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Edited by Ranjana Das and Brita Ytre-Arne
With contributions from the CEDAR network

Audiences, towards 2030

Priorities for audience analysis

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Audiences, towards 2030

Priorities for audience analysis

Edited by Ranjana Das and Brita Ytre-Arne
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About CEDAR

This report brings together the work done by CEDAR – Consortium of Emerging Directions in Audience Research, an Arts and Humanities Research Council funded consortium of early-career European audience researchers. CEDAR came together to map trends, gaps and priorities emerging over the past decade in the field of audience studies.

CEDAR in its first year of work committed itself to conducting a systematic review of the state of the art in the field of audience studies. This phase aimed to identify a set of key themes emerging in the study of media audiences, as it stands today, in a complex multi-genre, multi-media context, with diverse social, political, civic and cultural implications significant for a range of fields in the social sciences. This work has been published in 2016 (see ‘Outputs’).

CEDAR is directed by Dr Ranjana Das of the University of Surrey, UK and co-directed by Dr Brita Ytre-Arne, of the University of Bergen, Norway. A full list of its currently active members is on the next page.

The Network

Membership of the network has changed over the last few years. This below represents the participation in the final couple of years of CEDAR's work.

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About this report

This report presents outcomes of the second phase of CEDAR's work: a foresight exercise aiming to present a research agenda for the field as it would stand in the year 2030. In order to do this, the consortium, having used a systematic literature review already, conducted a trend analysis exercise, a stakeholder consultation exercise and a horizon-scanning exercise to arrive at a set of implications and research recommendations for the field of audience studies looking into the immediate future.

This report is organised into several colour-coded sections.

- Sections on pages with a lime-green header (such as this) speak about general themes arising out of our work—for instance—our framework, approaches, recommendations, outputs etc.
- The three exercises which formed part of our foresight analysis are coded in three separate colours. Each such section begins with an overview of the approach and method and presents findings to follow this.
 - On pages with a brown header is an account of our trends analysis exercise presenting findings under four key themes arising from this work.
 - On pages with a yellow header, we have an account of the stakeholder consultation exercise presenting findings under the same four key themes arising from this work.
 - On pages with a blue header we have the horizon scanning exercise, where we discuss the approach, the key drivers we followed and outline four scenarios for 2030.

We follow these sections with a discussion of implications and recommendations amongst other things.

The report is an edited publication, similar to an edited book in terms of organisation. CEDAR members have authored many individual sections in this report, each bearing the names of some of the people who have been involved with the particular exercise a section speaks about.

We hope you find this report useful and interesting. Electronic copies are available to download from our website www.cedarahrc.com.



Executive summary

Questions, approach and design

CEDAR engaged in and drew inspiration from both long and short histories of audience research. We began in 2015 with two clear questions:

- What were the key transformations in audience activity in the past decade (2004-2015)?
- How could analysis of these transformations help us scan horizons and build an agenda for the future of audience research?

CEDAR developed a theoretical approach which is Critical, Agentic and Trans-media (our 'CAT' framework). In order to analyse key transformations and scan horizons to build an agenda for the future, CEDAR worked with three approaches central to foresight work –

- Trend analysis – here we identified trends understood as transformations; something rising, growing, declining, changing, developing, and altering.
- Stakeholder consultations – CEDAR consulted a diverse selection of more than fifty European stakeholders who engage with audiences regularly in some capacity.
- Horizon-scanning – here we dealt with a short temporal frame of 1.5 decades and targeted the year 2030 to focus closely on audiences' interface with technological transformations and transformations in the nature and contexts of public participation.

Findings:

Intrusive media and coping strategies

1. Audiences are increasingly confronted with intrusive media.
2. Intrusive digital media can be described through four characteristics: Exploitation, Formativity, Pervasiveness and Exclusion.
3. Audiences are developing ever newer coping strategies of self-management and technology management to deal with these intrusive media.
4. Pressures and intrusions from new digital formats lack widespread acknowledgement in practice.
5. Little is known about audiences' strategies to cope with intrusions.
6. The quality of attention that people pay to media is often ephemeral and discontinuous.



Small acts of productive engagement

7. Our research shows that in parallel to larger scale acts of engagement, audiences are increasingly engaging in small-scale acts of engagement online.
8. Three small scale acts of engagement have been identified: One-click engagement; Commenting and debating; Production of small stories.
9. Factors influencing these small acts of engagement include temporal, spatial and technical affordances, and the social position of the producer, for example altruism, personal gain, social contexts, attitudes and skills, social and cultural capital, and subjective reasons for engaging.
10. Software supported analytics and online comments are providing media producers with a continuously updated view on their audience – but this is a one-way street, therefore generating progressive power-imbalances in the media-audience relationship in the age of supposed audience empowerment.
11. Production routines of legacy media are changing in response to small acts of engagement.
12. Nonetheless, legacy media continue to shape, regulate and manage small acts of participation by audiences.
13. Audiences and companies are tied into a complex dialectical relationship.

Changing relationships between audiences and media institutions

14. Audience creativity is increasingly enmeshed in economic relations.
15. There are growing relationships of distrust between audiences and media producing bodies.
16. Acts of audience production are being sought, shaped and co-opted by larger powers, over this past decade.
17. Digital media platform design is increasingly shaping content and audience agency into computable data.
18. The creative participation of audiences in processes of glocalisation show how audiences' work is being managed and co-opted by global players.
19. Media companies and online platforms are developing new business models based on metrification.
20. Micro actions are a main form of audience participation, despite at times explicitly pointing to macro-political actions aims or interests.
21. There is a push towards academic collaboration, especially among organized stakeholders.
22. We can identify a tendency towards moving from prescriptive regulatory approaches to preventive media pedagogical work.

Scenarios for 2030

CEDAR’s scenarios for audiences in 2030 were created by combining two set of “dimensions”, represented by axes:

- The nature of participation and public life
- The response to technological developments in the context of the Internet of Things (IoT) and a range of other emerging technologies.

These axes are further broken down into and supplanted by a set of drivers. On the basis of Van Notten’s STEEP classification that was revised for the case of audience research, sixteen drivers were grouped around economic, political, societal and technological developments.

Economic drivers	Societal drivers	Political drivers	Technological drivers
Commercial versus private interests	Audience fragmentation	Strength of democratic institutions	Privacy concerns
Co-option of audience work - disinvestment of audiences	Personalization	Active state involvement	Technological risks
Transnational investment in communication technologies and services	Identities	Participation in political life	Technological capital
	Producersage	Social (counter) movements	Big Data
	Transnational flows		

Figure 1: Drivers

Pursing these drivers around the two intersecting axes stated above, we arrive at four scenarios – not intended as predictions, but rather opening up a range of possibilities in the short term. The four scenarios we present are not intended to be a listing of what we think are four possibilities for the future. Indeed, countless scenarios might be created depending on what one is interested in studying. The four scenarios simply demarcate to us, a combination of the four extremities of our longstanding interest in two dimensions (axes) that we have pursued with interest. Because the four scenarios themselves involve the extremities of these two dimensions (our “axes”), they may therefore, misleadingly, appear to be a restrictive prediction of four extreme focal points of possibilities – almost as though they predict that people will either engage with the IoT, or not engage with the IoT; or that societies will either witness a large state, or witness a small state, and similar such futile binaries. But instead, they simply open up and



demarcate the boundaries of an analytical space within which we find future developments and research around audiences in 2030 likely to unfold. It is critical to note therefore, that rather than focusing scholarly attention on these four scenarios themselves (alone), or on pondering how likely these are, or are not, we might focus, more productively, on the space in-between these, and consider the many possible interactions of these two dimensions we identified above, and the many changes that can be driven along these two dimensions.

- Scenario 1 sees a high uptake of technological developments with the development of the IoT and a well-functioning, participatory public life, with an engaged state liaising with variety of sectors.
- Scenario 2 sees a high uptake of technological developments, in the context of an increasingly small state, and a corporatized public life.
- Scenario 3 sees resistance to and lower uptake of technological developments with the IoT and a well-functioning, participatory public life, engaged State liaising with variety of sectors.
- Scenario 4 Resistance to and lower uptake of technological advancements, increasingly small-state, corporatized public life.

Our findings imply that...

- The algorithmic functions of new interfaces pre-configure users into their design. Much of this is difficult to trace and cannot easily be detected by audiences themselves.
- Audiences are presented with a difficult and dichotomous choice by these pre-configurations, and a more meaningful range of choices need to develop.
- This suggests interesting configurations for audience agency, relating to long-standing conversations on the topic within science and technology studies – on the one hand audiences perform ever newer sense-making and creative activities with emerging technologies, and on the other, they continue to pre-configured, as implied, or assumed users, in the very design of these technologies.
- Regulatory efforts around new and intrusive interfaces need a shift from a stance of individual responsibility and blame.
- A shift in perception from media producers is called for, from consumerist readings of audiences as blameworthy for critical questions around risk and privacy.
- Shifts in focus and language are required, from outlining the apparent failure of audiences to read lengthy terms of service, through recognising that audiences might gradually be accepting drawbacks of their media landscape, towards developing alternative routes to counter resignation.
- Audience creativity with newer formats and forms of content enters economic



relations more than ever before. This generates newer forms of hidden labour, vulnerabilities and disparities about which knowledge is still nascent.

- Very little is known currently about users' confrontation with and the normalisation of intrusive digital media.
- Clearer fine-tuning and a new impetus to further media literacy work is required to both understand and develop coping practices to deal with increasingly normalised intrusive interfaces.

We recommend...

- Clearer analysis of fragmented, individualised and hyper-connected audience experiences in the face of the developing Internet of Things.
- A fuller convergence of audience research and research on citizenship, political participation and opinion formation.
- The critical, empirical investigation of co-option of audience labour, and commercial interests in audiences' attention and productive work.
- Critical and systematic analysis of the privacy concerns, surveillance mechanisms and risks that audiences face in the Age of Big Data.
- A renewed commitment to researching widespread and fundamental audience experiences such as reading, viewing, listening and interpreting.
- Systematic and critical analysis of gender, ethnicity, class, age and global inequalities.
- A substantial effort to research different forms of resistance to media and technology.
- Analysis of transforming and emerging vulnerabilities.
- The development of collaborative audience research that steps outside of comparatively easier-to-hand groupings of Western industrialised countries to address stark North-South imbalances in audience research.
- Acknowledging the ever greater ethical challenges arising out of the relationships between intrusive media and powerful transnational structures, and those between the researcher and researched in contexts of newer technologies, especially with the development of the Internet of Things.
- Careful reflection, as audience researchers, on what happens with the products and outcomes of our research.
- A commitment to ensure that the outcomes and relevance of audience research projects are communicated with those who address, define, assume, speak for, measure and use audience attention and work.



Contexts of knowledge

CEDAR engaged in and drew inspiration from both long and short histories¹ of audience research. The longer history of the field that inspired us considered the now 75 year history of interest in audiences, if we begin roughly around the time of Herta Herzog's analysis of radio listeners². From this long history, we want to highlight the interdisciplinarity that always lay at the heart of a field which received contributions from literary theory, mass communications, sociology and critical-cultural theory³ amongst others – and equally paying attention to how different strands of theory have been prioritised by different voices within the field.

We kept in mind the premises behind active versus implied readers⁴ from film and print-mediated communication, and the attendant debates that these came with – around the over-celebration of divergence⁵, or critiques about mis-readings of power from within political economy⁶, and carrying these critiques into CEDAR's interest in audiences and users. We also returned, on occasion, to the seemingly dated but nonetheless relevant debates around administrative and critical research⁷, as we engaged with stakeholders and developed our work on building scenarios for the future. From this long history we drew reminders to view audiences simultaneously as communities of interpretation⁸, as agents as well as subjects⁹, as publics¹⁰ and citizens^{11 12}; as local, global and transnational¹³, simultaneously fluid and located, and as users, and even producers¹⁴ of media content.

A 'transformative' decade

The shorter history that we refer to, spans a transformative decade¹⁵ for audience analysis, 2004 to 2014, which immediately preceded the inception of CEDAR. This decade was marked by collective and individual scholarly curiosity and even uncertainty about the scope and premises of audience research, amidst many attempts to argue for its continuing relevance¹⁶. Much of the theoretical work within this short history involved attempts to bring audiences and users together in a conceptual union¹⁷, while working with a family of concepts imported from mass-mediated environments to illuminate interactive ones. This decade was marked both by increasing uncertainty and even discomfort about foundational concepts in the field, such as reception, interpretation, text or genre, and by the parallel recognition that these concepts might continue to work for us, albeit in refreshed ways, as texts become increasingly complicated, with doubts still remain about users becoming "active participants"^{18 19}.



CEDAR worked in the context of this short history, where media environments have changed, thereby putting new question marks around our previously debated but central categories of texts and readers. We have seen markers of the questions these changes generated, in articles, books, international projects and as ever, in classrooms.²⁰ As it stood in 2014 – the year that the funding bid for CEDAR was scripted - audience research could only be defined with great difficulty²¹, for it had spread its roots amongst a variety of sub-fields and new fields in and outside media and communications, and yet – people continued to do (their own kind of) audience research. We found that within this short history, the question of interest was no longer whether audience research was dead, and the key assertion to be made was not that audience research is indeed, alive. Questions about the dis/continued validity of the “audience” concept had indeed perplexed the field in the decade or so preceding CEDAR, sitting against, but not referring to, a long-standing interest in the ‘retirement’ of concepts^{22 23}. But these questions, and assertions of the continuing critical vitality of audiences as a concept, we found, had over a decade, been settled.

So, CEDAR began in 2015 with two clear questions:

- What were the key transformations in audience activity in the past decade (2005-2015)?
- How could analysis of these transformations help us scan horizons and build an agenda for the field for the future of audience research?

A critical, agentic, trans-media framework

CEDAR developed a theoretical approach which can be referred to as Critical, Agentic and Trans-media (henceforth CAT). We present this approach both as a framework for the work we have conducted in CEDAR, and as a contribution we hope can be useful for audience research more broadly.

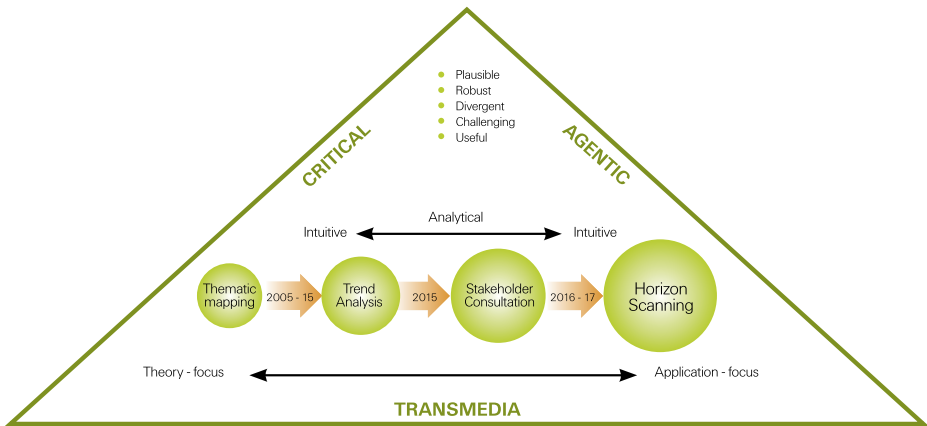


Figure 2: A critical, agentic, transmedia framework

C for critical

The C of the CAT framework stands for Critical. We have adopted the methodology that lies behind horizon-scanning from practice-based work: engaging with stakeholders and aiming for relevance to policy and practice, but still our approach has been critically academic. Presenting our framework as a potential resource for other academics, we underline the importance of this. For instance, CEDAR has addressed the co-option of audience labour in the context of intrusive interfaces and the often unequal dynamics of small and large flows of content between institutions (with relative power), and audiences (usually without), in the media-sphere. When we have engaged with stakeholders we have been conscious of the value-laden baggage²⁴ that the very term 'stakeholder' carries with it. We have remained conscious of the different kinds of knowledge interests in the different stakes held by individuals and institutions, and queried the premise of stakes held in the domain of audience research, ranging between and across administrative and critical purposes.



A for agentic

The A of the CAT framework stands for Agentic. Originating in the word agency/agencies²⁵, this emerged at a network workshop where three parallel concepts – literacies, participation and creation – came together as CEDAR brainstormed its framework.

Literacies emerged as a relevant concept for us to make sense of people's appropriation of newer technologies, and come with attendant concepts such as capabilities²⁶, competencies and skills, all of which could be more critically framed as literacies in order to reflect the long-term interest in studies of the appropriation of media in everyday life.

Participation emerged as a relevant concept of great interest in the field, doing justice to CEDAR's substantial interest in citizenship, democratic potentials and theories of participation. Creation, encompassing but not restricted to the ideas of produsage^{27 28}, small and large acts of content creation and attendant questions of audience labour, emerged as key concepts in our work, as well.

What emerged out of the discussions about literacies, participation, creativity and related concepts was that the words agencies and by extension, agentic, provided the space within which we could develop and converge these articulations.

T for transmedia

The T of the CAT framework stands for Transmedia. Aware of debates around the words transmedia, crossmedia²⁹, polymedia³⁰, and the research on media repertoires³¹, CEDAR selected transmedia to represent the vibrant conversation happening in the field along these lines, including the divergences between them. Our approach was never bound by either genre or platform, and we adopted a very loose (on purpose) definition of audiences and audiencing. The differences between parallel concepts of transmedia, crossmedia and polymedia have not necessarily played an instrumental role in the way CEDAR has approached its work, but the centrality of blurred boundaries, diversely mediated texts, and the rapid emergence of new genres have been central to our approach. Transmedia has kept the 'media' central to CEDAR, not by placing the media in a box distinct from social and cultural life, but in keeping with the rich literatures on mediation³² and mediatization³³, we ensured that media production, regulation and audiencing, involving a constantly negotiated relationship between individuals/publics, industries and other institutions was central every time we thought through audiences on CEDAR's exercises. Transmedia worked for our framework at multiple levels, by holding together our interests, in affordances, generic diversities, institutions and the ways in which audiences related with these.

Aims, scope and design

In order to analyse key transformations and scan horizons to build an agenda for the future, CEDAR worked with three approaches central to foresight work – trend analysis, stakeholder consultations, and horizon-scanning. These approaches followed the systematic theme mapping CEDAR had already conducted, and drew from the considerable literature considered there.³⁴

Exercise	Quick description	Year conducted	Time period considered	Sector considered
Theme Mapping	Systematic qualitative literature review	2015	2005-2015	Academia (publications)
Trends Analysis	Qualitative analysis of emerging trends 2005-2015 for the purposes of foresight	2016	2005-2016	Academia
Stakeholder Consultations	Interviews with stakeholders from industry and policy	2017	Present	Media institutions
Horizon Scanning Exercise	Horizon scanning workshops based on all above with subsidiary exercises to create scenarios	2017	2015-2030	Multi - sector

Figure 3: CEDAR methods and timeframes

Our choice of these approaches can be illustrated by considering them as different perspectives – in a literal and visual sense – from us as a new generation of audience researchers, giving our outlook on the field and the empirical realities it seeks to understand.

Imagine the audience researcher as a hiker climbing a mountaintop; reaching a plateau that affords views of the route travelled as well as new horizons opening up. The four exercises can then be placed in this image as different fixtures of the researchers' gaze.

- Theme mapping is retrospective, the researcher turning her look back to where she came from.
- Trend analysis represents the moment in which her gaze slowly shifts from the route travelled to where she now stands and the beginnings of new outlooks.
- Stakeholder consultations represents a wider outlook, more broadly in every direction, also encompassing perspectives not in her main path.



- Scenario building or horizon scanning, is fixing her eyes on a new horizon that has opened up, to assess what is there.
- However, in order to fully apply this metaphor to CEDAR's work, the researcher should not be considered an individual figure, but rather as a group or a team, embarking on a collective effort and combining their individual outlooks and capabilities.

As this metaphor of different perspectives conveys, the time periods and sectors we have considered vary for each exercise as illustrated in Figure 3. Our theme mapping and trend analysis build on the extensive literature review conducted, of a recent transformative decade for audiences, and this analysis builds on academic audience research. Stakeholder consultations, conducted in 2016, focus on that present time and explicitly aim to highlight perspectives from outside academia, including regulatory bodies, media institutions, and organizations representing audiences. Our horizon scanning exercise looks forward from 2015 to 2030, and is necessarily oriented towards bridging and combining perspectives from many sectors.

Analytical-intuitive balance

In the context of the CAT framework discussed previously, CEDAR adopted a methodology which was simultaneously analytical and intuitive. This was necessary in order to achieve the balance between innovation and analytical rigour that we were aiming for in our work. We found inspiration in three methods central to other foresight work – trend analysis, stakeholder consultations, and horizon-scanning – but critically adapted them within the context of our developing framework.

The network itself was not simply a structural feature of CEDAR – it was an intellectual hive-mind, whose collective and individual strengths were made use of in intensive rounds of brainstorming, mind-mapping and exercise-based workshops. Intuition, in this regard, was critically central. It did not mean haphazard grappling around, but was invoked systematically as an individual and collective resource in selected components of exercises. These included initial keyword generation before embarking on thematic mapping in a systematic literature review of audience research. As we turned to foresight analysis, we similarly developed initial hunches for a trend analysis exercise before systematically exploring a series of micro trends and merging these into four key transformations, to be presented later. Furthermore, after intuitive assessments of what the key stakes and knowledge interests in the field are, we developed a 14 country wide rigorously conduct-



ed stakeholder consultation exercise. In order to scan horizons, an approach necessarily drawing on scholarly intuition, we applied findings from trend analysis as starting points for defining axes and drivers in our construction of scenarios.

Each exercise represented this **blend of intuition and analysis, creative thinking and critical rigour** – which gave CEDAR a set of robust exercises with which to do its work. In so doing, we opened up – from an entirely academic-outlook at the very outset, in the theme-mapping exercise, through a trends exercise which sought to distil easily communicated trends from it, to an increasingly public-facing stakeholders exercise to a wide-open horizon scanning exercise which brought together a range of knowledge interests in creating the scenarios. Key to CEDAR, was Van Notten’s account of the role of cultures of curiosity in foresight work – where cultures of curiosity are defined as *‘environments driven by inquisitiveness and imaginative thinking about the future. Such curiosity-driven research, free of vested interests and organizational impediments is likely to do more for free-thinking scenario development than any so-called scenario tool.’*³⁵ This brings us back to our account of the properties of the network itself and the energy it displayed as an entity, outside of being an organizational or structural device.



Trends and Transformations



Trend analysis: Approach

CEDAR's first foresight exercise was trend analysis. With this, we sought to understand transformations occurring in the past decade of audience research. We focused on transformations we found to characterize the present state of the field and that we believed would continue to rise in significance in the future.

The systematic literature review and theme mapping CEDAR conducted in its initial phase, before embarking on foresight, inspired our trend analysis exercise in two ways. It provided key materials, and it inspired analytical starting points. While the terms 'theme mapping' and 'trend analysis' might sound relatively similar, there were crucial differences between these exercises – as will also be evident by the different scope of the publications they have inspired.

- First, our understanding of the very idea of trends was key to informing this analytical approach: We saw **trends as transformations - rising, growing, declining, changing, developing, altering.**
- Second, as trend analysis was part of foresight analysis, we focused on trends that we believed to be clearly presented in the past decade and the here and now, but also continuing into the future.
- Third, we aimed for these trends to be formulated and communicated in concise phrases easily accessible to those outside academia.

In order to define trends, we started with a list of keywords developed by each of the thematic clusters that CEDAR had developed – as an organizational and analytical tool – while conducting our literature review. The first task of trend analysis was, however, to disband this structure and search for cross-currents, removing ourselves from the categories we had previously worked with. This was important in order to be open to developments at macro levels and blurring boundaries in the field. Through a brainstorming exercise, the keywords were merged and refined, many eliminated and new ones added, resulting in a series of small and large topics. In this process, we particularly emphasized our understanding of trend analysis as a way of shifting our focus from past to present – and then on to the future. Therefore, important themes discussed at length in CEDAR's previous publications were not prioritized unless we saw them taking on new meanings in the light of changes occurring in the media landscape of today. Even with this focus a multitude of relevant topics emerged.



Four pivots of transformation

On each of these topics we set out to do a detailed assessment of trends and transformations, drawing from the systematic literature review already conducted. The general approach was that two people in the network worked on each topic, producing short reports and formulating key trends found in the literature they considered. At a second workshop, these trends were collated and synthesized through presentations and discussions. As analyses of micro- and meso-level trends progressed, we found that our identified transformations could be grouped and analytically understood as **four pivots of transformations**.

These pivots could be formulated and further analysed as macro trends, speaking to each other at an overarching level, but solidly grounded in the detailed trend analysis that came before. Teams were formed working collectively to produce detailed analysis of each such pivot of transformations, which were, in this process, further discussed and assessed. In what follows, each team reflects from the trends analysis exercise on these four pivots of transformation.



Coping with intrusive digital media

Frederik Dhaenens and Anne Mollen

The power of digital media platforms is increasingly addressed in contemporary critical research. We have explored current and projected trends focusing on the power behind **intrusive media and on people's emancipatory sense-making**.

We identified three such trends:

- Audiences are increasingly confronted with intrusive digital media.
- Audiences are developing coping practices to deal with these intrusive media.
- Audiences are developing newer literacies that focus on the technology behind digital media.

Investigations of the interrelation between digital media platforms and people's related media practices run the risk of oversimplifying, ascribing either too much or too little power to platforms. Following Couldry and Hepp, who argue that to understand how contemporary social worlds are made and interpreted media needs to be understood as both 'technologies including infrastructures and as processes of sense-making'³⁶, we asked:

What can the role of audience research be, in a materialist phenomenology that focuses on the media as both technologies and processes of sense-making?

We consider that the challenge for future audience research is to reconcile people's sense-making with the material intrusiveness of digital media technologies. The three trends we have formulated points towards this challenge.

Audiences are increasingly confronted with intrusive digital media.

Based on increased interest in the materiality of technologies, *intrusiveness* is meant to grasp how especially digital media technologies are conceptualized in audience research. Intrusive digital media can be described through four characteristics that reflect how researchers hypothesize the power that digital media technologies can exert on audiences.

- *Exploitation* is used as a generic term to assemble such phenomena as free labour and encompasses research that targets the economic interests of media companies



in producing, providing and making accessible media to audiences.

- *Formativity* describes how specific conceptions, roles and types of agency become pre-configured for audiences and their engagement with media in their everyday life within the software interfaces and the algorithmic functioning of intrusive media.
- *Pervasiveness*, refers to the increasing ubiquity, embeddedness of and reliance on digital software-based media in people's everyday life, requiring them to display and adopt complex and differentiated ways of handling and managing their engagement with media.
- Last, *exclusion* refers to the power imbalance between producers and providers of digital media platforms and their users and audiences. Researchers point to a fundamental lack of audience participation when trying to oppose certain formative potentials of digital media platforms.

However, such research should be seen as only one perspective on the matter. Responding to the need for a more nuanced perspective, some studies have looked at how audiences perceive and respond to this supposed intrusiveness of digital media. One strand has investigated how far audiences are aware of this intrusiveness as well as their affective responses to intrusion. The second strand of research has addressed how far audiences engage in processes of co-signification and co-production when it comes to digital media. We argue that this latter strand is concerned with **audiences' complex coping practices** and consider this a trend in its own right.

Audiences are developing coping practices to deal with intrusive digital media.

We identified two fields of audience research that investigate coping practices.

- The first concerns audiences' *self-management*
- The second can be labelled as concerned with *technology management*

Research on self-management in intrusive media takes established frameworks in audience research and adapts it to the changing media environment. It addresses how individuals handle the power of platforms by making sense of intrusive media in their everyday life. Many of these studies demonstrate how audiences navigate the affordances and constraints of digital media platforms and how they display complex coping practices to, for instance, negotiate different identities online or to control their privacy.



The second field tries to break more fundamentally with continuities in audience research by asking what constitutes the power of intrusive media, and eventually how far audiences co-construct the power of intrusive media. We consider research increasingly focusing on audiences' role in what may be dubbed *technology management*, as opposed to self-management, to not only make sense of the power of intrusive media but also to question it. A look at these practices demonstrates how audiences develop knowledge into digital media technologies and appropriate digital media technologies to their personal or collective advantages, needs and ideas. **Audiences might resist implied user practices**, renegotiate functions of interfaces and even force media companies to change some of their restrictive settings. Such approaches reflect the much-discussed power of media platforms in contrast with audiences' sense-making.

New media literacies are being developed, shifting attention towards intrusive digital media and addressing their political as well as ethical implications.

A less addressed but crucial topic is the development of new media literacies that go beyond the content of digital media and address their underlying technologies. In this regard, *critical media literacies*³⁷ promote the idea that people acting in software-enabled environments need to gain knowledge about the software's working. In that case, they can provide a counterbalance against the idea of all-powerful digital media platforms and the imposition of their intrusiveness onto people's everyday lives. The overall aim seems to be to make the invisibility of intrusive media apparent in the first place.

But, for audience researchers, it remains important to stress that media are again seen as technologies and processes of sense-making. Being technologically savvy does not constitute the only way of being media literate in an age of intrusive media. Instead, audiences' complex coping practices demonstrate their potential for resistance even when they might lack insights into digital intrusiveness. Still, even newer media literacies need to address how both technological understanding and audiences' sense-making go together in addressing the profound ethical and political implications that intrusive digital media can have on people's everyday lives. Current political debates on how to hold large media companies accountable for phenomena like **hate speech, fake news or data exploitation** reflect how their technology is deeply intertwined with people's practices of appropriation.

Small acts of audience engagement interrupting content flows

Jelena Kleut, Jannie Møller Hartley, Tereza Pavličková, Ike Picone, Bojana Romić, Sander de Ridder

The audience has become highly productive in many different ways, but we find it analytically fruitful to focus on what we call **small acts of engagement**. Three types of these engagement practices have been identified in the trend analysis conducted in CEDAR:

- One-click engagement
- Commenting and debating
- Production of small stories

In 2006, Jay Rosen coined the famous term “the people formerly known as the audience”,³⁸ in a context of promising disruption in which ‘Web 2.0’ technologies would enable virtually anyone to publish information online at no cost and no effort. Ten years on, ideas of the audience seems much more complex than the ‘*everyone is a media producer now*’ atmosphere suggested back then. Admittedly, the productive dimension of media use is thoroughly ingrained in people’s everyday media practices. But the main way in which members of the audience contribute to production is much more subtle than initially envisioned. The trend analysis conducted in CEDAR allows us to emphasise three such subtle but important practices.

One click engagement encompasses a variety of acts - liking, sharing, re-tweeting, linking, flagging - occurring through social media platforms. What all of these have in common is that user engagement is facilitated by ‘social buttons’ as built in affordances of platforms. Use of ‘social buttons’ requires little effort and is a widespread type of audience engagement, providing users with the sense of (inter)activity and the platforms with valued traffic. Importantly, the abundance of user data gave rise to Big Data analysis, used by researchers and media industries alike. However, this growing field rarely intersects with audience research, as aggregated quantitative data often lacks in-depth individual and contextual analysis.

Commenting and debating also arose as a consequence of social media and web 2.0. A hypothesis has been that readers can consume but also actively participate in the production of news or popular culture. Some have argued that journalists and editors are no longer



gatekeepers but rather ‘gate watchers’ who monitor.³⁹ Studies of debates and commenting can broadly be divided into those focusing on instruments and possibilities for debate, studies that look at the actual debates, and studies that examine moderation. These are media driven ways of controlling or encouraging commenting as small acts of engagement. What has been missing is further research on how audiences actually engage in these debates.

Production of small stories represents a highly discursive audience activity. Small stories reflect individual experiences, identities, and interpretations. Compared to the other small acts discussed here they can be further removed or detached from the socio-technical frameworks of legacy media or platforms. Small stories are often studied in relation to social and cultural identity expressions, especially in the context of minority audiences or marginalized groups. Social dynamics of online identity expression are usually conceptualized within the framework of symbolic interactionism, referred to as online *self-representation* for which people use digital semiotic tools to show ‘idealised’ versions of selves.⁴⁰ Equally, there has been a keen interest in how online storytelling relates to identity construction, for example studying connections to the performative nature of gender, sexual and ethnic identities in online contexts.⁴¹

A conceptual model for understanding small acts of engagement

We argue that a conceptual model of these forms of small acts of engagements need to take into account:

- Implicit and less visible factors influencing engagement, including temporal, spatial and technical affordances, and
- The social position of the producer, for example altruism, personal gain, social contexts, attitudes and skills, social and cultural capital, and subjective reasons for engaging.

We suggest that small acts of engagement need to be conceptualised in terms of their level of productivity, ranging from *casual* acts, such as endorsing, liking, clicking and voting, towards more *intentional* and motivated acts such as sharing, commenting, debating and producing small stories. We can further conceptualise in terms of *effort* – writing a blogpost demands considerable effort, whilst commenting, liking or sharing does not. Lastly, we suggest to develop a conceptualisation of the influence or effects, what we have labelled *interruption*, on a more aggregate discursive level, focusing on intended and unintended effects.



Attentive dimension	Productive practices	Media driven / Audience driven	Interruption	Theoretical concepts
Reading	Liking, sharing, re-tweeting, flagging, checking	Media provide content and structures of audience engagement	Has a role on the aggregate level and indirectly on the content	Sense-making, meaning making
Evaluation of text - content	Commenting, debating	Media provide content and/or structures of audience engagement	Media adopting audience-produced content	Personal productive use of information, identity construction (collectively and individually)
Evaluation of overall media experience	Small stories	Driven by audiences identities, experiences, knowledge and skills	Broadening the mainstream	Empowerment – the audience using the productive dimension as a resource
Implication	Satire, re-configurations of content, mocking, flash-mobs, campaigning, promoting a certain issue, slacktivism	Driven by audiences evaluations of content or overall media experience	Challenging the mainstream	Governmentality – resistance against self-disciplining

Figure 4: Small acts of audience engagement

In order to address how mainstream media flows are broadened or challenged by audiences, peoples’ casual and everyday acts of engagement merit consideration. The rise and prominence of users’ productive practices is mostly and primarily driven by small acts of engagement. These are productive acts of interpretation, an expression of users’ understandings of media texts. Mainstream media flow can be challenged if not transformed due to the volume of these acts, which is realised by the producing audiences as well as by mainstream media. That is to say, profound changes in the way information is produced and distributed are fuelled by small acts of engagement rather than by more laborious and dedicated practices. For instance, the news industry has been more affected by the rise of people sharing news on social media than by bloggers publishing journalistic pieces.

Finally, **legacy media aim to appropriate alternative voices** and their rising prominence within public discourse, in order to adapt them into well-established journalistic practices. They implement their own policies of selection, ordering and attention, and hence, these interruptions represent a shift in discourse as opposed to radical uncontrolled disruptions.



Audience creativity and its co-option by larger powers

Miriam Stehling, Lucia Vesnic-Alujevic, Ana Jorge, Lidia Marôpo, Miguel Vicente

This section deals with the theme of co-option of audience work and creativity. We found that acts of audience production are being sought, shaped and co-opted by larger powers, over this past decade. Such powers mainly refer to players from the commercial media industry, but also include media regulators and policy makers, and stakeholders who could profit from audiences' participation in media production. When talking about co-option, we refer to an understanding of this term as diverting or using something in a role different from the usual or original one. In specific, this can on the one hand mean to adopt something (e.g. an idea or a form of media content) for one's own purposes, or include someone in something that they often do not want to be part of; or on the other hand to make someone part of something by agreement of all parties involved (cf. Oxford Learner's Dictionary).

The latter part of this definition is not usually used or even discussed in academic debates on the co-option of audiences. The theoretical frameworks that are commonly used to discuss this topic are political economy of communication and in particular of the web 2.0⁴², or the notion of participation with a background in cultural studies⁴³. Discussions include terms such as the commodification and exploitation of audiences, as well as digital and free labour on the one hand (political economy), but also participation, co-creation and audience creativity (cultural studies). Nevertheless, as Vesnic-Alujevic and Murru show⁴⁴, there is a need to find bridges between cultural studies and political economy approaches and the participation and labour of audiences' work.

Different to the terms participation or free labour, co-option emphasizes the ambiguities in these processes. According to danah boyd⁴⁵, co-option can be defined as the stage when the media under investigation become a creole and new practices emerge that are incomprehensible to those who were fluent in the previous culture of that media. In neo-liberal times, processes of produsage and co-creation of media content by audiences are inevitably entangled with practices of self-governance⁴⁶ and self-care. Also, processes of self-branding and self-marketing become increasingly important in the work of audiences as YouTubers, bloggers, citizen journalists, etc⁴⁷.



The three trends we identified here are as follows:

1. Digital media platform design is increasingly shaping content and audience agency into computable data.

This trend can also be termed as metrification, which means that **audiences' agency and engagement are turned into metrics**. This process of metrification is discussed as a critical development in which companies exploit the participation of audiences as free labour. Related to the concept of affordances that is used to describe the 'mutuality between technological shaping and social practices'⁴⁸, digital audience research is trending around the areas of automated processes. Examples of automation are algorithms, on which digital media are based. On the one hand, algorithms are used for filtering information on social media platforms and search engines; on the other hand, they are used for social and political bots. Although more research is needed on both these forms of algorithms and their effects on audiences' agency, they are considered with caution, because they are not regulated or controlled and their power lies in making something popular when it is not. Also, they are difficult to trace and cannot easily be detected by audiences themselves.

2. Media industries are encouraging and appropriating audiences' productive engagement for their purposes.

This involves audience creativity and user-generated content, such as fan fiction or citizen journalism. While audiences are resisting restrictions and constraints by mainstream media with self-produced alternative media, **existing power imbalances and hierarchical structures remain fixed**. This is especially the case with citizen journalism where audiences' content is used for economic benefits, but clear distinctions between citizens' contributions and content by professional journalists are made. Additionally, this trend includes new developments of the commercialisation of 'social media celebrities' such as YouTubers and bloggers, meaning that public relations companies increasingly recruit persons who have become popular on social media platforms for their own purposes. Our analysis shows that conflicts between audiences and larger powers do not occur as often as expected and that creative audiences also enjoy the visibility and recognition of their work, which might then lead to tolerance and co-option of it.



3. The creative participation of audiences in processes of glocalisation show how audiences' work is being managed and co-opted by global players.

Here, we see that commercial players in media industries increasingly not only use, but explicitly encourage audiences' work in order to use it for their own purposes. The co-option that takes place here takes a new form of using the work of audiences in a very direct form, as commercial bodies often address audiences to take part in the development of their media products as 'volunteer workers'. This work is then rewarded through rankings and peer-review within Facebook communities. The participation of the audience is a crucial part of the process itself, since the users fulfil a vital role in the glocalisation strategy of the company.



The micro-macro politics of audience action

Gilda Seddighi, Inês Amaral, Maria Francesca Murru and Maria José Brites

The political significance of audience practices takes on potentially new meanings in a changing media landscape. From our trend analysis we find -

- First, mediated daily life and civic engagement represents a broader transformation of mediated civic cultures.
- Second, these micro politics have an impact on macro-politics and collective action.

In the area of social life where the ordinary politics of media practices on micro levels connect – or disconnect – with manifest macro political actions, we propose that three key trends have emerged: a centrality of emotion in political participation, individualized collective action, and critical literacies.

Emotion in political participation

The centrality of emotion in political participation is a trend emerging from a body of literature taking interest in connections between everyday individual acts of media use, including emotional reception of media, and organized and non-organized collective political actions. When focusing on the impact of emotion in collective political action, emotion is often described within a social and cultural constructionist approach. In this regard, emotion is considered as an embodied societal product that can circulate, trigger or direct individual senses of civic-engagement. The relationship between individual articulations of emotions and reception of the emotions is key here. For instance, studies on tweets show that facts, opinion and affective sentences are blended and shape emotive stories at times of political uprisings.⁴⁹ While emotional articulations can contribute to mobilization, they can also strengthen feelings of belonging in a community, and influence feelings of exclusion and inclusion. In this regard, affect or emotion as the feeling of belonging to a social or a political community is a main point of connection or disconnection between micro and macro politics. This is especially important since younger generations might feel excluded and show little attention to partisan politics.⁵⁰



Individualized collective action

Individualized collective action is a second trend. As Kavada states, digital media allows ‘individualized forms of political action that subvert the notion of the collective as singular’.⁵¹ The process of individualization is articulated in personalized action formations. Following this perspective, Bennett and Segerberg argue that ‘people may still join actions in large numbers, but the identity reference is more derived through inclusive and diverse large-scale personal expression rather than through common group or ideological identification’.⁵² In other words, digital media can bring individuals together **without a consistent collective identity**. This implies that digital media as a context for political action could significantly challenge key understandings of relationships between individuals and collectives taking political action.

Critical literacies

Critical literacies⁵³ is the third trend emphasizing new connections between micro and macro political engagements. Critical media literacy is associated with the use of media as tools for promoting critical thinking and democratic good.⁵⁴ The evolution of media and information possibilities points to the need of transforming notions of media literacy, making this ‘less an issue about technical capacities, and more oriented toward critical, normative reflection’.⁵⁵ In this regard, it has been argued that digital media literacy can help youths to counterbalance low levels of political motivation.⁵⁶ Civic and media literacies are thus related in the need to foster connections between having critical and informed citizens that can be more engaged.⁵⁷ Knowledge, particularly a certain degree of literacy and valid civic knowledge, provides a starting point for participation in society. In this context, literacy is considered as a starting point, as cause and as an effect, in a ‘virtuous circle’.⁵⁸

Importantly, all of these trends tend to seek explanations of emerging forms of connection between micro-macro politics, rather than disconnection. The **feeling of belonging to or being excluded from a community** is considered crucial for understanding how personal and individual emotions contribute to connection or disconnection. Digital media landscapes can enhance micro-participation on individual but connective levels, without the conventional rules of collective action.



Stakes in Audiences



Stakeholder consultation: Approach

David Mathieu and Miriam Stehling

In its second phase, CEDAR embarked on a long journey that resulted in the consultation of fifty-one stakeholders. This consultation connects organically to the other phases of CEDAR's work- not only did the perspectives of various stakeholders offer a rich source of knowledge of our field, it also brought further nuances and complexity to the four trends identified in a previous phase (see the section on 'Trend Analysis: Approach' in this report). Additionally, the knowledge shared by stakeholders shaped our vision for the future of audience research.

Our consultation was set in the continuation of scholarly efforts in the field of audience research to relate to and collaborate with stakeholders, including policy makers, regulators, educators or actors from the industry.⁵⁹ Our project was also located in the context of rapid and drastic changes in the media landscape, creating a pressing need to understand the impact of this environment on audiences. Yet, as the influence of academic research on society can no longer be taken for granted, this creates a need to work actively with the impact and relevance of audience research. Our stakeholder consultation was inscribed within this logic, but not without provoking tensions and doubts.

CEDAR adopted a critical stance throughout its entire work, which is reflected in the formulation of trends that served as a platform for the stakeholder consultation. Yet, we were aware that focusing solely on our critical position might prevent us from obtaining a better understanding of our field. Throughout the process, we were reminded of important contrasts between academia and the industry, but we also suspected that such discourses often serve to maintain and reinforce a Manichean dichotomy, while the reality is always more nuanced or varied. We realised, that not engaging with stakeholders could merely be a way to confine ourselves within a sense of false clarity regarding our comprehension of the field. Therefore, we did not simply wish to engage in a consultation in order to confirm our initial suspicions, an outcome that too often follows on from adopting a critical perspective,⁶⁰ but in order to **learn from the knowledge stakeholders have to offer**.

At the same time, we also recognised that we have different obligations towards audiences. This can be felt in the sometimes quite contrasting approach to research ethics or in the audience discourses that follow from different practices, including research.



Stakes in audiences are not value-free and can be used for political or economic gains. Hence, the stakeholder consultation engaged in a process of deconstruction and reconstruction of the different positions involved – including our own. Similarly, we did not intend to be the megaphone of certain discourses or practices that occupy a dominant position in the field. Therefore, we saw it as a necessity to secure voices of stakeholders who are less visible and influential.

The rationale for the selection of stakeholders was based on a reflection pursued by Sonia Livingstone (2005)⁶¹ around the conceptions of audience involved in different practices in and around media, and which was systematised in a table by Bjur, Bolin & Nyre in their report on stakeholder collaboration.⁶² The table is organised around, on the one hand, the dichotomy between system and lifeworld suggested by Habermas (1981/1992)⁶³ and, on the other hand, the public versus private spheres of audience activity. The table, reproduced below, provides indications of the types of stakeholder that took part in the consultation. These stakeholders, dispersed in 13 countries, represented activists and activism groups (3), bloggers (6), community media (1), content producers (5), content providers (6), interest groups (5), marketers (4), media consultants (1), media educators (3), media regulators (5), NGOs (8), public service broadcasters (3) and SoMe editor (1).

	Public (citizen)	Private (consumer)
System (object)	SoMe editor Media regulators Media educators Public service broadcasters Content providers	NGOs Content producers Media consultant Marketers Content providers
Lifeworld (agent)	Content producers Community media Bloggers Activists and activism groups Interest groups NGOs	Content producers NGOs Interest groups Activists and activism groups Bloggers Media educators

Figure 5: The stakeholder exercise



We took interest in four different kinds of stakeholder groups distinguished by the conception of audiences that they articulate as part of their practice and discourse. First, the vertical axis makes a distinction between stakeholders who tend to objectify audiences and those who represent audiences as agents, articulating agency in audiences. That is, audiences can be seen as objects to be controlled, influenced, educated or otherwise changed. Such discourse about the audience arguably forms a dominant conception amongst stakeholders. In opposition, audiences can be seen as agentic, and this discourse is encouraged and promoted by a bulk of stakeholders who defend and represent, more or less directly, the interests of audiences. This includes members of the audience itself, but also activists and grass-rooted initiatives that claim to give a voice to media audiences. Second, stakeholders were also distinguished along a horizontal axis expressing an interest in the audience as citizens or as consumers, acknowledging that these two roles are difficult to disentangle. Nevertheless, this way of organising our consultation proved to be useful in many respects. The grid provided a systematic approach that encouraged us to look beyond the obvious, and select stakeholders of different sizes and interests.

While the overall methodology was developed by us (as the stakeholder action group), yet discussed at CEDAR meetings, four smaller teams representing the four trends were responsible for the concrete planning, conducting and reporting of the interviews. As the goal was to inspire in-depth conversations and encourage the unique perspectives provided by stakeholders, the qualitative interview appeared as the method of choice for the consultation. General questions concerning the conditions and contexts of media audiences in the past, present and future were complemented by specific interview questions driven by the interests of each trend and by the type of stakeholder consulted. Interviews were conducted by individual members of the consortium, often in their native language, and for the most part face-to-face. All interviews were recorded and summary reports were prepared to facilitate the analysis. The findings of the stakeholder consultation can be found in the sub-sections that follow.



Acknowledging the dilemmas of intrusive media

David Mathieu, Juliane Finger, Patricia Dias, Despina Chronaki, Cosimo Marco Scarcelli

Part of the stakeholder consultation addressed strategies that media audiences are developing to cope with pressures and intrusions in a changing media environment, characterised by digitalisation and interactive possibilities. We interviewed ten stakeholders representing interests such as content production, media literacy, media regulation, and activism. Consulting with these stakeholders left the impression that **pressures and intrusions from media lack widespread acknowledgement**, and that little is known about audiences' strategies to cope with media. Even when intrusions are acknowledged, we find no consensual motivation, nor any clear avenue for action. Therefore, we have analysed different discursive positions that prevent acknowledging or taking action upon the pressures and intrusions that we presented to these stakeholders. The discursive positions are outlined below.

Dilemmas of intrusion: Discursive positions

Never heard of it! This position results from stakeholders who engage strategically with audiences and develop measurements concerning audience responses to content delivered that indicate the position of the organisation on the market of audience attention. In brief, media pressures and intrusions are simply not being perceived by measurements developed to assess the audience as consumers of media content.

How could that be! Not only are pressures and intrusions not in focus as in the previous position, but they come as an element of surprise in a media environment seen to provide opportunities for audiences, and characterised by competitiveness and fragmentation. Audiences as consumers are said to be driving the production of media content, and their changing habits are difficult to track and keep up with. It is as if these stakeholders have to adapt to the audience, rather than vice-versa.

They are the problem! In this position, not only are audiences occupying the front stage of the media scene, but their actions are seen as a major source of intrusions and



pressures. Threats to privacy, trolling, bigotry, etc. are seen as results of intrusions created by audiences. Moreover, changing norms in media use, in self-presentation and identity formation are the outcome of peer pressure, that is, of the constant and demanding presence of an audience always alert via digital and mobile media.

How can we handle it! In this position, the pressures and intrusions are recognized, but the rapid changes in audience habits and the complexity and transnational character of the media landscape make it difficult to intervene, in spite of the willingness of stakeholders who do create awareness and encourage coping strategies.

We can't help! While the problems are recognized, the media environment as a whole is seen as responsible. The problem is in the hands of media who operate beyond national borders, who do not wish to collaborate or share knowledge. Such views encourage resignation, diffusion of responsibility and a culture of silence in which the problems created by the media are too easily accepted.

Improving the situation

Working towards an improvement of this situation involves acknowledging the presence of these discourses, and finding solutions that take them into account. We indicate solutions in **three main contexts of intervention**: socio-technological, normative and regulatory, that encourage greater awareness of the problems, a proper articulation of their underlying conditions and a comprehensive framework upon which to develop intervention.

In the socio-technological context, we propose that real and diversified choices need to be offered in which audiences do not have to choose between engagement in the media or protection from pressures and intrusions. According to many stakeholders, young people know the risks associated with the use of media, they know that might be exploited or how to customize privacy settings, but such knowledge does not lead to action because that would have consequences for their everyday or social life. If action is taken, stakeholders are increasingly noticing young people looking for alternative lifestyles that involve switching off completely from the media. Audiences are thereby presented with a difficult, dichotomous choice in their attempt to manage their engagement with digital, interactive media. Either they have to accept the media environment as it is, with all the risks and intrusions it entails, or they have to withdraw completely. This choice is especially difficult to make for young people because media are highly integrated in their



everyday life and because there are social consequences in withdrawing. It is therefore important to find solutions that are not solely articulated in terms of technological interfaces, but also accounting for social dimensions.

In the normative context, we draw attention to the need to change the expectations that audiences have of their media environment. The failure of audiences to read grueling terms of service or regulate privacy settings should not be read as signs of apathy, but as indications that audiences are slowly accepting the drawbacks of their media landscape. Audiences, broadly speaking, do not have the privilege to act on their dislike of or disagreement with what a service entails. If they want to use it, they have to accept it wholly. At the same time, audiences seem to accept that certain norms, values or expectations do not apply in online environments. Such resignation rests on an understanding of the media environment as **too complex, too remote and too chaotic**.

In the regulatory context, we underline that the burden of coping with the media falls heavily on individuals. Audiences develop their own rules and ethics in using new media, developing their competences, but they have little power to change the media. Moreover, regulatory frameworks developed for broadcast and national media content are quickly becoming obsolete as transnational media and audiences are changing rapidly. Hence, regulation should encompass concerns around the media and focus on implications and consequences of media use. Normative differences between online and offline environments indicate that effort can be made to apply existing frameworks to the online world, rather than developing new frameworks.



Interruption, disruption or intervention?

*Tereza Pavlíčková, Bojana Romić, Jannie Møller Hartley, Ike Picone,
Sander de Ridder, Jelena Kleut*

Small, random and casual acts of audience engagement have become one of the key characteristics of contemporary content flows. To map the changes brought by this trend, seventeen stakeholders were interviewed in five countries – Belgium, Czech Republic, Denmark, Serbia and Sweden.

Since some small acts of audience engagement are invited and facilitated by media, while others are driven by audiences themselves, the stakeholder consultations included respondents in traditional roles of content creators (journalists, social media editors, marketing professionals), as well as amateur and semi-amateur producers (bloggers, vloggers) and non-profit organisations aiming to empower audiences or to supplement mainstream media offer.

The consultations result in four key findings:

- Software supported analytics and online comments provide media producers with a continuously updated view on their audience.
- Production routines of the legacy media change in response to small acts of engagement.
- Audience creativity enters economic relations.
- In relationship between audiences and media there is a transformation related to (dis)trust.

The 'real-time' audience

Digital communication technologies have scaled-up the two-way communication channel between media producers and their audience. *'Media producers now have a permanent relation with their audience because they see in real time what people are consuming on different platforms'*, to quote Wouter Verschelden, a founder and editor-in-chief of Newsmonkey.be (Belgium). Hence, media producers' perception of their audience equally evolves in real-time, based on a continuous feed of quantitative and



qualitative insights about their audience. Editorial analytics such as Google Analytics, Chartbeat or Hotjar provide media producers with up to the minute information on who is visiting their platforms and which content is performing well. Additionally, comments and @replies on social media give media producers a 'qualitative' sense of the concerns and sensitivities amongst members of their audience.

These analytical tools fragment the monolithic audience in tangible sub-communities that can now, supported by personalisation algorithms, be easily targeted with specific information and advertisements. Furthermore, the dramatic shortening of the time lapse between an editorial action and feedback on the audience' reaction (one recalls quarterly circulation numbers) might further reinforce the 'entertainment' bias in media production towards 'nice to know'-information as opposed to 'need to know'-information.

Adjustment and control of content

In networked media ecology, the production routines within legacy media are changing because of small acts of engagement. Large scale audience engagement is increasingly seen amongst stakeholders as not done for the right reasons, partly because of lacking public interest orientation, partly because it is turning towards commercial content seeking to reach more views, likes and shares. There is an increasingly niche-orientation in the production of content as bloggers and vloggers are producing content to different niche audiences, that again become more niche, for which community building seems to be crucial.

Disruption is thus a form of co-created ecology of content, between legacy media as proactive with content distributed following existing norms and routines and producers of small acts of online engagement as re-active. This in some cases results in the change of content and making it their own, which can transform small interruptions into larger ones. These disruptions are issue-oriented rather than brand oriented.

Therefore, both public and private actors who aim to influence the public with content, i.e. encourage small acts of engagement, have to be much more re-active to a general agenda set by audiences. However, this is difficult as the media driven engagement is influenced by institutionalised routines and norms of production within legacy media institutions, whereas audience driven engagement is driven by a 'making it up as you go along' logic. Public and private bodies are reacting to this trend by adapting their micro-communication across different platforms, *'the platform shapes how we think about certain issues'*, says Tobias Egmose, social media strategies at Økologisk Landsforening (Denmark).



Audience engagement between creativity and economy

Small acts of engagement contribute to the segmentation of the audience around various 'affective spaces'. They often have an artistic potential that is supported by the infrastructure of the platform and seen as a contribution to the community. Current trends are showing that small creative acts made by the audience are often taking place within the predefined niche-spaces carefully designed to encourage desired activity. When this **immaterial labour** is substantial, the important cohesive element is community-building, where the most prominent audience members gain a special status: they become trusted people within the community.

This creative potential of audiences' engagement is greatly fostered by the media, for example in the case of game and transmedia projects that are designed to involve creative interventions by the audience members. Cecilie Stranger-Thorsen, founder of Stranger/Nordic transmedia Producers (Sweden) gave the example of the game made by Malmö-based company where audience members can produce goods that are traded within the game. Alyssa Levin from BoostHbg (Sweden) emphasizes: *'You have to create audience engagement!* In other words, the infrastructure and support has to be there to facilitate audience activity.

The interruption of trust and trustworthiness

Audiences' small engagements in the form of various endorsements granted to online content establish an alternative mechanism of visibility and prominence of content. Audiences' quantified attention is, by various algorithms, prioritised over quality of the content and its standards of production. The notion of popularity and public appreciation then stands for proof of reliability and trustworthiness. The legacy ways of working are being contested by new practices arising from the notion of shared audiencing, intertwining with the traditional values of journalistic practices.

With the increasing amount of available sources, and often contradictory content, **audiences are burdened anew with the task of selection and verification of content**. Therefore, they are looking for media providers or opinion leaders (media- or audience-driven) they can relate to, and invest trust in the process. *'We are the curator, we will follow all the blogs, do that intensive task for you, that is something that has great value for readers'*, says Robin Wauters, founder and CEO at tech.eu (Belgium). Legacy media are supplemented and increasingly substituted by media



authorities that due to their niche-orientation are able to build a closer relationship with their specific audience.

Legacy media operating in different legal environments as opposed to audience-driven media platforms face particular challenges in relation to audiences' engagements by being accountable for the content produced by audiences yet distributed via them. That leads to their editorial involvement or even interference with the content contributed by audiences', for example closing down discussion threads or editing live feeds from social media in television broadcasting.



Redefining audience relations

Miguel Vicente, Lucia Vesnic-Alujevic, Miriam Stehling, Ana Jorge, Lidia Marôpo

Co-option was one of the first words emerging from our initial brainstorming about the future of audiences and audience research. This intuition turned into something concrete after our mapping exercise, but our semantic field incorporated other keywords relating to the relationship between the various agents involved in communication exchanges around us. Participation, collaboration, exploitation, free 2.0 labour were only some of the labels we found trying to capture the essence of these ongoing changes. Using in-depth interviews conducted during early 2017 in five European countries, our group reached a diverse group of experts, ranging from the audience measurement industry to civil society representatives advocating for audiences' rights. Their insightful collaboration fostered conclusions for understanding audience transformations and their social implications, with particular emphasis on co-option.

The consultations resulted in three key findings:

- Technological advances are key to – but not the only explanation for – changing relations between audiences and industries.
- Business models are reconsidered building on metrification and co-option.
- Audiences and industries are tied in complex dialectics, signalling the continued need for critical perspectives.

The transition from a classical media-centred system of distant relations between those producing messages and a vast majority of people receiving them, to a more balanced distribution of agency is fostered by technological advances, but it cannot be explained only in these terms. Social and economic norms are being redefined and the final outlook of this shift is yet to be determined, as established and emerging powers experience a constant and hard-to-predict negotiation of their influences.

The radical centrality that ICT acquired in most people's daily life demands both empirically-grounded research and theoretically-courageous attempts to explain our contemporary societies. The links between content users and producers have been multiplied and diversified, leading to a complex landscape of crossed-interests and mutual influences. Our interviewees share this uncertainty and do their best to understand and adapt their actions to a somehow confusing environment.



Changing business models

On the one hand, the business model of mass media which was dominant during the 20th century is slowly receding, although it is still up and running in all media systems across the globe. Large corporations keep on playing a key role, with a growing presence of technological players, such as Google, Apple, Facebook or Amazon (GAFA). On the other hand, mediated practices have exploded at the interpersonal and group levels of communication. Individuals are now able to produce and distribute content due to the spread of ICT skills and platforms: the extent to which these messages are reaching wide audiences is still under discussion, but it is obvious that the amount of available information experienced a constant growth which seems to be far from any slowdown. Lay people are now able to produce content, stepping outside a passive understanding of audienc(ing). Relevant concerns regarding online safety, privacy and fraudulent uses of online information appeared frequently in our respondents' quotes, as the relation between individuals and larger powers is not a balanced one. People's digital competence is not at the same level for all audiences and this leads to potential conflicts in the way people use and relate to media and technology.

Media companies and digital platforms are developing a new business model based on metrification. Technological evolution allows a precise tracking of audience practices, converting audience agency into computable data. In an era where big data is turning into an expanding reality, metrification is presented as a new step forward for market-driven audience research. People meters symbolised an epoch where TV ratings were set as the accepted system to distribute revenues among strong players.

Changing dialectics

This implies, that the politics of empirical audience research continue to matter,⁶⁴ and companies are tied into a complex dialectical relationship with audiences. Media industries are encouraging and appropriating audiences' productive engagement for their economic purposes: calls for participation are frequent, as a new resource to monetize the linkage between production and consumption. Some younger audiences are attracting online interest challenging global media players with alternative practices and resources. From bloggers to YouTubers, these people are proving that there are other alternative models to be explored. Yet, even their discourse seems to, most of the time, reflect dominant approaches to media economy: maximizing audience figures and exchanging these figures by revenue.



Critical perspectives in social sciences underline the imbalance of this relationship, highlighting that the creative participation of audiences is being co-opted by global players. However, an emerging ambiguous relationship between these platforms and audiences was identified in our work with stakeholders, constituted by conflictive interests of entities such as traditional media producers and distributors, which strive to maximize profits and audiences that seem to struggle to keep their creative work and agency protected.



Collaboration potentials in micro and macro politics of audience creativity

Maria José Brites, Niklas Alexander Chimirri, Inês Amaral, Gilda Seddighi, Marisa Torres da Silva and Maria Francesca Murru

In our stakeholder consultation following up on trends concerning the micro and macro politics of audience action, we explore the potential impact of audiences' micro-participation and connection to macro-actions. We address this issue taking into consideration intrinsic continuities and discontinuities between academia and the stakeholders' perspectives. Our findings continue to emphasise the

- (dis)connections between micro and macro actions
- A technological appeal for action
- Collaboration potentials between academia and other stakeholders.

(Dis)connections between micro and macro actions

Contemplating definitions and (dis)connections between micro and macro actions, the stakeholders who were interviewed work on promoting audiences' media competencies, in fields where audience micro-actions could potentially link to political macro-actions. We connect this to understandings of participation as a process that occurs in minimalist and maximalist forms.⁶⁵ While minimalist democratic participation is focused on representation and delegation of power, maximalist democratic participation also balances the concerns of representation. Nico Carpentier argues that '*while macro-participation relates to participation in the entire polis, country or political imagined community, micro-participation refers to the spheres of school, family, workplace, church and community*'.⁶⁶ There are gaps but also bridges between micro and macro politics and various conceptualizations of these differences.^{67 68 69 70}

Meanwhile, micro-forms of participation are often strategically understood as springboards for macro-participation. This argument is articulated by media educators and social movement organizations: The School Library Network aims to '*to educate to promote an educated public opinion*' through activities on the micro level of participation, and micro-forms of citizen participation also form the basis for the collective actions of the



social movement Que Se Lixe a Troika. Other micro-organizations articulate civic action as ‘fun activism’, which values short-term emotional investment. Despite clear differences with macro-institutions’ views on media education, who display a different understanding of literacy as needing to be internalized by citizens, their work is also fuelled by emotional engagement.

Technological appeal for action

All interviewees pointed to a technological appeal for action. This emerges as intrinsic to many of the discourses the interviewees draw on: in the digital age, online platforms and other technologies act as seemingly innocuous tools that citizens can make use of to participate. For instance, in the case of the social movement Que Se Lixe a Troika, the interviewee stresses that *‘although social networks are a good indicator of the popularity of an action, they often still need the credibility of traditional media’*. This idea is also connected to the argument of ‘individualized collective action’^{71 72} in a sense that both are interconnected, revealing intersections between micro and macro politics potentiated by technology. Techno-euphoric and celebratory understandings prevail strongly. However, some interviewees also point to a decrease in the quality of user participation and creativity, which could in the longer run undermine the relationship between stakeholders and audiences. Several stakeholders point out that the use of technology and even ‘produsage’ is not necessarily synonymous with participation.

Collaboration potentials

Collaboration potential between academia and other stakeholders is articulated as essential in the interviews with public service broadcasters, regulatory institutions and media educators such as the School Libraries Network or the media pedagogical unit of the Freiwillige Selbstkontrolle Fernsehen, though it is not always as well organized as hoped for. Fragile relationships could be due to lack of insight into one another’s work practices and interests. This is different for those regulators who are closely connected to academia. For instance, the head of the Danish Media Council and also other board members, are academics. Here the intensification of academic and non-academic engagements is emphasized in order to push for policy change in terms of legislative updates that reflect current media convergence trends.

In interviews with less formalized bodies, meanwhile, collaboration with academia does not appear that relevant anymore. Instead, collaboration is partly sought with other gov-



ernmental and non-governmental stakeholders, seeking to promote political and emotional investments in media education and literacy for funding purposes. In the case of micro-organizations and communities that have a more outspoken activist profile (such as the movement of Que Se Lixe a Troika and the political blog of Jugular), interviewees identify that current media convergence trends have had an impact on their emotionally mediated engagement, however they neither explicitly work formally in terms of citizens' media literacy, nor does collaboration with academia appear relevant to them.

Our primary conclusions are as follows –

- There is a tendency to associate participation with technological mediation, while neglecting offline possibilities.
- There is a push towards academic collaboration, especially among organized stakeholders, which is critical, and renegotiates underlying promises on online micro-engagements.
- We can identify a tendency towards moving from prescriptive regulatory approaches to preventive media pedagogical work.
- Emotional engagement is a main factor for political action and should not be ignored in future work on the area.
- The quality of attention that people pay to media is ephemeral and discontinuous.
- In-depth knowledge of the processes involved in reception, interpretation and 'listening' are missing in our stakeholder's interviews.

A close-up photograph of a person's hand holding a white smartphone. The background is a blurred cityscape at night, featuring numerous out-of-focus lights in shades of yellow, orange, and white, creating a bokeh effect. The phone is held horizontally, and the hand is visible on the left side of the frame. The text 'Horizon Scanning' is overlaid in the bottom-left corner.

Horizon Scanning

Horizon Scanning Exercise: Approach

In envisaging scenarios for the future of audiences, CEDAR has dealt with a short temporal frame of 1.5 decades and targeted the year 2030 to pinpoint our analysis. Our reasons for this choice concern a delicate balance between ambitions to be forward-looking and yet maintain clear connections to the present day. As we aimed to formulate priorities and agendas for research, we have desired that these should be practical and realistically feasible. These scenarios are meant to be productive only in combination and only as the boundaries of possibilities that are likely to unfold somewhere within. They are not predictive snapshots, and they are not, and cannot be inclusive of everything that engages audience analysts.

In making the choice to scan the horizon of what the contexts of audience research could look like in 2030, we note that we do this task at the brink of the potentially transformative Internet of Things, a term first used by Kevin Ashton in 1999⁷³, mediating the life worlds and practices of audiences as individuals and communities, and becoming an increasingly realistic possibility⁷⁴. At the time of writing this report, we note that critical questions about media regulation, surveillance, privacy, and essentially inequalities of power⁷⁵, are beginning to overlap across conversations on social media and on the Internet of Things.

We envisage that by 2030, we will have entered the high point of the Internet of Things mediating most aspects of social, civic and political life in connected Europe – the context of our work. This refers to the notion of distance travelled between the early energy accompanying the appearance of a new form of mediated communication and its becoming ubiquitous in its uptake and developed in terms of the intellectual and socio-political critique around it. Far from being determined by technology, we stay close to Bolter and Grusin's work on remediation⁷⁶, as we read the history of the IoT into what went before – for instance, ubiquitous computing⁷⁷ or pervasive computing⁷⁸.

As we scan horizons, we follow some of the different ways in which mediated experiences are likely to unfold over the foreseeable future. Comparing with the ubiquity of popular social media platforms and the distance travelled from the inception of these platforms till today, we envisage in 2030, that:

- the IoT is widespread across Europe and increasingly integrated in daily life and in different societal arenas and sectors



- mediated experiences are increasingly tailored to individual preferences and choices, as people are anticipated by some scholars⁷⁹ to increasingly live 'in' rather than 'with' the media
- the intellectual critique of the IoT is reaching a state of maturity with well-developed theorisations of its social, cultural and political ramifications, similar to what happened with the emergence of social networking platforms.

It is this context that we position the four pivots of transformation presented previously under our trend analysis exercise, to hone in closely on their focus on two dimensions –

- Audiences' experiences with and responses to technological transformations
- Transformations in the nature and contexts of public participation.

In scanning horizons, these two dimensions constitute two key axes emerging out of our work on trends and further developed through stakeholder consultations. As discussed previously, they weave in and out of all the four pivots we presented. Of course, these were not the only axes we could have developed our scenarios around, nor do they explicitly represent all topics included in our trend analysis or stakeholder consultations. They remain, however, critical points of reflection, for us, as we scan the future, from the present.

In what follows, we first pursue these two axes further, to unpack them for the driving factors that each of these contain – our key drivers– before we move on to outlining the scenarios built around them.

Key Axes and Drivers

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Axes

CEDAR's scenarios for audiences in 2030 are created by combining two set of variables, here represented by axes:

- The nature of participation and public life
- The response to technological developments in the context of the Internet of Things (IoT).

These axes are further broken down into and supplanted by a set of drivers. On the basis of Van Notten's STEEP classification⁸⁰ that was revised for the case of audience research, sixteen drivers were grouped around economic, political, societal and technological developments.

Axis 1: The nature of participation and public life

A vibrant participation in public life represents an essential aspect of democratic governance. While for some scholars, public life is assumed as reason-based and homogenous,⁸¹ for others, participation in public life is also a struggle for dominance.⁸² The widespread use of the web 2.0 in democratic societies has led to offering more opportunities for engagement in political life and the possibilities for the existence of online public sphere(s) as well as supranational citizenship.⁸³ However, despite the fact that the majority of citizens in European states have access to the Internet, many take distance from participation in conventional politics – notably also the younger generation.⁸⁴

The development of political citizenship and participation in public life was influenced by social movements in the 1960s and 1970s where the emphasis was on the relationship between civil society, the nation-state and citizens. From the late 1970s onward, social movements increasingly opposed neoliberalism (e.g. Thatcher's policies in 1980s), by proposing global or cosmopolitan citizenship. Consequently, governance practices have increasingly been taking place outside nation-states. In the scenarios presented in the



next section, although we focus on nation-states as the main social context of public life, we do not limit the scenarios to territorial boundaries.

Axis 2: The response to technological developments in the context of the Internet of Things (IoT).

In the context of complex interactions between users and technology, between humans and non-humans, real and virtual entities,⁸⁵ social and political instability, and new notions of citizenship arising, our second axis considers the role of technological uptake, especially the Internet of Things (IoT), its ubiquity and pervasiveness, and their consequences.

The techno-scientific neoliberal narrative of innovation, often present nowadays both in public entities and private companies, would lead us to believe that there is a technological fix for all our problems in contemporary lives and the challenges of our time. The IoT is currently present in many debates across Europe and for example, it is seen as one of the main drivers for the Innovation Union and an important part of the European Commission's Digital Agenda. However, the convergence of physical, digital and virtual worlds poses many challenges to norms and values, rights and society, especially in terms of users' agency, autonomy and social justice.

From the invisibility of objects around us that users stop noticing, through the ever-present connectivity of a high number of devices (which are also not always perceived), the IoT reminds us to think about tensions between the public and the private and about limited possibilities for an opt-out or an alternative to being 'connected'. This also leads to users' data being generated, manipulated and co-opted by corporations.

IoT extends user agency, but strong mediation can also lead to unwanted shift and delegation of agency from users to objects. Also, individuals are often seen only as 'pieces of data', with their agency being threatened and impaired.⁸⁶ However, it is possible to think about the IoT also as a site for resistance and empowerment.

Thinking along these two key axes, we developed a set of drivers which became the guiding tools with which we scanned horizons to arrive at snapshots of the future of audiences and audience analysis.

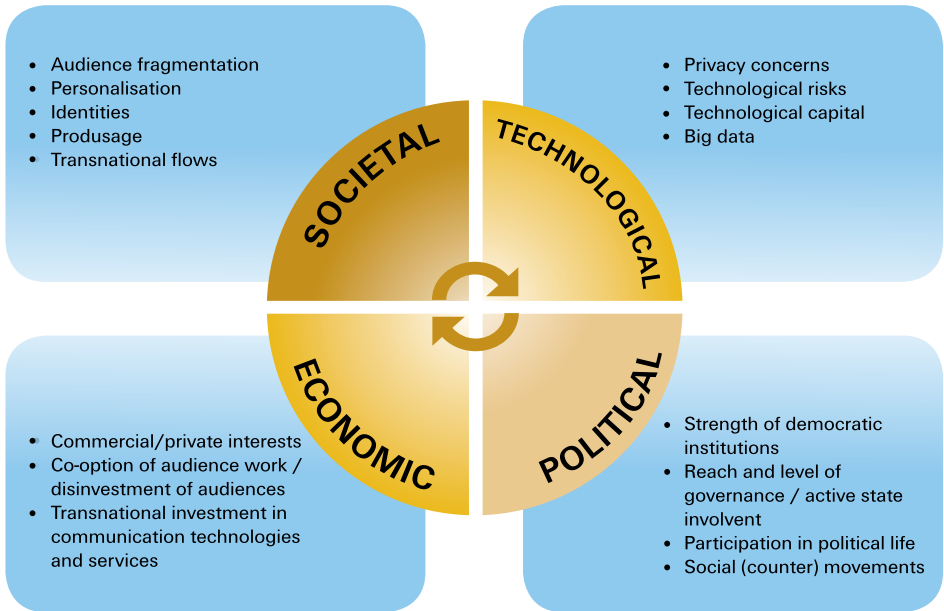


Figure 6: Drivers for 2030

Drivers

Economic drivers

Commercial/private interests

Commercial interests and the exploitation of free labour, together with corporate surveillance and the use of users' (private) data by companies continue to grow with the development of IoT technologies.

Co-option of audience work- disinvestment of audiences

Big commercial players encourage audience creativity, practices and participation in the production of digital content and co-opt them for their own purposes.

Transnational investment in communication technologies and services

Investment and regulation of communication technologies and services have been decentralized by the rising power of transnational corporations viewed as generators of economic growth.



Political drivers

Strength of democratic institutions

The strength of democratic institutions matters for the emancipation, involvement and protection of media audiences. Strong democratic institutions invite the participation of a vibrant and diversified civil society, which in turn serves the interests of democracy.

Active state involvement

The state, as the constitutional legal system and its regulator, offers laws and institutions that enable public life.

Participation in political life

Civil society is an important motor of participation in public life and is largely oriented against a neo-liberal order.

Social (counter) movements

Digitally-enabled collective actions in the last decades have been described as 'individualized collective action' having interest in the ethics of daily life, rather than in the conventional politics.

Societal drivers

Audience fragmentation

The media landscape is characterised by a high degree of fragmentation of audience attention, in line with increasingly differentiated media practices.

Personalization

Social media in which personal engagement is enabled, play an important role in the escalation of personalization.

Identities

Media and identities are interlinked and this relationship is often articulated along dichotomies that express power relations in society.

Producers

Digital audiences not only create content but also use other practices that include some sort of a productive force, such as liking, sharing, recommending.



Transnational flows

Transnational media flows and the increase in cross-border mobilization have escalated the debate on de-territorial aspect of media production, circulation and consumption and its implication.

Technological drivers

Privacy concerns

The corporate surveillance of individuals online, who become objects of information and are used for profit-making, continues to be an important issue, because it leads to the loss of user privacy and agency.

Technological risks

Several challenges have been recently discussed by policy makers and stakeholders, namely security, liability, privacy, data protection and trust (European Commission Staff Working Doc, 2016).

Technological capital

Technological capital risks being concentrated in the hands of a few, while the vast majority is confined to protect itself from or be exploited by technology.

Big Data

Big Data help invasive marketing strategies and often lead to privacy intrusions. It is expected that the number of data will continue to grow with the development of IoT technologies.

Four Scenarios

CEDAR's four scenarios for audiences in 2030 are created by combining the drivers along the two axes of public participation and responses to technology.

In the graphic below, we see the green arrow going horizontally, representing levels of public uptake and investment in the gamut of technological developments that unfold within, related to and outside the Internet of Things, including increasingly intrusive interfaces. We see the brown arrow going vertically representing people's participation in the public sphere, including the relationships of audiences as individual actors with institutions, both private and public.

We snapshot our scenarios at two ends of this:

1. the social-democratic vision envisages a state involved with a variety of sectors participating in healthy public life, and
2. the more neo-liberal vision sees a small and receding state, corporatized public life and many commercial players dominating most aspects of public life.

We present our scenarios as mirror scenarios – in pairs – each pair presenting two scenarios that paint opposite pictures along the axes above.

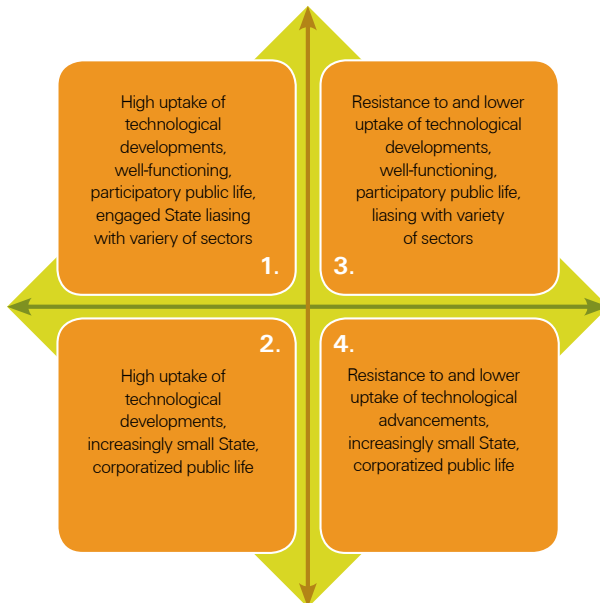


Figure 7: Scenarios



1

In the top left quadrant, we see in 2030 our first scenario, in which most individuals, households and organisations are using connected gadgets which have complexified the Internet of Things from a nascent stage today. From the projected 50 billion connected devices by 2020, there is a manifold increase in 2030, including diverse artifacts from all social arenas. We work with the idea that automation has become less cumbersome, but also more intrusive and subtly present in people's lives. This inspires critical conversations on security and privacy, generally high levels of public awareness and critical literacies, and lively debates about data ownership, privacy, legalities of data, accessing of risky and harmful content by vulnerable audiences, surveillance and so forth. We tentatively see gaps in people's access to technological capital closing, as the IoT ends up being more ubiquitous, affordable and accessible. In this scenario, we see a healthily functioning democracy with an engaged state involved with a variety of other sectors to promote education, health and emotional well-being. Technological transformations have had central roles to play in these sectors coming together to advance formal and informal literacies concerning media and technology. Social movements have become crucial avenues of participation in public life and are contributing in parallel to democracy.

2

In the bottom left quadrant, we see a related second scenario that shares the facets of scenario 1 concerning people's engagement with mediated communication, but departs from it in terms of the nature of public participation and the role of corporations and the state. This scenario sees people participating less in small acts of self-directed engagement with the media, and more in audience labour that is cleverly co-opted by larger and more powerful institutions. There is an increasingly neo-liberal public life with a small and receding State with diminishing involvements and regulatory responsibilities. We envisage here that technological transformations have had central roles to play in private sectors coming together in formal and informal education, media and technical literacies and education, healthcare and well-being. There is large scale co-option of audience labour, corporate surveillance and exploitation of data. Both these scenarios converge in their visions of public engagement with the Internet of Things in mediated societies of Europe, but they diverge, therefore, in the nature of public participation and institutional participation in the public sphere.

In our third scenario in the top right quadrant, we see media production post the IoT as hyper-fragmented. Audiences are participating less in self-directed productive engagement with the media, but more in labour that is cleverly co-opted into programmatic ads – which are highly personalised, individualised and customised.



3

Gaming has transformed from multiplayer games to gaming portals operating by recognition of individual physical cues and bodily sensors, and individuals are engaged in immersive virtual-reality single-person experiences. Connected devices are no longer occasional technological treats, but have fully entered the core workings of businesses, everyday life, social networking, healthcare and public affairs. Travel, transport, healthcare, education, toys and learning technologies are dependent on cloud based applications and devices, sharing data between each other and audiences. There is an increasingly neo-liberal public life with a small and receding State with diminishing regulatory responsibilities and a receding level of involvement with anything other than corporate and commercial sectors. The technological transformations have had central roles to play in private sectors coming together in formal and informal education, media and technical literacies and education, healthcare and well-being. There is large-scale co-option of audience labour in the market, corporate data surveillance at a scale much more manifold than with social media pre 2020s, data exploitation by companies that have found new avenues to explore post Internet of Things. High levels of technical skills and newer literacies enable small and medium scale social movements to become crucial avenues of resistance in public life in the context of these outcomes of intrusive and automated technologies.

4

In the bottom right quadrant, we see our fourth scenario that shares the facets of public life described above, but diverges in its description of the uptake of transforming technologies. Post concerns over fake news and social media surveillance, critique of intrusive technologies has continued to rise, unevenly across the population, but steadily nonetheless. Key concerns voiced entering the 2020s have increased in complexity: the legalities of data ownership and protection, boundaries between public and private, surveillance post IoT, and the Big-Brother society that the high point of IoT has enabled. As the IoT has burgeoned over the 2020s, significant pockets of resistance have developed with refusals to take up technological advancements. These operate in the context of an increasingly neo-liberal public life, and with commercial interests developing large-scale co-option of audience labour, corporate surveillance and exploitation of data. Significant sections of the population escape these by opting out of technical engagement, but this is mostly meaningful at an individual level. In opting out of technological developments which they find intrusive, individuals also miss opportunities for organization, participation and communication. These gaps are affecting the development of newer literacies, and are hindering social movements.



The contrasting pair of scenarios, as far as people's engagement with technology is concerned, envisages that, towards 2030, scepticism and critique of intrusive technologies have continued to rise, unevenly across the population, but steadily nonetheless. Key concerns about intrusive, automated technologies, which were voiced in specific circles, entering the 2020s, have increased in complexity, having to do with the legalities of data ownership and protection, boundaries between public and private and increasing levels of surveillance that the IoT has fed into. As the IoT has burgeoned over the 2020s, significant pockets of resistance have developed that have refused to take up technological advancements as keenly. As a consequence, the population is increasingly fragmented between those who have chosen to resist and those who have not. There are some widening gaps also in terms of people's access to technological capital. We see two versions of this playing out depending on the nature of state-public relationships and the nature of public participation.

The scenarios open up and demarcate the boundaries of an analytical space within which we find the future in 2030 likely to unfold. It is critical to note therefore, that rather than focusing scholarly attention on these four scenarios themselves (alone), or on pondering how likely these are, or are not, we might focus, more productively, on the space in-between these, and consider the many possible interactions of these two dimensions we pursued as above, and the many changes that can be driven along these two dimensions by the drivers we have identified previously. The space in-between the four scenarios promises more to us, than the four scenarios themselves. These scenarios are not predictive snapshots, and they are not, and cannot be inclusive of everything that engages audience analysts. These scenarios are intended to provoke thought, and anticipate the direction that research agenda might take within the field. They could inspire some speculation about which outcome is more or less likely, but they are not created for such a purpose. Instead they are intended to create a space of predictions of what the future may look like, a short while away from now. Coming out of a horizon-scanning exercise, they are systematic projections of different combinations of trends and developments along predefined axes. The scenarios are divergent, but intended to be utilized together. Within the analytical space they create, scholars and stakeholders might evaluate how research and developments in media technologies, public life, and a variety of other sectors can be placed and considered in relation to each other. This is particularly useful as we foresee burgeoning interest in the IoT and its implications in media and communications research, and anticipate substantial and highly diverse bodies of research to be published in the years to come. Similarly, with changing political conditions in Europe and resulting concerns over democratic participation in public life, the scenarios offer tools for considering the role of media and technology, highlighting both potentials and pitfalls.

Implications

In what follows we outline a set of twelve inter-linked implications for media practice. These implications concern media practice at small and large scales, and are intended to be useful and thought-provoking for anyone concerned with transformations in media practice. As outcomes of CEDAR's work on audiences, the implications speak implicitly or explicitly from the perspectives of audiences, as they have been evident in the literatures, materials and analyses involved in CEDAR's work. The implications arise out of the trends we have analysed and the outcomes of consulting with stakeholders, and further draw upon – but do not frame themselves as direct outcomes of – the analytical space opened up by the horizon-scanning exercise.

The reason for making this distinction is that the scenarios in the previous section were not designed as predictions of unfolding realities, but as an analytical space for thinking of what the future may look like, a short while away from now. They could inspire speculation about which outcome is more or less likely, but are not created for such a purpose. Coming out of a horizon-scanning exercise, they are systematic views of different combinations of trends and developments along predefined axes. The scenarios are divergent, but intended to be utilized together. Within the analytical space they create, scholars and stakeholders might evaluate how research and developments in media technologies, public life, and a variety of other sectors can be placed and considered in relation to each other. This is particularly useful as we foresee burgeoning interest in the IoT and its implications in media and communications research, and anticipate substantial and highly diverse bodies of research to be published in the years to come. Similarly, with changing political conditions in Europe and resulting concerns over democratic participation in public life, the scenarios offer tools for considering the role of media and technology, highlighting both potentials and pitfalls.

In the next section of this report, we distil recommendations for research, with intellectual and systemic priorities for audience research. Here, however, we focus on practice-based issues. The two sections remain interlinked of course, in countless ways, as they must be in order for research to find its agenda from evidence on the ground (and the lack of it).

We position the implications following four cross-cutting lines of thought:

1. The first category deals with the shape of new, interactive formats



2. The second category deals with the production and regulation of content within these formats.
3. The third category addresses the unevenness of power arising out of new media-audience relations, and
4. The fourth category looks at audiences' literacies in dealing with these formats.

Intrusive interfaces

- The algorithmic functions of new interfaces pre-configure users into their design. Much of this is difficult to trace and cannot easily be detected by audiences themselves. Already occupying researchers of the IoT, these functions could become more intrusive but also opaque to users as pervasive and intrusive technologies develop.
- Audiences are presented with a difficult and dichotomous choice by these pre-configurations, and a more meaningful range of choices need to develop, in which audiences do not have to choose between engagement in the media or protection from pressures and intrusions.
- Digital media platform design is increasingly shaping content and audience agency into computable data in a process called metrification, which is attendant to the IoT, and comes with associated political, social and ethical concerns.

Producing and regulating content

- We can identify a tendency moving from prescriptive regulatory approaches to preventive media pedagogical work, and this is likely to morph and continue as the IoT matures. But these regulatory efforts around new and intrusive interfaces need a shift from a stance of entirely individual responsibility and blame.
- A shift in perception from media producers is called for, from consumerist readings of audiences as blameworthy for critical questions around risk and privacy, towards the subtle, indecipherable configuration of users into digital media algorithms.
- Audiences' resignation about difficult questions on trust and privacy online rests on an understanding of the media environment as too complex, too remote and too chaotic – but nonetheless, ever present. Shifts in focus and language are required, from outlining the apparent failure of audiences to read lengthy terms of service, through recognising that audiences might gradually be accepting drawbacks of their media landscape, towards developing alternative routes to counter resignation.



Newer vulnerabilities

- Software supported analytics and online comments provide media producers with a continuously updated view on their audience – a largely one-way street. There is an imbalance of power between producers and providers of digital media platforms and their users and audiences.
- Audience creativity with newer formats and forms of content enters economic relations more than ever before. This generates newer forms of hidden labour, vulnerabilities and disparities.
- Large multinational media industries are encouraging and appropriating audiences' productive engagement for their economic purposes: calls for participation are frequent, as a new resource to monetize the linkage between production and consumption.

Newer literacies

- Very little is known currently about users' confrontation with and the normalisation of intrusive digital media.
- Clearer fine-tuning and a new impetus to further media literacy work is required to both understand and develop coping practices to deal with increasingly normalised intrusive interfaces, which is a critical part of the logic and even rhetoric around the ubiquitousness anticipated of IoT.
- Advancing creative literacies implies that small acts of engagement (rather than laborious and dedicated practices) are functioning as productive acts of interpretation into mainstream media flows. In parallel, mainstream media's own policies of selection, ordering and attention appropriate these interruptions, often preventing these from becoming radical uncontrolled disruptions.

An agenda for audience analysis

Reflecting on key outcomes from CEDAR's work, we produce a list of priorities emerging from the societal, technological, economic and political contexts of audiences. This list is not exhaustive, but it is indicative of the priorities and ambitions that we find needed to drive audience research over the immediate future.

We arrived at these priorities by tracing pathways out of our trends, outcomes from stakeholder consultations and the drivers considered for our scenario exercise. We position the priorities in this agenda within a conceptual framework developed by CEDAR, which is Critical, Agentive and Transmedia, and which we suggest provides the analytical space to deal with the priorities we outline. As we formulated these priorities, we worked hard to remind ourselves that as audience researchers, we have responsibilities to the academy and to audiences themselves, and we are constrained by cross-cutting and shifting priorities, marked by systemic inequalities in academic funding, globally. We recognise that audience research – and adjoining fields including sociology, cultural studies, critical theory, political communication, technology research and many more – come with rich histories and promising strands of developing work that provide resources for dealing with these priorities. We argue for these insights to be brought together more closely, as highlighted by our final priorities.

Intellectual priorities

1. Analysis of fragmented, individualised and hyper-connected audience experiences in the context of intrusive technologies and the developing Internet of Things, experienced differentially across the globe, and particularly emphasising questions of power.
2. The critical investigation of co-option of and commercial interests in audiences' attention and productive work, incorporating transnational flows of media content and reframing longstanding interests in citizen-consumer dichotomies in the face of technological transformations.
3. A fuller convergence of audience analysis and research on citizenship and participation, in formal political systems including elections and governing institutions, and in small and large-scale socio-political movements locally and globally.
4. Critical and systematic analysis of the surveillance mechanisms and risks that audiences face in the Age of Big Data, asking how privacy and safety concerns can be guarded as metrification and the Internet of Things develops further.



5. A renewed commitment to research widespread and fundamental audience experiences such as reading, viewing, listening and interpreting, also with regards to social, digital and newer media, developing a more careful balance between interest in production and other audience practices
6. Systematic and critical analysis of communication and power, including dimensions such as gender, ethnicity, class, age and global inequalities taking on new meanings in light of technological developments.
7. A substantial effort to research resistance to media and technology, including lower or slower uptake of connected technologies, evasion or non-use, scepticism, critical voices and protests towards Big Data or transnational flows, bridging everyday, cultural and political dimensions.
8. Further development of empirical and practical approaches to researching the mediatization of everyday life, incorporating changes brought about with the Internet of Things, but also the continued and transforming uses and influences of old, new and newer media.
9. Analysis of transforming and emerging vulnerabilities concerning audiences' coping strategies with intrusive media, as well as divides concerning capabilities to benefit from opportunities in the age of connected media.
10. The incorporation of longstanding and new priorities of audience research with priorities in other fields of media research, and in the humanities and social sciences more broadly, emphasising the ambition of audience research to speak in the interest of audiences in diverse global, cultural, political and scholarly contexts.

Systemic Priorities

1. Focusing on the development of collaborative audience research projects that step outside of comparatively easier-to-hand groupings of Western industrialised countries thereby addressing intellectual gaps which are the outcomes of uneven research funding between the North and South.
2. Taking care that audiences do not lose their voice or their privacy in the very conduct of research on new, connected technologies. This implies acknowledging the ever greater ethical challenges arising out of two kinds of relationships: between intrusive media and powerful transnational structures, where audiences are often caught within a web of institutional powers, and the potentially intrusive nature of research into these questions.
3. Careful reflection on what happens with the products of our research, containing the voices of audiences, and on where and how these products are disseminated,



including but not restricted to the inequalities and politics of access to outcomes and frameworks of audience research.

4. A commitment across individual and collaborative audience research projects to ensure that the outcomes and relevance of audience research projects are communicated with those who address, define, assume, speak for, measure and use audience attention and work.

Directing an early career network

Directing CEDAR has been an exciting and challenging task, made infinitely fruitful by the brilliant colleagues who contributed to stimulating intellectual conversations, to friendships and collaborations developing, and devoted un-costed research time throughout the project, keeping up individual and collective motivation between our network workshops.

As a network of relatively early career researchers, CEDAR experienced a particular combination of work-life challenges which is unusual for other networks, which are likely to contain scholars from across different career and life stages. CEDAR has seen many babies being born, and both directors go on maternity leave, in succession. Likewise, CEDAR has experienced challenging journeys of first job-hunts, uncertain futures, and changing academic affiliations. This specific combination of circumstances worked as a succession of challenges, of course, but they brought out the very best of this network.

With researchers from 14 different countries, CEDAR has seen and felt the enormous disparities in funding and research time owing to institutional and national unevenness in these things. Only one person – the Director’s – time was costed into the grant, with everyone else contributing their work on their own time. The grant that funded CEDAR enabled its researchers to meet at network workshops, and these have been instrumental to developing and advancing the work presented in this report. In-between, substantial amounts of time and effort have been devoted by individuals working partly alone, but mostly in a series of shifting constellations within the network, from the large clusters that worked together early on to different writing teams collaborating. With this process behind us and further publications ahead of us, CEDAR has been a true arena for international academic collaboration.

And, thus, in many ways, as CEDAR concludes, we find, actually, that this is in many ways, a beginning of new things. Most of the people who entered CEDAR as newly minted PhD students or post-doctoral fellows are now in established academic positions. New research groupings are forming fast, and the network is likely to continue in many different forms, over the years to come. So, as we work now on preparing the network’s book, we look forward, with interest, to what CEDAR will do next, if not as the same team under the same name, but in other, different, garbs. With this, we feel that CEDAR has truly achieved what was also one of its objectives: To build capacities of a new generation of engaged audience researchers.



Outputs

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Edited by Ranjana Das and Brita Ytre-Arne

Key features of the book:

- *Anticipated publication: **Summer 2018***
- *With a foreword by **Sonia Livingstone***
- *Will feature a comprehensive conceptual and methodological account of all of CEDAR's exercises in foresight analysis*
- *Horizon scanning work, including key drivers of change, scenario building and implications*
- *Present an agenda for unfolding priorities in audience research in the face of emerging technological transformations*

the **FUTURE** of **AUDIENCES**

A foresight analysis

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And finally, we thank Bojana Romic for designing this report – if she had not stepped in to take charge of the aesthetics and design, this document would have looked rather different and far less finished!



Stakeholder List

No.	Name	Organisation	Country	Type
1.	Prof. George Plios	<i>Greek Media Regulation Authority</i>	Greece	Media regulators
2.	Latsios Yiannis	<i>ANT 1 Media group</i> (Media Producer/Media Production Director)	Greece	Content producers
3.	Ans Oomen	<i>Wel Jong Niet Hetero</i> (trans. Young But Not Straight) Civil Society Organisation	Belgium	NGOs
4.	Frank de Brabander and Mariana Silva	<i>Pumpkin</i> magazine (Online 'magazine' that offers content for parents of young children)	Portugal	NGOs
5.	Manuela Botelho and Susana Paiva	<i>Media Smart</i> (promotes Media Literacy of Children and Teenagers, advertising)	Portugal	NGOs
6.	Anniina Lundvall	<i>Save the children</i> (Children and Digital Media)	Finland	NGOs
7.	Katharina Heitmann	<i>BREMA</i> (State Media Regulator and Educator, interviewee is responsible for media literacy)	Germany	Media regulaors
8.	Emma Holten	Online human rights activist	Denmark	Activists
9.	Lene Heiselberg Jakob Vikær Hansen	<i>Danmarks Radio 2</i> (interviewees are audience researchers)	Denmark	Public service broadcasters
10.	Cary Balzagette	Freelance writer, spec. in media education	UK	Media educators
11.	Wolfram Pfreundschuh	Blogger (about political information) formerly host of a political show on <i>Radio Lora</i> , Munich	Germany	Bloggers
12.	Dinko Gruhonjić	Journalist, website <i>Voice</i> (editor); <i>Press Council Group for Ethical Guidelines for online media</i>	Serbia	Content Providers
13.	Đorđe Krivokapić	<i>SHARE Foundation</i> (non-profit, digital rights)	Serbia	NGOs
14.	Radovan Kupres	Creative director, marketing agency <i>Luna/TBWA</i>	Serbia	Marketers
15.	Milan Inić	Vlogger on YouTube - <i>Yasserstein</i>	Serbia	Bloggers
16.	František Lutonský	Vice editor-in-chief, <i>Češka televize</i> (Czech television)	Czech Republic	Public service broadcasters
17.	Patrik Banga	Main editor of <i>Blogy idnes.cz</i>	Czech Republic	Content providers
18.	Marie Heřmanová	Press spokeswoman for Czech Team - <i>Refugee Help/ Pomáháme lidem na útěku</i>	Czech Republic	NGOs
19.	Paul Rapacioli	CEO of <i>The Local</i> (news network)	Sweden	Content providers
20.	Cecilie Stranger-Thorsen	Festival Producer at <i>Nordisk Panorama</i> , founder of <i>STRANGER/Nordic Transmedia Producers</i>	Sweden	Content Providers
21.	Alyssa Levin	<i>BoostHbg</i> (VR, transmedia and film)	Sweden	Content providers
22.	Tobias Egmose	<i>Økologisk Landsforening</i>	Denmark	Media consultant
23.	Tine Thorlander	SoMe editor at <i>Radio 24/7</i>	Denmark	SoMe editors
24.	Adrian Langer	Director of <i>Splays Denmark</i>	Denmark	Marketers



No.	Name	Organisation	Country	Type
25.	Irene Zanetti	Communications Officer at <i>ALDA - The European Association for Local Democracy</i>	EU	NGOs
26.	Samir Korbi	Vlogger at YouTube channel <i>UP2D8</i>	Belgium	Bloggers
27.	Wouter Verschelden	Founder and editor-in-chief <i>Newsmonkey.be</i>	Belgium	Content providers
28.	Robin Wauters	Founder and CEO at <i>tech.eu</i>	Belgium	Content producers
29.	Mathias Vermeulen	Policy officer for <i>MEP Marietje Schaake</i>	Belgium	Media regulators
30.	João Silva	<i>Digital Connection</i> (Digital Marketing Agency)	Portugal	Marketers
31.	Rita Mendes	<i>Barriga Mendinha</i> (blogger)	Portugal	Bloggers
32.	Rita Madaleno	<i>Rita Listing</i> (blogger)	Portugal	Bloggers
33.	Alejandro Perales	Former president of the <i>Spanish Association of Communication Users</i>	Spain	Interest groups
34.	Javier López Cuenllas	<i>Mediaset Spain</i>	Spain	Marketers
35.	Adriana Lukas	<i>The Quantified Self</i> (London QS)	UK	Interest groups
36.	Johannes Kleis	<i>BEUC</i> (consumer protection)	EU	Interest groups
37.	Hugo Torres	<i>Público</i> (newspaper)	Portugal	Content providers
38.	Dr. Christine Horz	<i>Publikumsrat</i>	Germany	Interest groups
39.	José Eduardo Moniz	Senior TV Producer (<i>JEM - Media Consultancy</i>)	Portugal	Content producers
40.	Anne Mette Thorhauge	<i>Danish Media Council for Children and Young People</i>	Denmark	Media educators
41.	Tânia Soares	<i>ERC</i>	Portugal	Media regulators
42.	Margarida Toscano	<i>School Libraries Network</i>	Portugal	Media educators
43.	Leopold Grün and Christian Kitter	<i>Freiwillige Selbstkontrolle Fernsehen</i> (Organisation for the voluntary self-regulation of television)	Germany	Media regulators
44.	Cinzia Squadrone	<i>RAI</i> (Italian Public Service)	Italy	Public service broadcasters
45.	Maria João Pires	<i>Jugular</i>	Portugal	Bloggers
46.	Nuno Ramos de Almeida	<i>Que se lixe a Troika!</i>	Portugal	Activists
47.	Martina Chichi	<i>Associazione Carta Di Roma</i>	Italy	Interest groups
48.	Marisa Ferreira	<i>Rádio Manobras</i>	Portugal	Community media
49.	Kati Indrefjord	<i>Kirkens Bymisjon</i>	Norway	NGOs
50.	Carina Hermansen	<i>Red Cross/ Street Mediation project</i>	Norway	NGOs
51.	Janae Philips	Chapters Directors at <i>Harry Potter Alliance</i>	UK	Activists



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