content. Some women, however, have played a role in this gender-based pandering: "It is women newscasters who smile flirtatiously, ask personal questions, hug rapists, and show cleavage" (Steiner, 2005, p. 50). In other words, gendered performance is not solely dictated by men but also reinforced by some women, perhaps reflecting internalized expectations.

Even with more women in leadership roles, change is slow, as women journalists have been found to be "blind to gender issues" (Steiner, 2009, p. 121; see also Ross,

2001). The television industry has made gains in the number of women in management. Women comprised a record-high 33% of news directors and 18.9% of general managers in local TV news in 2015 (Papper, 2016). However, numbers fall short of equal representation, when women comprise 44.2% of TV staffs (Papper, 2016). In addition, those who recognize sexism still “largely adopt journalism’s structures as part of the profession” (Steiner, 2009, p. 121). Similarly, as Nilsson (2010) found, despite attempts by female journalists to resist gender norms, “both men and women constructed and reconstructed social beliefs that sustained the power relations between the sexes in the newsroom and the gender typing of assignments” (p. 14). Female TV journalists, then, may engage in repeated gendered acts as a means of maintaining their place in—and coping with—the power matrix of the newsroom.

The Influence of Viewers and Social Media

Ratings have existed for decades to give the broadcast industry insight into viewers’ preferences, with Nielsen launching audience measurement in 1950 (Nielsen, n. d.). The rise of the Web and social media, however, has changed the relationship between journalists and viewers, who can now provide instant public feedback. Research has found that a majority of Americans now get news via social media (Gottfried & Shearer, 2016), allowing them to make public comments in real time on the pages of news organizations or individual journalists. As a result, newspaper and TV news organizations now increasingly host “unpolished, wide-ranging, and unpredictable user-generated discussions” (Braun & Gillespie, 2011, p. 383).

Although journalists and audiences may agree on the traditional tasks of journalists as information disseminators and interpreters, some commenters are driven by affective, self-centered motivations, rather than a desire to interact with editors (Heise, Loosen, Reimer, & Schmidt, 2014). Commenters also play a role in press criticism, drawing upon traditional professional norms as well as broader social values to differentiate good and bad journalism (Craft, Vos, & Wolfgang, 2016). However, although the public has shown strong support for reader comments in some contexts, journalists have been less positive about them (Bergström & Wadbring, 2014). At the same time, research has found that audiences do “shape journalistic routines and are tacitly embedded in the news-making process” (Heise et al., 2014, p. 412), and they may use online forums and comments to evaluate journalistic decision-making and performances (Jenkins & Tandoc, 2017; Tandoc & Jenkins, 2018).

Research suggests that women have faced obstacles when communicating online, including attempts to exclude women from participating in public discourse (Megarry, 2014). Online spaces can also perpetuate violent sexism and misogyny, which “is compounded with racism, homophobia, ableism, and all other forms of hate” (Shaw, 2014, p. 273). Men and women on social media also respond

differently to rejection and criticism, with men retaliating to a greater extent than women (Chen & Abedin, 2014). Even so, individuals have been shown to believe that others feel more negative emotions as a result of uncivil online comments than themselves (Chen & Ng, 2017).

Interviews with journalists showed that more than half respond to commenters at least occasionally, and all aim for deliberative responses, such as setting a civil tone in a conversation (Chen & Pain, 2017). Some journalists, however, said that distancing themselves from harsh comments was challenging, and a third said they do not respond to any comments (Chen & Pain, 2017).

Viewer comments may also reflect assumptions and beliefs that reinforce male-dominated norms. Sonderman (2011) wrote that “women too often face an additional layer of spite, insult, and objectification” in online forums, noting that newspaper and digital journalists also face these issues. As Shaw (2014) notes, “misogyny, racism, homophobia, etc., were not invented by the Internet, but they are enabled by technology and the cultural norms of Internet communication in which this behavior is supported, defended, and even valued” (p. 275). Further, research has shown that male newscasters have been judged by viewers as more credible than their female co-workers (Weibel, Wissmath, & Groner, 2008), as well as more competent, composed, and extroverted (Brann & Himes, 2010). This perhaps creates a chicken-and-egg argument as prior research has found that “the media, and television in particular, play a powerful role in perpetuating myths and stereotypes about physical attractiveness” by promoting “idealized images of women” (Mitra, Webb, & Wolfe, 2014; p. 46; see also Downs & Harrison, 1985). In other words, there is a circular relationship between television presenting idealized images of women as favorable and viewers responding positively to those images.

Mary Bock, a University of Texas at Austin broadcast professor, argues that viewers are not well served by watching broadcasters adhering to strict limitations of beauty. Bock, Cueva Chacón, Jung, Sturm, and Figueroa (2016) argue that biased standards that do not reflect the diversity of a community are problematic for journalists and audiences. For example, Marwick (2013) writes that social posts that treat women like sex objects reinforce “male entitlement and conventional gender stereotypes while normalizing egregiously sexist behavior” (p. 12).

Although changing decades of gender-performance norms may seem impossible, recent research on British audiences found that viewers focused more on professional competency than appearance among TV anchors (Mitra et al., 2014). With that in mind, this study addresses the following research questions:

RQ₁: According to television journalists, how do viewers discursively construct perceived notions of “correct” gender performances through their feedback?

RQ₂: How do television journalists respond to viewer discourse about their gender performances?

Method

The authors conducted a qualitative survey of male and female broadcast journalists as a follow-up to Engstrom and Ferri's study (2000). A SurveyMonkey link was sent to the Radio Television Digital News Association, which describes itself as "the world's largest professional organization exclusively serving the electronic news profession". The association included a brief description of the survey and the survey link in its daily e-newsletter; the survey was emailed to members on January 18, 2016, and January 25, 2016. Moreover, the researchers also shared the survey link on Facebook and Twitter sites of U.S. broadcast journalist organizations, in addition to emailing the survey link to 25 state broadcast associations across the country that included contact emails on their Web sites. Survey respondents could provide contact information to enter a drawing for a \$50 Amazon gift card for participating. The survey closed on February 5, 2016, and yielded a total of 70 responses; one respondent chose not to consent, leaving 69 responses.

Survey participants were asked demographic questions related to their age, gender, and race, as well as questions about their current jobs, including state, number of years in the television industry, Designated Market Area (DMA) rank, and job position. They were also asked whether they had received viewer criticism about their appearance, the frequency of such commentary, which platforms viewers use to express this criticism, broadcasters' personal and professional reactions to this criticism, the role of social media in viewer criticism—as well as whether broadcast newsrooms provided training or policies for responding to viewer criticism about their physical appearance. These questions represented a mix of yes/no questions. Eleven of the survey questions were open-ended to allow participants who answered yes to share their experiences and enable the researchers to qualitatively analyze responses and note recurring themes.

Respondent Profile

The majority of respondents were women (63%). Nearly 90% of respondents were Caucasian, with 4.5% Hispanic, 3% black, and 3% indicating multiple ethnicities. Nearly 80% were between ages 20 to 45. The majority of respondents (84%) had worked in the broadcast industry for 25 years or fewer. About half had worked in the industry for 10 years or fewer. Just over half of respondents worked for smaller television markets (DMA 51 or higher), with 27% working in the top markets (DMA 1–25), and 18% in mid-markets (DMA 26–50). Overall, responses came from 27 states. Most respondents identified as anchors (44%), but reporters (32%), multimedia journalists (10%), producers (10%), assignment editors (2%), and photographers (2%) also completed the survey. The survey permitted journalists in a variety of positions to take part due to the fluid nature of job changes in the industry.

and the blended roles of TV journalists in small markets, thereby allowing journalists with prior on-air experience to also respond.

Analysis

After data collection, responses to all open-ended questions were analyzed by both researchers. Specifically, the responses were classified, interpreted, and summarized based on common themes. These common themes include how audience members reinforce societal notions of gender through their comments and how journalists' responses to this discourse reinforced or challenged these assumptions.

Results

Results indicate that increased opportunities for viewers to communicate with news organizations via online and social media channels have largely reinforced the status quo in terms of viewers' expectations of gender performances, rather than resulted in changes. In addition, broadcast journalists indicated that they do not tend to challenge viewer commentary that reflects rigid gender expectations. Instead, they suggest that their news stations should provide training and policies so that they know how to address viewer criticism. Each of these themes is explored in depth below.

Viewer Expectations

Nearly 76% of the journalists said they received viewer criticism about their appearance, with a majority receiving negative comments via emails/letters (64%) and Facebook (58%). One in four received criticism via Twitter. Significantly, 89% agreed that social media have increased viewer criticism about their appearance, and 98% believed women broadcasters receive more appearance criticism than men. Broken down by gender, 87.5% of female respondents said they received criticism about their appearance compared to 57% of men. However, nearly all of those men said criticism came rarely, with a few saying they were critiqued monthly. In comparison, half of the women received criticism monthly, with the other women saying criticism happened rarely. Respondents were more closely aligned in other areas, with 91% of men and 87.5% of women agreeing that social media have increased viewer criticism. All of the men and 97% of the women agreed women receive more appearance criticism than men.

Comments from journalists of both genders indicated that they are primarily criticized regarding their clothing, weight, and hair, with some women indicating that viewer comments cross into sexual harassment.

"Can't pull off that dress." Broadcasters shared a range of viewer comments critical of their clothing. For example, a viewer informed a male South Dakota reporter that he should not wear pink shirts "because it sends the wrong message to boys." A Virginia anchor said viewers have called and emailed her to say a certain color of clothing didn't look good, thereby using both passive (email) and direct (phone call) discourse to "correct" how she performs her gender. A Missouri reporter said a viewer posted on the station's Facebook page to criticize a female anchor's dress, with a social network serving as an arena to publicly announce what was proper. Other viewers complained that the dress of a Texas reporter was "not impressive," and a male reporter in California was "the worst dressed on-air journalist in America." A Nevada anchor said a female viewer told her she could not "pull off that dress." In North Dakota, a reporter was told her wardrobe adviser should be fired, and "you and all women on TV should stop wearing anything grey." This comment is interesting in that this viewer suggests that not only this particular broadcaster but *all women on TV* should adhere to certain gender-normative standards.

Other female journalists specifically noted criticism from male viewers. A New York anchor said she was out on assignment when a couple waved her over. The husband proceeded to give her clothing tips, while his wife "nodded enthusiastically during his feedback." In this case, a male viewer not only implied that he had expertise in how a woman on TV should dress, but also that her professional performances will be judged on her clothing. The wife, in positively responding to the feedback, also participated in determining how these journalists should correctly perform their gender. In another response, a Missouri anchor said "you can't win" because viewers frequently criticize women's clothing choices, an indication again that clothing is considered a critical component of femininity and gender performance. Interestingly, one South Dakota female anchor who described middle-aged men complaining about her dresses being "out of style" felt the need to also note, "to be fair, I have received compliments that counter each of those critiques." However, whether the comments are positive or negative, they are problematic in emphasizing her appearance over her journalistic abilities.

"Your hair is ridiculous." Like clothing, hairstyles are another visible indicator of gender performance that broadcast journalists said generate a plethora of critiques. A male reporter in Massachusetts said he has been criticized for having "antique sideburns." After a shoot on a windy day, a Georgia male reporter said a viewer criticized his bangs. One North Dakota broadcaster provided a sampling of emails she received after deciding to grow her hair out. One viewer wrote to praise her hair and said to "keep up the good work." Another viewer wrote, "Thank you SOOOO (sic) much for changing your hairdo tonight!!! You looked so professional and adult-looking." In these cases, viewers insinuated that their perceived correct presentations of gender are strongly tied to professional competence. The same journalist received a more blatant viewer response about appearance being critical to professional worth:

Honey.... (sic) We honestly and truly adore you, but please... (sic) cut your hair. Your hair style is extremely out-dated (sic), and it is distracting from the news stories that you report, as well as from your pretty face.

What is just as striking as the comments is that this broadcaster kept these critical emails, indicating their continued impact on her.

A Minnesota anchor wrote about the viewer comment that asked, "Do you wear a wig? Your hair is ridiculous." A broadcast journalist in Texas has been referred to as "the dumb blonde reporter" and received criticism when viewers did not like her hair color. An Arkansas producer said he tries every day to shield his on-air team from viewer criticism about lipstick colors, outfits, and hair styling. Again, the professional work of these journalists is considered secondary to viewers, due to their "failure" to meet audience members'—and, by extension, society's—standards of gender performance.

Some broadcasters downplayed viewer criticism. A South Dakota anchor said his hair had been described as "too tall, distracting, or plastic looking," but he noted that his female co-workers received more criticism than he did. Another male broadcaster from Wyoming also reported being told he had bad hair, but he said "they were right." A female North Dakota reporter said family members commented if her hair was "a mess." She excused the remarks by saying she had asked for the feedback and the comments followed a breaking-news live shot—when she did not have time for hair and makeup. By downplaying critiques of gender performance, broadcasters inadvertently permit the continuation and the normalization of these comments, however.

"A decent ass for a big girl." When asked for examples of viewer criticism, broadcasters most often provided critiques of their weight. A Minnesota anchor said comments have ranged from "What? You're not pregnant? Oh, you must just be eating well then ... (sic) really well" to "Your (sic) an excellent broadcaster buuuuuuuut (sic), you really would be much prettier if you just lost about 15 pounds. I hope you're not offended." These comments, again, equate broadcasters' appearance with professional worth, suggesting that "prettiness" is more important. Another viewer also believed he/she was "helping" by telling a female Colorado reporter "we care about your health and you have gained a little weight. You should take care of yourself." In these cases, viewers have determined that they know more about how female broadcasters should be performing their gender and expect the broadcasters to appreciate their "help."

Other female broadcast journalists have been told their fingers were fat, their arms were "sausages," and "you look fatter and taller on TV." A California anchor wrote that she has been called a "fat ho" by a viewer, and a Nevada anchor said she has been told she looks "like a skank" and "a good lay." The same anchor was told she had "a decent ass for a big girl." These comments not only critique the journalists' appearance but also reduce the journalists to sexual objects. A Texas anchor said she will never forget an email she received from a viewer saying he/she wouldn't watch her "do another story about losing weight until she loses weight." This comment

suggested that the journalist's credibility and ability to report the news were tied to her weight. An Indiana reporter received a card in the mail telling her to go on a diet, and a Virginia anchor said a female viewer commented, "you are a pretty girl, but your weight is really starting to show." These are additional examples of *women* expecting other women to perform their gender "correctly." Rather than contest the often unrealistic expectations for women in terms of appearance, these comments reinforce them.

Male broadcast journalists are not immune to weight criticism. A Florida male reporter was told he was "too fat," and a California male producer said he has received comments along the lines of "who would listen to this fatty?" In Minnesota, a male anchor said viewers who do not like his tweets, even those with factual reporting, have responded by criticizing his appearance or weight. When these journalists deviate from expectations, they are seen as in need of correction, often in a public forum. However, as the next theme explores, many of the broadcasters indicated they do not challenge prevailing gender assumptions. Rather, they prefer their organizations to provide guidance for how to respond.

Opportunities to Challenge Gender Expectations

The survey asked broadcasters about their personal and professional reactions to viewers to better understand the extent of their autonomy when their gender performance is criticized. Although the majority said they personally ignore the critiques, a number of broadcasters reported being negatively affected. However, from a professional standpoint, few reported challenging viewers over what was said. Rather, an overwhelming majority said they desired guidance from their news organizations on acceptable ways to respond. Nearly 90% said their newsrooms do not have policies for how to respond to viewer comments about appearance. Nearly 90% said they think their newsrooms should have training on how to handle these situations, with 80% agreeing there should be newsroom policies. Below, we examine broadcasters' comments on their personal and professional responses to viewers.

"Brush it off" vs. "cry." Many of the respondents said they ignored viewer critiques, with men more likely to respond this way than women. Some broadcasters dismissed the critiques as invalid, irrational, or irrelevant, and others acknowledged the rise in criticism and bullying inherent in digital commenting culture. A male assignment editor in Kentucky said, "We must have thick skins. Laugh, brush it off," and a male Wyoming broadcaster said he opted to "grin and bear it." A male Minnesota anchor wrote, "We should all know that when we sign up for duty as an anchor, people are going to be critical." Although the journalist is correct that public figures inevitably draw criticism, this statement is also problematic in its passive approach. Female broadcasters offered similar remarks, with a California anchor writing that her response is to "shrug it off" and a Missouri anchor noting the criticism doesn't bother her since "you have to have a thick skin" to work in

broadcast. A Wisconsin reporter's response was "ignore it. F'em." An Ohio broadcaster summed it up this way:

You have to shrug it off or you completely lose your confidence to be on the air ... The fact that social media now allows them to do it instantly, with less accountability, means that more people are more snarky than ever before.

This comment suggests that the rise of digital culture has legitimized anonymous online critiques, and journalists are powerless to counter them. Several broadcasters reported being emotionally affected by negative comments. A female journalist from North Dakota said the criticism can be "deflating" and remembers reading a viewer email criticizing her hair, while she was sitting with her sister who was battling cancer. During her pregnancy, which had early complications, a Minnesota anchor said she cried over weight-related viewer criticism. Similarly, a Texas anchor stopped reading viewer emails, saying she "used to cry a lot" over it. A male Florida reporter said he became bulimic, and a female Minnesota anchor wrote that she has called in sick because she was too depressed to go to work. Despite these serious issues, the majority of respondents reported that they do little or nothing to defend themselves.

"Thank you for watching." Some of the broadcasters surveyed said they respond to viewers critiquing their appearance. A California anchor said she writes back and says, "I'm sorry you don't enjoy my show, but there's lots of good content." If a viewer leaves a comment on Facebook that is factually incorrect, the same anchor said she responds under the station's user name and usually receives an apology. A North Dakota reporter occasionally responds to Facebook messages by asking questions about why the viewer feels that way. A female Tennessee anchor said she has also responded at times to viewers on social media by saying she isn't pregnant or "sorry to hear you hate my dress."

However, the majority of broadcasters in the survey who do respond to viewers said they simply thank them. A male South Dakota anchor wrote, "It is just best to keep responses brief and courteous." A female Nevada anchor said she has used the same response for years: "Thank you for watching XYZ News. I appreciate you taking time to reach out to voice your comments and concerns." A male Ohio anchor said he will "smile and say thanks." By thanking the viewers, however, broadcasters seemingly condone their behavior and perpetuate unrealistic gender expectations.

Discussion and Implications

Twenty years after Engstrom and Ferri's survey, it appears little to no progress has been made in actively addressing or combatting discourse critical of broadcasters' appearance, with social media adding another avenue for viewers to publicly "correct" gender performance and maintain the status quo. Although scholars suggest that narrowly defined beauty standards have for decades contributed to who finds a broadcast journalism job and career longevity (Steiner, 2009), audiences now

also play a role in shaping journalistic routines and expectations for news-making (Heise et al., 2014).

Individual broadcasters reported that they typically do not respond to commenters, although some described the emotional and professional consequences of the negative feedback. In a few cases, journalists said they heeded commenters' suggestions and altered their appearance, suggesting that they may see the sexist nature of these remarks but also recognize the need to seek opportunities within existing patriarchal newsroom structures (Ross, 2004; Steiner, 2009). Many journalists said they want their news organizations to provide training or guidelines for how to respond. Although one could argue that journalists should have agency to respond themselves, there is undoubtedly a chilling effect created by news stories that feature unsympathetic stances from female supervisors and that report on the negative repercussions for journalists who do defend themselves (Foster, 2016; Ponder, 2013).

The rise of social media and the increased accessibility viewers now have to broadcasters should prompt news organizations to consider how to support the mental health and credibility of their employees. The fact that the majority of this study's respondents desire more communication from their news organizations suggests that these critiques have increased in the digital era and that change is needed. With viewers serving as an echo-chamber rather than a challenger of the industry's male-dominated norms, women who challenge "Ken and Barbie journalism" (Van Zoonen, 2002, p. 40) may be ostracized within the professional culture. Although viewers have judged male newscasters as more credible and competent (Brann & Himes, 2010; Weibel et al., 2008), TV depictions also reinforce myths about how women should look and behave (Mitra et al., 2014), suggesting that if TV news stations take an active stand against sexism, in both hiring and viewer comments, their responses could have an impact within the industry and in society more broadly.

Limitations of this research include the number of responses and the primarily white female demographic of respondents. Repeated attempts were made to reach thousands of broadcasters through the RTDNA e-newsletter, social media groups, and state broadcast associations, yet only several dozen responded. Future research would benefit from a larger sample. Additional studies include analyzing viewer posts on news organizations' social media sites, focus groups with viewers, and interviews with station managers. Additionally, interviews and surveys of journalists and viewers could explore the emotional dynamics of their relationship. Specifically, studies should consider the internal variables that predict with what emotion a journalist responds to a negative comment. Similarly, research should examine how the nature of para-social relationships between viewers and journalists affects whether and how they choose to critique them.

This study's results indicate that news organizations can empower journalists and should consider developing policies and training procedures that support them in resisting gender critiques, rather than forcing them to conform to "existing structures of patriarchy" (Ross, 2004, p. 146). While certain appearance guidelines for broadcasters is understandable—such as noting the problems of wearing nude-colored

clothing on camera or that shiny jewelry can create glare—newsrooms should consider whether their policies reinforce patriarchal ideals of beauty that suppress female journalists. Television is a business that relies on viewers; however, ignoring sexist comments or saying “thank you” may continue a vicious cycle that clearly has psychological effects on some employees. News stations could create strategies for addressing sexist social media comments that are not top-down policies but encourage input from employees without fear of retribution. By supporting new routines and expectations, news organizations can perhaps create a working environment in which success is determined by work rather than gender and appearance.

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Diversity on U.S. Public and Commercial TV in Authorial and Executive-Produced Social-Issue Documentaries

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Diversity on U.S. Public and Commercial TV in Authorial and Executive-Produced Social-Issue Documentaries

**Caty Borum Chattoo, Patricia Aufderheide, Kenneth Merrill,
and Modupeola Oyeibolu**

Where are diverse makers and subjects most likely to be found in U.S. TV documentary? This study compares commercial and public TV series, and also anthology formats ("authorial" series) and executive-produced formats. A content analysis for characters and makers showed that public TV authorial series are more diverse than either commercial or other public TV series. Independent documentaries have diversity value both in commercial and public TV settings.

Issues of diversity are one potential measure of the difference between publicly funded and commercial TV in the United States, particularly for documentaries that concern political, cultural and socio-economic relations. Generally, one of the core principles historically driving cultural policy in the United States is the notion that actively supporting diversity supports democratic values and acts (Kidd, 2012). Despite the need for diversity in such programming, publicly available information about public and commercial TV documentaries in relation to diversity is lacking. This study intends to help fill this gap.

People of color and women are underrepresented in American media overall and notably in broadcast and cable programming, even though ratings have been shown to be higher for programs featuring people of color and women (Hunt, Ramon, &

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Color versions of one or more of the figures in the article can be found online at www.tandfonline.com/hbem.

Price, 2014). Thus, continued underrepresentation appears to reflect not an economic bias, but rather systemic, if often unconscious, discrimination. This discrimination is significant; cultivation theorists have shown that the effects of television content can transcend any program, with overarching messages and themes that can infuse an environment of belief about different individuals and events (Morgan, Shanahan, & Signorielli, 2009).

Media production generally underrepresents women and minorities. As of the 2010 U.S. Census, the population in 2015 was projected to be 51% female and 37% non-white (U.S. Department of Commerce, 2015). However, these proportions are not well reflected in surveys of diverse participation and representation in media fields. In 2015, an American Society of News Editors study found consistency over time in low representation of minorities—between 12–14%; women’s participation has stayed steady over a decade at about 36% (ASNE, 2015). An RTDNA/Hofstra study (Papper, 2015) found that, at U.S. TV stations, the workforce is 42% female; women held only 31% of news director positions and the minority workforce was represented at 22%. In filmmaking, a 5-year study by the Directors Guild of America (DGA) found that among first-time film directors, only 18% of available hires went to women, and only 13% of new director hires were minorities (Directors Guild of America, 2015).

The same patterns are found in speaking roles and characters. For cable comedies and dramas in 2011–12, about 37% of the lead actors were female, and 15% were minority (Hunt et al., 2014). A 2014 study of speaking roles for women on prime time broadcast network programs found that about 42% were female, and three-quarters of those were white (Lauzen, 2014). A study of a sampling of prime time network TV programming between 2000 and 2008 found that Whites were overrepresented at 80% of the characters, and that only African Americans were at parity among minorities (Signorielli, 2009); overall, minority participation was declining.

In documentary platform, women have historically played a larger role, although often not matching their presence in the general population. A study of more than 11,000 filmmakers who participated in Sundance Institute events between 2002 and 2012 found that 42% of directors were women and 75% of producers were female (Smith, Pieper, & Choueti, 2014). A 2015 study of female filmmakers (Lauzen, 2015) showcased in 20 film festivals in 2014–15 found more female directors in documentary (29%) than in scripted features (18%). Considering all major roles in making a film, women were only 26% of the production staff; women were most likely to serve in a producer position, however. Proportions of representation and roles in film production for women were consistent over the last 6 years, based on this 2014–2015 study (Lauzen, 2015).

Public TV and Independent Documentary

Diversity is an important part of the claim for U.S. public broadcasting, and documentary—particularly, social-issue documentary—has been key to serving that

claim. Public broadcasting in the United States was created in stages starting in 1938, with a dramatic new commitment of federal tax dollars and incentives in 1967, to be a non-commercial alternative to commercial broadcasting (Aufderheide, 2000; Day, 1995; Debrett, 2010; Engelman, 1996). The Carnegie Commission, the blue-ribbon group that laid the template for the service the law authorized, called for “excellence in the service of diversity” (Debrett, 2010, p. 142). Classic historical arguments about the public interest in public media services, articulated by scholar/public intellectuals such as Blumler (Blumler, 1992) and Raboy (Raboy, 1995, p. 9), emphasize the powerful distinction between consumer and citizen for media services.

Public broadcasting is seen by such analysts and many early leaders, such as Bill Moyers and James Day (Day, 1995), as a mediating element in the public sphere, or the circulation of discourse about public affairs that creates public life (Garnham, 2000; Keane, 1991). As James Carey, among others, noted, media do not merely interpret reality but go far to create the reality we understand (Carey, 1989). Public television is a counterweight in the creation of reality predominantly shaped by interests of advertisers and the powerful, and diversity is key to that action.

The Corporation for Public Broadcasting (CPB), which channels the federal dollars to stations and programs, announces on its Web site that “Digital, Diversity, and Dialogue are the framework for public media’s service to America” and that it was founded “to champion the principles of diversity and excellence of programming, responsiveness to local communities, and service to all” (<http://cpb.org/aboutpb/>). The Public Broadcasting Service (PBS) celebrates its female executive leadership and diversity of anchors (both in terms of gender and race) on its news program, *NewsHour* (Taibi, 2015).

The question of anchoring values for mission is important within public television, especially at a time when many competitors for viewer attention have arisen. American public television, once nearly the only venue for the social-issue documentarian, now finds rivals from HBO, National Geographic, History Channel, A&E, CNN, ESPN, and others, as well as streaming services such as Vimeo, YouTube, Netflix, and Amazon. (Cieply, 2015; Gilbert, 2015; Hamilton, 2015). As a decentralized and majority privately funded service, public television has always been cautious and controversy-averse (Aufderheide, 2000, pp. 85–120; Balas, 2007; Debrett, 2010, pp. 133–157; McChesney, 1999); Padovani & Tracey, 2003; Rowland, 1986). And yet enough legislators value it as a site to inform public discourse, among other things, to consistently allocate (without increasing) funds to the Corporation for Public Broadcasting (McLoughlin & Gurevitz, 2013).

In this environment, diversity could also be a defining difference between public and commercial TV. But public TV has not demonstrated a consistent investment in diversity. A 2013 study found that public TV newsrooms actually lagged behind commercial TV newsrooms generally for female representation (Marcotte, 2013). In 2015, women were twice as likely to be news directors in public TV stations as in commercial ones, but minority news directors’ percentages were the same as in commercial stations—13% (Papper, 2015). Salaries are also skewed. A 2015 study of executive salaries showed that women hold 39% of top executive positions in TV and radio in the top 25 markets, more than double the percentage of women in top

executive positions in the general workforce. But they earned only 83 cents for every dollar their male peers made (Mook, 2016). Only a third of PBS' board of directors were women in 2015, and fewer than a fifth were minorities.

Not all diversity data have been negative. Half of CPB's board, which is politically appointed, was composed of women in 2015, while almost a third of the board were minorities. A study of news reporting in the 2008 U.S. national elections found that public television featured the greatest diversity (Zeldes, Fico, & Diddi, 2012). The Independent Television Service, which co-produces with independent producers, also prioritizes diversity as a selection criterion (ITVS, n.d.).

In U.S. public television, documentaries are a small element in programming, but historically a large element in defining the difference between public and commercial broadcasting, particularly through diversity. Social-issue documentaries—a film genre that addresses the implications of social, political and economic arrangements and conflicts—have always been a distinctive feature of public television. Some of public TV's hallmark programming, including the series on the African-American civil rights movement, *Eyes on the Prize* (PBS, 2016) and the celebrated documentary on African-American young men dreaming of success through basketball fame, *Hoop Dreams* (Hoop Dreams, n.d.), have come from independent producers winning space on public TV for their topics. In a time of rapid change in journalism, social-issue documentaries may play an increasingly important role in exploring contemporary social issues.

The relationship between independent filmmakers making social-issue programs and public broadcasting has inevitably been contentious, since programmers have little incentive or appetite for controversy or even for topics that may seem negative or depressing (Bullert, 1997, pp. 142–144; Debrett, 2010). At the same time, this relationship has also been productive. Sustained pressure on public TV from independent producers, asserting the centrality of diversity in the mandate of public service TV, has been decisive in creating and maintaining space for such work since the 1970s. Public TV documentary series such as *POV* and *Independent Lens* are the result of independent filmmaker pressure on the system. In the last few years, independent filmmaker pressure twice secured good placement for the documentary series *POV* and *Independent Lens* on the major programming service PBS (Das, 2015; Fisher, 2015).

These conflicts have also unveiled the lack of reliable data on diversity, historically linked to public mission. This study addresses this empirical gap.

Hypotheses

In conflicts over programming for public television, independent producers and some programmers have argued that independent, authorial programs serve the mission of public television because of their diversity. To provide one measure of this, we conducted two kinds of content analysis on a contrasting set of television documentary series—"authorial" and "executive-produced." We looked both at the

racial/ethnic and gender characteristics of major characters in the programs and of directors and producers of the programs.

Authorial documentaries are produced by independent documentary producers who are not employed by the distributing broadcast network. These authorial works are then acquired and licensed by the distributing broadcast network to showcase publicly. Final choices about story, characters, and crew (directors and producers) are made entirely by the independent decision-makers (directors and, to a lesser extent, producers), not the distributing broadcast network. In other words, the decisions—and ultimately, the implications for story and diversity of major roles behind the scenes—do not rest with broadcast executives. *Executive-produced* documentaries are produced and created by the professional in-house team employed by the broadcaster, with one executive producer in the ultimate final decision-making role. This categorization of authorial vs. executive-produced social-issue documentaries is an original contribution of this study.

We hypothesized that:

H₁: Authorial formats in public TV would be more diverse than authorial works in commercial TV, because of public TV's historic diversity mandate.

H₂: On public TV, the authorial documentary format would be more likely to be diverse than the executive-produced format, because decisions about content would be made by creative decision-makers who are independent of the broadcast network, and less controlled by the distributing network's executive producer and his/her team.

Method

Overview and Sample

In a content analysis approach, we examined three categories of social-issue documentaries: Public TV authorial, commercial TV authorial and public TV executive-produced. For each, we examined the racial/ethnic and gender proportions of directors, producers and major characters of the programs.

We considered the entire body of films produced in the 2014–2015 season by the two authorial series on public television and two largest authorial series on cable television, as well as three executive-produced public television documentary series with similar content. These series all feature documentaries concerning social issues or social context of expression, rather than, say, nature, arts performance, reality shows, or instructional/how-to. This resulted in a comprehensive body of 165 documentaries that aired either during 2014 or the 2014–2015 TV seasons in the United States.

For commercial TV, we chose *HBO Documentaries* (N = 39) and *CNN Documentaries* (N = 12), the largest such series for social-issue authorial work on commercial cable TV. For public TV, we chose *Independent Lens* (N = 19) and *POV* (N = 27), the only national series featuring social-issue authorial documentary aired during PBS prime time. They are all anthology formats; each film has its own authorial voice.

For comparison of authorial with executive-produced series within public TV, we selected three executive-produced public TV series featuring documentaries—also carried by public TV stations nationally on PBS prime time—for analysis. These series explicitly embrace a brand identity, look and feel for the series, and all work must conform to the branding; this is part of the explicit claim of the series. Its promotional materials depend on the series brand, not the individual program's distinctive voice. While such series give credit to individual makers, employ independent producers to work on these programs, and sometimes even select programs based on pitches by them, they maintain control over the ultimate design and look of the program. We chose two series that feature social issues, *FRONTLINE* (N = 12) and *American Experience* (N = 44), as well as *American Masters* (N = 12), an arts series featuring the social context of performance.

Coding

A single coder, with close supervision by one of the principal investigators, coded the documentaries for the racial/ethnic and gender composition of both makers and characters, using public resources, including reviews, IMDB.com, and series and film Web sites. Additionally, we endeavored to check our work with series producers, successfully in all cases but *HBO Documentaries* and PBS' *American Masters*. Only three errors were reported from the series staff, all of underreporting; these errors were corrected for the final reporting and analysis. Given this approach, which involved the programming source, we did not employ statistical methods (i.e., intercoder reliability) for this component of the work, as it was unnecessary given the direct verification of the data with programming executives. This approach closely parallels the method used in a similar content study that examines race and gender diversity on entertainment TV (Smith, Choueti, & Pieper, 2016).

In asking about racial/ethnic composition, our standard was whether at least one member of the relevant group was a U.S. minority within the federal categories of (with various terminologies) African American, Latino, Asian American, or Native/Pacific Islander. We also included people with Middle Eastern names. Because we were working only with public records, we used as indicators names, photographs and self-identification, e.g., on Web site biographies. For characters, in addition to promotional photos about the programs, we also drew on contextual information in narrative descriptions.

We also coded for presence of racial/ethnic minority, international, and female characters in a major role. A major role was defined as any recurring character who shaped the narrative and/or moved the arc of the action or explanation; this definition resulted in no conflicts of interpretation or difficult decisions. In particular, experts were typically not counted as major characters unless their journey of discovery was the arc of the action. For international characters of color, we included Middle Eastern. In all cases, any maker or character who occurred in two categories, e.g., minority and female, was counted in both.

We contrasted programs that had any diversity, either gender or racial/ethnic, as represented by at least one person, with programs that had none. Thus, this was a simple binary choice. We did not code for amount of diverse participation in any one program. Aside from resource conditions, we decided to take this binary approach because in this kind of documentary production, there are two decision-making roles in the crew: director, and, to a lesser extent, producer. These are the sole and specific “production crew” members that were examined and coded for this study, as these two roles retain power over decisions in terms of story and characters, and thus, diversity decisions. Similarly, the decision to code only for “main character” was similarly meaningful, given that main characters in this kind of documentary drive the story forward, and thus, carry the reflection of gender and racial/ethnic diversity in the story experienced by the viewing audience.

Analysis

We grouped together the two public TV authorial series (*Independent Lens* and *POV*) and the two cable authorial series (*HBO Documentaries* and *CNN Documentaries*), because they are all “authorial” programs. For the executive-produced public TV series (on PBS), we treated them as a unit—“executive produced”—in almost all cases. In a few instances, we examined the two specific programming strands included in this “executive-produced” category (*American Experience*, *FRONTLINE*, *American Masters*) since differences even among these three programs are important for a closer look at public broadcasting as a whole.

We employed the chi-square test of independence to assess significant differences ($p < .05$) between the main categories of documentary distribution in the study (“public TV authorial” compared to “cable TV authorial,” and “public TV authorial” compared to “public TV executive-produced”). We did not include tests larger than 2×2 given sample size limitations.

Results

Across public TV (both authorial and executive-produced categories) and commercial TV, patterns emerge in terms of gender and racial/ethnic diversity among the ranks of creative decision-makers in documentaries (directors and producers) and lead

characters. We present the total diversity findings across the three TV categories and all individual TV series strands in terms of both gender and race/ethnicity in three areas—directors, producers, and lead characters. We find significant differences in several distinct areas: minority directors, female producers, and lead characters coded as “international.” Of the three areas in which significant differences are noted, authorial series in public TV are more likely to be inclusive in terms of diverse representation.

Minority Directors

Comparing the two authorial cable series (distributed on HBO and CNN) and the two public authorial series, *Independent Lens* and *POV*, the two public TV series show a higher representation of minority directors. Public TV authorial programs were significantly more likely to distribute work by non-white directors than commercial TV authorial programming ($\chi^2 = 5.14$, $df = 1$, $p = .023$). Figure 1 illustrates minority directors in the authorial format across all programs. Figure 2 illustrates the comparison between minority directors in authorial public TV and authorial commercial TV.

This pattern does not hold, however, for public TV as a whole. The two authorial public series are twice as likely to have at least one diverse director on each film as on *American Masters*, four times as many as on *American Experience*, and six times as likely as on *FRONTLINE*. Two of the three other public TV series have a record on minorities that is dramatically worse not only than independents’ public TV series but also commercial documentary series. Public TV authorial programs were significantly more likely to distribute work by non-white directors (33%) than public TV executive-produced programming (7%) ($\chi^2 = 12.09$, $df = 1$, $p = .001$).

Figure 1
Minority Directors

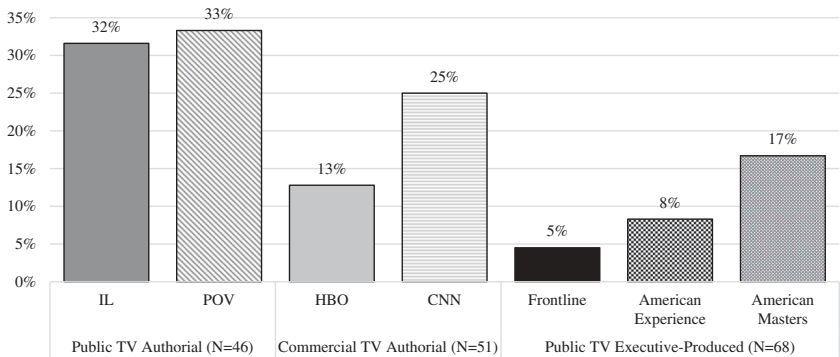
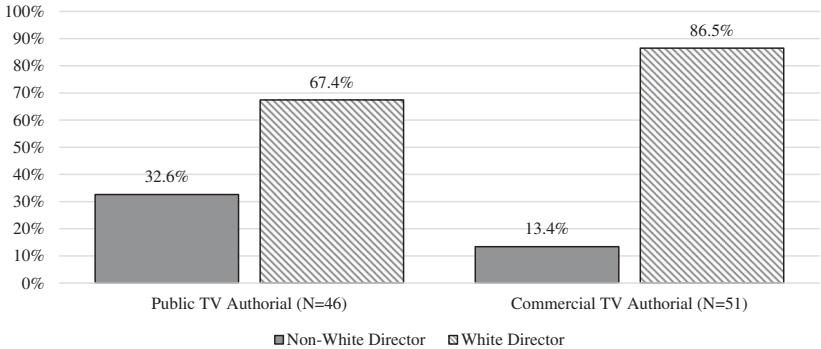


Figure 2
Minority Directors: Public TV Authorial Vs. Commercial TV Authorial



* $p < .05$

Female Directors

The place more likely to showcase work by women directors is an authorial public TV series. For female directors in authorial series, the two public series, at 46%—close to parity with the general population—outpace the commercial (37%). The executive-produced series vary dramatically; two are significantly below even the cable TV series. *FRONTLINE* has only 20% of programs with at least one female director, the lowest of any series, either public or private; in *American Experience*, 67% of programs have at least one female director; and a third of *American Masters* programs do. Figure 3 illustrates the inclusion of female directors across all social-issue documentary categories. However, we did not find a statistically significant difference between public and commercial TV authorial programs; public and commercial authorial programs similarly represented female directors ($\chi^2 = 0.84$, $df = 1$, $p = 0.36$); about 46% of authorial public TV directors were women, while 37% of authorial commercial TV directors were women. In public TV as a whole, authorial public TV formats were not significantly more likely to include work of female directors than executive-produced public TV formats.

Minority Producers

Across all social-issue documentary TV categories examined, the majority of programs have at least one White producer. Figure 4 illustrates the inclusion of non-white producers across all programs. However, in terms of the inclusion of minority producers between public TV authorial (28% minority producers) and

Figure 3
Female Directors

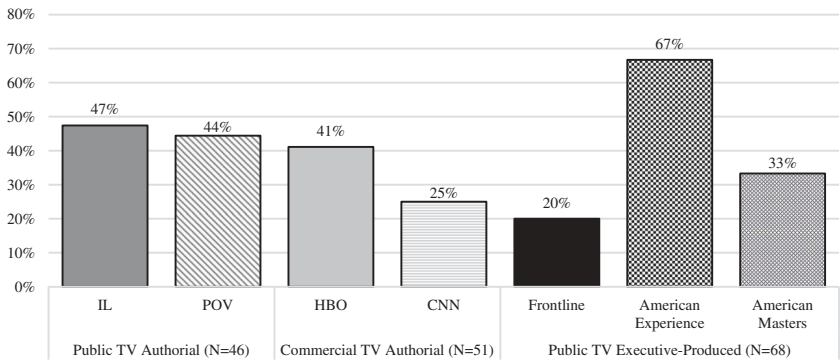
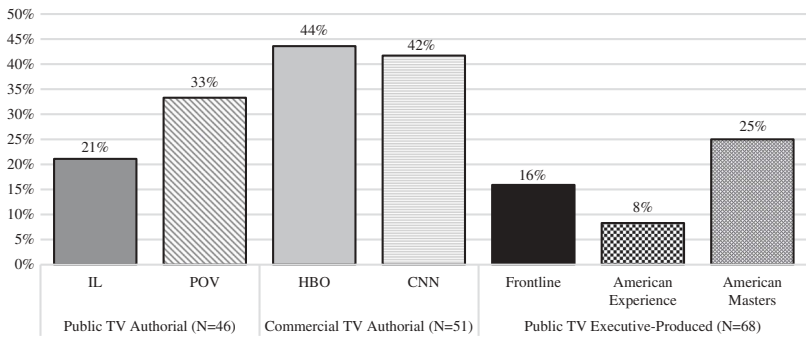


Figure 4
Minority Producers

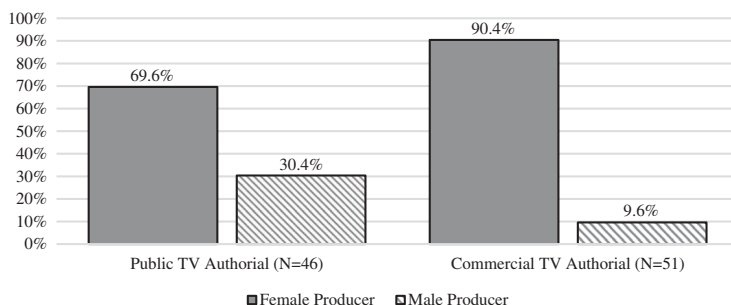


commercial TV authorial (42% minority producers), we did not find a statistically significant difference ($\chi^2 = 2.09$, $df = 1$, $p = 0.15$). Additionally, we did not find meaningful differences in terms of minority producers in public TV authorial (28%) and public TV executive-produced (16%) programming ($\chi^2 = 2.41$, $df = 1$, $p = 0.12$).

Female Producers

Commercial TV authorial programs were significantly more likely to distribute work produced by female producers than public TV authorial programming ($\chi^2 = 6.77$,

Figure 5
Female Producers: Public TV Authorial Vs. Commercial TV Authorial



* $p < .05$

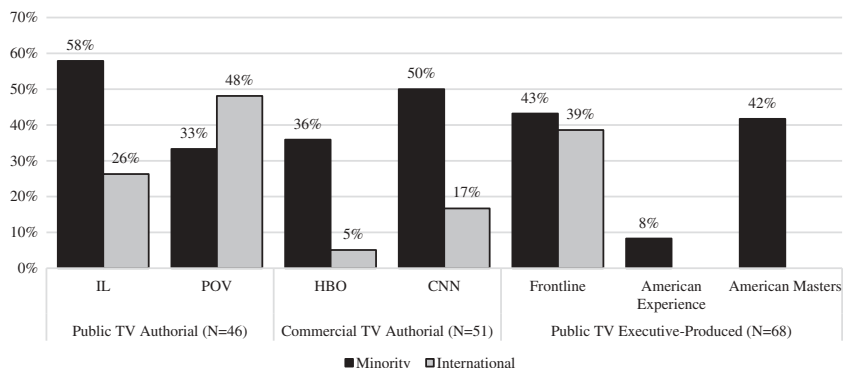
$df = 1$, $p = .009$). Figure 5 illustrates the comparison of female producers in authorial public TV compared to authorial commercial TV. In terms of female producers, there were no significant differences, however, between public TV authorial (70% female producers) and public TV executive-produced programming (74% female producers) ($\chi^2 = 0.21$, $df = 1$, $p = 0.64$).

Minority Lead Characters

Minority lead characters are slightly better represented in public authorial series than in commercial authorial series, but not at a level of statistical significance. Figure 6 showcases minority and international major characters across all programs and formats.

Executive-produced public series vary widely. About 43% of *FRONTLINE* programs feature a leading minority character, and *American Masters*, which showcases famous talent including African Americans Misty Copeland and Quincy Jones, has 42%. But only 8% (or one film) of *American Experience* programming featured a minority major character. We did not find statistically significant differences between public TV authorial (44% minority lead characters) and commercial TV authorial formats (39% minority lead characters) with regard to minority major characters ($\chi^2 = 0.25$, $df = 1$, $p = 0.61$). Similarly, we did not find statistically significant differences between public TV authorial and public TV commercial formats with regard to minority lead characters ($\chi^2 = 0.52$, $df = 1$, $p = 0.47$).

Figure 6
Minority and International Characters



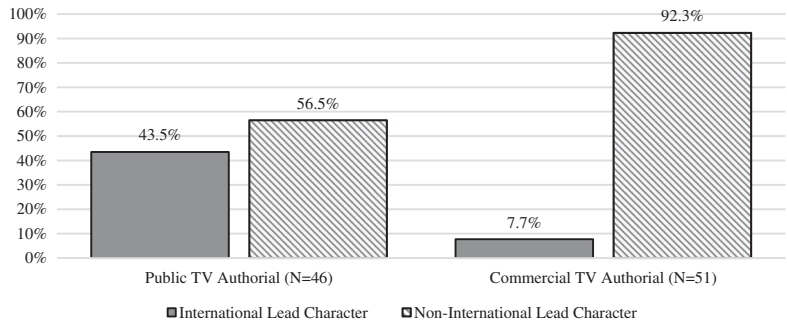
International Characters of Color

HBO and CNN together only featured 8% of programs with a major international character of color. By contrast, 39% of *Independent Lens* and *POV* programs had such a character. Executive-produced public series differed widely. *FRONTLINE* also featured programs with an international character of color, expectably for a public affairs program. *American Masters* did not have any, and *American Experience* had one program, *Last Days in Vietnam*, which featured an international setting but characters who immigrated to the United States and thus were counted as U.S. minorities. Public TV authorial programs were significantly more likely to distribute work featuring international lead characters than commercial TV authorial programming ($\chi^2 = 13.86$, $df = 1$, $p = .0001$). However, we did not find meaningful differences in terms of international lead characters in public TV authorial (44% international lead characters) compared to public TV executive-produced programming (25% international lead characters) ($\chi^2 = 2.58$, $df = 1$, $p = 0.11$) (see Figure 7).

Female Lead Characters

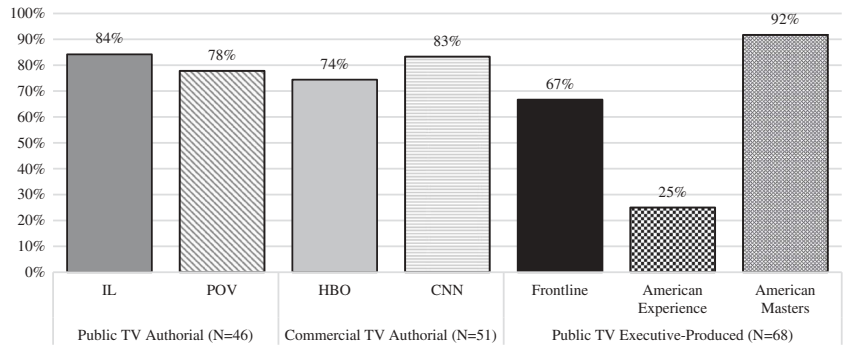
Authorial series on commercial and public TV both showcase many women as major characters, relative to males as lead characters; 80% of public TV authorial programs and 71% of commercial TV authorial programs include women in this way. However, we found no statistically significant differences between commercial or public TV on this issue ($\chi^2 = 1.14$, $df = 1$, $p = 0.29$), or between public TV

Figure 7
International Lead Characters: Public TV Authorial Vs. Commercial TV Authorial



*p < .05

Figure 8
Female Characters



authorial (80% female lead characters) vs. executive-produced programming (65% female lead characters) ($\chi^2 = 3.30$, $df = 1$, $p = 0.07$). Figure 8 illustrates female major characters across all programming formats and titles.

Discussion

In the evolving digital media landscape, with marketplace competition from cable TV and online streaming networks, public TV in the United States maintains its

original mandate to uphold a public interest mission. Such a mission includes showcasing documentary programming that reflects the United States during a period of demographic transition. Featuring diverse storytellers—directors and producers—and telling diverse stories on screen can serve this mission.

In this study, we make an original contribution by articulating and examining two types of social-issues documentaries based on the decision-making power of the storytellers: “authorial” documentaries, or those produced externally and acquired by TV networks, and “executive-produced” documentaries, or those produced largely inside the TV networks. We identified two main creative positions in social-issue documentary production—directors and producers—although they serve distinct roles in the decision-making process. Directors are responsible for the vision, direction, argument, and perspective of the work. Both decision-making authority and recognition come to the director. Producers, on the other hand, serve in a kind of workhorse role in independent documentary production, although the nature of the work is highly varied. Being a producer can include writing a grant proposal, making a partnership connection, arranging the logistics of a shoot, finding the personnel for post-production, directing shoots in the field, or more. Many producers frequently contribute creatively to the project, but the producer executes the vision of the director, and does not necessarily get the recognition or other rewards for the creative vision or the completed work. Women and minorities are often found in this role, which can often relegate them to work without the same level of public recognition for their work, which is relevant to finding new career opportunities in documentary production.

Compared with census data and demographics from other parts of television, both women and minorities in the United States are underrepresented as documentary directors on U.S. TV. Looking at our two main hypotheses, we found varied results in terms of inclusion and representation for both women and racial/ethnic minorities as key creative decision-makers (directors and producers) and as major characters. In terms of our first hypothesis—that is, that authorial formats in public TV would be more diverse than authorial works in commercial TV, because of public TV’s historic diversity mandate—we find some limited evidence. Authorial public TV is significantly more likely to showcase works by non-white minority directors than authorial commercial TV, and is also more likely to include major international characters than authorial commercial TV. However, when compared to commercial authorial TV, authorial public TV is not significantly more likely to showcase works by female directors, or to include major minority lead characters. In fact, commercial authorial TV is more likely than public authorial TV to spotlight work of female producers. This finding, however, may be seen as evidence of the lesser workhorse role. With regard to our second hypothesis—that is, that authorial public TV would be more diverse than executive-produced public TV, given decision-making power with independent producers in the former category—we find that public TV authorial programming is significantly more likely to showcase works by non-white minority directors than executive-produced public TV, offering some validation. No other meaningful differences were revealed in our analysis for this category.

Examining statistically significant differences between social-issue documentary categories alone fails to capture the complete portrait of diversity in social-issue documentary. To delve deeper, we consider a larger aggregate portrait.

Authorial public TV series offer a bigger showcase for both women and minorities than executive-produced programs or cable TV. The public, authorial series *Independent Lens* and *POV* consistently demonstrate greater participation from women and minorities as directors, compared with other series. The focus on "authorial" compared with "executive-produced" is meaningful, as they convey decision-making power in the issues and storytelling ultimately experienced by the viewing audience. In the case of "authorial" documentaries, creative decisions are made by independent producers who are not employed by the distributing broadcaster, and therefore, may be assumed to be free of internal decision-making politics and to be reflective of their communities. In the case of "executive-produced" documentaries, creative decisions are made by executives employed by the distributing broadcaster, not by independent producers reflecting their communities and realities.

Women are overrepresented both in commercial and public TV documentary series as producers, and minorities are overrepresented as producers in commercial series. These are the areas of production that get less credit and have less decision-making authority. No public TV series has as much minority and female participation among producers as do HBO and CNN.

Considering lead characters, public authorial series are more likely to carry programs that showcase at least one minority character than any other category, either cable authorial or executive-produced public TV. They are about as likely as commercial TV to have a program that showcases at least one female character. Public TV is more likely to feature programs with at least one international character of color than cable TV; authorial public TV is most dependably international.

Thus, both public TV and authorial voices matter in increasing diversity, and the two categories together make it much more likely. Both *Independent Lens* and *POV* far outstrip other public TV series and cable TV series in showcasing minority-status directors and characters. Independent voices bring diversity to U.S. TV viewers, both in terms of gender and international and minority-status perspectives. Across all categories of programming, though, creative decision-making roles are dominated by White, male directors and female workhorse producers.

More generally, this study shows the value of independent filmmakers and the programs that showcase them, *Independent Lens* and *POV*, to a service that is partly funded by national, state, and local tax dollars. As well, they validate the claims of the Corporation for Public Broadcasting on its Web site that "Digital, Diversity, and Dialogue are the framework for public media's service to America" and that it was founded "to champion the principles of diversity and excellence of programming, responsiveness to local communities, and service to all" (Corporation for Public Broadcasting, n.d.). This study also demonstrates the fragility of that claim, since neither of the two series have commitments from many of the public TV stations to be carried at feed, nor do they have a commitment from PBS for a stable place in the

prime time lineup. Other public TV documentary series do not demonstrate a commitment to diversity in either makers or characters.

Public TV's authorial series offer both minority and women directors opportunities not as evident elsewhere. This is in great part because the space created and maintained for them on public TV has been so zealously fought for by women and minority producers, funders, and non-profit allies. Such pressure could not have been brought at all upon commercial entities such as HBO and CNN. This was a point that one of the veteran organizers of independent documentary pressure actions, Kartemquin production house co-founder Gordon Quinn, made consistently in the latest round of conflict. "We value public TV," he said in a public hearing, "because when we have something to say, you have to listen—because you're public. You are accountable, because you are taxpayer-funded" (Center for Media & Social Impact, 2015). Thus, the productive tension between independent filmmakers and the public TV system, focused on diversity, generates an important public-sphere effect. But the site for this work is precarious.

In terms of limitations, this study's conclusions are built primarily on one season's data, with some support from a previous, one-season study the year before. They measure only whether at least one female or member of a minority group appeared as a maker or character, with comparisons from a previous, more limited study. Thus, conclusions from this data are limited. One might like to know if inclusion of racial/ethnic minorities as directors or producers makes a difference in showcasing people of color as lead characters and storylines, and which roles are influential. But this study, limited by resources, does not distinguish between different roles of producers, nor does it identify which productions might be more heavily staffed with women or minorities, since it only assesses whether at least one member of the group was included in the category. (We strongly suspect that if the total number of women and minorities were included, the authorial public TV programs would be even more strongly differentiated.) One might also like to know if today's producers are tomorrow's directors, but that would need, at a minimum, longitudinal data. We strongly believe similar studies to this one, providing such comparative data, would be useful. One might want to differentiate between a minority subject who is already famous, such as Misty Copeland, and a minority subject whose story would otherwise be unknown, since it is easier to market a film with celebrities in it, but explicating this level of understanding would require a different study.

Conclusion

Public TV is currently not demonstrating a full, system-wide commitment to diversity. Nor, with recent competition from cable channels and evidence here of significant representation of women and minority producers, and in some cases characters, on cable authorial series, can it claim to be the only venue in which to

see the stories that traditionally have been neglected by commercial television programmers.

The results of this study suggest that U.S. public television, while still a uniquely valuable place for minority and women independent makers and a site for storytelling that otherwise may not reach television publics, has competition from cable, particularly for more established makers and for women. Although commercial television does not feature as many women and minority directors as public authorial TV, it employs more women and minorities in secondary roles do than public authorial series. Although public TV's independent series showcase many more international figures of color than commercial and outdistance commercial TV for stories featuring women and U.S. minorities, commercial TV showcases more such stories than some other leading public TV documentary series.

Public TV has ready material to bolster its claim to diversity. But while *Independent Lens* and *POV* outperform commercial series in giving leadership roles to women and minorities, and showcasing them in speaking roles, public TV does not support them with secure placement on the PBS schedule or with encouragement from PBS to increase station carriage. Nor do other public TV series or PBS repeat the diversity pattern evident in public TV's authorial programs in other documentary series. Without such a claim, commercial TV can offer stiff rivalry for some of those productions. They are most likely to select the ones easiest to promote, which are rarely the diverse, underrepresented voices. At risk, both on cable and on public TV, are first-time filmmakers, voices from the hinterlands, perspectives that lack easy promotion, and diverse issues shielded by conventional wisdom from mainstream media.

Diversity, particularly brought by independent voices, would reinvigorate and integrate into the core of public TV organizations' operations the diversity mandate that played such an important role in its creation and is now kept alive primarily by strenuous grassroots political pressure.

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Producing Milton Friedman's *Free to Choose*: How Libertarian Ideology Became Broadcasting Balance

Caroline Jack

In the first weeks of 1980, Public Broadcasting Service affiliates across the United States aired Free to Choose, a television series featuring the economist Milton Friedman. This article focuses on the production team, which brought Friedman's small-government, market-focused perspective via privatizing the production of public television. Specifically, executive producer Robert Chitester's success in bringing the series to air stemmed from two factors: first, he expressed social imaginaries that helped coordinate funding relationships with underwriters; and second, he drew on his institutional knowledge of public television production to navigate zones of regulatory ambiguity without running afoul of broadcast rules and regulations.

Robert J. Chitester, the general manager of Erie, Pennsylvania public television station WQLN-TV, might have seemed an unlikely figure to be profiled in the February 1980 issue of *Fortune* magazine. The venerable American business magazine made much of how Chitester's "open shirt," "long, curly hair and...impressive mutton-chop sideburns" necessitated warning calls in advance of his meetings with corporate executives (Bernstein, 1980, pp. 108–109). Chitester's personal appearance struck a countercultural note, but the reason for his presence in corporate boardrooms was not to protest corporate power. Rather, Chitester came to ask for corporations' partnership in publicizing the ideas of monetarist economist and libertarian essayist Milton Friedman. The fruit of Chitester's efforts was *Free to Choose*, a 10-part television series featuring Friedman and his ideas.

Light-handed regulation and deference to market forces were central to Friedman's arguments, and remain defining aspects of today's economic and political libertarianism in the United States. The series helped to cement Friedman's status as "the great popularizer of free-market doctrine," and, by some accounts, the most influential economist of the postwar 20th century (Krugman, 2007). Examining the production of *Free to Choose* illuminates how its production team and underwriters

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privatized the production of public television, creating a program that even today commands a strong influence on American libertarian political culture—and all while staying within regulatory and organizational definitions of balance and editorial independence.

With *Free to Choose*, Chitester brought advocacy for libertarian ideology to the public airwaves, successfully leveraging network concerns over political “balance,” and privatizing production funding entirely. Concerns about the corrosive effects of corporate sponsorship on American public broadcasting’s educational and public service missions were at least as old as the Corporation for Public Broadcasting itself (Avery, 2007; Barsamian, 2001; Day, 1995; Ledbetter, 1998; Roman, 1980). *Free to Choose* was entirely sponsored through corporate and foundation underwriting, and the perceived legitimacy of this arrangement hinged on the program being legible as both politically balanced and editorially independent of its sponsors’ interests.

A tension between advocacy and education was a common issue for the producers of “economic education” media, reflecting broader tensions that had long troubled the field of economics (Burgin, 2015; Jack, 2015). As such, this article argues that Chitester coordinated the production of *Free to Choose* by expressing understandings of media and economics that cemented his relationships with underwriters—understandings that framed education and advocacy as one and the same. On the strength of these relationships and his knowledge of institutional rules, Chitester worked within zones of regulatory ambiguity without running afoul of PBS, the FCC, or the U.S. Tax Code.

Public broadcasting in the United States has historically been a site of political struggle. Numerous forces, including political, economic, and technical factors, shape the space a society grants to public broadcasting (McChesney, 1999). By focusing on the funding and organizational factors in the production of a single series, this article emphasizes how critical-historical studies of media production can trace individual events’ and projects’ contributions to what is now recognized as a broader neoliberal turn: toward deregulation, globalization, and individualism premised on visions of self-regulating markets.

Neoliberalism can be understood, paradoxically, as both a necessary analytical term, and a practical impossibility to represent through discrete events (Phelan, 2014). No one event, in other words, can be said to represent a neoliberal turn, yet the term is analytically useful for describing the broad social shifts of recent decades. *Free to Choose* made public television a vessel for a libertarian perspective on economics and politics, and did so while staying within rules and regulations that demanded not only political balance, but also editorial independence from sponsors. This case details how advocates for discourses of individualism and freedom partnered with powerful patrons to bring libertarian ideas to the public. For Friedman and Chitester, the project was a matter of bringing true, effective, and proven ideas to the public; the corporations and philanthropic foundations that sponsored the series joined a tradition of industrial deregulation boosterism that Pickard (2015) traces to the postwar 1940s.

Economists played key roles in advancing market-oriented perspectives during the interwar and postwar periods of the 20th century, as historians have documented (Amadae, 2003; Bernstein, 2004; Burgin, 2015; Rodgers, 2011). However, prior scholarly treatments of economists' use of television for public outreach have turned focus away from some of the details of media production. Take, for example, Burgin's (2013) account of both *Free to Choose* and Keynesian-institutionalist economist John Kenneth Galbraith's rival series *The Age of Uncertainty*. As Burgin observes, "the rediscovery of the market unfolded, in part, as a plebiscite on these dueling representations of the economic world" (p. 195). Burgin argues that the affordances and limitations of the televisual medium, in confluence with the two economists' telegenicity, intellectual style, and comfort on camera, led to decidedly different outcomes for the two programs. Although Burgin acknowledges the institutional and technical complexity of television production as compared to literary production, his account is focused on the two economists—their rhetorical and intellectual predilections—and their ability to connect to audiences.

This article concentrates on the figures and structures that remain secondary to celebrity economists in Burgin's account of *Free to Choose*: the producers and sponsors of the program, and the organizational and cultural contexts within which public television programming is produced. In doing so, the emphasis is on how expressions of public intellectualism must contend with the "shape and dynamics" of media institutions (Park, 2006, p. 120).

The Milton Friedman papers, stored at the Hoover Institute at Stanford University, are the main set of primary historical sources; within this collection, the records related to the funding, production, and distribution of the *Free to Choose* TV series, companion book, and video box set were examined and analyzed. The analysis also drew from contemporary press accounts and, in one case, a background interview. This research is part of a wider project on the production and funding of "economic education" media and, as such, it sought documentation of the process of creation, funding, and distribution for the series.

Accordingly, this article places *Free to Choose* in context as part of the "economic education" genre. Especially in the latter half of the 20th century, corporations and corporate-funded philanthropic organizations bankrolled the production of "economic education" media that slipped easily across the ambiguous boundaries of public relations, public service, and, in some critics' views, propaganda (Fones-Wolf, 1994; Moreton, 2010; Phillips-Fein, 2009; Waterhouse, 2014). Economic education's prominence waxed and waned over the course of the post-New Deal 20th century, reaching particular saturation in the 1950s and re-emerging in the 1970s (Fones-Wolf, 1994). Chitester sometimes referred to *Free to Choose* as an economic education project, but more importantly, mobilized his stated faith in Friedman's ideas as a means to resolve the inherent tensions of economic education media. Under Chitester's leadership, the *Free to Choose* project produced content on par with major metropolitan PBS affiliates, without accepting any direct subsidies from the Corporation for Public Broadcasting. Chitester possessed the requisite institutional knowledge to shepherd donor corporations through PBS's sponsorship rules. In

this account of *Free to Choose*, Chitester is a figure of consequence, not merely a small-town station manager whose biggest achievement up to that point had been helming a nature series about fish (*From Guppies to Groupers*), as described by Burgin (2013, p. 208).

Libertarianism as “Balance” in Public Broadcasting

Libertarian Freedom and Institutional Politics

Chitester's self-image was that of an individualist above all else. Largely uninterested in economics in the early 1970s, Chitester came to find that Friedman's libertarian vision comported with his own emphasis on social and political individualism. As Chitester told it, reading Friedman's *Capitalism and Freedom* revealed that “a free market is just another manifestation of a free society”; the book inspired in the television executive a “faith in the market” that was “absolute” (Bernstein, 1980, p. 109). Friedman's argument in *Capitalism and Freedom*—that markets, not governments, were best suited to coordinate the economy, therefore every individual should have maximal latitude for individual action—was a shift from the understandings of individual liberty espoused by many industrial free-enterprise adherents during the postwar period. By these earlier understandings, freedom was socially embedded in an interconnected web of social relations and obligations (Rodgers, 2011). The libertarian understanding of freedom Friedman endorsed, conversely, held that social relations would be priced into market transactions, and thus the best course of action was to permit market forces to function without impedance. PBS's tax-supported funding structure was out of line with libertarian philosophies, and Chitester's ambition was to serve his vision of the public interest by showing that public television programs could be made without public funding.

“Balance”: Public Television and Corporate Underwriting for *Free to Choose*

Chitester's initial contact with Friedman was prompted by *The Age of Uncertainty*, a series on the history of economic ideas featuring John Kenneth Galbraith. Although Chitester chafed at the airtime given to views he saw as incorrect, he seized the opportunity to propose a counterpoint series from a libertarian perspective. This series would not claim to be, itself, a balanced presentation of economic views—rather, Chitester would pitch the series as a counterbalance to *The Age of Uncertainty*. In May of 1977, weeks before *The Age of Uncertainty* debuted in the United States, Chitester observed that executives at the Public Broadcasting Corporation were bracing for controversy (Chitester, 1977a). Galbraith's coverage of a broad range of economic ideas was likely to enflame conservative opinion and

generate attention to PBS's founding mandate for objectivity and balance (Burgin, 2013; Ellison, 1977). Efforts, it was rumored, were underway at PBS to moderate the anticipated response through "rebuttals by opposing scholars" (Ellison, 1977, p. 1). Chitester, already months into planning for *Free to Choose*, was well placed to seize the opportunity.

Economic and Media Imaginaries

Chitester's characterizations of economic knowledge and media dynamics helped him raise funding for *Free to Choose* in the name of education, objectivity, and balance. Chitester worked around the tensions between advocacy and education that had typified "economic education" media projects from the midcentury period onward, by framing Friedman's ideas as representative of the field of economics itself. In doing so, Chitester effectively characterized Friedman's political and intellectual positions as objective, scientific, and beyond dispute. Further, Chitester's appeals to sponsors framed Friedman as a relatable figure whose personal appeal would make audience members more likely to adopt Friedman's ideas. Such claims about economic knowledge and media dynamics can be considered expressions of social imaginaries.

A *social imaginary*, in the words of philosopher Charles Taylor, encompasses "the ways in which people imagine their social existence, how they fit together with others, how things go on between them and their fellows, the expectations that are normally met, and the deeper normative visions and images that underlie these expectations" (2002, p. 105). Social imaginaries are crucial to sensemaking within the social world; they may be stated, but are more often gestured to as the things that everyone knows. Social imaginaries are shared by groups of people as common understandings that need not be tested, yet help to coordinate common practices and bestow them with a broadly recognized sense of legitimacy. Focusing on social imaginaries is not only a way of acknowledging that people tend to rely on sets of shared, assumed, and taken-for-granted knowledge; it is also a way of digging into how particular sets of such knowledge influence sensemaking and action. Approaching Chitester's correspondence with underwriters in terms of social imaginaries highlights the vernacular knowledge that Chitester drew upon as he coordinated the production of the series.

Advocacy and Education: An Economic Imaginary of Indisputability

Promotional and fundraising materials for *Free to Choose* framed Friedman's intellectual positions and political views as constitutive of the field of economics. In a sense, these materials adopted an economic imaginary that was, from within its own perspective, beyond dispute. This framing of Friedman's views as ground truth permitted Chitester to describe advocacy for Friedman's ideas as a form of education.

For example, a project proposal for *Free to Choose* echoed, perhaps unwittingly, earlier decades' advocates for economic education by framing the series as answering a social need in a time of crisis. It pitched the prospective series as an opportunity to foster public values that would protect freedoms of thought, religion, and speech ("Proposal", n.d.). In this formulation, government bureaucracy loomed as a danger to liberty and prosperity. The proposal opened with data from a 1976 *Industry Week* poll reporting that, although 91% of those polled opposed government ownership or management of business and 60% supported making sacrifices "to preserve free enterprise," 75% of those polled approved of increased regulation of commerce ("Proposal", n.d., p. 2).

From a non-libertarian perspective closer to, for example, Galbraith's school of economic thought, the *Industry Week* findings scarcely registered as cause for alarm. They reflected a public sentiment close to the views of moderate economists: that government should regulate, but not directly own or manage, businesses. Some areas could be carved out for relatively unregulated interplay of market forces, but other areas, where market failure or market corrections might harm the public good, could be more tightly regulated. In essence, the poll numbers suggested that public understandings of the national economic situation reflected the prevailing viewpoint among economists and policymakers. From a libertarian perspective, however, the poll findings suggested a pervasive misunderstanding of the discipline of economics.

The *Free to Choose* pitch suggested that public interest and private interest were not opposites, but one and the same. Accordingly, the pitch interpreted the poll results as evidence that the public misunderstood economics. Citing the success of personality-driven documentaries "of an 'educational flavor,'" such as Sir Kenneth Clark's *Civilization* and Jacob Bronowski's *Ascent of Man*, the pitch called for a television series "advocating" for private enterprise ("Proposal", n.d., p. 2). By doing so, the pitch subtly identified advocacy for libertarian perspectives as an educational project.

The pitch implied that prior industry-funded efforts at economic education must have been unsuccessful, since the prevailing trend was toward "expanded government involvement" ("Proposal", n.d., p. 2). Interest in market-centered ideas was growing, by the proposal's telling, yet there had not been "a definitive or compelling radio or television program or series advocating its merits" that could reach and persuade a broad swathe of the population to adopt such a perspective ("Proposal", n.d., p. 2). Television, the proposal suggested, could make the crucial difference in changing the American public's attitudes.

Milton Friedman Talks about Life: An Audience Imaginary of Parasocial Connection

"Parasocial interaction" refers to the interpersonal pseudo-relationships that, it is theorized, audience members form with media figures (Horton & Wohl, 1956).

Subsequent communication research has conceptualized that parasocial pseudo-relationship formation can strengthen attitudes and behaviors consistent with a media narrative (Moyer-Gusé, 2008). The notion that a personal connection between Friedman and the audience would heighten the program's persuasive power was a central aspect of the behind-the-scenes appeal to sponsors. Friedman could be both message and messenger: his viewpoints were compatible with corporations' policy ambitions, and his persona seemed to offer both emotional resonance and the appearance of scholarly impartiality. The economist's potential to engage and persuade audience members was as much of an asset, in short, as his intellectual and political positions. In planning documents and underwriter correspondence, Chitester highlighted Friedman's intellect, authenticity, wit, and geniality as crucial to the series' audience appeal. Sponsors, however, seemed especially interested in Friedman's symbolic relevance to the audience as an avatar of editorial independence.

As Chitester approached prospective donors for funding support, he emphasized how Friedman would be a palatable spokesperson for perspectives friendly to private enterprise. As *Free to Choose* producer Michael Latham later commented, "[t]he problem was that a housewife in Iowa isn't going to sit down and listen to Milton Friedman tell her about Adam Smith...but she will listen to Milton Friedman tell her about life and occasionally mention a guy named Adam Smith" (Rout, 1979, p. 32). Friedman's persona could make him relatable—a representative of the common man, in contrast to the intellectual distance Galbraith had displayed (to poor response) in *The Age of Uncertainty* (Burgin, 2013).

Chitester framed Friedman's ability to connect with the audience as a crucial asset. For example, Chitester assured one prospective corporate underwriter that he and Friedman would "use TV effectively" to "change the direction of political thought in the U.S." by forging a strong bond in the public consciousness between personal freedom, political freedom, and private enterprise (Chitester, 1977c). Friedman's personal presence was essential to this goal. Calling the economist "fascinating" and "delightful," Chitester argued that Friedman's "enthusiasm, curiosity and clear thinking" would be readily discernable to TV viewers. The economist's warm, engaging presence, Chitester argued, would create "a susceptibility to his ideas" amongst members of the viewing public (Chitester, 1977c). In short, Chitester mobilized economic and media imaginaries that framed Friedman as a bright, persuasive speaker with both intellectual firepower and audience appeal.

Corporate Underwriting

Chitester's sponsors were constrained: both by Federal laws and regulations, and by PBS's rules for underwriting. To enjoy the financial blessings of corporate underwriting, programs intended for PBS's airwaves had to remain within PBS's rules designed to limit corporate influence. Further, underwriting relationships had to be carried out in such a way that donations retained tax exemption under Federal law.

As this case demonstrates, the bright-line rules of the state and the broadcasting system left open zones of ambiguity.

The Rules—and the Spaces in Between

To get *Free to Choose* on PBS's airwaves, the producers and sponsors had to contend with a series of rules that codified what counted as editorial independence, political balance, or, conversely, undue sponsor influence over the content of programming. The argument here is not that Chitester and the sponsors of *Free to Choose* wantonly broke the rules, but precisely that they were able to make a politically valenced, business-friendly production *without* breaking the rules or regulations. What this indicates, then, is that prevailing definitions of objectivity, balance, and independence can serve as pathways for fostering political and economic ideas and viewpoints within a culture. That which the regulations and rules do not define as biased, unduly influenced, or politically leading becomes defined, *de facto*, as within the bounds of neutrality, objectivity, and balance. Ideals of neutrality, objectivity, and balance may be just that—ideals, which are difficult to bring about—amid the complexity of real events. From this perspective, the production of *Free to Choose* illustrates the contingent and constructed nature of such ideals, and the ways bright-line rules fail to account for the complexity of culture.

The tax code and Federal Communications Commission (FCC) rules barred outright political messaging, but this left generous room for producers and underwriters to advance ideas with political implications. The United States Internal Revenue Code limited the activities for which corporate-sponsored foundations could make tax-exempt donations. The tax code set forth that underwriting grant funds could not be used “to carry on propaganda or otherwise attempt to influence legislation” (“Smith Richardson Foundation Memorandum,” 1978). Underwriters who attempted to influence legislation by mobilizing public opinion would be unable to claim tax exemption for their donations. Further, any attempt to exert similar influence over legislators, other than communicating to them the results of nonpartisan research or analysis would, similarly, be disqualified from accepting tax-exempt underwriting donations. Even the underwriting acknowledgements were subject to regulation: FCC rules dictated that these acknowledgements could not directly promote the underwriting company's goods or services in the course of acknowledging the underwriter's donation (Cotlar, 2006). Outside of these bright-line rules about direct endorsement of legislation or products, however, the tax code had little to say, leaving a broad gray area in which underwriters could work.

PBS had rules in place to address such concerns. PBS's own production standards precluded even the impression of program sponsors exerting direct editorial control over programming. A 1976 PBS rulebook, for example, forbade programs that appeared to serve the interests of an underwriter's industry; yet, enforcement of the rules was inconsistent and often served to shut down counterpoints to the corporate agenda (Ledbetter, 1998). Subsequent research found that, a decade and a half after

the production of *Free to Choose*, corporate influence over PBS programming was palpable, if indirect: program development often hinged upon whether a program was perceived as fundable, and producers tended to learn what funding organizations wanted to see (Hoynes, 1994). As such, production teams were under some pressure to demonstrate a plausible level of non-partisan positioning and independence from any given donor, if only to avoid bad press. Indeed, the production team on *Free to Choose* deliberately sought out small donors and strove to avoid the impression of being apologists for any one company or industry (Burgin, 2013).

Producers also had to adopt a strategically broad approach to subjects with political implications. The logic that emerged from this balancing act was a performance of neutrality through careful elision. Endorsing (or attacking) a specific piece of legislation would not be tax-exempt, but communicating a wide-ranging worldview would be very difficult to regulate against. Even though PBS's enforcement of its rules was spotty at best, sponsors and producers had a clear incentive to align with the (rather problematic) visions of objectivity and neutrality set forth by rules and regulations: controversy over a sponsored PBS program had the potential to bring the tax-exempt status of a sponsorship gift into question.

The "Rules of the Game"

Chitester carefully tended to underwriting relationships—relationships that were even more important because he did not receive production funding for *Free to Choose* from PBS's funding body, the Corporation for Public Broadcasting. Producing the Friedman project without funding from the CPB was ideologically consistent, but demanded more work from Chitester in securing external funding. As Chitester told it, PBS waived its usual guidelines limiting the number of underwriters to seven, permitting him to engage 15 corporate or foundation underwriters (Chitester, 1977b). By January 1978, Chitester had secured \$2.1 million in funding from companies and foundations including the Fred C. Koch Foundation, Getty Oil, the Bechtel Foundation, General Motors, Pepsico, the FMC Foundation, Firestone, the Lilly Endowment, the Sarah Scaife Foundation, the Reader's Digest Association, the General Mills Foundation, L.E. Phillips Charities, Inc., the John M. Olin Foundation, and Hallmark Cards ("Friedman Television Project Progress Report," 1978a; Koch, 1977). Examining correspondence between Chitester and his corporate underwriters helps to illuminate how the process of underwriting and questions of influence played out.

Sponsorship of media content is not necessarily complete agreement: it comes closer to a gamble on producers' imperatives aligning with an acceptable proportion of the sponsors' desired positions or perspectives. The likelihood of this outcome hinges, itself, on the underwriters being able to signal their preferences and perspectives without going so far as to explicitly demand their inclusion in a production. Sponsorship can also be an investment in an ongoing funding relationship: producers of underwritten programs can return to the same underwriters for funding across

multiple projects. Neither party needs to explicitly state the alignment of their interests, yet interests can be closely aligned. Still, it would be a mistake to assume, in the case of *Free to Choose*, that corporate underwriters simply expected the program to include whatever content might help corporate bottom lines.

Written feedback to Chitester illustrates the range and nuance of underwriters' thinking on a project designed to enhance the viewing public's economic literacy. Production records suggest that underwriters expected to have their feedback heard by the production team, but also that underwriters, in some cases, differed with Chitester and Friedman on what a balanced, persuasive program looked like. Upon seeing a preview reel of Friedman delivering a lecture, executives from the chemical manufacturer W. R. Grace and Company sent Chitester copies of memos discussing the preview. One Grace executive opined that the preview lacked the appearance of editorial balance; another expressed concern that a one-sided argument would not land well with the viewing public. This executive cautioned that a strong focus on market forces such as competition risked neglecting the "possible beneficial effects of regulation to the consumer," such as protection from fraud and injury (O'Connell, 1978, p. 1). Unless the program acknowledged these benefits, the Grace executive warned, it risked being dismissed as a mouthpiece for industry; focusing on a sector such as air travel, where recent deregulation had lowered fare prices, might be a wiser approach.

A third Grace executive described the preview reel as "a one-sided polemic" against regulation, calling instead for a more sophisticated and, from his perspective, more believable discussion of how deregulation could lead to prosperity at the local and national levels. This, he suggested, would be more persuasive than a "simplistic morality play" (McQuade, 1978). In short, the three executives' comments suggested that underwriters expected programming to be persuasive, but without resorting to what might be seen as cheap shots or extreme positions.

Chitester's response signaled the boundaries of editorial independence and sponsor influence. In a telex to Grace, Chitester confirmed receipt of the executives' feedback, but declined to directly respond to their points since PBS rules barred underwriters from making "content or editorial decisions related to any PBS series" (Chitester, 1978a). Chitester assured the Grace executives that he would give their feedback a hearing, but any changes would be under the sole discretion of himself and Friedman. Further, Chitester refunded Grace's 50 thousand dollar underwriting donation, with the proviso that he would welcome a reinstatement of the grant, if the W. R. Grace Company continued to support the project, given Chitester and Friedman's sole editorial control over it (Chitester, 1978a). The response from Grace, two days later, was brief: in just a few lines, it explained that Grace was returning the check and reinstating the donation, adding, "We now know better the rules of the game." (Navarro, 1978).

On that same day, Chitester reiterated his position in a progress report to underwriters. An invitation to join himself and Friedman for a meal and conversation during shooting was accompanied by the caveat that underwriters' "input" was "welcome," but "under PBS underwriting regulations, editorial control of content

lies exclusively with Dr. Friedman and myself" (Chitester, 1978b). Regardless of whether Chitester or Friedman did in fact consider or incorporate underwriters' input, his position created a zone of ambiguity: "welcoming" feedback may have simply been a matter of professional courtesy and relationship management, but it also left the possibility open that such feedback had a chance of affecting the details of the production.

The Grace executive's mention of the "rules of the game" points to the delicate work required to maintain underwriting relationships while comporting with rules regarding editorial independence. The structural ambiguities of sponsoring relationships leave much room for people with ideas and people with money to come together, when their interests align. Producers can present prospective underwriters with a pitch for a series, in hopes that the potential donor will see enough broad agreement, or approve sufficiently of the general thrust of a program, to take a chance on how the details of the program might shake out. Underwriters are free to provide feedback; producers are under no obligation to act upon that feedback. However, relationships between producers and underwriters are not necessarily one-time pacts; producers' projects must meet with some level of sponsor satisfaction, if the underwriting relationship is to continue onto future projects. Honoring an underwriter's suggestions—or, at least, welcoming feedback—is a means for producers to increase the likelihood of underwriting agreements for subsequent projects. As long as these practices do not trigger enforcement of underwriting rules and regulations, they can be framed as balance, independence, and objectivity.

Production, Marketing, and Distribution

By January 1978, the form of the series had crystallized, and key funding and personnel were in place. Shooting in locations across the United States took place in the spring and summer of 1978, and in the autumn of that year the project embarked on international shooting in Hong Kong, China, Japan, Greece, India, Germany, and the United Kingdom. The series would air in 10 parts. Each part would begin with a half-hour "documentary" section in the globe-trotting style pioneered by BBC long-form documentaries—and end with half an hour of discussion and debate between Friedman and other academics, politicians, and labor leaders—filmed in the atrium of a University of Chicago library. The "documentary" films would then be released for classroom and other educational use, with an expected lifetime of at least 10 years. The 10-episode series spanned topics that linked Friedman's economic and political ideas to current events and concerns.

The "documentaries" took a topical approach, each exploring facets of Friedman's economic theories and political ideology. The first episode, *The Power of the Market*, explained Friedman's general position: that America would only prosper if it could rediscover its heritage of "individual initiative plus limited government" ("T.V. Topics," n.d., p. 1). Subsequent episodes covered topics from the American past and present through this lens. Two episodes

covered U.S. economic history through an anti-institutionalist lens. They credited corporate leadership—rather than government intervention or labor union protections, as the cause of workers' growing prosperity in the 19th century—and suggested that the Great Depression was caused by Federal mismanagement of money. Similarly, the episode on education argued for school choice via a voucher system in place of efforts to equalize the quality of public education across income divides. Other episodes took aim at New Deal welfare reforms, government jobs programs, and consumer protection regulations. Despite their benevolent intentions, Friedman argued, these interventions ended up harming the public, enacting "hidden taxes," spurring inflation, and benefiting the middle class at the expense of rich and poor alike. As these examples illustrate, Friedman's views encompassed much of what have come to be core tenets of American libertarian thought.

Imaginaries in the Promotion of *Free to Choose*

Promotion strategies for *Free to Choose* drew, as the production strategy had, on an economic imaginary of indisputability and a media imaginary of parasocial persuasion. Nobel laureate Friedman's scholarly prestige and his "simple, direct and practical" style of explaining economic concepts were major points of promotion (Chitester, Landou, Moynahan, & Wright, 1978, p. 5). Promotional plans cast the series as "a living course in economics" that considered everyday practices, again playing up how applying ideas from economics to everyday life would increase the program's relevance for the common viewer (Chitester et al., 1978, p. 5). The series would convey the idea that "economic freedom and personal and political freedom" were dependent upon one another (Chitester et al., 1978, p. 5). The framing of economic and political liberties as mutually dependent was a common political trope in economic education materials from the 1940s onward (Fones-Wolf, 1994). Promotional materials played up Friedman's academic detachment, describing the series as "totally objective in its viewpoints," with Friedman in the role of critiquing "powerful groups in our society" through the application of "the disciplines of free markets" (Chitester et al., 1978, p. 5). In laying out these points, promotional strategies for *Free to Choose* acknowledged the series' advocacy of free-market positions, while also presenting such advocacy as objective and educational in nature. This was a different strategy than that of earlier decades' conservative media activists, who rejected ideals of media objectivity as smokescreens for liberal bias (Hemmer, 2016).

Underwriters, too, were interested in Friedman's academic reputation—not so much for the rigor of his theoretical arguments, as for the economist's capacity to signal objectivity to members of the television audience. In this regard, sponsors had to carefully manage impressions of Friedman's compatibility with corporate interests. As a letter from one corporate chairman noted in a postscript, members of the company had to carefully protect Friedman's "academic detachment and credibility"

from the implication that the economist was in the company's pocket. Rather, the chairman argued, members of the company should think of Friedman as a "great academic master" from whom the company could "invite" the public to learn (Kriebel, 1979).

Friedman's academic credibility was valuable, especially because it could move ideas that comported with sponsors' ideological positions—and, often, their financial interests—into the public discourse. Still, it's important to note that in this historical moment, Friedman presented his market-oriented understanding of freedom as laying beyond the left-right continuum of American politics, and some philanthropic foundations took a similar approach. For example, *Wall Street Journal* coverage of the newly founded MacArthur Foundation asserted a growing sense of concern across the political spectrum that "central government has grown too powerful" and that philanthropists were looking to fund efforts for "government efficiency and 'personal freedom'" (Klein, 1979, p. 40). The market, in other words, provided a focus that seemed to transcend the old divisions of left and right, while remaining uniquely American. Chitester himself drew on such discourses to a prospective underwriter at GMC, when he cast the series as "a reawakening of 'American values'" such as "individual responsibility" and "economic freedom" (Chitester, 1979).

Responses to *Free to Choose*

The series' debut met with a measure of approval. For example, a 1980 *New York Times* review of the *Free to Choose* companion book (authored by the economist and his wife, Rose, an economist herself), framed the Friedmans' anti-regulation stance as something newly palatable to the public. In decades past, the reviewer contemplated, such libertarianism "might have been greeted by the public with all the seriousness reserved for a pamphlet picked up at Knott's Berry Farm" (Lehmann-Haupt, 1980, p. C14). What, then, had changed since the 1960s to facilitate public acceptance of the Friedmans' position? The *Times* reviewer gestured to the "altered psychology" of a public buffeted by taxation, inflation, renewed Cold War tension, and an "ideological drift" since Watergate and the end of the Vietnam War (Lehmann-Haupt, 1980). In fact, these factors may have been influential, but they also dovetailed neatly with the emergence of a variety of conservative constituencies in the 1970s, from Sun Belt entrepreneurs to Orange County conservatives (McGirr, 2015; Moreton, 2010). Indeed, the *Times* reviewer took the Friedmans' perspective to be a broadly supported turn in the public economic consciousness (Lehmann-Haupt, 1980).

Independent media coverage was less enthusiastic. Critiques of *Free to Choose* condemned the corporate colonization of public media spaces. The National Citizens Committee for Broadcasting (NCCB), a reform group led by former FCC Chairman Nicholas Johnson and affiliated with consumer rights activist Ralph Nader, used its magazine *Access* to criticize *Free to Choose* (Brobeck & Mayer, 2015).

Despite the mixed reception it received at the moment of its release, *Free to Choose* endured throughout the 1980s and 1990s. The series was updated and rebroadcast on CNBC in 1990 with new commentary; in 2003, the Dallas Federal Reserve Bank sponsored a conference on the legacy of *Free to Choose* and its implications for the 21st century (PR Newswire, 2003). Over the course of the 1990s, American public broadcasting welcomed increasing levels of corporate sponsorship in light of dwindling Federal subsidies. The case of *Free to Choose* shows, however, that the logics of privatizing the production of public television were in place long before PBS's commercial turn in the 1990s.

Conclusion

Examining the production of *Free to Choose* reveals a paradox of making libertarian content for public television: this privately funded series proposed a vision of unfettered freedom in economic and political life. Yet in order to make the series, Chitester had to be especially mindful of and find ways to leverage regulations governing the tax deductibility of underwriting as well as PBS's rules about balance and editorial independence. At stake was the program's eligibility to air on PBS stations, and the perceived legitimacy of its message as something more than a mere mouthpiece for corporations and the wealthy. This case suggests another paradox: narrow and clearly defined rules and regulations leave wide zones of ambiguity that can foster the dissemination and legitimization of ideological content in putatively "balanced" public media spaces.

Although Chitester is a central figure in this article, this study does not argue that the success of *Free to Choose* or the popularization of libertarianism (and, by extension, the neoliberal turn itself) rest solely on Chitester's shoulders. Rather, the case demonstrates how the dynamics and conditions of media institutions intermix with other causal factors. Personal ambition and ideology, industrial imperatives to create a friendly operating environment, and corporate strategies for minimizing tax burdens (to name a few) shaped how the series conveyed libertarian visions of markets, individualism, and freedom to popular audiences.

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The Many Sides of QUBE: Interactive Television and Innovation in Electronic Media, 1977–1983

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The Many Sides of QUBE: Interactive Television and Innovation in Electronic Media, 1977–1983

Noah Arceneaux

QUBE was an interactive cable television system that attracted significant attention when it launched in 1977. The service has been deemed a commercial failure, though many of its ideas foreshadowed current television practices. There is however no detailed study of QUBE, and previous scholarship provides limited information. Using Moran's concept of an "evolution-revolution," this study analyzes the content offerings of QUBE to reveal how they were similar, and how they differed, from prior practice. This historical inquiry fills a gap in the historical record, while also exploring the complex nature of innovation in the world of electronic media.

Observations about new technology can be divided, broadly speaking, into those that stress continuity with the past and those that emphasize change. Proponents of an emerging technology typically stress its new aspects, often touting exaggerated benefits. Critics meanwhile may emphasize that the alleged innovation is simply a new way to do something we've already been doing. In describing the history of human communications, Moran (2010) used the term "evolution-revolution" to encompass both ends of this spectrum. Moran's conceptual framework suggests that many phenomena we typically categorize as dramatic innovations in media, such as the printing press or radio, were derived from prior practices. Each form of media technology has distinct characteristics, but these differences can be easily overstated if we ignore history.

The present study employs the evolution-revolution perspective for a historical analysis of QUBE, a cable service introduced by Warner Communications in December 1977. QUBE offered pay-per-view services, interactive television, home shopping, games, distance learning, and electronic news, years before such forms of media content became common. Countless news outlets, even some outside the United States, profiled the launch of QUBE, with journalists characterizing it as a revolution in television technology (a perspective likewise supported by Warner's

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own promotional materials). *Time* magazine was especially effusive and said the first test market, Columbus, Ohio, had become “the prototype electronic village” (Dertouzous, 1978). Within a few years, it was apparent that QUBE was not a commercial success, though much of what it had to offer directly heralded current practices. Most notably, MTV, Nickelodeon, and the Movie Channel were all incubated within QUBE, and the service paved the way for movies-on-demand. QUBE can thus be seen as a transitional technology, linking the original broadcast era of television with the current post-network era (Lotz, 2007).

With Moran’s concept at the fore, this study documents and analyzes the various content offerings of QUBE in relation to previous media technologies. Specifically, in what ways did the services of QUBE derive from prior practice, and in what ways did they represent new possibilities? Neuman (2010) described the evolution-revolution process as “bizarre”: “What we assume to be an inevitable technical progression is actually the result of accidental sequences of events and diverse political battles won and lost. In other words—bizarre happenstance” (p. 2). The lessons learned from QUBE indeed indicate that the development of new media can be unintended and even accidental.

In addition to Moran’s evolution-revolution concept, this analysis draws upon concepts from the social construction of technology framework (Bijker, Hughes, & Pinch, 1987). This school of thought argues that technologies do not arrive in society fully formed, but are instead the culmination of a series of negotiations and decisions. In one expression of this idea, MacKenzie and Wajcman (1999) wrote that “new technology ... typically emerges not from flashes of disembodied inspiration but from existing technology, by a process of gradual change to, and new combinations of, that existing technology” (p. 9).

This concept of a gradual evolution differs from the popular perspective that attributes inventions to single individuals or specific moments. Neuman (2010) characterized such claims as belonging to the “heroic school” of media evolution, adding that such claims often include a “founding myth” (p. 8). This current analysis deliberately rejects a “heroic” argument and does *not* argue that QUBE single-handedly ushered in the post-network era of television. The argument instead is that by deeply exploring this single phenomenon we can gain insight into the great many forces and players that pushed television into its next stage of development. QUBE is an effective prism through which to explore such issues as it was at the nexus of so many technological and social practices that we now take for granted.

The analysis is also informed by Winston’s (1998) attempt to establish an overarching model for media evolution. To explain why certain prototype technologies are popularized, while others languish undeveloped, Winston identified a “supervening social necessity” (p. 6–7). For a technology to become successful, it must do more than simply function in a purely technical sense. It must be perceived and recognized as fulfilling some particular need, whether it be convenience or profit. Winston also described “the law of the suppression of radical potential” (p. 11), a dynamic which works to mitigate a technology’s diffusion. When an emerging technology proves to be too disruptive to established markets, social structures, or

regulations, various forces may come together to put a brake on the technology's development.

The discussion of QUBE's interactive experiments also invokes "medium theory," as described by Meyrowitz (2009). In contrast to those academic studies that seek to establish discrete effects from specific forms of media content, Meyrowitz (inspired by McLuhan) urged scholars to focus on the varying characteristics of different forms of communication. With this conceptual approach in mind, this study argues that the interactive TV experiments of QUBE represented a different medium than the purely linear form of scripted television, the type of content that dominated the medium for decades, and still does today.

Beyond exploring Moran's evolution-revolution perspective, and revealing the complex nature of media evolution, this study has another goal. Namely, to fill a gap in scholarship. As previously noted, the service received voluminous press attention when it launched, though media historians have devoted scant attention to QUBE after it faded from the popular spotlight. When QUBE has been referenced in historical works, it has typically been in connection to some other topic, such as the development of interactive television, the origins of Nickelodeon and MTV, or the history of cable in general (Banet-Weisser, 2007; Denisoff, 2002; Kim, 2001; Kim & Sawhney, 2002; Mullen, 2003, 2008; Parsons, 2008; Pecora, 2004). Meehan offered the most sustained academic analysis of QUBE, though this work provides only broad descriptions of its content. For Meehan (1988), the project was a way for Warner Communications to "covertly measure genre preferences" (p. 185) and economic imperatives of corporate ownership subverted the utopian potential of the interactivity.

These earlier works all provide some information on QUBE, though there is no single, comprehensive history of the service, nor any account that clearly defines its programming. So, while the primary focus of this study is to analyze QUBE using the evolution-revolution perspective, and other theoretical concepts, presented above, it is first necessary to provide an abbreviated history of the service. Information about this history comes from a variety of sources, including: interviews with individuals directly involved with the planning and programming for QUBE (see Interview Appendix), era newspapers, programming guides, and prior academic scholarship. John Coleman, one of the producers of original QUBE programming, supplied a collection of internal memos and newspaper clippings that was particularly helpful.¹ Trade journals from the Cable Center (Denver, Colorado) provided an overview of the development of the industry as whole.

The Story of QUBE

QUBE was an outcome of the "blue skies" period in cable television history. This early era of cable television is a vivid example of Winston's "law of suppression of radical potential" (1998, p. 11). The term "blue skies" denotes the period when the regulatory paradigm changed, and the FCC then encouraged the spread of cable

(Parsons, 2008, pp. 265–267). Several companies in the early 70s even began to experiment with interactive television, or two-way as it was known at the time (“The gear for two-way services starts at NCTA,” 1973). According to the loftiest visions, the technology could provide an almost unlimited stream of entertainment, news, and information to viewers, along with home shopping and banking services (Parsons, 2008, pp. 238–239).

In 1973, Warner Communications hired Gus Hauser as CEO of the recently formed Warner Cable Corporation. The supervening social necessity that drove QUBE was the desire to establish a pay-television service, this at a time when most viewers were accustomed only to free, over-the-air broadcast signals (Hauser interview). The interactive programming, which attracted so much press coverage, was a direct outgrowth of this original motive. Even when the high-profile interactive programming was phased out, the desire to maintain a pay-television service persisted. Everything that QUBE offered followed from this underlying drive.

Before delving into the details of QUBE, its immediate precursor should be noted. Gridtronics, a subsidiary of Warner Communications, patented a technology for delivering premium content to cable subscribers (“Pay-cable device patented,” 1973). This technology scrambled a handful of premium cable channels, and subscribers paid a monthly fee to unscramble the content. Warner implemented the system in seven of its cable franchises, branding the movies as the “Star Channel.” According to Mullen (2008, p. 108), mechanical problems with tape playback plagued the service.

An improved cable service was envisioned, specifically one that allowed pay-per-view billing instead of a flat monthly fee. Earlier pay-television systems had been attempted, but billing could be rather awkward. Some systems, for example, required plastic punch cards, purchased in advance, or relied upon coded signals transmitted over a telephone line (Mullen, 2003, p. 87). Warner Communications developed a streamlined service that required no action beyond selecting the appropriate channel. The resulting system “polled” each cable box every 6 seconds, automatically recording the channel currently in use. Viewers incurred an additional fee on their monthly bill, if they tuned to a pay channel and kept watching for a certain period of time. The interactive network provided constant surveillance of subscriber activity, yielding detailed audience metrics for every channel. The name QUBE was eventually coined for this grand new system, though the Star Channel name remained for premium movies.

Programmers found other ways to exploit the two-way functionality, beyond pay-per-view billing. This dynamic expresses the idea of “excess capacity,” as described by Sawhney (2010): “One of the biggest spurs to innovation seems to be the presence of excess capacity in a communications system” (p. 133). Sawhney used this concept to explain how the increased channel capacity of cable systems, in contrast to the very limited number of broadcast frequencies, motivated programmers to expand the supply of content. Similarly, the interactive nature of QUBE was developed originally for selling movies to viewers, but was later expanded for a great many other purposes, detailed below.

Viewers expressed choices using five buttons along one side of the QUBE remote. Two buttons could be pressed simultaneously and theoretically, twenty-five different options were possible ("A brief description," 1977). In practice, however, the interactivity was limited to basic poll questions with five options. A computer at the head-end of the system could activate a message light on the remote. In this way, viewers could be presented with simple questions and notified of a correct answer. Warner referred to the interactivity as "touching in," a variation on the common phrase "tuning in" (for watching television), and perhaps even a throwback to "listening in," as early radio listening was once known.

The subscription fee was \$10.95 per month, comparable to that of other pay cable systems, but Warner executives hoped that the pay-per-view options would generate additional revenue; premium content ranged from fifty cents to a few dollars. QUBE originally offered ten pay-per-view channels, known as the P channels, which featured movies, including semi-recent releases, classics, and soft-core, adult content (nothing X-rated), and occasionally sporting events. These P channels were largely devoid of true interactivity. In a slight nod to audience autonomy, QUBE had a "Viewer's Choice" option, though this simply showed a movie that had been selected by viewers en masse. The movies started at pre-set times and the same signal went to everyone. While this was certainly an evolutionary step towards the modern practice of video-on-demand, QUBE subscribers could not start nor stop the program in the manner to which modern viewers have become accustomed. Another block of channels, known as T (for television), represented the original purpose of cable and simply brought distant stations, such as WTBS from Atlanta, to viewers in other cities. The C, or Community, channels contained original, locally produced content and boasted most of the interactivity.

For an activation fee of \$10, subscribers could also receive five channels of FM radio. Supplying radio programming in this manner was already a well-established cable practice by the time QUBE launched. For yet another additional fee, QUBE offered the functionality of a home security system, linking homes to local police and fire stations, though it is unclear how widely this particular feature was used by subscribers. It should be noted that using interactive cable as a home alarm system, a scenario that prefigures the smart homes of today, was not an original concept. The two-way systems of rival company TOCOM, for example, had been offering this service for years (The gear for two-way services stars at NCTA, 1973).

As an indication of the evolutionary nature of QUBE, rather than revolutionary, Warner chose to install the system in its pre-existing cable franchise in Columbus, Ohio. The demographics of the city provide a good representation of the country, and Columbus enjoys a reputation as a popular test market even today (Hauser interview). Hauser also noted that city leaders provided a welcoming regulatory environment. QUBE officially launched on December 1, 1977 to great fanfare. The system was profiled in magazines, newspapers, and by all the major broadcast networks of the day.

The trade journal *Broadcasting* offered a detailed report on QUBE, several months after its debut ("Warner Cable's QUBE: Exploring the outer reaches of two-way TV,"

1978). According to *Broadcasting*, 20,000 homes were wired for QUBE; the average subscriber ordered two or three movies per month, generating only a few extra dollars (on top of the standard subscription fee) for each subscriber. Given that Warner Communications had reportedly spent \$20 million to establish QUBE, which had expenses of \$1 million per month, these revenue figures suggested that the service was generating half-a-million dollars in debt per month. In the same article, Hauser insisted that the monthly deficit was not so severe, though agreed that QUBE would not be profitable until it expanded to other cities.

Given the extreme start-up costs, QUBE was blamed for an overall decline in the profits of Warner Communications (Maher, 1978). In 1979, Warner Cable received an influx of funding when American Express became a partner; the new entity was known as Warner Amex. The financial institution was reportedly intrigued by the idea of developing a home banking service for QUBE (Parsons, 2008, p. 367). In 1980, Warner Amex won the rights to establish cable franchises in a number of cities, without promising a duplication of the interactive services everywhere (Schwartz, 1980). Rival operators charged that QUBE was never a realistic vision and was simply a tool to win these franchise rights (Parsons, 2008, p. 413). While QUBE unquestionably served this function, Hauser insisted that winning local franchises was not the original motivation (Hauser interview). Warner Amex cable systems in five additional cities, including St. Louis, Cincinnati, and Dallas, ultimately utilized some version of the QUBE technology. Critics insisted that these franchises would never be profitable, citing the unrealistic expense of installation. In 1980, one rival described QUBE as a "good idea built on 1968 technology," pointing to the dramatic improvements available with newer fiber optic cables ("The Wheelers Tell the Dealers," 1980).

Some of the QUBE programming was made available to other cable companies, and these channels arguably represent QUBE's greatest successes. The Star Channel (later renamed the Movie Channel), an original component of QUBE, was made available across the nation via satellite, which was a new method for distribution in 1979. At the same time, a block of children's programming was uplinked to the same satellite and renamed Nickelodeon. QUBE also experimented with various forms of music programming; in 1981, Warner Amex introduced MTV. QUBE ultimately proved to be prohibitively expensive, and in 1983, Warner Amex reported an after-tax loss of \$99 million (Denisoff, 2002, p. 158). The situation was compounded because Warner Communications, one of the two parent companies, had seen its own profits plummet, the decline largely attributed to the disastrous performance of its subsidiary Atari in 1982. QUBE activities were dramatically reduced at the start of 1984. In Milwaukee, Warner Amex abandoned its plan to install QUBE, scaling down the project to a single pay-per-view channel ("Franchise promises come back to haunt Warner," 1984). In Pittsburgh, TCI bought the Warner Amex cable franchise. TCI similarly planned to offer pay-per-movies, though would replace the existing infrastructure "because of the high maintenance costs and increasing failure rate of QUBE boxes" ("Go in Pittsburgh, no in Milwaukee," 1978).

In 1985, Warner Cable bought American Express out of the partnership. To generate the necessary capital, Warner chose to sell MTV, Nickelodeon, and the Movie Channel (formerly the Star Channel) to Viacom (Parsons, 2008, p. 517). Scott Kurnit, a QUBE executive, migrated to Showtime (also part of the Viacom empire) and brought the idea of a pay-per-view movie service along. This part of Showtime programming was known as “Viewer’s Choice,” the very same name used by QUBE years before (“Showtime launches a pay-per-view service,” 1985). Identifying an absolute end-date for the QUBE experiment is difficult, as many of the original cable boxes remained in use, even after the interactivity was abandoned. In 1989, Warner Cable announced the installation of fiber optic cables in its Columbus, Ohio franchise, a process that involved phasing out the original QUBE terminals (“More fiber,” 1989).

Interactivity

The evolution-revolution perspective applies quite well to the interactive programs of QUBE, with numerous reporters immediately gravitating towards the latter term. For example, *Newsweek* published an article headlined “TV of tomorrow” in 1978, which profiled emerging technologies—including video cassettes, video disks, and video games—though the bulk of the article lavished praise upon QUBE. According to this article, QUBE was “the experiment that may revolutionize America’s relationship to television,” and offered “the most varied range of programming ever piped into a living room” (“TV of tomorrow,” p. 64). The two-way nature of QUBE was at the heart of this impending revolution. QUBE’s promotional literature likewise stressed a break from the past, contrasting the active, two-way nature of the system with old-fashioned passive viewing.

A closer examination of the historical record reveals that while Warner may have launched the most high-profile, two-way cable system to date, a number of other cable companies had already experimented with interactivity (“The gear for two-way services stars at NCTA,” 1973). Even the use of QUBE channels for education was not entirely new; classes had been taught via radio broadcasting since the 1920s (Slotten, 2009, pp. 42–50). As previously noted, the C channels featured QUBE’s original productions and featured most of the interactivity. The C-1 channel was known as “Columbus Alive,” which was also the name of a light talk show. *Columbus Alive* was a deliberate attempt to duplicate the look and feel of the *Today* show. So, while trying to innovate the next generation of television technology, QUBE was ironically trying to do so within a remarkably traditional format.

Viewers were frequently presented with opinion polls, and producers found a great many ways to encourage voting. QUBE viewers, for example, once chose a baby’s name (presumably from a list of pre-approved options), and selected the image for the cover of *US* magazine in June 1978. Amateur talent contests were a regular feature on *Columbus Alive*, with viewers offering feedback. Andy Kaufman once appeared as a cranky Las Vegas crooner who “told viewers they were small-town hicks who ought to be grateful he was there” (Drake, 1978). In a semi-professional

football game, viewers were allowed to actually select the plays (QUBE Program Guide, June 29–12 July 1980).

While QUBE may have pointed in the direction of a truly interactive medium, it never fully embraced the possibilities. According to Meyrowitz's medium theory, each form of media should be evaluated and utilized according to its own capabilities. For various reasons, however, QUBE programmers operated as traditional television programmers of the past (as evidenced by the desire to reproduce the *Today Show*). To use a contemporary phrase, the interactive elements were not "baked into" the programs but added afterwards. Another remarkably formulaic program was *Flippo's Magic Circus*, the kind of afternoon kids' program that was a staple of early television. Some interactive games were used on the clown show, but for a service that promised to usher in the future of television, Flippo was decidedly stuck in the past.

QUBE did not, for example, offer interactive narrative programming, with viewers actively determining the storyline. Producer John Coleman explained that integrating interactivity into such programming was a logistical and financial challenge, as you could not plan ahead for all the options (Coleman interview). He also described differing perspectives from the higher-ranking Warner executives in New York, and the younger producers of the live programs who were based in Columbus, Ohio. There was one attempt at an interactive drama, entitled *Lulu Smith*, which was partially scripted and partially improvised. The results were rather awkward and the one-episode remains a historical oddity.²

Interactivity was also used to attract local advertisers to the system. "Qubits" were short commercials, up to 2 minutes in length, while longer segments were dubbed "infomercials." The *Northern Ohio Business Journal* offered a particularly detailed overview of advertising uses ("TV advertisers put 'In Touch,'" 1978). One restaurant allowed viewers to make reservations, while a travel agency polled viewers about popular destinations. One advertising agency, relying upon Columbus' reputation as a test market, had viewers evaluate the storyboards for two potential yogurt commercials.

A premium pay educational channel was part of the original QUBE vision, specifically programming that prepared students to take college-entrance exams (Horner interview). Educators had been actively experimenting with television in classrooms, specifically closed-circuit systems, since the early 1950s, and QUBE's efforts in this area should be seen as part of this long tradition (Cooley, 1952). It is not clear if this particular pay channel on QUBE was ever implemented, though a consortium of local universities created educational content for the system. QUBE could be used for simply taking attendance, or could be used to test students. Franklin University was the most active of these local universities (Jordan, 1978). The class fees were same as that of the university's regular offerings, and students were only required to come to campus for exams. They otherwise received instruction via two 90-minute "tele-lessons" each week; these lessons were repeated throughout the week, though the interactive options could only be utilized during the initial airing.

Allowing viewers to play video games through their cable system, even playing against fellow subscribers, could have truly distinguished QUBE, though such services did not come to fruition. Before the launch, a Warner executive stated that subscribers would in fact be able to play games and compare scores with others (Wilkinson, 1977). QUBE did offer some games, though the offerings were less than impressive. Viewers might see a jumbled image, for example, and choose the correct answer from a short list, or watch a video clip and then answer multiple-choice questions. In 1981, buoyed by the launch of Nickelodeon and MTV, Warner Amex announced plans for additional satellite channels, including ones devoted to shopping, major pay-per-view events, and games (Ziegler, 1981). These additional channels never materialized.

The gaming component of QUBE seems a genuine missed, opportunity given that Warner Communications was the owner of Atari, the dominant force in the video game industry of the time. Hauser insisted that there was no synergy between QUBE and Atari, though certainly some possibility existed for collaboration. PlayCable, for example, was a channel of the early 1980s that relied upon an infrastructure even simpler than what QUBE entailed. Games were transmitted to specially designed Intellivision consoles, and no interactivity or two-way functionality was required (Mullin, 1981). The business model was a clear precedent for the modern practice of downloading video games, though QUBE never dabbled in this area.

Shopping & Banking

The idea of using a television screen as a miniature department store window, beaming a sales floor directly into viewers' homes, is as old as the technology of television itself (Presbrey, 1929). The supervening social necessity that drove QUBE's development, the desire to establish a pay-television service, yielded an infrastructure that could actually make the television-shopping vision a reality. The same remote control used to change channels and respond to opinion polls could be theoretically used to order merchandise. Since the central database of the QUBE system already tracked individual subscribers, for the purpose of pay-per-view billing, adding retail purchases into the equation would seem simple.

When put into practice in Columbus, though, this scenario did not work as envisioned. One bookstore experimented with selling books, though very soon orders were verified by phone "because children enjoy pressing the response buttons" (Brown, 1978). Selling clothing proved even more difficult, since customers had so many questions about size and color; to this end, the R & R Lazarus department store instructed viewers to press a button if they desired more information on a particular product. A salesclerk could then call the prospective customer directly (Brown, 1978).

It should be clarified that while QUBE offered one version of home-shopping, albeit one that did not work as smoothly as planned, the genre of home-shopping programs had already been established. Numerous home shopping programs had

existed on radio since the late 1920s, with listeners provided a phone number to place orders (“Radio publicity,” 1928), and the genre was later adapted for television. Trade journals for the cable industry of the 1970s were filled with articles about various televised-shopping services. When cable entrepreneurs of the era imagined interactive systems, home shopping was one of the default options. Prior to the introduction of QUBE, the TelePrompter cable system aired “tele-auction” home-shopping programs on more than a dozen of its franchises, for example. Nyhl Henson, who later worked for QUBE, was involved with many of these projects (Henson interview). Although TelePrompter did experiment with its own version of interactive cable, these earlier shopping programs relied upon standard telephone technology to complete the feedback loop with viewers.

It is also worth recalling that American Express sought to create an electronic home banking service on the infrastructure of QUBE. There is no evidence that such a system ever got beyond the drawing board, though it is difficult to avoid speculating about the possibilities. A QUBE program guide for November 4–17, 1979 featured a full-page advertisement for a show on the original C-1 channel: “Christmas shopping via QUBE, 96 exclusive items selected by American Express.” This advertisement hints at the kind of corporate synergy that some executives may have envisioned, a televised home-shopping service with all transactions handled via American Express.

Children’s Programming & Music

QUBE’s forays into these two content areas yielded two phenomenally popular cable channels, Nickelodeon and MTV. For the current discussion, it is worth noting that both genres, children’s and music, were already established prior to QUBE. Creating satellite-distributed television channels devoted exclusively to such content could certainly be considered innovative, but of an incremental nature. The story of Nickelodeon’s origin is one of unplanned innovation, or what Neuman dubbed “bizarre happenstance,” while MTV’s backstory is a bit more complex.

During the planning for QUBE, Vivian Horner was hired to develop educational and children’s programming, based on her work for the Children’s Television Workshop and *Sesame Street*. The resulting QUBE fare, known first as *Pinwheel*, bore a great deal of resemblance to that earlier show. Original skits with puppets were interspersed with cinematic fare acquired from overseas. The filmed programming ran continuously on a loop, without any commercial interruptions. In 1978, *Pinwheel* was the largest block of cable programming dedicated specifically to younger viewers (Hill, 1978).

The program had its own dedicated channel and was available around-the-clock. The detailed audience data of QUBE revealed a surprising popularity for *Pinwheel*, even in the evening hours (Marcovsky interview). In April 1979, when Warner Amex uplinked the Star Channel to a satellite, the daytime hours were not in use. Based on the positive response for *Pinwheel*, this block of programming was used to fill the

extra satellite time, and was renamed Nickelodeon in the process. This is another example of Sawhney's idea of "excess capacity."

Initially, Nickelodeon was offered free to cable systems, provided as a supplement to the Star Channel. The enthusiastic response from the marketplace for commercial-free children's programming soon changed this policy. Nickelodeon then began charging monthly fees to local cable operators; the fee was determined by the number of subscribers in a market, and ranged from eight to ten cents per subscriber ("Nickelodeon," 1980). In November 1979, the channel was reported to be on 150 different cable systems ("Nickelodeon rockets past million," 1979.)

Pop Clips, an original show on Nickelodeon that featured music videos, is generally cited as the direct predecessor to MTV. In August 1981, Warner Amex spun the music programming off from Nickelodeon to create MTV. According to Denisoff (2002), "the role of *Pop Clips* in the evolution of MTV is a highly controversial one," as many individuals have claimed credit for the idea (p. 24). The influence of *Pop Clips* must be acknowledged, though even a cursory review of QUBE's history makes clear that music programming had always been part of the vision. Musical acts, particularly those with some connection to Warner Communications, frequently appeared, and a number of concerts were also broadcast. During QUBE's development, a pilot for a music-based program, called *Middle Earth*, was shot. An FM DJ with the unusual name Orville Zitt played records, though programmers struggled to come up with compelling visuals, as music videos were not yet a common practice (Blumenthal interview). MTV's overlap with a "video jukebox" program, *Sight on Sound*, should also be mentioned ("QUBE launches Video Jukebox," 1981). This weekly 90-minute program allowed viewers to select music videos, answer trivia questions, and vote in a "battle of the bands" ("Retail chain underwrites QUBE show," 1981). Based on these precursors, it seems apparent that no one person can claim credit for MTV's genesis, though the project was clearly birthed within the larger QUBE experiment.

News and Data Retrieval

Of all the various services that QUBE attempted (or at least promoted), a "data retrieval" service was perhaps the most revolutionary. Before outlining this project, QUBE's other efforts to provide news to its subscribers should be outlined, to provide some context for this potentially dramatic innovation in information technology. QUBE's news programming was, for the most part, somewhat lackluster. QUBE did not produce its own dedicated news channel, though much of its content certainly qualified as news. Jon Steinberg, a correspondent from *Columbus Alive*, created his own program using the persona of "Mr. QUBEsmer." On this show, Steinberg addressed various consumer affairs, analyzed product claims, and generally served as a local version of Ralph Nader ("U.A. Resident," 1978). QUBE also covered many city meetings, and the promise of adding interactivity to such broadcasts was a definite selling point when cable operators sought local franchise rights. QUBE

added CNN to its lineup in 1981, and some interactivity was even integrated into CNN's programming. According to *Broadcasting*, the QUBE system in Columbus was connected to the CNN studios in Atlanta in order to display poll results on air ("Cable news network," 1981).

As a way to provide news to subscribers, QUBE debuted with five information channels, devoted respectively to sports, news, consumer information (prices from local stores), the stock market, and weather. In the parlance of the era, the programming was alphanumeric; viewers saw plain text and numbers, along with simple maps, on a black screen. Such barebones channels had existed on cable and UHF stations since the late 1960s and were not interactive. Viewers simply turned to a channel depending upon their news needs at the moment.

These QUBE channels used standard cable technology and should not be confused with other electronic services of the era. Teletext for example used the "vertical blanking interval" of a conventional television signal to provide similar information to viewers. Television sets required special decoders to receive the teletext version of alphanumeric content. QUBE was also distinct from videotex, another technology that attracted significant industry investment in the early 1980s. Videotex transmitted information over telephone lines to special consoles or home computers (Boczowski, 2004, pp. 25–27).

The "data retrieval" experiment of QUBE can be seen as either QUBE 2.0 or the Web 0.5. For this project, Warner Amex worked with CompuServe, one of the handful of companies that connected home computers to electronic databases. In January 1981, fifteen QUBE subscribers used Atari computers to connect to CompuServe ("Another side to the QUBE package," 1981). By paying \$5-per-hour, QUBE users could now actively search for specific content rather than passively receiving the alphanumeric content; they could also send messages (proto-email) to one another. News was available from the Associated Press, as well as an electronic version of the *Columbus Dispatch* (already available in a primitive digital format for videotex). Even though this was more than a decade before the Internet made such online content popular, an article in *Broadcasting* suggested that the forces of suppression had already come into play. The director of marketing for the *Dispatch* said that the newspaper was only allowing QUBE to access it as electronic content for "demonstration," and that a permanent arrangement had not been reached. Given the current debates over online content, and exclusivity and cost of access, it is perhaps surprising to discover that similar discussions were occurring in the early 1980s, long before the Internet was even part of the equation.

It is unclear if this particular experiment made it beyond the incredibly limited user base. Another article from *Broadcasting*, published more than a year later, similarly discusses the data retrieval service and cites the number of users as twenty ("Special report: Teletext and Videotext: Jockeying for position in the information age," 1982). Little else is known about this venture, beyond fleeting references in various trade journal articles, and no one interviewed for this research could provide further clarification. More than a decade later, this kind of data retrieval service became a reality with the diffusion of the internet. The blue sky vision of an interconnected,

electronic media landscape had finally become a reality, but not with cable television, the technology that originally inspired the ideas.

Conclusion

Before revisiting the evolution-revolution perspective, Meehan's (1988) characterization of QUBE should be addressed. According to this earlier, critical analysis, "corporate imperatives have limited the design and implementation of cable to serve corporate interests" (p. 185). While it is undeniable that QUBE was intended to generate profits (it was a commercial venture after all), programmers appear to have had the freedom to experiment widely. It is not at all apparent that corporate interests or some attempt to "covertly measure genre preferences" should be blamed for QUBE's failure to achieve the lofty predictions for interactive television. This was a proverbial brainstorming session, with producers throwing out ideas left and right.

Based upon this current research, we can offer a few other reasons to explain QUBE's failure (if we indeed wish to characterize the service in this manner). The entire project was quite expensive, and even if estimates in this area vary, it does seem clear that QUBE could not recoup its costs through subscription fees. The evolution-revolution perspective can also be invoked to explain QUBE's shortcomings. New technologies are always built upon frameworks, including both physical infrastructure and mental concepts, that were established in the past. If the intended technology strays too far in this regressive direction, however, the end result may be to stifle its growth. This dynamic is evident in the history of QUBE when we consider the numerous reports of technical problems, and recall that Warner built the system upon existing cable technology, instead of beginning from a truly blank slate. Returning to the idea of medium theory, we could also emphasize that so much of QUBE's content was based on the older, linear paradigm of television programming. Rather than creating something that was truly new, the bells and whistles of QUBE were intended to dress up the old.

In addition to these possible explanations, we should recall the supervening social necessity that drove QUBE, the desire to deliver pay-per-view content to subscribers. With this notion in mind, the rival technology of the VCR is critical to the current discussion. Hollywood studios began to seriously embrace video cassettes for home distribution in the late 70s/early 80s, and the number of rental stores exploded from 700 in 1979 to 23,000 in 1985 (Wasser, 2001, pp. 96—101). For viewers at the time who wanted to watch movies from the comfort of their living room couches, this was a simpler, more reliable technology that allowed more individual control when compared to the buggy cable systems of the day.

Whether one ultimately views QUBE as a something truly new in television history (a revolution) or as a minor improvement on the past (an evolution) depends upon the scope of analysis. If we conduct, for example, a detailed, fine-tuned inquiry into QUBE's various services, it is clear that each individual service borrowed from previous technologies and practices. From a macroscopic view, though, looking at

QUBE as a totality, it indeed seems to represent a paradigm shift from the earlier era of television. It is therefore not surprising that QUBE generated so much press attention when it launched (even if some of the press coverage was undoubtedly exaggerated). QUBE offered a window into the future of electronic media, a world in which viewers could select content narrowly tailored to their tastes, purchase products, communicate with their neighbors, and conduct home-banking. Returning to MacKenzie and Wajcman's (1999) quote in the introduction of this study, the phenomenon that we typically categorize as "innovations" may be more accurately described as combinations and slight improvements to a batch of previous technologies. Informed by this perspective, it is indeed appropriate to characterize QUBE as a significant innovation in the world of television.

An increased awareness of QUBE, and other innovative electronic and cable services of the past, helps to put the modern post-network era of television into some perspective. It is too easy to become enthralled with the new—to fall into the rhetorical trap of referring to each new innovation as a revolution—and to overlook all the many complex, even bizarre steps of evolution that came before. This overview of QUBE provides some description of its content offerings. It also reveals that the television practices of the current time are the result of a great many years of innovation, practice, experimentation, and sometimes accident.

Appendix: Interviews with Original QUBE Personnel

Steven Anderson, interviewed by phone June 5, 2012.

Howard Blumenthal, interviewed by phone June 1, 2012.

John Coleman, interviewed in person June 10, 2012.

Michael Dann, interviewed by phone July 2, 2012.

Gus Hauser, interviewed by phone June 4, 2012.

Nyhl Henson, interviewed by phone August 19, 2012.

Vivian Horner, interviewed by phone June 5, 2012.

Michael Marcovsky, interviewed by phone July 23, 2012.

Tony Perutz, interviewed by phone July 19, 2012.

Notes

1. Information from this collection is cited as the Coleman Collection.
2. As of this writing (February 2016), portions of the program are available on YouTube, under the name "Lulu—1st Interactive TV Drama."

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