

Still Waiting: Nielsen's Persistent Failure to Deliver the "Holy Grail" **Ryan Bowles, University of California-Santa Barbara**

"The holy grail of tools, many executives say, does not yet exist, but it would collect data about the audience for all media from a single source."

—*Advertising Age*, 2001.¹

"There's probably no single solution to television audience measurement... There are probably multiple solutions, and multiple methodologies, and whether it's diaries, set-top boxes, people meters, portable meters, I think in the future there will be a mixture of all these."

—Jack Loftus, Nielsen Senior VP of Communications, *Advertising Age*, 2003.²

Since 1950, Nielsen has promised to create a legible, sellable "commodity audience" in the form of the "Nielsen Family"; at the same time, however, its business practices and technological "advances" have consistently failed to measure the viewing of certain demographics, even those particularly coveted by advertisers.³ In fact, to write the history of television audience measurement in 2008 is to write a history of failures.

In 2004, Nielsen, Arbitron and Procter & Gamble announced the launch of their "Project Apollo," a "long-elusive tool that [would] marry media exposure and purchase data to measure return on marketing investment." Hope and hype circulated in the trades that perhaps, finally, "it could be the holy grail" of television audience metrics: single-source measurement.⁴ While other attempts at single-source measurement had been made in the past, Apollo was unique in that it combined Arbitron's Portable People Meter technology with that of Nielsen's Homescanner. For the first time, Project Apollo represented the possibility of isolating data for viewer-consumers, inciting an unmatched optimism in the trades and even garnering interest in popular publications such as *The New York Times* and *Business Week*. So utopian was the hope for Apollo that even as marketers rejected its seven-figure price and trade hopes dwindled, P&G, Arbitron, and Nielsen decided to move forward without investors. Their risk did not pay off, however, and on February 25, 2008, after investing four years of research efforts and more than forty-five million dollars in what has been referred to as "one of the most ambitious, expensive, and heavily hyped market-research programs in history," Arbitron and Nielsen announced the end of Project Apollo.⁵ In a joint statement, the two companies lamented that "Despite a promising level of interest" they simply had been unable to "secure sufficient client commitments to make Project Apollo a sustainable venture."⁶

While Project Apollo represents Nielsen's most recent, and likely most remarkable, failure, it is just one misstep in a long line of unsuccessful attempts at innovation in measurement technology and practice. From the paper diary to the Storage Instantaneous Audimeter to the People Meter, each of Nielsen's metrics has been inherently flawed in some way, failing to accurately measure demographics—even those particularly desired by advertisers—and make them legible for sale. Technologies that do allow for passive measurement, such as Nielsen's Audimeter and, more recently, Arbitron's *Portable* People Meter, solve the problem of "fatigue and conditioning" by removing the burden on the viewer. However, the Audimeter fails to provide any demographic information, and the Portable People Meter is unable to guarantee active viewing. While Nielsen's most widespread technological development, the People Meter, does provide demographics, it is only able to account for up to *two* guest viewers,

a flaw that particularly alters information for communal viewing. And of course, the People Meter, with its assigned personal viewing buttons, places the burden of measurement back on the viewer. Unsatisfactory as Nielsen's technologies may be, the ratings industry needs only one set of numbers to function, and thus far there has been nothing to compel the monopoly to significantly alter its practices.

In a new media landscape, it becomes even more important for advertisers and academics alike to consider whose viewing is being left out by these outdated metrics: who is left uncounted and undervalued? Consider, for example, preliminary attempts made to measure college-age viewers. Despite the desirability of this group's measurement data, conventional wisdom in industry trades has been that young people cannot be relied upon to fill out paper diaries with accuracy or consistency. But even if a young person could be given enough incentive to fill out his or her diary accurately, the belief long circulated in the trades that college-age students do not watch much television while living away from home anyway. When they do watch television, they are thought to be "multi-task" (i.e. inattentive, disengaged), non-habitual viewers. And while advertisers place a certain value on young consumers for their trend-setting, innovative nature, Nielsen understands those same traits as emphasizing the unpredictability of young viewers—constructing them as particularly slippery when it comes to measurement. Due to pressure from forces like Rupert Murdoch and his NewsCorp, the 2000s have seen the implementation of the first attempts to measure dorm room viewing; however, the number of young people measured has been minimal at best, and the measurement itself has been performed without technology suited to capture the particular ways in which college students watch television—in groups and on multiple screens.

Thus, despite the ability to monopolize the ratings industry and the "convenient fiction" upon which it is based, Nielsen should not be regarded as a success. Rather than succeed, the company *persists*. This persistence is built upon its striking ability to withstand many botched attempts at "innovations" in measurement technology, to function despite failing to reconcile contradictory conceptions of "value" among the different industry sectors, and to reemerge after each misstep with hope still intact in the industry that someday, the "holy grail" of audience measurement will come along and rescue—or rather, *measure*—us all.

¹ "Buyers Demand More Data; Media Planning: Ad Execs Say They Need Better Ways to Measure Audiences." Laura Q. Hughes. *Advertising Age*. 18 Jun. 2001.

² "Rating TV's Future." *Advertising Age*. 8 Dec. 2003.

³ I borrow the term "commodity audience" from Eileen R. Meehan, "Why We Don't Count: The Commodity Audience." *Logics Of Television: Essays on Cultural Criticism*. Edited by Patricia Mellencamp. Indianapolis: Indiana University Press, 1990.

⁴ "P&G, VNU, Arbitron Aim High, But Could Be Undone By Panel Data." Jack Neff and Claire Atkinson. *Advertising Age*. 4 Oct. 2004.

⁵ "Arbitron, Nielsen abandon \$45M Apollo project." Jack Neff. *Advertising Age*. Feb. 25, 2008.

⁶ "Arbitron and Nielsen Kill Project Apollo. *Tvnewsday.com* (accessed online). Feb. 25, 2008.