The background of the book cover features a complex, abstract geometric pattern. It consists of numerous triangles of varying sizes and orientations, all meeting at a single point in the center. The colors transition smoothly from one to another in a circular fashion, starting with dark green at the top left, moving through yellow, orange, red, pink, purple, blue, and back to green at the top left. This creates a vibrant, sunburst-like effect.

Second
edition

Media and Communication Research Methods

Anders Hansen
and David Machin

MEDIA AND COMMUNICATION RESEARCH METHODS

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2nd edition

Anders Hansen and David Machin



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Preface to the second edition

As their technologies become more and more deeply embedded in our everyday lives, these are exciting times for studying media and communications, and there has probably never before been a greater need for critical and analytical awareness of public media and communication processes. With this second edition of *Media and Communication Research Methods*, we build and expand on the first edition's introduction to researching and to key approaches and methods. As the pace and volume of research in our field continues to grow unabatedly, one of the key joys – and challenges – of working on the second edition has been to reflect exciting new examples, adaptations and developments, while also appreciating the resilience of longstanding methods and approaches to media and communications.

Key changes and additions for this second edition:

- Updated references, statistics, cases and examples throughout
- New images
- Synchronising of language/terminology to reflect that the tools of research are now electronic devices, apps and programs
- Updated sections on media ownership in the digital landscape, and new sections on contemporary photographic archives
- New case study using observation and interviews to understand how photojournalists work
- Completely revised and reorganised chapter on Critical Discourse Analysis to illustrate concepts and tools in a more applied fashion with updated examples from Brexit and lifestyle magazines

- New section on using concepts from semiotics and multimodality for the analysis of videos
- Expanded emphasis on advances in content analysis, including its application in visual and multimodal analysis, and a new section on computer-assisted algorithmic content analysis
- Expanded discussion of corpus linguistic approaches
- Updated referencing and versions of analysis and online programs for data collection and data analysis (e.g. online survey tools, text analysis tools, SPSS, etc.)
- Expanded glossary

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CHAPTER 1

Introduction

These are exciting times for studying the central role of media and communications in our everyday social, political and cultural lives. Never before have communications media and technologies been so integral to everything that we do. And never before, it seems, has the pace of change in our media and communications environment been so rapid and dramatic as in the present era. There are new possibilities, new opportunities and indeed new challenges for research; and, as before, the need to study, understand and make sense of the context and role of media and communications in the social, political and cultural dynamics of society. The aim of this book is to introduce some of the key ways of – and methods for – doing so, while also showing the importance of historical context for understanding media and communications technologies themselves as well as the theories and methods by which we make sense of them. With this chapter, we start with an outline of media and communication research, and the relationship between research methods and theory in the study of media and communications. This is followed by a brief overview of the structure of the book and the contents of individual chapters.

Research methods do not, and never should, exist in isolation from theory. Media and communication research methods are no exception, but the point is possibly more important to make for the field of media and communication research than for some other and longer-established fields or disciplines. The simple reason for this is that media and communication research, rather than being a well-defined discipline, is a sprawling and multidisciplinary field of research approaches and theories, drawing inspiration from a

wide range of disciplines across the humanities, the social sciences and even the sciences. Far from being a weakness, this has in fact proved to be one of its major strengths: a productive impetus to continuous development and adaptation to what have historically been rapid changes in the nature and application of media technologies as well as political and social concerns with communications media.

The aim of this book is to provide an introduction to selected key research methods, approaches and tools for the study of media and communications. We introduce methods which we have found in our own research and teaching to be the most productive and appropriate for addressing core questions about the role of media and communications within wider social, political and cultural contexts. Our perspective is principally sociological, although – as will be evident throughout the book – the methods and approaches introduced here draw inspiration from a broad range of disciplines.

The emphasis throughout is to provide a ‘how to’ guide to addressing research questions in media and communication research, with examples of how each method has been used and how it fits into the wider historical context and development of the field. Each of the methods introduced in the book can be used on its own, but a common theme throughout is also to emphasise the potentially significant gains from combining methods in a mixed methods design. Thus, as we shall see, many of the most successful and prominent models of media and communication have been based on research combining methods for analysing public communication in its full social context.

Mapping the field of media and communication research

Even a cursory glance at introductions to media and communication research will quickly reveal that there are many approaches that can be taken, and many principles that can be used, to categorise and map this broad field of enquiry. Some approach this from a strictly *method-driven* perspective, often

within a broad distinction between qualitative and quantitative methods and with the individual method as their starting point and organising principle. Others approach it from a *theory-driven* perspective, discussing the particular (and often multiple) methods that have been applied in research guided by each specific theory. Still others take a *media-driven* approach, focusing in turn on the methods and theories which have been used in research on each individual medium (film, television, newspapers, radio, advertising, etc.). Many use a mixture of these organising perspectives, and furthermore attempt to place their discussion of methods and approaches in chronological and historical context.

As the late James Halloran – one of the pioneers of communication research in the UK – insisted (e.g. Halloran, 1998), research methods cannot and should not be discussed or understood in isolation from the theories, models and socio-political concerns which have guided media and communication research. Likewise, neither method nor theory can be understood in isolation from the technological and economic possibilities and arrangements, or from the social and political struggles and concerns, which characterise different historical periods. A sense of the wider historical, disciplinary and political context of media and communication research thus helps in appreciating that just as each method has its own history, so too is its use, application, development and career very much a result of historical conditions and changes.

While much variation exists in how scholars characterise, categorise and describe the field of media and communication research – which in itself of course is symptomatic of its multidisciplinary nature – McQuail (2004: 14–15), drawing on Rosengren (1983), identifies four key paradigms informing the field: (1) a *functionalist* paradigm which stresses the media's contribution to the functioning and maintenance of the existing social order and favours quantitative research; (2) an *interpretive* paradigm favouring qualitative methods for describing and investigating cultural issues of meaning and content in relation to communication processes; (3) a *radical-humanist* paradigm, which, like the interpretive paradigm, favours qualitative methods but with a clear sense that the goal of research is to expose the

'hegemonic' role of the media and to effect radical change in society; and (4) the *radical-structural* paradigm, which:

looks at the media as a material, especially political-economic, force in society that has to be investigated in its concrete manifestations (i.e. with reference to patterns of ownership and control, market power, political connections) and by objective methods of analysis applied to reliable data. (McQuail, 2004: 15)

Another helpful taxonomy is offered by Oliver Boyd-Barrett (2002), who groups media and communication research under the main headings of *effects research*, *cultural studies* and *political economy*. Recognising the neat simplicity of this categorisation, Boyd-Barrett proceeds to expand each of these headings considerably in an overview that plots *theoretical models of society*, *concepts of media power* and *types of communications process* with *prevailing focus* (i.e. individual or social), *tone* (positive or negative) and *characteristic method of enquiry*, against a *timeline* that broadly indicates the predominance of each paradigm by decade(s) from the 1930s onwards. The historical purview is important, because it enables us to appreciate that different approaches and methods exist on a timeline: although they may be ever-present, they originate in particular historical circumstances and they wax and wane in response to social, political, historical and, of course, academic/scholarly pressures, factors and endeavours.

Perhaps the key influences on the development of the media and communication research field then can be identified and summarised as:

1. *Technological* – every new medium brings with it new communications possibilities, new formats and types of communication, new ways of relating to producers, audiences or consumers, new types of integration with other media technologies, and hence new research questions about their social and political roles in society.

2. *Disciplinary* – the nature of communications enquiry, including not only the questions asked but also the theories and methods used, has depended to a large extent on whether the informing disciplines – sociology, psychology, social psychology, linguistics, philosophy, literary studies, anthropology, ethnography etc. – were social sciences or humanities/humanistic sciences. We should, of course, also not forget the influence of science disciplines such as mathematics, computing and cybernetics, which were a significant influence in the early days of media and communication research and are increasingly becoming influential again in the digital communication environment (with keywords such as algorithmic analysis and big data analysis). Related to the question of disciplinary home, albeit not mapping on to disciplines in a simple straightforward manner, is the question of whether communications enquiry is executed with predominantly quantitative or predominantly qualitative methods, whether predominantly about ‘measurement’ or predominantly about ‘interpretation’.
3. *Political* – by which we wish to signal the classic division between administrative and critical communication research (a distinction first introduced in a now classic article by one of the founders of modern communication research, Paul Lazarsfeld (1941)): between research that is driven by commercial or administrative interests in functionality, efficiency and profit-maximisation, and research that is formulated from a socially and politically critical perspective with a view to informing critical social understanding and policy. ‘Critical’ in this context refers to research designed and conducted from a socially conscientious perspective in the interest of the ‘common good’ and not in the interest of furthering particular economic or political interests. The importance of political-historical context for understanding the development and focus of media and communication research has been noted by many, but is particularly succinctly expressed by British media scholar Graham Murdock (2012). He notes that while media and communication research was a key beneficiary of the tremendous growth in the 1930s to the 1960s in social

scientific research, ‘it was also profoundly shaped by the political climate created by the onset of the Cold War’. This climate and ideological conflict dominated the intellectual landscape and provided a fertile ground for the dominant model of the social order during that period, ‘structural functionalism’, and its concerns with ‘maintaining social stability and cementing consensus’ – a task in which media and communications systems were seen as playing a key ‘gluing-together’ role (Murdock, 2012: 63).

On theory and methods – and asking the right questions

Appreciating the *political* context of the development of communications theory, research and methods links directly to the continuing debate in media and communication research about whether the right questions are being asked (Halloran, 1998). This is a debate that raises questions about method and focus (*media-centric* or *socio-centric*), but most significantly it points to the key argument that research should always be theory- and policy-driven, not method-driven:

[M]ethods are but a means to an end, important though they are, they are not an end in themselves, nor should they be used, as they have been, to determine the end or define the nature of the problems to be investigated. (Halloran, 1998: 10–11)

Halloran thus criticises communication research, particularly in its early history, for being unduly dominated by the ‘administrative’ (in Lazarsfeld’s terminology) needs of the media and the marketplace. This resulted, Halloran argues, in the favouring of a positivistic orientation leading to a concentration on methods which produce accurate and ‘scientific’ information on simple, narrow and, in sociological terms, relatively uninteresting phenomena. Essentially, his critique is that if much of the accumulated evidence from a long history of communication

research appears both contradictory and inconclusive, then it is to a large extent because the wrong questions have been asked. That is, if communication research has failed to come up with clear answers, it is because much of it has been asking narrow and media-centric questions, using methods more concerned with what could be easily measured and counted than with whether that which was measured actually helped answer key questions about the wider social and political roles of media and communications processes.

Halloran's critique was in large part directed at the body of mainly American communication research often referred to as 'the dominant paradigm' (Gitlin, 1978). However, it is perhaps evidence of the persistence of this paradigm that prominent media scholars continue to echo the call for research questions which consider media and communication processes in their social, political and historical context and which critically address the core classical sociological concerns about power, organisation and control in society. At the turn of the twenty-first century, Philo and Miller thus rightly repeated the challenge to social scientists by asking 'why much of social science and in particular media and cultural studies can now communicate little that is critical or relevant to its own society' (2000: 831).

Murdock is similarly clear that the research questions addressed by media and communication research must be anchored by their social relevance and historical awareness, and must deal in a social scientific and critical way with questions of power, structure and change in society. Few have succeeded in bringing together the imperatives of critical enquiry, social relevance and historical awareness as eloquently and succinctly as Murdock:

illuminating the exercise of power and structural constraints and exploring the possibilities for change remain the central aims of a critical social-scientific approach to media and communication ... in pursuing this task, we have a rich stock of concepts and methods to draw upon. Their originators are not distant figures to be consigned to dusty back rooms in the museum of ideas. They remain our contemporaries. We still confront the central

questions they grappled with, and their search for answers still has much to teach us. We are part of a continuing conversation about the structure and meaning of modern times and the ways they are changing. They stand at our shoulder, advising, carping, urging us on. To refuse their invitation to debate is to condemn ourselves to regularly reinventing the wheel. (2012: 66).

Quantitative and qualitative methods – and convergence

When considering the historical development of media and communication research and the various paradigms that have dominated during different periods, one is continuously confronted with the relationship between, on the one hand, researchers' theoretical conceptions of society and of the associated role of media and communications therein, and, on the other hand, their choices of research methods, data quarries and modes of data collection. This relationship is, of course, core in a book such as this, which has as its principal focus 'methods' for the study of media and communications processes. Because of the priority that the book gives to 'methods', it is even more important to emphasise, in Halloran's words, that 'methods are but a means to an end' (1998: 10–11).

All research, in other words, must start by 'asking the right questions', duly informed by existing research, knowledge and theory, and *only then* consider which method or methods might be most suitable for addressing the issue or problem at hand. Never should research start by choosing a method before considering what research questions to ask and what theoretical frameworks to draw on. Research is not principally about gathering data that lends itself to easy collection or analysis, but rather about using/choosing the right methodological tools for addressing 'relevant' questions. There are of course many criteria of 'relevance' that could be applied, but principal among these should, we would argue, be considerations about the social, political and policy relevance of research.

There are two main reasons for highlighting these points: *first*, to reemphasise that there is no single ‘best’ method for media and communication research, and, *second*, to encourage an eclectic approach that keeps an open mind on which methods – quantitative or qualitative – are most suitable for the research problem at hand, *and* which appreciates that a combination of several methods can often achieve more and better illumination of a research problem than a single method applied in isolation. The plea for methodological open-mindedness is spurred on by the long history of both real, and perhaps more often perceived, ostracism and entrenchment between quantitative and qualitative approaches to media and communication research; a divide which itself parallels, but is not synonymous with, a positivist social scientific approach versus a humanistic ‘interpretive’ approach to media and communications processes.

Much of the intellectual debate from the 1960s through the 1980s was taken up with sometimes bitter entrenchment into quantitative and qualitative camps, and, while ‘convergence’ has long been on the agenda, the case for convergence needs essentially to build on a close examination of the epistemological differences and similarities of qualitative and quantitative approaches rather than on caricature and stereotyping. It also benefits from a thorough sense of the history of media and communication research. Thus, as Murdock’s (2012) historical perspective on communication research makes clear, many of those, like Paul Lazarsfeld, who have come to be remembered for their quantitative methods, and who have often been dismissed as crude empiricists, were in fact pioneers of multi-method research, whose ‘choices were always dictated by the issue to be addressed, and there was no question of one method being suitable for all questions’ (Murdock, 2012, referencing Morrison, 1998: 140).

In his succinct examination of the complementarity of qualitative and quantitative methodologies in communication research, Jensen (2012: 288) argues that it is at the level of *methodology*, ‘defined as a theoretically informed plan of action in relation to a particular empirical domain [...] that the distinction between qualitative and quantitative research belongs’. He shows

how *levels of analysis* and *forms of inference* need to be specified to address complementarity, and likewise discusses the central concepts of *reliability, validity, generalisation and probability* as they relate to quantitative and qualitative approaches. Building on this discussion, Jensen argues for scientific *realism* as a framework for convergence:

The realist framework is of particular interest in the perspective of methodological convergence. It suggests that while different empirical procedures (e.g., experiments or depth interviews) focus on and, in a sense, privilege specific kinds of *events* (e.g., either the recall or the decoding of media content), they nevertheless may bear witness to the same, similar, or related *mechanisms*. Instead of engaging in paradigmatic conflicts over a singular definition of the empirical domain of inquiry, a realist strategy, thus, proposes to tap the full range of *experiences* of reality, and to take advantage of several methodologies in order to examine different aspects of media and communication. (Jensen, 2012: 299)

Jensen concludes by pointing to three approaches to convergence between qualitative and quantitative methods: (1) *facilitation* – quantitative and qualitative approaches are used at separate stages of the research process, one informing the other; (2) *triangulation* – increasing reliability and validity of findings by using several methods to illuminate the same phenomenon; and (3) *complementarity* – different methodologies are used to examine different aspects of a research question, and not necessarily in the same concrete empirical domain.

Structure and contents of the book

We intend this book to be used as a reference handbook for the media and communications student or researcher who wishes to learn about how to use and apply a selected method or methods for studying media and communications phenomena and processes. Together with the contents list, this section then offers

an overview that should enable the reader to select and go directly to the appropriate method or tools. We start with a brief outline of the book's structure and then proceed to provide one-paragraph overviews of what is covered in each chapter.

In brief outline, the structure of this book is as follows: we start with an introduction to the key steps in the research process. This is followed by introductions to the core methods for each of the three major domains of the communication process and of media and communication research: (1) *Institutions/Organisations/Production*; (2) *Content/Representation*; and (3) *Audiences/Consumption*. We round off with a final chapter that discusses tools and approaches for managing and analysing communication research data.

Chapter 2 is aimed primarily at students or novice researchers embarking on one of their first research projects and adventures. The chapter aims to take some of the intimidating complexity out of 'the research process', by offering an accessible step-by-step guide to the key stages of any media and communication research project. It charts the process from formulation of a research question/topic, through literature review, conceptualisation and choice of method(s), to data collection, management of data, analysis and write-up/presentation of results. The emphasis is on providing a recipe for how to get going on a piece of research, and on demonstrating that, with the right ingredients and the right procedures, success is perfectly achievable.

Chapters 3 and 4 introduce ways of researching media organisations and media professionals. **Chapter 3** introduces the study of the political economy of the media: how to investigate the nature of ownership of the media, how they are financed, the organisation of production and how this is regulated by governments and international governing bodies. Researching ownership and control is important on the one hand simply to understand the nature of media organisations and processes. On the other it is at this level of analysis that we can begin to find out why media content is the way it is. We can ask whether the nature of the content of news on a web page or in an article in a magazine is down to the individual choices of the writer, journalist

or photographer or to institutionally established processes and corporate strategies. Such things cannot be understood at the level of textual analysis alone.

Chapter 4 introduces ethnography and observational methods, which have been used widely in media research to study both production and consumption of the media. On the one hand these methods are associated with actually watching or sharing in what media professionals or media audiences are doing and saying. But on the other hand these methods, ethnography in particular, should be seen as a way of approaching the data that we collect and can incorporate many different kinds of research methodologies. Traditionally, observational methods in particular have been used predominantly for studying media professionals and the production of media content. Much of the classic research of this type has focused particularly on news organisations and the practices of journalists, editors and other media professionals involved in the production of news. What is special to observational and ethnographic approaches is that they are used to understand social phenomena such as media use, effects and production, by viewing them as one part of people's lives and the culture they inhabit. It is this culture which provides them with the ideas and values through which they think about and share the world, and something like media consumption or any work practice must be seen in the context of wider cultural influences. So if we wish to understand what someone feels about, or how someone is affected by, say, a particular news report, we need to know more about this person in particular, the kinds of social values and ideas they normally live by and share with the people around them. We need to know how they behave more generally. If we wish to understand the production processes behind the creation of that news report then we may not simply be able to ask a journalist what they did, although this would be one important source of data. We would also need to look at what kinds of values and ideas the journalist has about what they do, the journalistic culture in which they have emerged and work, and also the processes and practices they used to produce the news report. In this chapter we show how these approaches are simple to use.

[Chapters 5, 6, 7](#) and [8](#) focus on different – but also overlapping – approaches to researching media and communications content. We start in [Chapter 5](#) with the technique of content analysis, which continues to be one of the most frequently used methods in media and communication research. The chapter begins with a brief review of the history and development of the method since it first came to prominence in communication research in the 1950s. It discusses some of the key issues which have underpinned and circumscribed the use of this research technique, including questions regarding the analysis of manifest and latent meaning, quantitative versus qualitative emphases, reliability and validity, social and cultural indicators, trend analysis, performance monitoring, etc. The key strengths and weaknesses of the method as an approach to studying communications data more generally are examined as is the relationship between content analysis data and other types of data in communication research. Drawing on examples from published content analysis studies, this is followed by a step-by-step guide to the process of doing content analysis, from the selection and sampling of media material to the preparation and analysis of the data produced by content analysis. The chapter ends with a discussion of exciting advances in computer-assisted content analysis, including automated content analysis procedures or algorithms capable of capturing and analysing large amounts of communications data, and summarising key trends and relationships in such data.

[Chapter 6](#) extends and elaborates the previous chapter's discussion of ways of analysing media content and meaning by focusing on the analysis of discourse. It looks at the particular set of tools for analysing texts and spoken language known as Critical Discourse Analysis (CDA), an approach founded in linguistics. Guided by linguistic expertise, CDA focuses on two core dimensions of language, namely lexis (the choice of words in a text) and syntax (the way that sentences and texts are constructed or organised). CDA allows us to reveal more precisely how speakers and authors use language and grammatical features to create meaning, to persuade people to think about events in a particular way, sometimes even to seek to manipulate people while at the same time concealing their intentions. CDA

offers the promise of showing exactly what features of language, what language choices, have been used to accomplish particular kinds of communicative aims. In this chapter, we introduce the key components and tools of CDA and demonstrate how these can be applied to reveal how meaning is constructed and manipulated in media texts.

[Chapter 7](#) introduces narrative and structural analysis as approaches to examining media content. While narrative and structural analysis have long had a prominent place in the study of literature and film, their application to the examination of news, documentary, drama, advertising and other media genres is more recent. It is perhaps symptomatic of the origins in literary and film analysis that such attempts have tended to focus on television drama, particularly soap opera, rather more than on other genres. This chapter argues that narrative and structural analysis offer valuable tools for the study of a broad range of media genres. It traces the origins and key dimensions of narrative and structural approaches, and it demonstrates how and when these approaches can be used productively either on their own or in combination with some of the other approaches to media content discussed in the book. We look at how to research the narrative structure or ‘discourse schema’ of texts or other media representations. Such analysis allows us to break down what appear to be quite complex stories and texts to reveal very basic messages about the kinds of values and identities, concerns and social boundaries that underpin them.

[Chapter 8](#) brings together a number of approaches from traditional semiotics and linguistics-based Multimodal Critical Discourse Analysis in order to show how we can produce much more systematic analyses of photographs and video. The chapter gives a set of guidelines for how in the first place we can *describe* what we see in photographs and video. Often this level of investigation is what is overlooked as the analyst jumps immediately to *interpretation*. But description is a vital level of analysis, in the case of photographs and video, and this chapter thus offers a guide to how to really ‘see’ what we are looking at. The methods described in this chapter are to some extent qualitative and are intended for detailed analysis of a smaller

number of cases. Yet, since they draw on linguistic forms of analysis, they also have a quantitative aspect as we describe actual concrete features of photographs and video. So some of the tools in this chapter can lend themselves to quantitative research and can be aligned to content analysis as described in [Chapter 5](#). At the end of the chapter we discuss specifically what a research project using this approach would look like. As with other chapters in this book it should become clear just how this approach should be used by the way the examples are dealt with and the models applied.

[Chapters 9 and 10](#) deal with core methods for analysing people in communications processes, whether classed as ‘media audiences’, ‘media producers’, ‘communicators’, ‘consumers’ or otherwise. [Chapter 9](#) introduces survey methodology, a method of data collection that has been at the centre of many of the studies which during the comparatively brief history of communication research have come to be seen as classics with a formative influence on the development of the field. While the emphasis in critical audience research has in more recent times shifted towards the more qualitative approaches of group interviewing, participant observation and ethnography, the survey method continues to be of central importance in communication research. The survey thus continues to be an essential tool for the regular monitoring of audience attitudes, opinion and media-related behaviour *per se*, while also, perhaps equally significantly, increasingly being used in conjunction with observational methods and audience ethnographies. The chapter starts by briefly charting the history of survey studies in communication research. It proceeds to discuss the strengths and weaknesses of survey research compared with other approaches to the study of media audiences, and it outlines the major types of survey research. A detailed outline of the key steps involved in carrying out a survey is provided, including sampling considerations, strategies for planning and managing the survey process, questionnaire design, direct interviewing versus self-completion questionnaires, interviewer training, coding of closed and open-ended questions, and analysis and interpretation of the data collected. The chapter considers the implications of the internet and advances in

computer-assisted analysis for the execution and administration of survey research.

[Chapter 10](#) introduces the focus group interview as a method that is more suited than survey research to discovering *how* people interact with, use, and make sense of media and communications. Focus group methods thus lend themselves to a more in-depth examination than is possible in survey research of what experiential knowledge and frames of interpretation people bring to bear in their use and understanding of media content. While the individual in-depth interview and the focused group interview produce similar data in many respects, our reasons for concentrating on the group interview are twofold: first and foremost, focused group interviews allow the researcher to observe how people make sense of mediated communication *through conversation* and interaction with each other in a way that is closer, although clearly not identical, to how we form opinions and understandings in our everyday lives. Second, group interviews are more cost-efficient than individual interviews – a wider range of people can be interviewed within the same limitations of time, resources and research money. The chapter outlines the steps involved in focus group research: selecting groups, arranging and convening group interviews, preparing an interview structure or menu, strategies for coping with group dynamics, and the use of visual material and other prompting for stimulating and focusing group discussion. The chapter further discusses ways of managing, analysing and interpreting the data produced through group interviews.

In the final chapter, [Chapter 11](#), we introduce ways and tools for managing and analysing quantitative and qualitative communication research data. In the first section, we introduce the analysis of quantitative data using one of the most powerful and widely used statistical analysis programs in the social sciences, namely SPSS (Statistical Package for the Social Sciences). In the second section, we consider computer-assisted management and analysis of qualitative data, and we introduce some of the ways of using qualitative analysis programs in the study of qualitative communication research data. This section discusses the organisation, management and analysis of

'qualitative' textual data, whether in the form of participant observation field notes, interview transcripts or digital news and other communications content. We introduce the significant gains of flexibility, speed, efficiency and reliability which computer-assisted analysis of qualitative data offers, and the powerful ways in which computer-assisted analysis facilitates the identification of key patterns and trends in large volumes of communications data.

CHAPTER 2

The research process

This chapter aims to take some of the intimidating complexity out of ‘the research process’ by offering an accessible step-by-step guide to the key stages of any media and communication research project. It charts the process from formulation of a research question/topic through to the write-up, presentation and publication of research. The emphasis is on giving the student or novice researcher a recipe for how to get going on a piece of research, and on demonstrating that, with the right ingredients and the right procedures, success is perfectly achievable.

To ‘research’ means literally to ‘search’ ‘again’ (re-), but the common uses of the word imply a ‘careful’ or ‘systematic’ investigation, as indicated in the two following excerpts from the *Oxford English Dictionary Online* (2016):

- 1 The act of searching carefully for or pursuing a specified thing or person [...].
- 2 A systematic investigation or inquiry aimed at contributing to knowledge of a theory, topic, etc., by careful consideration, observation, or study of a subject. In later use also: original critical or scientific investigation carried out under the auspices of an academic or other institution [...].

The word ‘research’ is often used in everyday English conversation to signify, it seems, any looking up or gathering of information, no matter how trivial or casual this may be. For our purposes it is useful to distinguish between this more casual use, on the one hand, and, on the other, the meanings stressed in the second dictionary definition above. It is particularly the emphasis on the ‘critical’ and ‘systematic’ gathering of facts and information,

through ‘careful consideration, observation, or study of a subject’ that provide important pointers to how social science/communication ‘research’ is more than the casual looking for information that is implied in everyday uses of the word.

We define media and communication research then as the planned, critical, systematic and transparent investigation into or gathering of information about media and/or communication processes.

‘Critical’ in this context should be taken to mean simply undogmatic and free of preconceived assumptions or prejudices about the nature of the object of investigation. ‘Planned’, ‘systematic’ and ‘transparent’ are interrelated defining characteristics of scholarly research, as being planned and systematic both help to ensure that the research is neither haphazard nor subjectively selective (i.e. only picking out information which confirms or supports assumptions or prejudices). Transparency is of the utmost importance in scholarly research, as only through transparency can other researchers and the scholarly community as a whole determine whether the research and its findings are sound, genuine and valid.

Our aim in this chapter, then, is to introduce the stages involved in ‘research’, that is to introduce the research process, from deciding on what to do research on, through planning the research and collecting data or information, to writing up and presenting/publishing the research. This process can often seem both daunting and intimidating. Here, we hope to show that – as with many other things in life – it helps to have a mental road map of what the constituent parts of the process are and to make a good plan, complete with a timetable.

What to research

All scholarly research starts with choosing a topic, that is with a decision about what to research. As a media and communications scholar or student, one would expect the topic to be some phenomenon or aspect relevant to media and communications.

This may seem obvious, but given the very wide range of technical, social, cultural, political, interpersonal, etc. dimensions pertaining to media and communications it may not always be as self-evident as it sounds. For the student looking for a topic to research, it is imperative to start by ascertaining what the formal requirements of their university or other organisation are with regard to acceptable topics, areas or fields for a research project (which may be for a research assignment, a dissertation or a thesis). For all researchers, it is relevant – even at this early point – to consider how a potential topic relates to ‘media and communications’, why it is interesting to research, whether it has been researched before (i.e. what other research has addressed this or similar topics), whether you (the researcher) have the skills and knowledge required (and, if not, what sort of training would be needed), whether the relevant data/information can be accessed and collected, etc.

Ideas about what to research can come from a broad variety of sources, but probably arise from two main categories: (1) everyday observation, curiosity and inquisitiveness, and (2) familiarity with scholarly debates, theory and research in a particular field (including general awareness of the kinds of study, research and data collection which get funded in a particular field). Everyday observation can be anything from the personal (what media we use, the media content we consume, how we as individuals communicate with our friends, etc.) to much wider questions about social, political and cultural phenomena in our everyday lives (e.g. what role social media play in political uprisings or in the breakdown of law and order in society). But the two categories inevitably also overlap, because we always of course draw on whatever knowledge system (religion, science, philosophy, scholarly research, etc.) is most readily available or familiar to us to ‘make sense of’ or ‘construct meaning out of’ what we see around us.

The steps of the research process

Table 2.1 Steps of the research process (inspired by information in Giddens (1989: 663); and from Wimmer and Dominick (2014: 16))

<i>Step/Task</i>	<i>...involves:</i>
1. Selection of research problem/topic	Selecting a topic for research
2. Review of relevant literature	Familiarising yourself with existing theory and research relevant to the chosen topic.
2.1. Searching for relevant literature	Interrogating relevant research with regard to:
2.2. Retrieving, managing and ‘processing’ relevant references with a bibliographic database	<ul style="list-style-type: none"> – theories drawn on – methods used – type of data collected – sampling strategy – variables analysed – types of analysis used – conclusions – recommendations
3. Statement of research question or hypothesis	On the basis of the review of relevant literature, formulating a focused research question (or a hypothesis) to address some aspect(s) of the selected research problem. What do you intend to find out about? Which variables or dimensions are involved?
4. Determination of appropriate methodology and research design	Determining how data will be collected/gathered (methods), from which sources or population (sampling), using
4.1. What method(s)?	

4.2.	Population and sample	which instruments of data collection
4.3.	Research instruments and variables	
4.4.	Research ethics and approval	
4.5.	Piloting	
5.	Data collection	Collecting, recording and organising your data
6.	Analysis and interpretation of data	
7.	Presentation/publication	Writing up a full account of your research in the format required for scholarly presentation (e.g. conference presentation) and publication
[8.]	Replication/further research]	[The start of a new research project]

1. Selection of research problem/topic

In the previous section we indicated where ideas or inspiration about what to research may come from. For students as well as researchers of media and communications, the main source of inspiration will most likely be derived from a general surveying of and familiarisation with traditions and trends in communications theory and research. As we study and learn about particular trends, approaches and theories of media and communications, we also become aware of what key questions have been addressed in past research, what has attracted research attention and what has not, and what researchers have said about further research that needs to be done.

As students of media and communications, we are also – one would assume – generally interested in finding out about and understanding the roles that media and communications processes play in the society, culture and politics around us. As communications and media are all-pervasive, the problem rarely is to find a media/communications ‘dimension’ to potential research questions. The main problem is often one of deciding which type of communications theory, approach or tradition is most suitable for the topic at hand, and indeed of deciding how the issue or topic is best researched. This is where the next step in the research process – the review of relevant literature – comes in. Before attempting to refine the focus and objective of a research project, and most definitely before even considering methodology (including the choice of population/sample and method(s)), it is imperative to examine and to gain an overview of what research relevant to the topic has already been carried out or published.

2. Review of relevant literature

Identifying and reviewing the relevant literature is possibly the single most important step in any research. Why? Because only by gaining a good overview of what has already been researched and published in relation to our chosen topic can we: (a) be sure that the questions we wish to research and find answers to have not already been researched and answered; (b) be sure that we focus our research on questions that are relevant, of interest and indeed researchable; (c) be sure that we don’t waste time on ‘reinventing the wheel’, when we can build on research designs, methods and instruments that have already been (successfully) tried and proved to yield data and findings of relevance.

On a more pragmatic note, we have often seen students who have chosen a fashionable-sounding research topic (e.g. product promotion/marketing through new/social media) for their dissertation getting very frustrated when they find that they have little or no idea about how to design a research project (assuming, maybe, that all research consists of or requires a ‘survey’) or that they are unable to find a relevant theoretical framework or any

other research/studies relevant to their topic. The best way to avoid such confusion and frustration is to move quickly and directly from the selection of a general topic to the second step in the research process: identifying and reviewing relevant literature. As we have said, but wish to stress again, this should be done before attempting to narrow down and focus the research question, and particularly before considering, let alone deciding on, the most appropriate research design and methodology.

While identifying and reviewing ‘relevant literature’ can be one of the most challenging parts of the research process, it is also undoubtedly one of the most exciting aspects, as it combines the thrills of ‘detective’ work (following leads, trails, clues – that lead to more trails etc.) and the excitement of discovery (“Wow, look at all this stuff that’s already known about this topic!”).

There is a growing body of comprehensive guides to conducting systematic literature reviews (e.g. Fink, 2014). Here, we simply wish to provide a brief introduction to the key components. While it is perfectly possible (and sometimes tempting) to just throw yourself into searching for relevant literature by typing a few keywords into Google or similar search engines, it pays – as with the research itself – to adopt a planned and systematic approach. The literature search and review process comprises the following two principal tasks:

1. Searching for, identifying and selecting relevant literature (including deciding on what sources, databases, etc. to consult, and on what search terms or search strategies to use).
2. Retrieving, managing and ‘processing’ relevant references (i.e. skim-reading, indexing, extracting key points, annotating relevant studies in preparation for the writing of your literature review) with a bibliographic database.

It is essential to keep a record or log of all searches in order to ensure that this is done systematically and to avoid wasting time (e.g. by inadvertently repeating searches that have already been done). Likewise, it is essential to organise, index and perhaps even go so far as to start annotating retrieved references for their

use in the literature review. This type of record keeping, managing and indexing is best and most efficiently done with a bibliographic database, as we will explain further under ‘retrieving, managing and processing’ below.

2.1. Searching for relevant literature

Potential starting points for a relevant literature search include course reading lists, textbooks and the increasing number of subject or topic area *handbooks* published by major publishers. Library books are generally catalogued by subject/topic area, so perusing the relevant sections or aisles in your university library can also be a potentially productive way to get started on gaining an overview of the type of research that has been done relevant to your area of interest. By far the most efficient, reliable (in terms of making sure that as wide a range of potentially relevant sources as possible have been checked or consulted), discerning (in terms of distinguishing ‘good’ from potentially less reliable or good research) and dynamic way to search for relevant literature is to use the scholarly databases that any university or equivalent major library offers. There are many high-quality indexes and databases to choose from, and a key consideration before starting is to determine what period of time and what range of publication types (e.g. books, journal articles, conference papers, theses, dissertations) or media types (print, audio recordings, film and other visual media content, etc.) are included. It is also relevant to check which disciplines or broader fields are covered, for example is the database primarily aimed at psychology, education, social sciences, the humanities, etc.?

For media and communication researchers we suggest that a literature search could usefully start with a relevant periodicals database, then proceed to looking for book publications in a comprehensive database of books in print, and only then to potentially cast a much wider net using internet search engines such as Google in order to identify reports, organisations or websites that may be of relevance. The reason for leaving this until last is that in using search engines it is much more difficult to assess the quality of information and to narrow down searches to ensure that only the most relevant material is identified. The

reason for starting with periodicals databases is that journal/periodical articles are likely, due to the shorter publication cycle, to be more up to date than book publications; they are generally subject to rigorous peer-review; they are usually more comprehensively and systematically indexed in searchable databases than books; they are fully abstracted; and the full journal articles (depending on library subscriptions) are often available for direct download.

For media and communication research(ers), we recommend that the search for relevant literature be focused on the following sources, in the order that they are listed:

1. Web of Science databases
2. WorldCat
3. Google or Google Scholar

The first step is to familiarise yourself with the search conventions of the individual database or search engine, particularly the conventions that apply when narrowing and refining searches (e.g. by time period, publication, search word combination), how to search for specific strings of terms or how to use Boolean operators ('and', 'or', 'not') and wildcards (e.g. 'scienti*' would find occurrences of words starting with this string, such as scientific, scientist, scientists, scientism).

Once a search has been done, and assuming that the search terms have been refined sufficiently to narrow the number of hits down to a manageable number (i.e. if a search produces several hundreds, or indeed thousands, of hits, then that is a clear sign that the search terms need to be refined/restricted further), then look through the resulting list and on the basis of the title or the accompanying abstract select (normally by ticking a box next to the individual title) those that appear to be relevant.

2.2. Retrieving, managing and 'processing' relevant references with a bibliographic database

The relevant (ticked) references should then be exported or downloaded to a suitable bibliographic database. A bibliographic database is one of the most useful and important tools for any

researcher, as it is essentially key to building up and keeping track of literature that is, or could potentially be, relevant to your research. Thus, it is also a key tool in the process of building an overview of relevant literature and is essential for managing and reviewing that literature. It is also a huge time saver in the simple sense that the bibliography which will eventually appear in the research report, thesis or other publication resulting from the research can be created in the required format without any laborious and error-prone manual typing of individual references.

Increasingly, leading bibliographic databases, such as EndNote, interface seamlessly with major publishers' lists and key publications databases. This means that all you need to do to 'capture' a reference to your personal bibliographic database is to press the relevant export-to-bibliographic-database button (e.g. the button labelled EndNote, RefWorks or simply 'bibliographic database') on the website of the publications database on which you have performed your search.

The importance of using a bibliographic database for managing and organising relevant and potentially relevant literature derives from more than simply the gains made in speed and accuracy by not having to manually re-type references. It also helps in keeping track of the many searches (often over an extended period of time) necessary to ensure a comprehensive overview. Thus, the bibliographic database is key to keeping track of *what searches* (using what search terms) have been performed, *when* (particularly important if engaging in long-term research where the field may 'move on' at pace even in the course of a few months, and most certainly if the research stretches over more than a year), using *what sources or databases*, and with *what results* (i.e. how many references were selected/deemed relevant out of the total number of 'hits' resulting from a search).

But, most significantly, using a bibliographic database is essential for the process of systematically digesting, processing and reviewing relevant and potentially relevant literature. This should be done by further indexing (e.g. by adding to any *keywords* that may have already been downloaded with the reference), using terms that are directly relevant to the research project at hand and further categorising (e.g. by creating relevant

subject or topic sub-groups within your bibliographic database – which may of course contain references relevant to a number of different projects that you are working on). But perhaps one of the most productive ways of using a bibliographic database is for summarising in your own words what the relevance and contribution of the individual reference is to the field of research that you are reviewing; how it fits thematically, theoretically or methodologically into the field that is being reviewed; how and to what extent the methods, variables and research instruments used can be built on or deployed in your own research; and, of course, your initial assessment of the quality and contribution of the research. In this respect the bibliographic database becomes the main tool in the first stage of processing or reviewing the relevant literature, and it helps ensure that the literature review itself – that is the review that will eventually form a key section or chapter in the research report or publication – becomes a critical synthesis and review, not a simple listing, of the relevant research.

A good literature review, then, should be much more than an annotated study-by-study listing of relevant research; in fact, such a listing would not qualify as a literature *review* at all. The term ‘reviewing the literature’ crucially implies notions of comprehensiveness, thoroughness, being systematic and objective (or at least open-minded and non-prejudiced) and critical (in terms of assessing the assumptions, frameworks, methods and contributions of relevant research to the topic at hand).

3. Statement of research question or hypothesis

Having established an overview of literature and research relevant to the originally formulated research topic or area, and synthesised and critically reviewed this, it is now possible to narrow down and focus the research. Narrowing down and focusing are important to ensure that the research to be planned and done is set in its proper context (theoretically and methodologically), is relevant (i.e. will further our understanding of the particular field) and is doable given the time, tools and resources available for the project. Narrowing down is also about

specifying the type of media, communications or people that are to be researched or studied (see also under Step 4 below).

The research objective can be formulated as a hypothesis – a statement about the relationship between two or more variables, phenomena or dimensions – to be tested by the proposed research. Or it can be formulated as a research question, which – like the hypothesis – should indicate what the key variables or dimensions to be examined are.

Stating the research objective in the form of one or more hypotheses is a good strategy if very specific relationships between variables are the subject of examination, as in the communication research tradition known as cultivation analysis, the relationship between amount of television viewing and viewers' beliefs about selected specified aspects of social reality. Hypotheses can, however, easily end up being unduly narrow and potentially even unduly trivial, so unless the review of literature has suggested some clear hypotheses used effectively in previous relevant research, we would suggest that the formulation of research objectives as one or more research questions offers a better starting point.

The research question should indicate what key areas or variables of investigation are involved but, unlike the hypothesis, it does not propose a specific testable relationship. Thus, the objective (in research question form) might be to examine how specific broadcast news organisations differ in their coverage of (specified) political issues. As a hypothesis, this might have been formulated with reference to how ownership or known political leanings of the selected broadcast organisations skew or bias (according to the hypothesis) the coverage of the specified political issues.

4. Determination of appropriate methodology and research design

The main objective of this book is to introduce and show what kind of research methods and approaches are commonly used and most appropriate for investigating what research questions, what media and what communications processes. In broad terms,

choosing an appropriate methodology thus starts by having some idea about what is available and what has worked well in previous comparable research. We emphasise again, as we did at the beginning of this chapter, that the formulation of the research objective should always, as indicated by the sequence of the research process in [Table 2.1](#), precede the choice of method and research design. For example, don't start by assuming that a particular problem always requires or is done with 'survey methodology' or 'content analysis'.

The key to choosing an appropriate research methodology is, again, the literature review. The literature review will have shown what kinds of approaches and methods have been used effectively and productively in previous research addressing similar or comparable questions, issues or topics. The review of literature may of course show that the topic at hand has been addressed in a number of different ways, using a range of frameworks and approaches, so one of the key objectives of the literature review is to assess critically which of these approaches (and associated methods) look most promising, effective and doable. The choice of an appropriate approach and method then should ideally emerge out of the review of the relevant existing research literature, but this is not confined simply to determining whether focus groups, a survey, a content analysis or other major methods are most appropriate for the investigation. It also – importantly for the considerations, choices and planning in this step of the research process – refers to sampling strategy and to the design of research instruments such as a questionnaire or a content analysis code-book.

This step in the research process then details what method is to be used; what (population) is to be investigated and how relevant and representative cases/data will be sampled; and what research instruments will be used to collect information on what dimensions or variables.

4.1. What method(s)?

At the most general level, the choice of method depends broadly on whether the research is primarily aimed at investigating communications/media content (text or documents in the widest

sense of these words) or people and their beliefs, actions and behaviour. Suitable methods for investigating communications/media content include content analysis, semiotics, discourse analysis, corpus linguistics, narrative analysis, genre analysis. Suitable methods for investigating *people* include surveys, individual interviews, focus group interviewing, (participant) observation, ethnography. However, methods for analysing communications content (such as the communications content produced by individual or focus group interviews) may also be an important part of research that is primarily concerned with studying people. In addition, a research design may call for a combination of both categories of method. Prominent communication research traditions such as cultivation analysis and agenda-setting research, for example, frequently (although not always) call for a combination of content analysis (to establish what is or is not prominent in the media) and survey methodology (to establish what and how much media content people ‘consume’ and to establish what beliefs people hold about the issues under investigation).

4.2. Population and sample

Regardless of the type of research – whether qualitative or quantitative, whether focused on media/communications content or on people – it is essential to be clear about what ‘population’ (i.e. the general body/collection) of media, communications or people the planned research aims to investigate and, eventually, to be able to describe. Terms like the ‘mass media’, ‘the media’, ‘film’, ‘advertising’ and even terms like ‘news media’ or ‘new media’ are too general and all-encompassing to be of much help in focusing a research project. Recognising the key differences and variations in characteristics which exist even within such slightly more specific labels as ‘broadcast news media’, ‘action-adventure films’ or ‘magazine advertising’, it is therefore useful to be as specific as possible about the population of media or people to be studied.

Even when the population has been defined relatively narrowly and specifically, it is still highly unusual – and indeed unnecessary – for research to study every individual case in that population.

Instead, a strategy is devised to obtain a manageable (given the time and resources available for the research) and representative sample. A representative sample is a smaller version of the population, containing the same key characteristics and in the same proportions as they are present in the population. Strategies for obtaining a sample divide broadly into those that are based on and conform to the requirements of statistical probability and those that do not (non-probability sampling).

We discuss the various sampling strategies appropriate to media and communication research in more detail in [Chapters 5](#) (content analysis) and 9 (surveys). Here we simply wish to stress that the most important aspect of defining the population and sample in any research is to transparently account for the way in which these are selected and the justification behind their selection. Selection and sampling criteria can be many and varied, but it must always be clear what they are and why they were seen/chosen as the most relevant criteria for specifying the population and sample.

4.3. Research instruments and variables

The collection of data, regardless of the method used, must always be focused on what is relevant or necessary in order to address and answer the objectives or questions posed for the research. This may seem self-evident, but, surprisingly, we have often come across the assumption that there is always a standard set of data collection categories associated with each method. In surveys, this assumption tends to relate to demographic variables of survey respondents. In content analyses, the assumption is often that variables such as duration, word length, type of news item or programme must always be coded. While such dimensions are indeed often relevant, they – like other variables – should only be included if they are relevant to the research objectives. In other words, there is no point in collecting information on dimensions or variables that would appear (either from the literature review or from the researcher's general familiarity with the topic being researched) to have little or no bearing on research questions or to have little or nothing to

contribute to understanding the issues or phenomena under investigation.

Consequently, the design of the research instrument and the identification of the dimensions on which information/data is to be collected is a case – as with sampling – of transparently explaining the rationale behind focusing on the selected variables. How do they relate to the overall objectives of the research, and in what sense is it anticipated that they will provide information relevant to testing the research hypotheses or to answering the research questions posed in the third step of the research process? This step is then essentially about translating the research questions or hypotheses into variables for data collection, and into variables or dimensions that can be coded or measured or about which information can be collected.

In practical terms, the research instrument and definition of variables for data collection will differ depending on the method used (see under each method discussed in the following chapters) but in very general terms the research instrument is the researcher's menu of questions/variables and manual of how to collect the information. In a content analysis, this is the code-book that specifies what content dimensions are to be coded and how; in a survey, it is the questionnaire and any associated instructions to interviewers/respondents; in a focus group study, it is the script indicating the moderator's role, speech and menu of questions/topics to be discussed, as well as directions for any prompts or stimuli that are to be used; in an observational study, it is the plan for who will be observed where, what dimensions will be observed, what questions will be asked, how answers and observations will be recorded, etc.

4.4. Research ethics and approval

Just as academic research must always be transparent in terms of design, framework, methods and procedures used, so too must it always be ethical. This is especially important where people are the subjects of research or in other ways involved as informants/respondents. Indeed it is increasingly a requirement by all recognised academic institutions as well as professional and scholarly bodies that researchers demonstrate their adherence to

their institution's or professional body's code of practice regarding ethics, and that their research design is subjected to formal review and approval by the institution's relevant ethics committee or equivalent board, before any data collection is embarked upon.

Different institutions and professional bodies operate different ethics requirements or codes of practice, but they generally revolve around core principles regarding consent, confidentiality, privacy, coercion/freedom, deception or harm to individuals. First and foremost, participants must give their informed consent, must be assured of the confidentiality of the information obtained from them (i.e. that the information will not be used to identify the individual respondent, unless they have expressly given their consent to this), and must be aware that they are under no coercion or obligation to participate, and that they can opt out at any point in the course of the research if they wish. The research must not involve procedures that could cause either physical or psychological harm to the participants, nor should it involve the deliberate deception of individuals. These considerations are important and increasingly required in any research involving people, but they are absolutely essential where children or teenagers under the age of 18 are involved.

Ensuring that research is ethical should not be seen as some red-tape bureaucratic obstacle. Rather, in addition to being a requirement, it offers the researcher a useful 'check' on whether the research design is asking the right questions in the most appropriate, acceptable and efficient way. Careful consideration should thus always be given to ensure that the language, terms and phrases used in questioning are sufficiently sensitive to the actual or potential sensibilities of respondents so as not to cause undue offence or in other ways risk biasing the response. Likewise, the researcher needs to ensure that the process of conducting research does not in itself unduly intrude on or cause offence to the people whose activities, institutions or practices are being observed or studied (e.g. by unacceptable intrusion into what they may regard as sacred, private or in other ways 'off-limits' to outsiders). The internet (including fan sites, social networking, blogging, etc.) has brought with it massively increased opportunities for observing, studying and analysing human

behaviour and communication practices, but also new questions about ethical conduct in research: see the website of the Association of Internet Researchers (<http://aoir.org/ethics>) for a full discussion of the particular ethics questions and issues applicable in internet research.

In practical terms, the researcher needs – at this or an earlier stage in the research process – to establish what their institution's or professional association's requirements are regarding ethics approval (these can generally be found on the institution's or association's website) and the procedure for obtaining formal approval to go ahead with the research, which will normally consist of submitting an application to the relevant committee or body for formal approval. Under no circumstances should any data collection involving human subjects commence – not even for the piloting of research instruments – until the required approval has been granted by the relevant body.

4.5. Piloting

In both qualitative and quantitative research, it is important, once the research design and instruments have been finalised, to apply them consistently to all cases or subjects in the research. In other words, new content analysis variables or interview questions should not be added halfway through the data collection process, nor should the way in which content variables are coded or the way in which interview questions are asked be changed during the data collection period. Such changes or additions may be tempting, as one learns more about the nature of the topic being investigated or the type of responses that people give. However, such changes or additions will potentially invalidate the research, as not all of the sample will have been subjected to the same 'conditions' (i.e. the same coding, questions or measurement) and it will consequently be impossible to account for what causes the trends or differences that might be found in the analysis. Because of this, it is necessary and desirable to make sure that the research design (including instruments, sample and variables for data collection) 'works' before embarking on the full-scale collection of what can in many cases be a large amount of data and a time- and resource-intensive endeavour.

It is therefore highly advisable to do a small-scale pilot study before embarking on the full data collection. A pilot study consists of simply testing the research instrument on a small sample of cases to see whether the codes or questions can be readily applied without misinterpretation, and whether they succeed in capturing the kind of information that will be relevant to answering the research questions. The piloting of an interview schedule or questionnaire will show up any questions that are either not understood by the respondent in the way that was intended by the researcher, or questions that are insufficiently precise and thus result in unacceptable diversity in the type of answers given; the piloting of a content analysis coding schedule will show up categories that are difficult or impossible to code/apply consistently and will reveal whether the coding schedule succeeds in capturing the type of information that is relevant to answering the research questions.

5. Data collection

An important key to successful data collection is careful and realistic time planning and timetabling. Issues to do with availability of and access to relevant research sites, documents and respondents have already been considered under Steps 3 and 4, and indeed some attention will also have been given to the length of time estimated as required for the collection of data. However, at the very start of this step, a more detailed timetable complete with actual target dates, taking into consideration public holiday closures etc., needs to be drawn up. Virtually all research (whether externally funded academic research, research theses or taught-course dissertations) is conducted to specified deadlines. Given that a range of research sites, researchers and assistants, and respondents may be involved it is essential to construct a realistic timetable which specifies who is doing what, where and when. The data collection itself consists of accessing the research sites (e.g. a news organisation or newsroom), media content or other documents or respondents, to apply the research instruments or procedures and collect the data in the form of coding/classification, answers or observations. In the chapters

that follow we indicate the type of ‘data’ that is collected with different methods and we indicate ways of organising, managing and preparing collected data for analysis.

While the steps in the research process are broadly sequential, we strongly advise that some analysis (Step 6) should commence as soon as a small amount of data has been collected – rather than waiting till all the data has been collected – and that a degree of analysis can usefully continue throughout the data collection period. This is to help maintain an overview of the research data and to help develop a sense of key trends in the data that can then be subjected to rigorous analysis and testing, when all the data has successfully been collected.

6. Analysis and interpretation of data

Although the researcher will already have had some glimpses of what the research will find and how it will be able to answer the research questions, Step 6 is where it all begins to ‘come together’ and where important parts of the jigsaw puzzle that is research finally fall into place to reveal new insights into and understanding of the topic being researched. Step 6 is thus undoubtedly the most exciting and potentially exhilarating part of the research process.

Regardless of whether the research is primarily quantitative or qualitative, or indeed a combination of the two, data analysis is essentially about identifying and summarising key trends, patterns and relationships in the data. What trends does the data show and what is related to what in the data? Quantitative data is subjected, at this stage, to statistical analysis showing both the distribution of individual variables and testing the strength of relationship between variables. Qualitative data is coded, classified or tagged and explored in terms of who says what, using what lexical terms, and focusing on what themes, subjects and discourses, or in terms of its structural arrangements (e.g. narratives, binary oppositions or core juxtapositions). We explore the specific nature of analysis and interpretation relevant to individual methods in the following chapters of this book.

7. Presentation/publication

The final step in the research process is to write up the full research for presentation or publication. Presentation may in the first instance be in the form of a research report to the funding body or a lecture or conference presentation. Ultimately, however, the objective of all academic research is and should be to make it available to the wider academic community, and indeed beyond to a wider public. Whether the research is written up for an undergraduate or postgraduate dissertation, for a PhD thesis, for a scholarly journal article or for book publication, the main ingredients and structure are very similar. The main reason for this comes back to the scholarly principle of ‘transparency’, meaning in this context that it is just as crucial, possibly more so in fact, to the way that academic and scholarly research advances that those who read the research are able to follow the process of the research – that is, how the problem was defined and how the data was collected and analysed – as it is for them to learn what the results, findings or conclusions were.

The core structure of the write-up of academic research – mirroring key steps in the research process itself – is illustrated in [Figure 2.1](#).

- Introduction
- Review of literature and framework
- Method and sample
- Analysis and results
- Conclusion
- References

Figure 2.1 The core structure of the research write-up/academic publication

We describe each of these core components in a little more detail in what follows, but first we note that different format and style requirements may apply depending on the type of publication

and/or publisher. Different academic journals and publishers thus each have their particular format or style requirements, and different universities have different style/format requirements for dissertations and theses (including specific requirements for the cover page, abstract, provision of keywords, contents pages, etc.). Early on in the process, and certainly in good time before finalising and submitting the write-up, it is important to check what the institutional or publisher requirements are regarding structure, style and format.

Introduction

The introduction states briefly and succinctly how the research topic was chosen or identified, why it is of interest (and potentially to whom), what it is about and what research questions, topics or issues it aims to address. Although generally not feasible or done for the shorter and restrictive format of a journal article, the introduction may also give a brief overview of what follows in each of the subsequent chapters.

Review of literature and framework

This is the first major substantive section or chapter in the write-up. This section or chapter surveys the relevant theoretical and research context, and it critically discusses and reviews existing research and literature relevant to the topic under investigation. ‘Critically reviewing’ includes identifying, comparing and assessing the types of research questions asked by previous research, the types of analytical and theoretical frameworks deployed in previous studies, and the types of populations/samples and variables studied and methods used for collecting data/information on these. As we have indicated previously, this chapter must be much more than a summary listing and description of selected key studies: it must critically compare and assess relevant studies and, on the basis of discussion of these, ideally it must arrive at conclusions about what seems to have worked best in previous research. It must then build on these conclusions to outline how they inform the choice of sample, methods and variables to be described in detail in the chapter that follows.

Method and sample

This chapter details the rationale for the choice of sampling strategy and sample, the choice of method(s) and the selection of variables to be analysed. It needs to offer sufficient detail for other researchers to be able to (a) assess the robustness of the research presented in the report and (b), if they wish, to replicate the study. The key to the whole of this chapter is justification/explanation: nothing should appear as if it just ‘fell out of the sky’ and no assumptions should be made about the naturalness or rightness of why these particular populations, samples, methods or variables were selected. If people with particular demographic characteristics are selected, or if particular media, media content and periods are selected for analysis, then the reasons behind and justifications for these choices must be explained. The variables chosen for analysis must likewise be justified in relation to the objectives and questions set out for the research. The chapter should also account for the research procedures used, for any piloting carried out and adjustments made on the basis of it, and for measures used to check on the reliability and validity of the research. It is not, however, normal practice to include the full questionnaire, code-book/coding schedule or other research instruments in this section or chapter; instead these may be included in an appendix.

Analysis and results

Analysis and results are then presented, supported by relevant tables, graphs or quotes, depending on the type of method(s) used and the nature of data collected. It is worth remembering that the purpose of using tables and/or graphs is to offer a succinct, ‘at a glance’ overview of key trends and findings, but that they cannot and should not be left to ‘speak for themselves’. It is thus the responsibility and task of the researcher to provide a narrative account of what was analysed, which key trends were identified and what relationships were examined and seem to be relevant or significant. The narrative thus, rather than repeating in prose what is shown in them, should pinpoint tables’ or graphs’ key highlights and provide interpretation of what the findings

mean. Likewise, selected direct quotation from respondents or from media content is used to illustrate and support key trends or findings discussed in the analytical narrative, but the narrative itself must show how these trends or findings emerge from the analysis through the use of the method(s) described in the previous chapter of the report.

Conclusion

The conclusion should ideally offer two things: a summary of the key results or findings of the research, and critical reflection on the research leading to recommendations for future research. Critical reflection includes asking – with the benefit of hindsight – whether the research showed what we expected it to show, whether the theoretical framework and methods used were the most appropriate for the topic, whether the sample was appropriate or could have been improved upon, and what specific problems arose in the course of the research and how they could be addressed in future research. Combined with the key findings or conclusions of the research, the critical reflection should ideally then lead to brief but succinct suggestions about how the research can be built upon, expanded and potentially improved in future research.

References

It is essential – in all academic research, writing and publishing – to ensure that all sources are clearly identified and referenced. The references section must therefore list the full bibliographic details of every source, work or citation used and referred to in the text body of the write-up. References that may have been consulted during the development or execution of the research, but are not mentioned in the text body of the write-up should *not* be included in a references section. The format of references/referencing may vary by publisher/publication type, and it is therefore essential always to check what the requirements are before finalising the write-up.

8. Replication/further research

As we have indicated, the aim of academic research is to contribute to the development and advancement of knowledge and understanding in the relevant field of enquiry, in our case media and communication. Knowledge and understanding are advanced through building on what is already known or has already been researched, and to elaborate on this in ways that will add further insights into the processes and phenomena under investigation. Essentially, therefore, the final step in the research process – the dissemination or publication of the research – has as its key purpose to kick off the next iteration of the research process or cycle, that is to serve as inspiration for further research development and/or the replication of this research but applied to a different time period or a different population/sample.

Further reading and resources

Publications databases

Web of Science: the premier periodicals database for social science research.

WorldCat: the premier database for books worldwide.

Search engines

Google and Google Scholar

Bibliographic referencing software

EndNote: www.endnote.com

RefWorks: www.refworks.com

Further reading

Berger, A. A. (2016). *Media and Communication Research Methods: An Introduction to Qualitative and Quantitative Approaches* (4th revised edition). London: Sage.

Berger provides a delightfully accessible and amusing introduction to research, literature searches/reviewing (Part I, Chapters 1 and 2) and a 'Putting it all Together' section (Part V), which includes a chapter (17) on 'Writing Research Reports'.

Wimmer, R. D. & Dominick, J. R. (2014). *Mass Media Research: An Introduction (International Edition)* (10th edition). Belmont, CA: Wadsworth Cengage Learning.

Part One is devoted to the research process, and comprises four chapters: (1) Science and Research; (2) Elements of Research; (3) Research Ethics; and (4) Sampling.

Fink, A. (2014). *Conducting Research Literature Reviews: From the Internet to Paper* (4th edition). London: Sage.

Accessible, clear, comprehensive and well-structured introduction to how to do literature reviews.

CHAPTER 3

Researching ownership and media policy

Introduction

While other chapters in this book describe methods for studying the content of the media and how to measure the way audiences take up and use this content, this chapter is concerned with how we study the political economy of the media. This means investigating the nature of media ownership, how it is financed, and the organisation of production and how this is regulated by governments and international governing bodies. This is important on the one hand simply to understand the nature of these organisations and processes, to know who controls our media. On the other it is at this level of analysis that we can find out why the content is the way it is. We can ask whether the nature of the content of news on a webpage or in an article in a magazine is down to the individual choices of the writer/journalist/photographer or to institutionally established processes and corporate strategies. Such things cannot be understood at the level of textual analysis.

Most of us are familiar with the accusation that media owners have used their power for their own ends. In Europe the typical cases over the years have been Silvio Berlusconi and Rupert Murdoch. It is important to emphasise, however, that media ownership for the most part leads to a kind of control over content that is ‘soft’ rather than ‘hard’. In other words, content can be influenced by the way a particular ownership structure manages and organises its companies rather than through direct and open

instruction to disseminate specific political viewpoints. And the nature of making profit, of organising production for economy of scale, of seeking out advertisers, can all influence what kind of content we find in the media as much, if not more, than the need of owners to promote their own point of view and agenda. It is, as we show, not difficult to find out who owns a particular newspaper, magazine or radio station, but it is less obvious how we use this information to help us to understand and explain particular kinds of news, web or broadcast content.

This political economic focus has its origins for the most part in Marxist economic sociology. From the 1980s in particular, a number of scholars became dissatisfied with studies of the media which they felt were missing the true nature of the media's power. Curran et al. (1987) looked at the role of media ownership, media concentration and advertising in driving the nature of content. McQuail (1994) had been interested in the commodification of audiences as private media chased maximum profits. With increased privatisation he asked to what extent the real plurality of voices offered by the media was challenged. Golding and Murdock (2000) argued that we should not think only about media effects but the way that the media have a massive control over the cultural forms available to us. And these forms can be traced to specific kinds of commercial interest and the processes that they foster. Writers like McChesney (2003) have been interested in the way that commercialisation of news has led to a rise in particular kinds of journalism.

In this chapter we look at two examples of how researching ownership and regulation can help us to understand much more about a particular media product. In the first case we look at the content of a local newspaper; in the second, we consider the photographs produced by commercial image archives. Each case begins with examples of texts. While it would be possible to say much about each example through content or linguistic analysis, a great deal can be learned through information about the company that produced the text, the organisation of that particular content producer and also the way the wider industry is organised.

The practical methods of research used in this chapter are archive research and interviews. In the first case the main sources

are annual reports, company websites and government documents. Annual reports give information about company structure, development, strategies and revenue and relationships to other companies. They can be available for download from websites and also can be obtained on request by post. Government documents relating to regulation and policy are also available online. In the second case, interviews with company employees such as journalists and editors, along with regulators themselves can reveal important practical information about working and production procedures. In this case we only give a limited number of interview examples, but the point is to show how we can use such data, what it can tell us and how we should present it. How these sources of information can each help us to understand the nature of media content will become clear through the two case studies.

Ownership and newsgathering

We begin with an example from a regional newspaper, the *Western Mail*, which is based in South Wales, UK. This case study shows that it is only possible to explain what we find in its pages through coming to understand the changing structure of newspaper ownership in Britain from the 1990s and the effect that this has had on everyday newsgathering techniques. In certain research strands such as Critical Discourse Analysis ([Chapter 6](#)) texts are analysed for their ideological content. But what such analysis misses are the social practices that lead to specific kinds of content. Therefore certain kinds of content cannot be explained so much by ideology or journalistic bias, or even the powerful voice of ownership, as by established practical procedures of news production often based around changing financial constraints and market context. In this section we look at the changing constraints on news production from the 1990s to 2016: the demise of print and the rise of online news and its relationship to social media, and data analytics software which tailors news to readers.

Below is an extract from a news item from 3 November 2005. The text was collected during a research project that investigated the changing nature of journalistic practice (see Machin and Niblock, 2007):

How does your life sit with the sofa habits revealed about our nation?

[There is a photograph of a designer sofa and another of interior designer Laurence Llewelyn-Bowen]

The comfort zone is more important than ever before.

Welsh people are spending more of their time sitting on sofas than ever before.

Where once people left the house to socialise or do chores such as shopping, modern technology has made it quicker and cheaper for people to spend their out-of-hours time in the comfort of their own sitting room, and according to a new survey, that's exactly what they're choosing to do.

According to a survey out today, commissioned by Intel, the most popular activities for Welsh families at home are watching television, listening to music, surfing the internet and playing games, all of which can be done from the sofa.

And with so much time spent sitting on them it's no surprise the average household has £23 in loose change down the back of them.

Furniture designer and former *Western Mail* Welsh Woman of the Year, Angela Gidden, described the trend as "the migration to the sofa" and said because people now spend more time on them, they have become more concerned about what kind they buy.

She said yesterday, "There's a lot of people who are watching their pennies and are quite happy to stay at home but it means they're more conscious of what they're living with and so they'll make a more considered choice when it comes to upholstery".

"People want a sofa which suits their needs and aspirations".

She added, "There's also more of a trend towards entertaining at home and less emphasis on going out to bars and restaurants and so living space is becoming more important".

But Wales' relationship with the sofa is not a new one. For the better part of the last century the centre of the UK's upholstery manufacturing industry was based in South Wales.

In the last few years cheap imports and a downturn in spending have taken their toll.

Christie Tyler, Wales' first major sofa manufacturer which was set up after the Second World War and employed around 1,000 people in Wales, went in receivership earlier this year. The decline of the company credited with creating the first widely available three-piece suites resulted in factory closures and job losses.

[The text goes on to look at a number of sofa retailers in South Wales and some comments on sofa fashions by Laurence Llewelyn-Bowen. This item, according to journalists we interviewed in South Wales, is typical of contemporary local news reporting.]

What we draw attention to here is the kind of reporting done to produce this news item and how this can be explained in terms of a particular pattern of ownership that has become increasingly characteristic of newspapers around the world, which has itself been a response to changes in the way the media industry is regulated.

In this particular case, what kind of investigation and informing has the journalist done? The item is in fact based on a press release for a survey by Intel. The journalist has drawn out the Welsh angle in order to create newsworthiness for the local market. The rest of the text appears to be based on promotional material for sofa manufacturing and sales in South Wales. So what kind of informing is this? Is it really 'news'?

In fact, in this text there has been no actual 'investigation' for the news item and the information has been gathered through email and the internet. This text is evidence of the way that

journalism has changed since the 1990s and is typical of the way that the content of much of our news has changed. To understand these changes in content, we need to know much more about the changing nature of news production and regulation.

The commonly held view of the purpose of local news is that it is the way we find out about what is going on in our local community or region. In such a view of the news media journalists are the eyes and ears of the public. Are our local MPs doing their jobs? Are services being run properly? Are there any concealed issues that should be brought to our attention so that we can approach those in authority and demand answers? Is our local health service run properly? Ordinary citizens do not have the time or resources to find these things out so we rely on journalists to do it for us.

In 1949 the Royal Commission on the Press pointed directly to the role of the press in a democratic society:

The democratic form of society demands of its members an active and intelligent participation in the affairs of their community, whether local or national. It assumes that they are sufficiently well-informed about the issues of the day to be able to form the broad judgments required by an election, and to maintain, between elections, the vigilance necessary in those whose governors are their servants and not their masters.

In the ideal scenario where a journalist acts as the eyes and ears of a local community we would imagine that they would detect the most important, relevant events to the community served by the news outlet. This would mean that they would have regular everyday contact with that community and understand its problems and needs. They would be able to identify what kind of people can provide them with further information about those events in order for them to be fully understood from every angle. For example, a reporter might hear about a rise in crime rates in their community from local police figures. They would then seek out those people who could verify this information. They might interview people in the affected area. More experienced journalists often speak of how they would maintain a sense of

what was going on in a community by simply spending time in its cafés. They may then contextualise this in a picture of a community living with high unemployment, digging out local government information that revealed the true picture. In the piece all points of view would therefore be covered. As a result the readers are informed about issues that deeply affect and shape the community around them.

In fact this kind of scenario has never actually been the case as regards local reporting. Journalists cannot simply hang out in pubs and cafés as this would seldom throw up interesting stories. Historically, journalists have developed solutions to the problem of supplying steady, predictable supplies of news stories by establishing *beats*. These beats that might see them given responsibility for particular kinds of stories, such as crime, would bring them into regular contact with sources such as police, courts, councils and other bureaucratic organisations. These settings process the kinds of events that are newsworthy on a daily basis at a pace that is predictable. So, rather than eavesdropping on conversations in bars and cafés, community reporters can access files and reports produced by these organisations. Of course this means that what becomes news is defined by these organisations' interests. Sociologists of journalism have been critical of the way that journalists therefore tend to reproduce the definitions of crime, for example, in accord with the interests of the police and courts.

Many journalists would defend the beat system and point out that these official sources can throw up stories that could then be investigated further. The problem is that changes in the industry, and in regulation and ownership, have made this less and less a component of everyday reporting practice, resulting in the kind of public relations-based news items of which the 'sofa' story is an example.

In the following story we can see an example of the former kind of reporting. *Western Mail* journalist Colin Hughes, who lamented the changes in journalistic practice leading to 'email and internet newsgathering', gave this is an example of a story where there was time for investigation and where he was engaged with issues

important to the community, drawing on his contacts from within that community.

Rugby Club that plays on a ‘gold’ mine, *Western Mail*
(17 October 1978)

The turf of Blaenau Rugby Club’s ground (above) in West Wales is even more hallowed than that of Cardiff Arms Park.

It may not have the same lush, green appearance but for all that it is regarded with reverence by the locals.

The reason? Beneath the grass of the Blaenau club lie rich deposits of best quality anthracite coal.

It is coal the National Coal Board would love to get their hands on – but stand no chance of doing so.

A member of the village welfare committee who own the Blaenau ground told me. “The NCB tried to move heaven and earth to buy the land.

“They offered us an alternative ground in Llandybie with all the facilities thrown in. But we said no. It would have been a betrayal of the village if we had agreed because the rugby club is the only recreational entertainment left here now.”

The coal board’s opencast operation at Glynglas, near Blaenau, was one of the last to go through the public enquiry procedure. It was bitterly opposed by villagers and on environmental grounds by Dyfed county and Dinefwr borough councils.

The board wanted to extract 700,000 tonnes of anthracite from the 422-acre site. They even wanted to include the rugby ground in their proposals.

But the inquiry result – in July 1976 – although giving the go-ahead to the NCB added certain restrictions. The size of the site was ordered to be cut by 15 acres to exclude the rugby ground and the inquiry inspector ruled that no excavation work should be permitted within 100 yards of properties in Pennygroes Road, the main road leading through Blaenau.

But the two years that have elapsed have transformed the surrounding countryside into a hive of industrial activity.

Today excavation work has turned once rolling hills into huge craters burrowed out of the ground by giant earth-moving machines.

Dozens of lorries and machines are on the move all day. The noise and dust for the villagers of Blaenau are often intolerable and sometimes plain unbearable.

But that is the way it has to be, I suppose if the “national interest” is to benefit to the extent of 700,000 tons of anthracite over the next five years. For the once peaceful village of Blaenau, though, it is all like a bad dream.

The story goes on to ask local people their opinions on the matter. This story is rooted in knowledge of the community and contacts based on spending time among its inhabitants. It draws on information from local people with whom the journalist has a relationship. Colin said that this trust was important as it meant that they would come to him with issues. Someone might have heard of a particular problem or event and Colin would know just the kind of person likely to help with his investigation. He would then dedicate some time to developing stories that had particular importance.

Colin said that since the 1990s this kind of reporting had become impossible. There had been huge cutbacks in staffing, and the marketing arm of the parent company had told journalists how to write for niche markets in order to address the needs of advertisers and increase revenue. To understand such changes we need to take a step back and look more carefully at ownership of the news media and how this has changed since the 1990s and why. This will give some clues as to the stages we need to go through to explore such issues.

Media ownership as a means to control what people read about, to promote particular views of the world, is not a new thing. At the turn of the twentieth century the ‘press barons’ such as Pulitzer and Hearst in the US and Northcliffe and Beaverbrook in the UK had used newspapers to promote their own political views. Their aim was to promote their business interests and to criticise those who disagreed with them (Curran and Seaton, 1977; Tunstall and Palmer, 1991). Until the 1970s most countries had

fairly strict restrictions on media ownership to protect the public from the possibility of single owners expanding their interests to have massive control over what people read, saw and heard. But since the 1970s with the rise of conservative free-market capitalism there have been waves of deregulation. Right-wing thinkers argued that that private ownership of the media facilitates a free press and is good for democracy. The logic goes that the free press will be owned by a range of voices who may indeed seek to promote their own interests, but if these voices do not reflect the interests of the public then they will simply go out of business. The idea is that that a number of private voices will keep the state and government in check. This led to successive waves of deregulation in the US, UK and then Europe – although the lobbying power of media corporations in these changes should not be underestimated (Tunstall and Machin, 1999).

In the 1980s and 1990s there were many big changes in the ownership and structure of news organisations. This was part of a more general bulking up facilitated by changes in broadcasting regulation. The US Telecommunications Act 1996 was the catalyst for speeding up mergers and buyouts, leading to a spread in relaxation of media ownership around the planet. The details of this Act can be found at the Federal Communication Commission website (www.fcc.gov/telecom.html). Examples of the wording of the Act are:

The Commission shall modify section 73.3555 of its regulations (47 C.F.R. 73.3555) by eliminating any provisions limiting the number of AM or FM broadcast stations which may be owned or controlled by one entity nationally

and

eliminating the restrictions on the number of television stations that a person or entity may directly or indirectly own, operate, or control, or have a cognizable interest in.

The Act encouraged competition with the assumption that this would drag down prices of news products. But in practice it has

meant that more could be owned and companies could get bigger. It also meant that companies could own across different kinds of media. So a company could own newspapers, radio stations, television stations and cinema outlets. The *Western Mail*, with its stories now based closely on public relations material, is an example of a newspaper that has fallen into the hands of a massive media conglomerate, in this case Trinity Mirror. The nature of the texts found in it can be seen as a direct effect of the drive to maximise profits. The same kinds of deregulation can be found in the UK Broadcasting Act 1996 which can be found at the UK office of Public Sector Information website and also at the Ofcom (Office of Communications, the independent regulator and competition authority for the media in the UK) website and in other European acts such as the German 1996 Broadcasting Act No. 223 and the French 1994 Broadcasting Law, although in France there has remained some control over cross-media ownership.

In Britain the 1995 Broadcasting Bill allowed regional newspapers to take stakes in local radio and for newspaper groups to take stakes in television. The conservative government's 1995 Green Paper on cross-media ownership allowed local newspapers to control circulations of 50,000 before referral to the Monopolies and Mergers Commission. This vastly expanded the control companies could have over individual cities.

After deregulation in the US all the major news networks were bought up by media conglomerates: ABC by Disney, CBS by Viacom and NBC by General Electric, a pattern of bulking up that was soon to sweep across Europe (Tunstall and Machin, 1999). Such information can be easily obtained from the network websites which usually carry annual reports which provide detailed information about owners. This meant that Viacom, as well as owning CBS News, had control of 40 television stations; cable stations including MTV, Nickelodeon, the Movie Channel, Sundance Channel; 176 radio stations across the US including in New York, Dallas, Seattle, Los Angeles, Denver, Philadelphia; a Hollywood film studio, Paramount Pictures, makers of movies such as *War of the Worlds*; an international film distribution company, UIP; the global chain of UCI cinemas; Blockbuster Video; and international book publisher Simon & Schuster.

Therefore audiences watching CBS News are viewing news items generated by a billion-dollar-a-year transnational media conglomerate. Websites such as www.theyrule.net, which catalogues up-to-date ownership and members of boards of directors, shows links between Viacom and other large corporations such as airlines, petroleum and pharmaceuticals.

This kind of bulking up enables cost-effective control of multiple stages of the media process – production, distribution and exhibition. It also has the advantage of synergy, meaning that corporations can cross-advertise and self-promote. They can also use material across different media, which brings about massive economies of scale; the larger the corporation's output and the more parts of the process it controls, the more that it can get a return on productions through multiple outlets, the cheaper the product.

Since they are tied into a global corporate network, some critics argue, such corporations are unlikely to be critical of the corporate world in general. Media researchers point out that many of the major shareholders and investors in media corporations are investment banks and other large institutions that have interests across a range of other industries (Wasko, 1982; Herman and Chomsky, 1988). This can easily be checked, again by consulting the annual reports of the companies and then accessing the annual reports of shareholders. For example, Goldman Sachs Asset Management is listed as one shareholder of Viacom/CBS news. We can then see the nature of this company as a global trading bank from its own reports.

Some writers (Hollingsworth, 1986; Herman and Chomsky, 1988; Kellner, 1990) see this as a process whereby media corporations will tend to support conservative policies, and will be uncritical of neo-capitalism, seeing it as a natural state of affairs. In fact McChesney (2004) has shown that media corporations are themselves among the biggest companies in the world. In 2002, McChesney shows, *Forbes* magazine calculated that over a third of the 50 wealthiest Americans generated the bulk of their fortunes through the media and related industries (p. 21). He argues: 'our media, then, far from being on the sidelines of the capitalist system, are amongst its greatest beneficiaries' (p. 2).

Since the mid-1990s in Britain the newspaper industry has been a part of these changes whereby companies have bulked up. In January 2005 The Newspaper Society stated:

Over £7.0 billion has been spent on regional press acquisitions and mergers since October 1995. The top 20 publishers now account for 86% of all regional and local newspaper titles in the UK, and 95% of the total weekly audited circulation.

At this time, there were 1,286 regional and local, daily and weekly titles in Britain. Ownership was dominated by three big press groups: Trinity Mirror plc, Newsquest Media Group and Northcliffe Newspapers Group Ltd. Trinity Mirror, for example, the owner of the *Western Mail*, had 280 online titles at the time of writing in 2016.

One of the effects of the deregulation of ownership and the forming of a handful of big companies has been the slimming down of the news production process. Increases in commercial competition enabled the larger newspaper chains and conglomerates to use production cost-cutting as a way to maximise profits (Hallin 1996; Bourdieu, 1998). The reduction in reporters has meant that some beats no longer exist and has reduced the reporter's ability to go out into the community. Where one reporter now covers an area formerly covered by eight, there is no time for nosing around, for verification, and especially for developing a story as in the case of Colin Hughes' story about the rugby club. Instead there has been an increased dependence on secondary sources such as press releases as we saw in the 'sofa' story. Story development now involves telephone calls to official organisations or press offices or visits to websites, rather than finding sources who can best verify a story or provide different angles. Many of the organisations that provide these releases will be staffed by the journalists who formerly worked for the newspaper before the waves of redundancies. A local council may employ ten public relations officers who feed press releases to two local newspapers where they deal with only one lone local reporter. Verification of stories may also increasingly involve calls to the kinds of celebrity lifestyle/culture experts that now dominate

the mass media. And news gathering, as we discuss in the following section, has become highly integrated with social media and based around data analytics.

Trinity Mirror

In 2016 Trinity Mirror was, in its own words, ‘the largest national and regional multimedia content publisher in the UK’. This included over 200 newspapers across the UK and Ireland. These included national titles such as the *Daily Mirror* and a huge portfolio of local titles which led Trinity Mirror to claim that there was hardly a postcode where it did not have a presence. It also owned over 80 websites which provided round-the-clock coverage of news, sport and entertainment. It deals with revenues of around six hundred million pounds each year (information easily accessible from annual reports normally available through the company website). This gave the company complete dominance over local news in many cities. In Birmingham, for example, it controlled the two formerly rival titles the *Birmingham Evening Mail* and the *Birmingham Post*. In South Wales, as well as the *Western Mail* Trinity controlled the formerly rival title the *South Wales Echo*, the *Cardiff Post*, the *Rhondda Leader* and *Wales on Sunday*. Of course this means that the plurality of voices that might help to voice a range of world views is removed. This multiple ownership of titles means practically that many titles can be produced by the same production teams and facilities, material can be syndicated and integrated advertising deals can be made. Trinity claimed in its 2007 annual report that in one week it can reach around 80 per cent of the adult population in South Wales and 72 per cent in the Midlands.

The same annual report laid out a strategy for what in fact we find today:

Our strategic goal is to build a growing multiplatform media business, by developing and sustaining strong positions across print and digital, with products and services which meet the needs of our customers, both readers and advertisers.

We will achieve this by both launch and acquisition, and by layering and segmenting our portfolio both geographically and by advertiser or content segment, thereby deepening our penetration and reach across markets. (p. 13)

It is this strategy that helps us to understand why reporting has moved away from actual engagement with the community, with investigation and checking of facts, to a reliance on press releases. However, since this time the news market has changed vastly, simply as people's habits of accessing information have changed. This has even further transformed news production, further pushing journalists towards writing for specific markets and in handling and preparing PR output.

Trinity Mirror and the shift to digital journalism

In 2015 Trinity purchased one of its main national rivals, Local World, owned partly by the *Daily Mail* and General Trust Group which owned around 80 titles including local newspapers such as the *Nottingham Post* and the *Cambridge News*. Of course this further extended Trinity's control over local news in the UK and Ireland. But this had particular significance in the context of their wider changing strategy in the changing news industry. An indication of this change is found on their own promotional material where they were claiming 120 million unique monthly online users of their digital news output (Trinity Mirror plc, 2016).

The purchase of Local World brought a number of important benefits to the company, particularly related to the shifting news market. At one simple level this allowed further consolidation of production processes. One shift in priorities from former news production has been that individual titles are not seen to require their own design teams, their own production and printing facilities. And Trinity has taken the step of using its extensive national infrastructure of design, printing and distribution as a business in itself. It also meant even more possibilities for economy of scale, for consolidation and increased sharing of content across regional titles where possible.

Increasing online news allowed Trinity to offer a quite incredible possibility to advertisers to access markets across the UK and Ireland. At the time of writing, print circulations are dropping by up to 20 per cent and advertisers are shifting increasingly to online outlets, where there is a corresponding 20 per cent increase in unique visitors to Trinity's local news websites (Greenslade, 2016).

These shifts away from print to digital also involved radical shifts in terms of news production and the way that journalists worked. Some of the patterns we have already seen as regards packaging of news and writing for specific markets became more pronounced.

As part of the shift away from dated print-based news, Trinity introduced its 'Digital First' programme. Linford (2015) explains the nature of these changes. In the first place this is clearly a move away from the old-style local informer that we saw in Colin's day. It involves a shift from self-standing individual newspapers with their own printing and production facilities. It is a model where there must be sharing of content and resources wherever possible, where stories can be syndicated across the now massive number of local titles as well as sold on internationally afterwards. But it involves a fundamental shift in the relationship with the audience.

New content is driven by data analytics. Trinity used a range of digital analytics tools, such as Chartbeat and Omniture (Trinity Mirror plc, 2016). This means simply that it is able to follow which stories are more or less popular. It also allows the company to trace and map patterns of reading. Resources are then moved into areas clearly popular with readers. For example, in specific localities this has, for example, involved hiring more football reporters. Journalists – in teams and individually – were also to be given audience goals. In other words the priority is to use data patterns to develop popular material (Linford, 2015). This, as Colin told us earlier, involved a refocusing of writing order to reach audience needs.

This tailored content would need to address readers' expectations for constant updates. Data analytics could be used to look at spikes throughout the day when specific kinds of

readers wanted such updates. As regards content provision there was to be an emphasis on short videos and also what Trinity called a ‘mobile-centric’ approach. Research showed that the digital news sites were accessed much more often on mobile devices (Mortimer, 2014) than on desk top computers. This meant that content was being accessed in situations where shorter periods of time need to be filled, as opposed to the former print designs which were more ‘sit and read through’. It was important that journalists understood how to make stories attractive to readers when they were first seen and then read on a smaller screen, in very different conditions and for other purposes than with the former leisurely reading (Somaiya, 2014).

This process of data analytics and predicting reading flows was also connected, of course, to advertising. Trinity teamed up with a digital advertising company called Taboola (Trinity Mirror plc, 2016). This uses software which can process complex data related to geography, kinds of device and user profile to predict purchasing behaviour and also media consumption patterns. This can be used to present content likely to be of interest to site visitors, including new stories, and which can also direct them to other Trinity sites.

The shift to the ‘Digital First’ model involved both staff reductions as resources and production became consolidated and also new kinds of journalists. One area in decline was clearly, as we saw from the interviews earlier, journalists working with local councils or local politics (NUJ, 2016b). These areas could still be covered but in the form of reworked press releases where the local could be emphasised, again as we saw earlier. It was also clear that staff photographers were making way entirely for freelancers and the use of much cheaper syndicated images (NUJ, 2016c).

Newly appointed staff would need to be literate with software and often competent in multimedia, in digital film editing and uploading and have a working knowledge of html. Stories would not be produced in the first place from the sense of civic relevance as Colin described earlier but by working from detailed data about reading habits and the kinds of writing styles known to be more effective for engaging specific kinds of readers. New jobs would

have titles like ‘head of audience engagement’, ‘breaking news blogger’, ‘digital sports writer’, ‘trend writer’ and ‘social media writer’ (NUJ, 2016a).

The integration of news consumption with social media was becoming more important as regards content production and delivery. Somaiya (2014) notes that social media such as Facebook in particular had transformed how people were accessing news: around 20 per cent of all readers coming to news sites were there through teasers appearing on their Facebook newsfeed; 30 per cent of adults were getting their news on Facebook; and 10 per cent of US adults were getting it from YouTube (Anderson and Caumont, 2014). Social media users themselves would create news stories in the form of film clips, images and commentaries, share news stories and participate in discussions about events. These new ‘social media writers’ and digital sports writers would need to be engaged with social media users, and the content and discussion which they generated. They would spend time online searching out local discussions from which they could then produce content, and take video clips from which they could then create content for the news site. And at Trinity at the time it was felt that video was to be the driver of online content (Mortimer, 2014). Research was showing that the top stories shared or accessed through Facebook related to entertainment and sport, although in third place was local and community events. This created a huge possibility for video content at a local news site (*ibid.*).

Another significant change here, creating a challenge for Trinity, was that people coming to a news site through social media, reading on their mobile phone, have little interest in where the story sits. They have little loyalty to that site, and former news titles relied upon loyalty. What has happened here, as Somaiya (2014) puts it, citing a senior editor for digital news at *The Washington Post*, is that just as the music industry has had to shift from selling whole albums to a mass market to selling individual songs online (which often involves a process of giving away material free of charge), so news outlets must think more about selling individual stories than newspapers.

This means of course that software becomes the curator of news. From the point of view of software, information and news comes to you, as do your friends, on the basis of your preferences and previous choices. Of course here this means that Facebook's algorithms come to decide on what is news. These are the new gatekeepers. Somaiya (2014) notes that when Facebook changes its algorithms this can affect news providers both negatively and positively. This has led some to echo the concerns of journalists such as Colin Hughes. Martin Shipton, Trinity Mirror area representative for the UK National Union of Journalists (NUJ), argued that people were simply no longer being informed about issues that affect their everyday lives, that the role of journalism in democracy was disappearing (NUJ, 2016c).

Working for Trinity Mirror

Colin Hughes worked for many years at the *Western Mail*, based in Cardiff. Colin spoke of the massive changes experienced by reporters working for the title. These had included huge cutbacks in staffing. Colin worked from the Swansea office for around 40 years. He said that until the 1990s there were around seven reporters working in the Swansea area. The newspaper covered a number of towns over South Wales, each of which would have its own office and reporters. Until the 1990s Colin worked a beat which included police stations and local villages, where he would attend meetings and sit in cafés and local bars. Here he developed a link with communities and a network of contacts. This was a beat in the traditional sense and brought him into contact with everyday life in the community. Through this he would learn about issues that had an important impact on the everyday lives of the local people. It was from 1990 that the *Western Mail* started to cut back on staff and close local offices outside Swansea. At the time of writing there is only one reporter working in Swansea, and he works from home. But now he also has responsibility for the whole of Wales to the west of the city, due to other office closures. This means that there is no longer time to work a beat. There is no time to visit police stations and certainly no possibility of spending time in the community.

Colin spoke of the huge changes that took place in newsgathering when reporters were being made redundant, leaving those left to cover the same areas. This meant that there was an increasing tendency to take press releases. Colin said:

We would be accepting stories that we wouldn't have before. And we wouldn't really have the time to check them.

He continued:

On the front cover of the paper you would get the impression that it contained investigative reporting, but inside it was all press releases, official reports and internet. Reporters might make a couple of telephone calls, but you wouldn't have the time to do any background research, any checking. In many cases you wouldn't have to even make any calls to show that you have sources as the press releases would come complete even with these. It would just mean cut and paste.

He spoke of the increased tendency to use the internet to get extra material for stories:

The internet means that you can get background material quickly. This is important as it is no longer possible to call people, to go and interview people [...] [T]his means that we are dependent on the information that organisations put onto sites. But since there has been massive reductions in staffing this is the only way to collect information. And the internet allows journalists to search other news sites to get information, as news is not copyrighted. But again this is not the same as investigation.

Two other local South Wales journalists, both former employees of the *Western Mail*, Mary and Malcolm Rees, now working freelance, also spoke of former times where they would have developed stories from a beat which took them out into the local

villages. This was before local offices closed and there were staff cutbacks. Malcolm said:

I used to write a weekly column which was based on interviews with people who lived in the villages. They would talk about their concerns. This could be money or benefits or work. Now you would not find the voices of real people in the newspapers. You might get vox pops where people are asked what they think of a comment by a US celebrity reporter that Catherine Zeta Jones has got a big bottom. As reporters you are now told to go out and get these. But previously there was the chance to bring in stories connected to people's real lives.

Mary spoke of the reliance on press releases which had resulted from staffing cuts. She herself was working freelance preparing business supplements. She said:

where you would previously have a business editor who would write stories drawn from contacts, about local business people and business issues, they will now base a whole business supplement on hand-outs which will be put together by a non-specialist.

Malcolm also spoke of the same lack of digging around through dependence on press releases and the telephone. He mentioned a story he had done which involved looking through receipts from council expenditures and finding that the taxpayer was funding private transport costs for certain council members. This story also relied on information and help from trusted sources. 'All this,' he said, 'has now gone, so much happens and no one is there to keep an eye out. The eyes of the public have been closed'. And in the region where these two journalists work, concern has been raised within political institutions themselves where there are simply no reporters covering politics any longer (NUJ, 2016b). This opens the door for more press releases and tailored material.

The content and nature of the news item 'How does your life sit with the sofa habits revealed about our nation?' should now be

easy to understand. A textual analysis might lead to a conclusion that the journalist is promoting national identity, or consumer behaviour. This too is an important observation. But we need to understand changes in media regulation, the resulting ownership patterns and newsgathering procedures to understand that this text has been produced by a journalist of high professional standard, who simply has no time to actually investigate anything happening in South Wales. So an angle is found on a press release to give the impression of local relevance. Of course press releases will be oriented to the business and commercial interests of those who produce them, who employ many of the journalists who formerly worked for the newspapers.

What we also see is that we must understand the nature of the stories we find on our Facebook news as part of this newer kind of writing, tailored specifically for particular kinds of readers and reading habits which are in the first place designed to align with sophisticated data and algorithms which can be used for advertising. And we must place these news stories within the overall picture of the changing nature of the exchange of information in society.

What this section has shown is that in order to understand content we need to know something about production practices, ownership and regulation – in other words, both how media companies behave and how they are allowed to behave. Such information, as we have seen, is available through financial reports, the websites of regulators, interviews with employees and a range of publications which produce content specifically for the news sector. As regards interviews, here we have only given the accounts of several journalists and more would be interviewed for a complete piece of research. But we have shown how we can use interviews to find out particular kinds of information and also how this information can be presented.

What is an in-depth interview?

An in-depth interview simply means interviewing people to gain their own perspective and insights into a particular

thing. For example, we may ask a journalist about how they gather information for publication on websites. Or we might interview individual readers of news to find out where they get their information from or what they think of particular stories. Such interviews may be structured through a list of key themes and issues which the researcher has pre-prepared, although they tend to be ‘open-ended’, allowing the discussion to develop along any interesting lines. This means that unexpected issues and information may arise which, if of interest, will be discussed further during the interview and/or used to conduct further interviews. In-depth interviews can be conducted face-to-face, which is good for developing trust, over the telephone if a person is very busy or far away, or even by email or online messenger feeds such as Skype or MSN. Some of these non-face-to-face methods are useful where people wish to retain anonymity. They also help to reduce travel costs and massively expand geographical access.

When should in-depth interviews be used?

In-depth interviews are used to get personal accounts of behaviours, opinions and experiences. They are often used to support or explore other kinds of data. For example if we find that there are changing ownership patterns in newspapers along with publicised reductions in staffing, we can interview journalists about their daily work experiences to find out how they have been affected. We might carry out a survey of news readership patterns and then conduct in-depth interviews to explore some of the issues further. In-depth interviews may be preferred over focus groups as they allow the interviewer to develop issues that appear of relevance and explore matters in an uninterrupted way. They may be used to gather information that interviewees may be less keen to provide

in the context of a focus group. They also allow the interviewer to explore and bring in other aspects of the interviewees' personal characteristics if relevant. For example, if we are interviewing a journalist about their work producing online news we can find out about their own experience, training and broader professional concerns.

How is an in-depth interview done?

First the researcher establishes what kind of information is required. For example, we may need further information on the way journalists gather information to place on websites.

We ask who can best supply this information. This might be from a range of perspectives. So we might interview journalists and editors who work at different kinds of news outlets.

We contact these interviewees requesting an interview. If this is a media practitioner or regulator this is best done first through a very short letter that says who you are and what kind of information you require in simple terms. Busy people tend not to attend to longer letters that are not of immediate importance to them. This can then be followed up with emails and telephone calls. Media practitioners are often busy, but can be very responsive when they see you are interested and can even respect persistence.

We should be fully prepared for the interview. If it is a media practitioner we should be familiar with their work or with their own outlet and the broader context where possible. Interviewees respond much better when they see you are well-informed, prepared and have taken a specific and genuine interest in them and their work. It is a good idea to have about ten questions ready to ask. Often in such interviews you will not get through these questions, but you may forget what you really wanted to

ask once the conversation gets going and they can be used to begin discussions that may move off in other interesting directions. And each interviewee may provide you with fresh information that will create new knowledge to carry to the next interview.

We decide how we will gather the data from the interview. Will we take notes or record the interview? One of the authors who has carried out many hundreds of interviews prefers to take notes and then write these up once he returns home, although he has also used tape recordings.

We should get consent to use the interview material. If we are quoting people, or naming people, we should ask their permission for ethical purposes.

What are the advantages of in-depth interviews?

In-depth interviews provide greater freedom to the interviewer to explore issues. Often this method can throw up unexpected issues which can then be discussed further. In-depth interviews also produce information in greater detail. Surveys tend to ask predefined questions that generate limited responses. In-depth interviews can therefore be used to supplement surveys and further explore any issues that arise. In-depth interviews are very good at throwing up unexpected or unforeseen issues that can then be explored using other methodologies. If we want, for example, to understand the way media regulation is influencing the way that radio stations are run then we find that carrying out 30 interviews across different kinds of stations, with operators, syndicators and news producers, along with the regulators, we are able to build up a surprising picture of what is happening.

What are the disadvantages of in-depth interviews?

In-depth interviews are time consuming, in terms of planning, contacting interviewees and possibly travelling to meet them. There is then the time taken to conduct the interview which may be an hour or more and the time required to transcribe the interview if it is tape-recorded.

In-depth interviews are subjective. Data gathered is the point of view of one person. So if we interview a journalist about their experience of producing online news this is simply their own opinion. Of course, more interviews should be carried out, and in the experience of these authors it is through this process that a clear picture of a situation can be built up. In this particular chapter comments are provided from a smaller number of interviewees in order to demonstrate, in a case study fashion, how such information can be useful. But in practice a study of this nature might involve ten or 40 interviewees depending on timescale and resources. The in-depth interview is also subjective as results may depend very much on the personality and behaviour of the interviewer.

How do you present in-depth interview data?

In this chapter we have shown that sometimes quotes or themes from individual interviews can be selected as part of your explanation of a changing situation. As has been done in this chapter it is often useful to provide some background information on the interviewee.

Researching stock image archives

In the previous sections of this chapter we have seen that if we wish to understand the nature of news content then we must place this in the context of ownership and production. To do this we would therefore research corporate websites and the media trade press, and carry out interviews and observations of work tasks. In this section we turn our attention to a specific kind of media content: the photograph. In other chapters of this book we show how we can critically analyse the contents of photographs in order to ask what kinds of ideas and values they communicate. But, as with news texts, to understand the nature of any such photograph we must also put it in the context of patterns of media ownership and production. One part of understanding the use of any kind of photograph, such as in a news story, may be related in the first place to more practical and economic matters. Such factors can play a huge role in the kinds of images that we come to see across media platforms. In this case we are interested in the way that globally operating companies have come to play a huge role in the provision of photographs for much of the media that we see. And we look at how we can research the nature of such images.

The photograph in [Figure 3.1](#) is one example of a typical ‘stock’ image. This particular photograph could most likely be found on a website dealing with local authority educational services. Or it could be found in a Metro-style newspaper for an article on bullying, or ‘healthy eating’ at school. It would be used to bring a visual dimension to a story which otherwise might appear very dull and which may be based on a press release; for example, where a government organisation has released figures regarding the numbers of children who report bullying, along with a comment that a new think-tank will be set up to address this. Such an image can be pasted in to ‘lift’ the story.

An image as we find in [Figure 3.1](#) will be purchased cheaply and conveniently from a commercial stock image archive such as Getty Images or Shutterstock, etc. And it is common to see these providers attributed under the image. The page editor will have searched their extensive digital archives using terms like ‘child classroom’. They may have been looking for a specific kind of image like this which foregrounds the experiences of one child who meets the gaze of the viewer. In this case we can imagine the

child as the possible victim of bullying. Or for another story, another press release, we might imagine such a child needing protection from a sugar-rich diet. In either case it may have been important that the image is relatively ‘feel-good’. In this example we see that the child is good-looking, the scene is brightly lit, colours are rich and coordinate across the scene between the pencils and clothing. The overall scene avoids any clutter. We appear to see what might be a teacher leaning in to a student, smiling warmly and energetically engaged. This is not exactly clear in the photograph, and it could even be another student, but nevertheless they appear to be communicating, sharing an engagement with something on the desk. Therefore, the image can work to suggest a positive learning environment.

In fact there is little in the image that tells us that this is an educational environment. Such images tend to use even a single prop to communicate such things. Here we find the bunch of pencils. A different prop could have changed the meaning. A microscope could have communicated ‘science’, a toy could have shifted the meaning away from an educational environment perhaps more to something domestic. Such stock images are now found across media platforms, simply because they are cheap and of high quality. And while here our example presents a rather sanitised picture, other stock images can be designed for kinds of uses where more gritty scenes are required. Scholars have pointed to cases where Getty Images have created a specific collection to represent non-traditional gender roles such as transsexuality (Aiello and Woodhouse, 2016). At a surface level such photographs appear to be less clichéd than the kind of image we see in [Figure 3.1](#), where all is positive. But nevertheless they are in the first place designed to be easily used by those needing visual support for texts in the same way as we discussed above for a Metro article on bullying. So on a deeper level, in the end we also find a very limited number of themes which tend to simplify the world.



Figure 3.1 Boy in generic educational setting

While it may appear relatively trivial that press releases are accompanied by these kind of stock images, some scholars have pointed to grave consequences. Hansen and Machin (2008) show how such images are frequently used for news items or corporate websites which deal with environmental issues. So a carbon offsetting website will show photographs of a woman holding a germinating plant delicately in her hand. A news article on the effects of climate change on global agriculture will carry a photograph of a tousled field of wheat, shown against a bright blue sky where the golden sun shines through from behind – a sense of optimism but also a hint at overheating. These authors argue that such images in fact serve to distract from the actual causes and solutions to current environmental problems. Rather they foster a sense that acting in an environmentally friendly manner is not something where the responsibility lies in the hands of governments and in the relentlessness of global capitalism, but at a more abstracted individual level where it becomes about personal morality and consumer acts. In other words the visual representation of the environment tends to represent not the interests of addressing concrete issues but prioritises those of

marketing and of branding. One of the authors carried out interviews with senior staff at Getty Images (Machin, 2004) who said that for them it was not so much what the images represented that was important to them, but how they suited multiple purposes which would lead them to be purchased many times.

The huge presence of these images across contemporary media and design can be explained by the spread of digital software, which makes their availability and use very easy. But it can also be explained by the economic shifts in the media industry which we considered earlier in this chapter. As regards news production, it was formerly common for news outlets to employ a number of in-house staff photojournalists, but the economics of news production and shifts in consumption meant that by the mid-2000s this was no longer economically viable (Machin and Polzer, 2015). Machin and Polzer carried out many interviews with photojournalists who described shifts in their careers over this period characterised by working as a photographer for a single news outlet, where work was often relatively predictable, to freelancing and distribution of their work through commercial image archives. This happened alongside the establishment of successive waves of digital production software in news production as outlets downsized, outsourced and shifted more to online and multiplatform formats.

Researching Getty Images

One step in understanding these images and how they come to dominate our visual landscape is to carry out research into the nature of the organisations who supply them. This can be achieved by searching on their own websites, where we can find documents, press releases and annual investment reports which tell us about the development and activities of the company. We can also do online searches in order to find industry reports on how the company is operating, and on mergers and acquisitions. This can be done in the first place by doing word searches for the company you are interested in and then other components of their organisation which you find on their website. This will usually take

you to sites of organisations such as *Forbes*, *The Times* business supplements, the *Financial Times*, *The Economist* and a wide range of other more localised sites. Once you get started with this you will, over a short time, be able to build up a comprehensive picture of the company, the companies to which it is related and its mergers and acquisitions. It may become clear how the company uses other companies for purposes of distribution, to enhance content, to gain access to new markets, even for technological support. You will also see how it fits into wider patterns of ownership. You will be able to plot how a company is operating strategically to create links to operate in new international territories, for example. And, put simply, you will learn about how the company operates. As part of seeking investments and self-promotion such companies provide press releases to talk about their plans and operations. Such trade press sources are usually written by a named journalist and can be cited like any academic source, providing you make clear that this is from the trade press. And, as with academic sources, it is necessary to read numerous sources in order to cross-check information.

One of the most globally powerful of the image archives is Getty Images. Most of us will see many images provided by Getty each day, in news, sports, education, in advertising and promotion brochures, even in documents used internally in the places where we work. Researching the corporate website of Getty and tracing its history through industry and trade publications provides us with information about the nature of the company. Getty began in 1995 when investment bankers Mark Getty and Jonathan Klein saw potential in a fragmented world image market. In the mid-1990s, there were image archives which could be used by editors preparing news articles, books, educational material, etc. But such images were stored in filing cabinets in the form of negatives. This meant that a page designer would have to contact the archive to describe what they wanted, or search through a list of what images were available. An archiver would then locate these chosen images, or those that sounded close to requirements, and post them out as negatives to the designer. Such a process was highly prohibitive since storage, retrieval and mailing were costly and took a lot of time. It also relied on the archiver having a sense

of the kinds of images in the archive and a good sense of what designers were looking for.

In 1998 when Getty moved into digital archiving with the acquisition of a company called PhotoDisc and set up an online system, this completely changed the way that the industry used images. The costs of storage, distribution and having an archiver physically search and locate images were eliminated.

Getty had a system which allowed designers and page editors to type in search terms such as 'classroom' or 'climate change' and conceptual terms such as 'confidence' or 'freedom'. This will produce many pages of images linked with the search terms. Such terms can be combined with specific terms such as 'classroom-confidence-one-child'. The designer or page editor can then simply download the image they choose, selecting the kinds of image rights suitable for their particular needs and the territory where they are working. Such images include both editorial images often used for current news items as well as more creative images of the kind we see in [Figure 3.1](#).

As Getty grew it spent over \$1 billion to obtain a number of image collections such as Eastman Kodak's for \$183 million in 1999 and that of the Visual Communications Group for \$220 million in 2000 which at the time was the world's largest image collection with around 10 million images. It also made a deal to license the image collection of National Geographic which contained over 10 million images. It also paid \$46 million in 2006 for Stockphoto, one of its competitors which licensed royalty-free images. The decision was to run the company as an independent brand, but this opened the opportunity for pooling resources and staffing, and also greater overall control over the market. It was also later to carry extensive stock video footage, including the BBC Motion Gallery which gave access to over 125,000 clips picked from BBC programming related to news, nature, current affairs and entertainment. Getty also looked to create deals with social media-oriented companies such as Facebook and Groupon which had huge demand for this kind of content (Kim and Roumeliotis, 2012).

Getty, with its increasing economy of scale, grew to sell billions of images each month in territories around the world, taking over a

huge section of the world market formerly occupied by small companies. But by the end of the 2000s shifts in the industry created challenges. In 2008 Getty was sold to the private equity firm Hellman & Friedman for \$2.4 billion. This was a globally operating corporation with interests in energy in Texas, and marketing, insurance, software and healthcare making up 15 per cent of Nasdaq. Much of the challenge to Getty was created by cheaper competition and amateur photography (Foley, 2008). A few years later, in 2012, it was then sold for over \$3 billion to the Carlyle group (Primack, 2012), a massive global asset management group with investments also in energy and real estate around the world.

At this point some in the industry were arguing that the Getty model did not seem to be working (Zhang, 2015), due to competition from services such as Shutterstock and Fotolia (owned by Adobe). These companies used different business models, selling images in bulk rather than individually. So companies would pay monthly subscriptions of about \$250 dollars for 25 downloads a day where the photographer gets about 25 cents a download. Getty had been based on individual downloads.

What we are learning about the photographs we now see across our media platforms is that in one sense they are about shifts in technology. But they are also about economics and shifts in the industry.

Researching the photographers

One other part of understanding these images lies in the role of the photographers who make them. Do they feel their role has a specific nature given that they supply images for syndication rather than for a specific work task? To discern this we can carry out interviews with photographers. Machin and Polzer (2015) interviewed war photographers who produced images for syndication. Rather than documenting specific moments in a war to either capture a significant moment or to accompany a specific text, these photographers created images for Getty. This means, the interviewees said, that they had to imagine the kinds of

broader ways that such images could be used. It would be to their advantage if such images were purchased many times. Therefore, images should be high quality, but should not be too striking or memorable. This would allow them to be used in a way more akin to the kind of ‘education’ image we saw in [Figure 3.1](#). It would also mean that they would consider the kinds of war images that would most likely be used over and over, even not connected to a specific war; in other words, what kinds of news stories tend to get written about conflicts. One photojournalist mentioned that once a conflict disappears from news attention it may later come back in terms of themes like ‘hope and healing’, ‘loss’ and ‘childhood in war’. So we might see a photograph of a couple just married against a backdrop of the aftermath of battle, a child standing meditatively in a ruined house. In addition, such images may not be too disturbing to allow them to be used in more thoughtful pieces and in supplements. Other photographers mentioned that war photographs focusing closer attention on women may then be more often taken up by women’s media.

Machin (2004) also carried out interviews with photographers who syndicated through Getty. These photographers talked about making photographs which were multipurpose, but also anticipating the kinds of images that different niche topics would require. Even images that were more ‘edgy’ would be created with a market in mind. One photographer here complained that this in one sense meant a shift away from the use of photography to bear witness and critically engage with the world to a use based around clichés, oriented to safe commercial uses and branding. Looking back to the image in [Figure 3.1](#), we do not find a photograph used in a newspaper that documents a particular aspect of social reality for readers, but one which is about the visual design of the title. And its feel-good look helps to provide a positive vibe for advertising which is the driver of Metro newspapers. Issues of education and bullying are not really investigated, but presented through aesthetically pleasing clichés. The same would go for more serious matters such as war and climate change (Hansen and Machin, 2008).

Doing a research project with political economic analysis

The point of political economic analysis is to look at the nature of media ownership and organisation with a view to investigating how this influences the kinds of content and output that we find. Fundamentally this kind of investigation is driven by concerns about fairness of representation, and who and what processes lead to the kinds of content that we find.

This form of analysis can draw on a range of methods. In this chapter we have used archive research and interviews. But we could have carried out an ethnographic/observational study where we spent time in production environments to see how news and magazines are put together, speaking with managers and even owners and regulators. We could have composed a survey and sent this to news and magazine workers. But importantly in political economic analysis we need to place our topic in historical context. This means we need to find out how the market is regulated and how this has changed. We need to find out how a particular company operates. Can content be explained partly, for example, due to the need to create material for cross-media platforms, or with an eye to suitability for international markets? For example, some news producers, such as Bloomberg, create news that is intended to have international accessibility. Writers are trained in a kind of ‘neutral’ language that avoids local inflections. A textual analysis of their output would be problematic unless it placed this in an understanding of the nature of the product. And this is the point of much political economic analysis.

How much data is required for such a study will depend on a number of factors. The number of archive documents needed will very much depend on the specific situation and case study, but the aim should be to provide a comprehensive account of the state of and changes in that context so that current operating practices are understood. The number of interviews required will depend for the most part on time and resources and may range from five, for example if the aim was to provide evidence of design decisions on local newspapers, to 200 if the aim was to claim to

have understood broader media changes in the context if new regulation.

Summary

- Political economic analysis reveals the importance of looking behind the texts themselves and how the kinds of content offered to audiences can be a result of a number of processes based on the way that media organisations are operated, regulated and funded.
- Political economic analysis is concerned fundamentally with the kinds of cultural forms produced by the media and how these are influenced by things like commercial imperatives.
- Political economic analysis is concerned with the kinds of plurality of voices offered to society by the media. At issue here is the role the media plays in our democracies.
- Political economic analysis is carried out through interviews and/or the study of annual reports, financial reports and government reports. These allow the researcher to find out the nature and form of a media organisation and what it controls. They allow the researcher to explain the extent to which commercial imperatives govern its practices and what kinds of regulation either limit or foster these.

Further reading

Noam, E.M. (2016). *Who Owns the World's Media?: Media Concentration and Ownership around the World*. Oxford: Oxford University Press.

International review of media ownership, looking at media concentration and links with politics in many countries.

Barnett, S., & Townsend, J. (2008). *Media Power and Plurality: From Hyperlocal to High-Level Policy*. London: Palgrave.

An account of media ownership and regulation across different kinds of media platforms, including social media, questioning what this means as regards democracy and plurality of points of

view in society. Excellent book showing why political economic studies matter.

CHAPTER 4

Ethnography and observational methods

Introduction

Ethnography and observational methods have been used in media research to study both production and consumption of media content. They are also used to examine how people use social media and interact on its platforms. These methods are associated with observing what media audiences, media users or media practitioners are doing and saying. The assumption is that the best way to study and understand what these groups think and do is to watch them, or participate in what they are doing. However, ethnography in particular should also be seen as a way of approaching the data that we collect, something that will be explained in this chapter. And it can, in fact, incorporate many different kinds of research methodologies as well as observation, but in this chapter we focus in particular on the *observation* part of this kind of research.

What is special to the approaches of ethnography and observation is that they are used to understand social phenomena such as media use, effects and production by viewing them as one part of people's lives and the culture they inhabit, or at least the immediate institutional cultures which shape media production processes. It is culture which provides people with the ideas and values through which they think about and share the world. Media consumption or any work practice must be seen in the context of such wider or more localised cultural influences. So if we wish to understand what someone feels about, or how they are affected

by, say, a particular news report, we need to know more about this person, in particular the kinds of social values and ideas they normally live by and share with the people around them. We need to know how they behave more generally. If we wish to understand the production processes behind the creation of that news report we would not simply ask a journalist what they did, although this would be one important source of data. We would also need to look at what kinds of values and ideas the journalist has about what they do, the journalistic culture in which they have emerged and work, and also the processes and practices they use to produce the news report.

In the case both of the news receiver and the news producer, researchers who use observation and ethnography would see them as a powerful way to reveal and understand instances of human behaviour by placing them in cultural context, and particularly as a way to draw out values and beliefs that otherwise often remain tacit or unspoken, and therefore undetectable by other methods. In other words, they allow us to find out what people actually do rather than what they say they do, and also to understand and research human behaviour in a way that is sensitive to the broader context of people's lives.

In this chapter we show how these methods are simple to use. We begin by explaining a little more about what it means to place data in social processes and about the notion of tacit knowledge – that is, the knowledge we have that we do not know we have, or at least that we are not immediately able to bring to the surface. We then look at some of the basic principles of doing observational or ethnographic research, looking at their origins in social anthropology. This is followed by considering how these methods have been taken up in media and communication research in general and also in online studies. Next we look at how to build observation and ethnography into an actual research project. We talk through a project on photojournalism carried out by one of the authors. We show how we must locate the research question in the existing literature, and be clear how the research question asks a fresh question and how these methods will help us answer our question. One temptation with these methods is to

become too descriptive. Finally, we look at some of the criticisms made of these methods.

Placing data in social processes

Ethnography and observational methods have often been contrasted with more scientific research approaches where we measure things like opinions, beliefs and values through questionnaires. However, in fact, in ethnographic and observational research, all kinds of scientific methods would be permissible and could be used to find out basic measurable facts such as how many rooms a family house has or how many computers it contains. A questionnaire could also be used to see what opinions people express about particular media products. But the difference is that ethnography would not see such data as producing social facts, but rather displaying evidence of one particular kind of human behaviour which must be understood by further observations and research. Ethnographers would argue that broader social behaviour is far too complex to understand by simple questionnaires alone. Let us give an example to illustrate.

One of the authors was talking to some of the regulars in his local pub. At the time a current issue in the news media debated whether a contestant in a reality show had been behaving in a racist manner. One regular local asked two other regulars what they thought of it. Both announced that they didn't watch, nor were interested in, such rubbish. Yet about an hour later the same regulars were heard chatting about the topic, clearly revealing the kind of knowledge that indicated that they had been watching the programme and were fully attentive, although the conversation was not so much about the programme itself but a general whinge about the excessive amounts of political correctness found in present-day society.

It is this kind of instance that indicates some of the problems for researchers wishing to measure and describe the way people use and respond to the media. Had we entered the pub with a questionnaire to assess how many people watched reality shows and to record the opinions they had about them, what would we have found? If we had not remained in the pub to hear the later

conversation we may have recorded only that people did not watch reality shows and that they considered them to be really awful. But this would not have been a faithful representation of the case. Clearly there is value in observing people where they act in everyday life. A questionnaire could be seen on the one hand as a simple snapshot of one moment in time, one response, although what it is a snapshot of is difficult to assess without further contextual knowledge.

With this example we begin to indicate how observation and ethnography can be used as research tools and how they allow us to understand more about people's responses. Of course their use by no means prevents us from also using questionnaires or other kinds of more quantitative methods, but it helps us to place and contextualise the data these yield.

In the first place it is how we think about the kinds of social interaction we saw in the bar that is the key to doing good ethnography and observation. How, for example, might we characterise the behaviour of these pub regulars who state they do not watch a programme but then later reveal that they do? Are they simply lying? Of course people may not want to admit to certain kinds of behaviour or beliefs, as we might find if we wished to research if people use pornography and which type, or whether people considered themselves to be racist. In such cases the way that people respond will be due to their concern with the way they come across as social actors. Importantly, the same can be said about the way the locals behave as they dismiss the reality show as rubbish and then later go on to talk about it. They are not lying, but rather are speaking with an intricate knowledge of what others know and think. And they speak always with a vivid awareness about the way others around them are responding. In other words, they are aware of the kinds of opinions others might hold about reality TV as low-brow entertainment. So in the first case they show that they are not the kind of people who watch such rubbish, something they are clearly quite proud of in that given moment. Then later in the evening they are able to use their knowledge of the programme to show that they are against political correctness. In fact many of the nightly conversations in the pub were general complaints about the world out there, most often with a fairly

conservative perspective: heavy, for example, on anti-immigration, critical of liberalism, tough on youth crime, favouring a return to national military service to instil discipline. The conversations about the reality show should be seen as being part of this social context.

The conversations heard in the bar serve the purpose of allowing the men to demonstrate their wisdom and air their sense of anger and bitterness with the world. This is something that can bring no small amount of pleasure. And crucially, as social anthropologists and psychologists have shown, such conversations facilitate a sense of community and belonging (Bauman, 1986). Of course these men may speak differently outside of the pub and even whinge about each other for their intolerant views.

The same requirement to look at how people behave over different contexts is found in production observation studies. For example, if we want to know about the production of a particular kind of media text, such as in the case of news, media practitioners may tend to want to emphasise certain roles they carry out in their jobs. It is of course crucial to take very seriously what these practitioners tell us. If the researcher has never worked in the media production environment they may have a tendency to impose quite wild interpretations on what they study. This can lead to practitioners becoming frustrated with academic work. But on the other hand any practitioner who has become embedded in a particular way of working, with its established procedures and culture, may have become so immersed that they have become less able to reflect on some of the assumptions they use.

One of the authors interviewed editors and writers of women's lifestyle magazines. These practitioners tended to talk about the way the stories they wrote were about empowering women. Yet an analysis of the texts shows something very different, with women addressed as naïve and passive through a range of mundane expert advice. Observing the process of production revealed a series of processes involving training, marketing, targeting of consumer groups and localisation that tended towards a particular way of writing about the world. To understand what the

practitioners mean by ‘empowering women’ we must understand them in the context of these processes. What the research showed was that in fact the editors and writers of these magazines were highly skilled at providing a sense of fun, irreverence and adventure, yet in ways that tied very much into the requirements of advertisers. Observing the writers work and talking to them made this clear. Yet this was not something they were used to talking about. Saying they wrote empowering stories was the usual way they did this.

In what follows we see that what lies at the heart of observation and ethnography is both a set of procedures and a particular way of viewing human behaviour where we think slightly differently about what people are doing when they talk. We can discern patterns in the way that people talk, how they describe their work, or how they communicate through social media. By looking at some of the origins of ethnography in anthropology we show exactly what this means in terms of doing research and using these methods to answer research questions.

Ethnography in anthropology

Ethnography as a research process has its origins in anthropology. Many people think of anthropology as the study of ‘exotic’ cultures and small-scale societies. To some extent this has indeed been the case and the field’s history is very much connected to colonialism and the Victorian adventurer. But anthropology itself, in fact, challenged the idea of the ‘primitive’ or ‘exotic’ that was predominant in Victorian intellectual thinking where the people of Africa or Polynesia, for example, had been seen through an evolutionary model as being evidence of primitive versions of Europeans and European societies such as in Frazer’s later classic work *The Golden Bough* (1922). In this view the ways of life and beliefs of these people, such as magic and witchcraft, had been seen as evidence of primitive thought, in contrast to the rational thinking characteristic of European culture. Anthropologists, first in the work of Franz Boas (1921) and later that of Bronislaw Malinowski (1922) and Edmund Evans-Pritchard (1937), among others, rejected such ethnocentric assumptions,

arguing that cultures should be studied in their own right. For these writers this meant coming to see the world through the eyes of the people being studied. Like the regulars in the pub, given in our opening example, or our editors working at a women's lifestyle magazine, we need to understand what these people say and do, what they seem to believe, as part of a particular culture at a particular time. As we saw, this means that behaviour that in the first place might appear as irrational can come to seem reasonable and comprehensible. And it also means that the well-trodden accounts they give for their actions do not really help us understand the actual knowledge and skills that they have.

Malinowski, through his studies of the people who inhabited the Trobriand Islands in Melanesia, made a crucial point about the way we can gather data about what people think and why they do things that tells us why we need to observe them across a range of settings. He emphasised that we cannot simply ask people why they do things, such as why they believe in, and act in accordance with, magic and witchcraft, as they would only be able to give idealised or 'official' reasons. This is important as it means we have to look much more carefully into different aspects of a social context in order, therefore, to find out. For example, if we asked a person in the UK why they drank a particular brand of beer, they might simply say that they like the taste. Of course this may be true. But advertisers have shown that it is possible to transform an ailing product through rebranding. A cider drink can be relaunched to give it associations of Celtic authenticity and cosmopolitanism. The drink's identity is changed and if the rebranding is successful this allows the consumer a different experience of the drink. Yet when we ask the person why they favour this drink they will not provide this as part of their explanation. For Malinowski this is because we generally do not have access to why we do things. Therefore we need to think about what people do and say in the context of broader information about their particular culture and society. This is rather like when we ask a journalist why they write in a particular way. The answer they give may tend to be more a sort of 'accepted' way of talking about what they do rather than one that actually

reveals the processes and decision making that is actually taking place.

We must, of course, be careful with how we take the kind of statement made by anthropologists that people may not be aware of the reasons why they behave in a particular way. Of course people know very well if they are motivated to struggle against some kind of oppression, for example. This should be taken strictly not in the sense that they are naïve but that their behaviour tends to be placed in beliefs and values to which they may not have conscious access. And, as we discuss in [Chapter 6](#), one task for media studies has been to show that the way we understand society may be very much a matter of the way that a particular interest group, that is the powerful, are able to promote their own ideas, values and forms of social relations as natural and inevitable.

In the context of these points it appears natural that we should study things like media effects and uses through ethnography and observation. We can only understand why a person might drink a particular beer if we understand a whole range of factors associated in masculinity with definitions of friendship and pleasure, all which may be exploited, or constructed, by advertisers. The same goes for media production. A journalist might tell us that they work in the way that they do due to the need to be objective. Yet scholars who have carried out observational studies of news production show that it is more of a strategic ritual rooted in journalism's history than an actual set of procedures (Schlesinger, 1978). We can simply record what people say and do in one particular moment. But we need to take a further step and reconnect this observation to its meaning in the flow of everyday life and perhaps even think about it as regards the way that certain ideas may reflect very specific interests. For example, in the case of women's lifestyle magazines we might argue that the 'empowerment' they offer women in fact distracts them from actual power into a kind of self-serving individualism rooted firmly in the interests of consumer capitalism. If we want to understand the way that people on a social media platform discuss a particular topic, say an exchange on the nature of home

improvement, or even a heated debate about a political situation, then we must place these views within the wider social context.

One question we haven't yet dealt with is how such data should be collected and recorded. We will look at a specific example of how this can be done later in the chapter. But for Malinowski collecting ethnographic data meant making as many notes as possible. These would be notes about settings, procedures, conversations and interactions. In fact Malinowski suggested that just about anything could be used to grasp the subject's vision of their world:

statistical documentation of concrete evidence [...] the imponderabilia of everyday life [and] ethnographic statements, characteristic narratives, typical utterances [...] documents of native mentality. (1922: 24–25)

More recently anthropologists have added the recording of conversations, video recordings and photographs and gathered databases of the masses of material available online. We will look in more detail at how to present and handle this data later in the chapter.

Media use and observational methods

Ethnography and observational methods have been used usefully in media research mainly to investigate media use and media production, and observation especially in the case of news. As regards media use, Tufte (2000) researched the way that women used soap operas in Brazil. By spending time in the homes of the women he was able to make comments on the way that they used the soaps to understand issues of gender behaviour, personal problems and issues of citizenship and responsibility. Lull (1978), in an investigation of the uses of television, had his researchers spend time in the houses of 200 families and observed their viewing behaviour. One of his interesting conclusions was that much television viewing was for companionship or for avoidance

of talking or alternatively to facilitate chat. In all cases how people reacted to what was being broadcast seemed to be anything other than simply watching.

Miller and Slater (2000) used ethnography to study the way that people in and from Trinidad used the internet. They produced many fascinating observations on the way that people manipulated servers to get free accounts. But mainly they showed the internet's importance in maintaining family ties in a dispersed community.

In terms of production ethnographies there was a wave of influential studies of news production in the 1970s and 1980s (Tuchman, 1972; Warner, 1970; Schlesinger, 1978; Gans, 1979; Fishman, 1988). In Fishman's classic study, for example, he was able to show the extent to which journalists were dependent for their definitions of news on official sources and bureaucratic organisations. As with all good ethnographic work he was able to reveal processes of which journalists were on one level unaware, or tended to background in their own accounts of their work, as these to some degree clashed with their broader sense of their professional identity. While studies of texts could show ideological qualities of news, these production studies revealed the way that things like 'objectivity' and 'neutrality' were simply misleading myths that should be better thought of as strategic rituals of journalism.

Much later other researchers have continued this tradition of news production studies. Van Hout and Jacobs (2008), Paterson and Domingo (2008) and Fenton (2009) have been interested in the way that new technologies have changed news production, particularly with the arrival of online news. Jennifer Hasty (2006) looked at the way journalists in Ghana drew on Western notions of objectivity even though the news organisations for which they worked were of a completely different nature than their Western counterparts. Wahl-Jorgensen (2007) has looked at the way that local news editors use the letters of readers to show good relations with the community. Schmenkel (2010) has shown how the lives of photojournalists in Vietnam must be understood in order to understand their professional practices and the work that they produce. Usher (2015) carried out an ethnographic study of

newsrooms in Miami. He wanted to understand the effect on journalists, and on news production, of the fact that many titles were moving away from prestige central city locations to more makeshift buildings. The research revealed how journalists saw this as part of the diminishing status of news in society in contrast to a former era which they associated with having a powerful role in the democratic process.

What all of these studies have in common is that they involve a research process whereby we use observations and interviews to understand (1) how a media output gets created as regards practical processes; (2) the organisational cultures and institutional practices that can have a huge influence on the nature of media output; (3) the ideas, values and identities that help to shape the motivations, understandings and practices of media professionals. In each case the research helps the investigator to arrive at information and understandings that may take a little time to reveal. And they may all involve drawing out the tacit cultural knowledge underlying professional practices.

Online observation and ethnography

Internet observation and ethnography was first identified as useful in media research in an area called ‘fan studies’ where the likes of Jenkins (2006) realised that the experience of watching television shows had become interrelated with the online discussions of the shows that took place on fan sites. This became a fresh way to research audiences and how they express and share their opinions and feelings about programming. The forums had the advantage that they offered the researcher access to naturally occurring discussions between fans.

Since these beginnings, as with ethnography in general, there have been many different ways of labelling and approaching online ethnography depending on the field of research. For example, as well as media scholars, linguists have carried out ‘digital ethnographies’ with a view to understanding more about the way language is used online. But overall some of the same principles apply; we simply have access to new sites of data where people share information or express opinions and feelings.

This data must be seen, as with other forms of social interactions, as belonging to that specific context and time and therefore located in a specific cultural setting. And in online environments, as in actual social contexts, it may be necessary for the researcher to participate in the processes which they seek to understand. This means they may have to participate in blogs and social media feeds (Pink, 2009). And just as it can take time to become immersed in a news production setting, so investment is required to become immersed in online environments.

While online ethnographies brought new possibilities to researchers they also brought new challenges (Hine, 2009). One such challenge, raised by Pink (2009), is that we need to deal with the way that content can be very quickly moved around and transformed across social media platforms. For example, if we wanted to study audiences of a particular reality television programme, we may find that this takes us across many different layers of blogs, discussion groups, YouTube accounts, etc. These may themselves feed back into the programme's content, such as in cases where reality show participants or presenters engage with social media. And some of these social media sites may contain parodies, or re-edited versions, of the show. The researcher must be able to follow this in a way that remains meaningful to the research question (Varis, 2015). This simply offers more of a challenge as regards the boundedness of a setting as compared, say, to a news production study.

In such a study of social media the sheer amount of material generated can create challenges of information overload. Here it is highly important to consider what material is needed to answer a specific research question. One problem with ethnography is that it tends to be highly descriptive and almost to become an end in itself rather than being a tool to answer very specific research questions (Blommaert and Dong, 2010).

Varis (2015) reminds us not to take data from the internet out of its context, and to avoid 'exoticising' online content. In other words, we should avoid falling into the trap of making the study of social media an end in itself. The aim should be to answer a specific research question. It may be true that some online ethnographic research which has been published in academic

journals under the umbrella of ‘social media research’ has had the rather less focused aims of learning about ‘digital communication’.

Postill and Pink (2012) argue that online or social media ethnographies, in very much the sense of ethnography we described earlier in this chapter, should ideally see the material gathered online as part of what can be potential data. They give the example of their own project researching internet activists. One part of the data may well be the material produced by the activists online and on social media, comprising discussions which take place. This would include the range of ideas and opinions expressed. This would allow the researcher to build up a sense of the kinds of ideas, values and identities that are found in this particular sphere. But these authors argue that research should also involve spending time with the activists and looking at how internet activism becomes meaningful in their everyday lives. Other authors have argued, for example, that there is a more complex relationship between those who write particular kinds of political interest blogs and social media postings and actual social and political contexts. Those who claim to represent the voice of a community online may rather be one smaller extremist group who use language cleverly for their aims (Chiluwa, 2015; Thulfiqar, 2015).

A compelling case for not exoticising or decontextualising online data comes from Lim’s (2012) study of the use of social media in the Egyptian revolt in 2011. Lim argues that the news media were wrong to simply call this a ‘social media revolution’. Rather, social media were simply a tool that was used at the time. A more crucial factor, perhaps, was the nature of the population at the time: there was a high proportion of people under 30, without children and experiencing unemployment. Lim notes that social media had been available since around 2005, but the situation was now different. Perhaps the idea of a ‘poverty and lack of work revolution’ does not have the same attraction for a headline as a ‘Twitter revolution’. But put simply, the point is that online data may ideally be seen as one part of an ethnographic study.

Other reasons to combine online and offline data are, as Androutsopoulos (2013) says, that we simply do not know if the way people represent themselves online and across platforms is

at all true. We do not know, for example, if they have several accounts, or if there is activity besides that visible on accessible parts of profiles. Hine (2015) also points out that the researcher simply cannot know what kind of engagement lies behind the kinds of posts that we see on social media and blogs. For example, it is common to find very negative, provoking comments on YouTube posts. But what levels of commitment do people have to these? Hine reminds us that former studies of television viewing showed that audiences often only engage with programmes in intermittent and often highly distracted ways.

Nevertheless Hine (2011) is highly optimistic about how the internet can foster a less context-specific way of doing ethnography where data is gathered from across different sites. And the online/offline issue is very much one which is dependent on the nature of research questions. If the research question relates to how viewers of reality television discuss social issues raised by the programme, for example related to a sexist or racist comment made by a participant, then the offline aspect is not so relevant. Of course if we want to know if people talk about these issues in the same way offline, that becomes a different issue. And we must be mindful that, like the men in the pub we discussed earlier in the chapter, all of these matters are highly context dependent. But we would argue that in such a case, online research can give us excellent access to the kinds of ideas and attitudes that are widely used to discuss a particular topic. And they also give us novel access to how people use such knowledge (Way, 2015).

To give some examples of uses of observation and ethnography in media research, Rosenberg (2011) carried out an online ethnography of an internet DIY forum where people discuss and share knowledge about DIY projects. The research was interested in the way that non-experts relate to the kinds of representations of DIY found in television home renovation programmes. Rosenberg argued that postings on the site reveal that discussions realise not only an exchange of information about DIY per se but also neoliberal discourses of being a ‘self-managing’, ‘independent’, ‘enterprising’ citizen. There was therefore a moral evaluation of being productive. There is a sense

that those who do not participate, who are not interested in good interior design, are tasteless, even morally inferior and not taking responsibility for themselves, hence somehow undeserving of full citizenship. All of this can be related to wider shifts in governance away from state responsibility to the central role of the relationship of the individual to the market.

In the case of Rosenberg's research, ethnography requires that the ethnographer takes the time to come to understand the way that discussions develop and looks at how different individuals give meanings to DIY, and what kinds of ideas and values are most valued and most devalued. Such things could not be researched, for example, by a questionnaire, precisely because the people who visit the site simply would not talk about what they do in such terms. Such knowledge is tacit. They would not say 'good design and hard work are moral issues', for example. Yet observing how people discuss DIY over time may make this very clear to the researcher.

Tian and Adorjan (2016) carried out observational research on Chinese literary sites over a four-year period. They had observed the rise of a very particular literary phenomenon in China: the massive growth in popularity of literature websites. These have become hugely popular, attracting many millions of users, and it is thought that nearly half of all Chinese internet users visit literary sites. Writers post episodes of stories which are then discussed and rated by readers. They may praise or criticise new instalments of a story, then pay to read more. Writers themselves will also be involved in these discussions. A successful author can earn millions of dollars a year. This is big business and a mass form of entertainment about which little has been written. The researchers read stories and followed discussions, observing the ways that stories responded to discussions and reader demands.

The authors explain the success of the sites partly by placing them in the context of Chinese socio-political history. It was not until reforms in the 1970s that commercial fiction was permitted, and previously all writers worked in forms of propaganda. Writers in Hong Kong and Taiwan then began to get published, although were still highly regulated by state publishing houses. From the 1990s writers began to publish online, overcoming many of the

existing regulatory processes. However, what the authors conclude is that despite the changes in state regulation, authorship is highly controlled by the sanctions and economic rewards provided by readers. The ideas of artistic creativity have still not emerged and literary production is tightly commercially regulated, much like a product that must continually shift according to consumer demands.

In the case of online ethnographies we also find insights into media production processes, as in the case of the Chinese literature. What these studies tend to have in common is that they are able to reveal what kinds of ideas and values come to characterise the way particular issues become discussed. This can be in the sense that DIY talk carries many tacit cultural ideas and values which are very much coloured by neoliberalism. Other studies, such as that by Way (2015), can tell us about such ideas and values, but also how these play out in discussions. In fact, Way argues that on some social media platforms there is little discussion, but rather extreme points of view trenchantly and selectively providing deeply skewed interpretations of social reality.

Building observation and ethnography into a research project: a case study of visual journalism

In this section we want to show clearly how observation and ethnography can be built into a research project using one case study. We show how these methods can be used to provide new insights into a field of research and also how this draws upon and contributes to existing scholarly work. We also point to the way that it can be used to complement textual or content analysis.

1. The research question

One of the authors was part of a research project on visual design in news, working with a colleague who was a professional designer and editor as well as a university lecturer (Machin and Polzer, 2015). The project was connected to the needs of teaching

and training in design. At the time there was a sense in the industry that training requirements for visual journalists – such as photojournalists, camera operators and designers – had changed as news had moved from mainly print to increasingly new and integrated multimedia and multiplatform forms. But exactly what these new training requirements were was little understood. Here we look at one part of this research, as regards how observation helped us to understand very specific changes in the nature of the kinds of photographs used in news. So our research question would be: *have changes in the news industry changed the nature of photojournalism?*

The academic literature made it clear that at the time of writing journalism was experiencing huge upheavals related to the demise of the printed newspaper in many countries with the shift to new habits of information access online and through mobile devices. There had been huge reductions in the amount of staff employed by news organisations (Schlesinger and Doyle, 2015). Those that remained would have to combine much more adaptable, software-literate and flexible working with new rhythms of news production and the latest demands for updated information competing with social media platforms. And many journalists would find themselves working freelance and needing to have a much sharper understanding of how to communicate to different niche markets as they chased work from different outlets.

So our research project could be seen as fitting into these wider scholarly concerns. What we wanted to know was if, and how, this had changed the work of photojournalists. Across the project we interviewed and observed the work of 75 journalists who worked in some aspect of visual design or photojournalism. For the part of the project we address here we closely observed the work of five photojournalists, but also spoke with a wider pool of photojournalists and observed the way that their work was used in news and magazines across different outlets and platforms, from print to tablets, and how it became integrated into television news.

2. The relevance of the question: scholarly work on photojournalism

As part of such a research project we would, of course, first find out what had already been written about photojournalism. This is how we can show what additional knowledge the research brings. Such a process also helps us to avoid repeating already established facts and guide us in the ways to approach our own research.

While books on photojournalism tend to celebrate the contribution of photographs in providing the public with a clear visual picture of what is going on in the world, academic work has been highly critical of the field. In our culture we tend to assume that photographs simply represent events transparently, so they bear witness to reality. But scholarly work has argued that this is not quite the case. First, the photograph is always a selected moment which may not represent the actual broader nature of a process (Newton, 2009). A photograph of militia in a conflict zone tells us little about why they are fighting. And their actions could form only one minor moment in a longer ongoing oppression by government forces (Bouvier, 2014).

In fact, since photographs have to somehow capture events in a single image they may encourage a way of viewing the world in terms of memorable moments rather than lengthy complex and interrelated events (Sontag, 2004). So we may find complex processes represented by a single photograph where a civilian stands before a file of armoured vehicles.

Second, all the processes that lie behind the taking of a photograph – the selection of the shot itself, angle, proximity, exposure, cropping, later editing and then the editorial decision to choose this particular image over another – become invisible due to the compelling effect of having the visual document in front of our eyes (Goldman and Beeker, 1985). The problem is that such decisions go unnoticed by the viewer (Huxford, 2004). So a viewer may not notice that a news photograph of a group of militia is cropped in a way to make them look slightly threatening, for example.

Third, it has been argued that photojournalists have to provide images that fit within established news frames (Hartley, 1982). News frames are basic themes that have become established within news culture. They signal to a journalist that an event is

newsworthy and how this event should be covered, who the key actors are and how they should be treated. It is thought within journalism that such frames are often necessary for the public to recognise an event as news, although to some extent they have become invisible to the practitioners themselves. These frames, therefore, are routinely used to structure how events are represented. For example, in the case of a natural disaster we may see a photograph of a child's toy in a pool of water to represent broken lives and upheaval. For an environmental story we may see an image of a rainforest or ice floe. In such cases the photographs do not help us to understand the actual events, but place them against familiar reference points. Again this challenges the idea of the photograph as truth or bearing witness.

This literature helps us understand much about the nature of the photograph. It helps to think about the way that photojournalists do not so much make images that bear witness to events but rather present them in ways that are memorable, that fit the needs of a particular story, or are part of the way that events become framed for audiences.

But what we found was that there was no literature that involved the photojournalists themselves as regards how they relate to such issues. There was no observational or ethnographic work into what kinds of values, decisions and processes lie behind the use of such photographs. And there was little to help assess how changes in the news industry had changed their work.

3. Doing the research

We contacted photojournalists who worked for very different kinds of news outlets – national news, local news, stock imagery – as full-time staffers and freelancers. We also contacted picture editors and visual designers who commission and choose which photographs are used in different kinds of outlets. We did this by writing emails and then following up with telephone calls. In some cases we got no replies, although we always persisted. Usually busy professionals will be happy to give you some of their time, but some persistence is required to signal that you have a genuine interest in speaking with them. It is also important to

demonstrate, even in early contact with them, that you have knowledge of their work, that there is a specific reason you wish to talk to them in particular. It is also important to indicate what it is that you want to find out in clear and practical terms. This should not be framed in highly academic terms but in a way that emphasises your interest in understanding more about their work and the industry. It can then be clear to them that you want their knowledge and insights. Framing the questions in academic terms may mean that it is not clear to them how they can help you.

And, as we have explored earlier in the chapter, much of the kinds of knowledge we seek to find out through observation and ethnography is held as tacit knowledge. In other words, the person may not overtly know why they do something, why they make specific choices. Such knowledge has to be drawn out through discussion and observation. Therefore it is advisable to foreground questions that are formed clearly within the realms of the kinds of things the person will feel that they can help with. So in this case we stated that we had been looking at their work and wanted to talk to them about this and how they feel the industry is changing.

Some of our attempts at contact were not fruitful. But in a few weeks we had all the contacts we felt were necessary. The process of research would start for each photojournalist with an interview at their place of work, or in a local café in the case of freelancers. We would take along examples of their photographs so we could ask about the processes and choices that were involved in specific cases and about their work and how it had changed. We would also ask to accompany them on jobs. This would allow us to see the decision-making process. We could also then see the actual photographs which were produced from a specific event for a particular outlet.

During these interviews and observations we would use a tape recorder and also take notes. We could then later transcribe the interviews. In the case of picture editors and designers this also involved looking the processes by which photographs were chosen and rejected, and how they were used and integrated into specific designs. We were given access to production processes

and versions of designs which had been accepted and rejected, and shown how images had been edited.

Importantly, in this process we must find ways to get answers to our questions through an awareness of the kinds of priorities and interests that define the work of these professionals. For example, in the first place a photojournalist may tend to talk in terms of the more celebratory ideas related to photojournalism as a bearer of truth. In fact what we found is that photojournalists did carry with them such idealised values, but at the same time they very much understood, although in their own terms, the nature of designing photographs for very specific markets and frames. But it took several conversations and different kinds of discussions about specific assignments to come to this topic.

4. Handling the interview and observation data

The kinds of data generated by the project were diverse and substantial in quantity. Each contact was interviewed several times, the interview captured with a digital sound recorder. We Skyped with interviewees in different parts of the world, which we also recorded. We did not transcribe all of the interviews, but would listen through them at different points in the project, writing out specific parts that were relevant to the research question. It is important in such a project to come to know the data closely. In this way we begin to see it as a kind of web of interconnected information.

Then we would pose follow-up questions via email, which is useful to provide a quite concrete list of questions that need answering. Such questions tend to arise, after periods of interviews with a person, when you begin to understand much more about a situation. Or, for example, a former interviewee might be involved in the launch of a major news website, so we may want to ask how the principles they described before apply in this case. We always found that going back to people in this way worked very smoothly.

All of this data was stored digitally in files under the name of each interviewee. Into these files we would also place the extensive notes we had made during a period observing their

work, or being shown the organisation of production processes. Often we would be given design notes, prototypes, marketing information, etc. This too we would digitise and place in the files.

The kinds of notes that we would want to take, of course, would change as the project developed, simply as we came to have more insights into processes and designer knowledge and practices. But in the first place the aim was, in the spirit of ethnography, on the one hand to document how things get done and on the other to understand why decisions are made from the point of view of the practitioner. This would also involve why practices had changed and how. Of course, we emphasise again, such knowledge may well be tacit, in which case the given reasons tend to be well-trodden themes. But observation and repeated interviews can serve to bring out this tacit knowledge.

5. How to use the data in analysis and writing

When using these kinds of methods we must keep the research question in the foreground at all times. The data is a set of resources for answering this question. Observation and ethnography are wonderful tools for solving such questions. But one danger with these methods is that they can be used descriptively, simply to describe a context or a way of life. We have seen many doctoral theses, for example, where the data had been simply used to create the most comprehensive picture of a particular context, but without any clear purpose. Our research question in this case is: *have changes in the news industry changed the nature of photojournalism?* Ethnography tells us that the interviewees may hold tacit knowledge which allows them to deal with such changes. So when we first question them the answers they give may be the rather typical available responses that circulate within the profession as accounts of what they do. For example, they may talk about having ‘a nose for a story’, or a ‘feel for a good photographic moment’. But this in fact conceals actual concrete and very specific skills and knowledge of what should be in a photograph for it to sell for a particular news outlet.

However, if we talk with interviewees about specific instances of their work over time and look at the processes by which their

work is produced and published, the answer to this question can be found. So we look into the data. We do not need to represent all of the data in the report or journal article that we produce at the end of the research. We may use a particularly striking quote which captures something well. We may, as we did in the book we wrote, summarise the way that particular individuals talked about their work where it provided good insights. A research paper may choose several examples of photojournalists. It could look at some examples of their work and how it is used in news outlets. We would discuss the processes by which they were given a particular assignment, how they thought it through, and the requirements of the news outlet. The data therefore becomes evidence by which we present a compelling answer to our research question. But in the report article only data that allows us to best answer the research question is presented.

Importantly, the data can include anything that we gathered during the research process. So the photographs themselves and the pages upon which they sit should also be seen as part of data. The observation and ethnography should, therefore, be coupled with textual and visual analysis.

6. What the interviews and observations revealed

Our research question was to find out: *have changes in the news industry changed the nature of photojournalism?* From the photojournalists it was clear that there had been a shift towards the requirement to be more flexible in the kinds of images needed by specific news outlets and to have a greater understanding of the way news frames changed. This was very clear in the case of those that worked freelance, which all the interviewees said was the future of the industry – formerly, outlets would employ staff photographers who would produce the same kind of image for much of their career.

For example, one freelancer had been producing photographs from the conflict in Libya from 2011 onwards, with his target market the national press in the UK which itself involved diverse requirements. He told us that he had to be aware that news frames shifted over time as regards the way that events were

reported and that if he wanted to sell photographs he needed to be aware of this. So when a conflict, such as in Libya, is first underway the demand may be for images of destruction and people being mobile. This might involve photographs of destroyed houses, perhaps with children standing in them, to emphasise the impact on everyday life. In the case of Libya, he said, it also involved images of ‘ordinary people’ as the events were portrayed in the news, very wrongly in fact, as a people’s uprising. But once wars and conflicts drew on, news outlets tend to perceive that readers will lose interest in the conflict and destruction frame. So this freelancer said that he then started producing images of ‘hope and healing’. Therefore we would find images of a couple who had married set against a setting of destruction. But here he was targeting slightly more upmarket titles which tend to carry more reflective feature pieces – unlike the destruction-type images these would need to carry markers that indicated ‘taste’ or ‘artfulness’. This would involve how colour was used, juxtaposition of objects to indicate a more ‘creative’ view on the world, a line of interest travelling from the front to the back of the scene.

The photojournalists also emphasised that there was need to think about the way photographs would be good for multipurpose uses, given that many would be sold through commercial image agencies, online companies who provide vast archives of quickly searchable photographs. Page editors can search these under key terms such as ‘Libya’ and ‘hope’. Or ‘Libya’ and ‘child’ where the archive, partly using software, anticipates the search terms that will be used. So the photographer must be aware of the kinds of images that are likely to be chosen. In this case we were told that it was better if photographs were not too memorable so that they could be easily used more often. And if there was nothing to indicate that they were in Libya the photographs could be used for other purposes such as to illustrate stories on child suffering in the world, or broader stories on conflict.

It was during interviews and observations with picture editors and designers that we gained most insights into the changes as regards just which kinds of images would be chosen. One designer who had been responsible for the cross-platform designs of many international outlets said that one huge change has been

the way that the photograph should no longer be seen as ‘evidence’ but as part of the design. He said that there had been a fragmentation of the market where online culture brought the expectation of much more clearly targeted material. This also meant content that was very specifically visually designed for specific markets. The photographs chosen were very much part of this sense of design. This chimed very much with the way photojournalists talked openly about the visual requirements of different markets.

Designers said that they now thought much more about the photograph as simply another design element such as font and colour. Importantly, they reported that photographs are now used much more to symbolise the ideas behind a story than to document a particular moment and, crucially, that this is thought about especially as regards the way it also communicates to a specific audience what kinds of relationship they have to the news item. For example, broadly speaking, one designer said that in general the meaning and status of news has shifted alongside other cultural changes. He said that formerly news could speak to readers or viewers as formal, important, authoritative and as containing all the information needed by a person who considered themselves ‘informed’. Visually this news needed to communicate this formality and authority. But society has changed: the internet and social media have changed people’s expectations of communication; here, opinion may have taken over from knowledge. News consumers clearly no longer tolerate the older form of news. They need to be engaged, treated as having opinions. Visually, too, the designer said, news must communicate this. It must feel visually open. Images must implicate people through visual interest or through the way they symbolically communicate with the reader. And, of course, all photographs must be thought about as regards the way they will appear not only in print but when a story is read on a mobile device.

7. Conclusion: what did observation and ethnography allow us to do?

In the first place, these methods allowed us to find things out that we would not have been able to find out by carrying out an analysis of the photographs themselves. A content analysis of photographs carried by news outlets over time may well have indicated that photographs have become less cluttered – which tends to be associated more with carrying out a symbolic role. We may also have found that many more came from image agencies such as Getty Images. But this would not have offered any indications as to why these changes had come about.

In the second place, we would not have been able to find these things out by using a questionnaire as we simply did not know about processes beforehand. One advantage of this kind of observational-type approach to research is that while you have a firm research problem to solve, you act in a manner whereby you build up a sense of what is going on. What you hear from the first interviewee may well not make sense, or not be really comprehended until further interviews and observations have taken place. The results of the research outlined above were a result of extensive talk and watching. We had to come to piece together how the tacit knowledge of the practitioners could be brought out in a way that allowed us to address our own quite academically formulated problem.

8. How did these methods allow us to contribute to the scholarly literature?

Academic criticisms of photojournalism point to the composed nature of photographs, that they are selected ‘memorable’ moments which tend to trigger common news frames. While the practitioners we worked with on the one hand held a sense of news as revealing truth and of, at the least, the potential for photojournalism to act as the eyes of the public, on the other, in their own terms, they spoke of their work in very similar ways. The difference is perhaps that in the new era of freelancing and demand they understand the requirements of different outlets – that is, what kinds of compositions, what kinds of styles, what kinds of frames they want. Such knowledge has become more of a standard skill requirement of the trade. And for our purposes as

regards the actual research project, this has implications for training of journalists.

The problems with ethnography and the role of the researcher

The strength of the methods described and applied in this chapter lies in the validity of the data. When we ask if the data we have collected is valid or not we are asking whether it actually shows what we think it shows. If we designed a questionnaire to find out what women think of the contents of a women's lifestyle magazine such as *Cosmopolitan* and 100 per cent of the women answered 'yes' to the question 'Is this magazine silly?', what does this really tell us about their relationship to the magazine and the ideas, values and identities that it contains? Such an item of data would have low validity as we don't really know if it is entirely true. It may be true that respondents may all wish to express this opinion, but it tells us much less about what they actually think and do. Ethnography and observation are therefore good at checking validity of data and being more certain about someone's actual feelings/opinions, as the researcher is hanging around to find out.

Ethnography and observational methods have been criticised on the basis of the three other terms used to evaluate research methods: representativeness, reliability and transparency. Representativeness is the extent to which the sample used in a piece of research is typical of people in general or of a specific group such as women aged between 20 and 25, or more specifically of women of this age who are single parents and on low income. A questionnaire might be used in a survey about opinions on local news coverage carried out on 1,000 people who are randomly chosen in a city centre. The results might then be claimed to be representative of the opinions of people in the city. But what kind of representativeness can be claimed for the photojournalists we looked at in the study of changes in the news industry? Since we spoke with 75 practitioners we were certain that the picture we had built up as regards how the work of visual journalists had changed was indeed a pretty complete picture.

But, given the massive number of people who work in the industry this small sample could not claim to be representative in the way as could a questionnaire completed by 1,000 visual journalists. And we could not claim that the people we interviewed were chosen randomly or with any degree of objectivity. We expressly sought out people who we considered could help us to answer our questions. One counter to this criticism is that these smaller samples do give us valid data and therefore allow us to understand more about a topic. What would be the point in having massive samples if the data produced is not valid in the manner offered by ethnography? We would simply not have known what questions to ask in the first place, and it would have been difficult to reveal more tacit knowledge.

Reliability is the extent to which a piece of research is repeatable. Research is said to be reliable if a different researcher could come along and, using the same methodology, produce the same findings. For social surveys, where individual researchers are carefully trained to make sure the same questions are asked in the same way, this is crucial. The same level of continuity will also be sought in content analysis research where coders will be trained to code in the same way, and where the decisions lying behind this will be made known as part of the methodology. In ethnography and participant observation there is no actual systematic research process. We might argue that a similar study of visual journalism would find pretty much the same thing as did our research, for example. But the things we found out related very much to our own existing experiences of design and visual journalism. It is indeed possible that a researcher with a slightly different background may come to different conclusions, having gone about the data gathering very differently. In the case of questionnaires or content analysis fixed questions can be asked in a set order. Interviewers or coders can be trained to go about their work in the same way.

Of course this lack of reliability means that there is no way to check the data. And this leads to what has been the gravest criticism of this kind of research. If it is not open to verification and if it is the findings of one person as they are hanging out, to what extent is the data for the most part down to the interpretations of

the researcher, or what they thought relevant to record? To a certain extent ethnographers have given as much attention to this problem they have to using the method to learn about social life.

During the 1980s a number of anthropologists (Clifford and Marcus, 1986) began to challenge the idea that ethnographers can simply reproduce what is going on in the world transparently through observation and then in their writing. What they argued was that we must understand how such an observer is very much a part of the research process, the data produced, and what gets written up in terms of findings. They argued that the ethnographer always enters the field with a huge cultural baggage of their own. Writers like Asad (1986) questioned whether cultural concepts could be so easily translated and rendered intelligible to the researcher's culture. Also the understanding and interpretation is additionally done through a particular academic paradigm which shapes how we write things up. In other words this research process should be seen as just another kind of writing. This has led to the increase of 'autobiography' in the writing up of field work (Oakley, 1992): researchers, rather than pretending to view the world objectively, incorporating their own feelings and reactions into their reports.

Such a reflexive approach has been taken up in more recent ethnographic research. Gillespie (1995) reflects on her role as a white woman in her study of Punjabis in London and how this affected what she witnessed. And media ethnographers have also suggested that can serve to enrich our research. Mayer (2005) suggests that who we are and our processes of discovery in the field can contribute to our knowledge of culture, as our own culture and who we are interacts with it under study. Of course we might think that it could defeat the object of doing research if we spend so much time talking about who we are. Hills (2002: 73) argues that this does not necessarily have to be the case, so long as we are cautious of 'endless self-interrogation' and narcissism. He usefully reminds us that the researcher must be aware of the way that when we question people about their lives, as in the case of how women relate to the values carried by *Cosmopolitan* magazine, it does not transparently reveal the true nature of their lives but causes them to 'cut into the flow of their experience and

produce some kind of discursive “justification” (2002: 66). In other words we must be aware of the way that the kinds of research questions we have can help to create an artificial set of accounts. Geertz (1973) was concerned to remind us that ethnography can be used productively and that we can learn to be good ethnographers. Ethnographies may be interpretations but this does not mean that they are false.

Many writers (Polanyi 1958; Ziman, 1978; Hacking 1983; and most famously of all Thomas Kuhn, 1962, in his classic work *The Structure of Scientific Revolutions*) have shown that the idea of, and objective, knowledge independent from social and historical moments is a myth. Knowledge is always embedded in the social world. In this sense there seems no reason that ethnography should be criticised above other methods which strive to claim to produce a form of knowledge that is indeed free-floating and independent from the social world.

Carrying out ethnographic and observational research

As we have seen throughout this chapter, ethnography and observational methods are not governed by large samples in the fashion of quantitative methods; they also can be very time consuming. On the one hand these methods are a way of viewing data, which means that we see them as one moment in people's lives as they are involved in specific interactions. We should not so much look for people to give us direct answers to our research questions as use their talk, writing, use of images, etc. as well as observation to help build up the kinds of ideas and models of the world that they use and how these inform their practice.

Deciding on an area for investigation

Since these kinds of methods are time consuming, scale is an issue here. A project might be able to look at the way a small number of young women relate to a particular television programme, such as *The Apprentice*. We could look at how they

discuss the programme in different settings. We could look for how they think about and evaluate business, corporate activity and ambition in general. We could ask how this fits with their attitudes to other parts of their lives. This could entirely comprise, or include, social media data. But the aim would not be to generalise about all women, but say something about these particular young women at this particular time. For a student project an in-depth study of five people could generate ample data. And, importantly, in such a study we could use any data that appeared relevant. The ethnographic studies by Fishman (1988), Miller and Slater (2000) and Bjorkvall (2010) all used a mixture of observation and interviews, and all combined these with things like textual and production analysis.

For student projects production studies may be more difficult, although many of our own students have done such studies during work experience, internships or where they have a part-time job. These students have been able to shed light on topics like assumptions and processes that lie behind writing promotional news items for local councils, public relations practices and advertising products. In each case the student had a research question relating to investigation production practices of certain media texts that they had shown through textual analysis to be ideological. The aim of the research to was to find out to what extent the practitioners were conscious of this and to locate the origins of this ideology in the production process.

Asking a research question

This is an important part of these kinds of research projects for a particular reason. When choosing an area for investigation we might come up with a theory about what is taking place and then go out and test it. This is called the deductive approach. If we wanted to look at how young women respond to a women's magazine we might hypothesise that they will be positive about representations of 'empowered' women. This would be called the hypothetico-deductive approach. In ethnographic research we would tend to not have a hypothesis; nevertheless, we would argue that it is still important to have a clear research question.

Finding respondents

The problem here is gaining access to the places where we wish to research. This may be easier if you want to research how your friends talk about a particular news story. But it will be more difficult if you wish to look at the kinds of practices and understandings of the people who create a magazine. In this case you will need to write to these people or take a job that brings you close to them. Recently one student researched workers in social media campaigns to market alcohol to students. To gain access she worked leafleting for one company and then developed contacts.

Recording data

One of the key tools for anthropologists was the notebook. This is still important. We can also use sound or video recordings where possible, although this may not always be possible if we seek to use naturally occurring events, such as the example of the men talking about a reality show mentioned earlier in the chapter. In such cases it is important to take notes as soon as possible to record topics of conversation, and if possible the exact language. But ethnographic research asks us to think more broadly about what our data is. You might want to make a collection of pages over time from a particular online news site. These are first analysed in the sense of what kinds of representations they contain before then looking at the way that these representations resonate in the lives of readers or before going to talk to some of the people who generate the content. For online and social media research, there is now more and more software for gathering and storing data. You should check what software is presently available to you. But here we must be wary of what it is that we want to accomplish – in other words, the amount of material we gather and store must be necessary and directly useful for answering our research question.

Presentation of data

Data should be presented as it is used to provide necessary evidence to answer the research question. In our project with photojournalists this meant that we showed different kinds of photographic work produced by journalists working in different markets. We showed examples of pages where this work had been used. In each case we talked about the examples, explaining what we had been told about them, by the photojournalists and page editors. We included several very short quotes where we felt that something very striking had been said. While we had learned and documented much about the individual practitioners, about their training and different jobs, about the rise and fall of different news outlets, this was not presented as it was not useful in this instance. Were we later to be invited to write a report on having a career in photojournalism, such data may well have been very useful. The point here is that we must avoid using ethnographic data descriptively even if, to us, at the time, everything we learned about was a revelation.

Ethical issues

This kind of research can be done overtly, so that you tell people that you are doing research, or covertly, where you do not. Currently universities tend to require that permission is gained from all respondents and/or that it is anonymised. In the case of the locals in the bar mentioned earlier in the chapter, their talk has been used here as data, although of course they were not aware that it would be considered as such. But this is completely anonymised. The data from the study of photojournalists all carried their names, but we asked for permission and also, where possible, showed them how we were to use the interviews. We also felt compelled to convey that these are indeed skilled practitioners working very hard in a ruthlessly competitive market, which also brought a sense of how they see their own work. One criticism of academic studies of journalism by journalists has been that they are condescending, and produced by academics who lack a real grasp of how things get done in their profession. Nevertheless we would advise that caution is always taken to

make sure that university regulations are followed closely. These rules are also designed to protect the researcher.

Summary

- Ethnography and observational methods are associated with actually watching or sharing in what media audiences or media practitioners are doing and saying. The assumption is that the best way to study and understand what they think and do is to watch them, or participate in what they are doing.
- These methods, ethnography in particular, should be seen as a way of approaching the data that we collect and can incorporate many different kinds of research methodologies.
- These methods place all data into the flow of social life. In other words, any idea a person expresses must be understood in the context of life and culture. If a young magazine reader says she values ‘independence’ we must understand why her culture currently places value on such a concept as opposed to, say, ‘responsibility’. We must also understand more about what this woman means by this term.
- People may not be aware of why they do what they do nor of the nature of their own values, beliefs and knowledge of how the world works. Our system of belief simply appears natural to us. The job of the researcher is to place these things into the cultural context.
- The kind of research method used may not involve making a hypothesis but be an attempt to answer a question or to understand more about a particular process.
- Ethnography and observational methods are time consuming and generally used for small samples, such as a group of newsroom workers, several groups of television viewers or a particular social media forum.
- Samples may be fixed, such as a number of friends or family, or may simply ‘snowball’, as any case of social interaction can be viewed as potential data if the aim is to increase understanding of a particular phenomenon rather than a particular group of people.

- Data may be presented according to themes, for which we present related evidence.
- These methods produce data that has high validity but is low on reliability.

Further reading

Tuchman, G. (1972). *Making News: A Study in the Construction of Reality*. New York: Free Press.

A classic work which exemplifies how ethnography and observation can bring unique insights into the nature of what we read and see in the media. It is now over 40 years old but shows the importance of gaining access to the kinds of ideas and values which govern the thinking and procedures of media professionals.

Moores, S. (2009). *Interpreting Audiences: The Ethnography of Media Consumption*. London: Sage.

Good review of literature which provides a comprehensive look at how to research media audiences. The book considers issues like media power over people, and how to assess things like media preferences and taste, as well as how people use media in the home.

CHAPTER 5

Content analysis

Content analysis is one of the most efficient and widely used research methods for the systematic and quantitative analysis of media and communications content. Since first becoming firmly established as one of the core methods in communication research in the middle of the twentieth century, it has enjoyed tremendous popularity both in this field and across many other disciplines (see Franzosi, 2007, for a comprehensive discussion of the history and uses of content analysis). Its popularity no doubt derives from a combination of characteristics, including that it is systematic, quantitative, highly flexible and adaptable, easy to use (although also easily misused) and particularly well suited for revealing trends and patterns in the large quantities of communications and symbolic content characteristic of modern societies. It is also a method that lends itself well to integration with other quantitative as well as qualitative methods in media and communication research, and, indeed, as such it is core to some of the major models in communication research and theory. While the method has certainly, over its long history, had its fair share of criticism (including of its foundations in positivist science, its claims to objectivity, its fragmentation of textual wholes and its lack of a theory of meaning), it continues to play a key role in communications. If anything, it has enjoyed something of a renaissance with the rise of new digital media and associated computer-assisted forms of analysis.

This chapter starts by examining briefly the origins and evolution of content analysis, as a formal method of enquiry in the social sciences and humanities. We then proceed to discuss some of its main challenges and criticisms. Drawing on examples from

published content analysis studies, this is followed by a step-by-step guide to the process of doing content analysis, from the selection and sampling of media material to the preparation and analysis of the data produced by it.

A brief history

Content analysis is notable as a communication research method for its long history of use. Krippendorff (2013) cites an eighteenth-century Swedish study of 90 hymns of unknown authorship as one of the earliest documented cases of quantitative analysis of printed texts. During the twentieth century, some of the most spectacular early uses of content analysis were in propaganda analysis. Through the systematic analysis of German radio broadcasts, Allied intelligence was able to monitor, and in some cases predict, troop movements, the launch and location of new military campaigns, and the development and deployment of new weapons. While these studies used content analysis for finding out about the intentions of the originator of messages, the aim of content analysis in media research has more often been that of examining how news, drama, advertising and entertainment output reflects social and cultural issues, values and phenomena.

Indeed, from an early stage, sociologists, political scientists and others interested in the social and political roles of the media saw the potential of content analysis as a method for monitoring the ‘cultural temperature’ of society and for the regular and systematic production of the social/cultural equivalent of the economic indicators used for monitoring the state of the economy. In the 1930s Harold Lasswell proposed a ‘continuing survey of “world attention” – as reflected in trends in media coverage of various social issues – to show the elements involved in the formation of public opinion’ (Beniger, 1978: 438). A couple of decades earlier, in 1910, Max Weber had similarly proposed an ambitious long-term systematic study of press coverage of social and political issues to be carried out together with the monitoring of public opinion responses and changes (Neuman, 1989). Weber’s proposal, however, was not realised. One reason for this was undoubtedly the very considerable cost of sustained collection and analysis of

media coverage. Another reason was that neither survey research nor content analysis had been developed into fully fledged methods at the time.

The development of content analysis as a formal method of social science enquiry took place in the years between the two World Wars, as well as in the major research programmes of Harold Lasswell and his associates around and during the Second World War. Krippendorff (2013) argues that developments in the method were spurred on by concerns about the contribution of the mass media to social upheaval and international conflict, a concern with the then new electronic medium of radio, and the desire to make social enquiry ‘scientific’ in a manner comparable to the controlled, systematic, objective and supposedly predictive methods of the natural sciences.

From being used in its early days mainly for keeping inventories of the contents of American newspapers and for journalistic studies (Holsti, 1969: 21), content analysis gradually became part of larger and theoretically much richer projects of social and political analysis. The method was increasingly integrated into larger research efforts involving not just the analysis of media content, but also other types of data and other methods of enquiry (surveys, experiments, participant observation, qualitative and ethnographic audience research).

A prominent and influential programme of research, which skilfully integrated content analysis with survey research in the analysis of media roles in the cultivation of public consciousness, was George Gerbner’s cultural indicators programme. Originally outlined in 1969, Gerbner’s cultural indicators programme proposed the use of content analysis for the systematic monitoring of trends and developments in the symbolic environment of American television (Gerbner, 1995). Combining detailed content analysis of television entertainment programming with surveys of public beliefs and attitudes, the cultural indicators research (e.g. Gerbner et al., 1994; see also Shanahan and Morgan, 1999; Morgan and Shanahan, 2010) aimed to examine how far television ‘cultivates’ certain world views in its audiences. In this respect, the cultural indicators/cultivation studies are typical of a considerable body of research which has used content analysis together with various types of studies of audiences to examine media influence

on public beliefs, attitudes, opinion and behaviour. While cultivation analysis – and the use of content analysis as one of its principal methods – was originally focused on television, Morgan et al. (2015) examine the continued applicability of the cultural indicators paradigm and content analysis in the new media environment.

Another prominent strand of communication research to rely on content analysis as one of its principal methods is agenda-setting research (Dearing and Rogers, 1996; McCombs and Reynolds, 2009; McCombs, 2014). Agenda-setting studies at their simplest level explore how far the issues which dominate the media agenda (as established through content analysis of media coverage) come to dominate and influence what the public ‘think about’ or regard as the most important issues of the day (as established through surveys of public beliefs and opinion). In more complex designs, but still drawing principally on content analysis and surveys, agenda-setting studies examine how policy agendas, media agendas and public agendas interact. Such designs have been prominent in, for example, environmental communication research (see Trumbo and Kim, 2015, for a comprehensive review) and in health communication research examining the interaction of public policy, legislation, media coverage and public opinion, attitudes and behaviour in relation to alcohol, tobacco and drug use (e.g. Fogarty and Chapman, 2012).

As well as being used for mapping changing cultural and socio-political trends in the media – and the relationship between such trends and changes in public opinion and beliefs (Janowitz, 1976; Neuman, 1989; Danielson and Lasorsa, 1997) – content analysis became integrated into studies of media organisations, media professionals, sources of media information and, generally, the production of news and other media content. Several of the classic studies of news production combine observational methods (in news organisations) and interviews (with media professionals and sources) with content analysis of the ‘product’: the news (e.g. Gans, 1979; Fishman, 1980; Ericson et al., 1987, 1989, 1991).

More recent trends have seen a resurgence of content analysis, as this has, since the 1990s, become a prominent component of much framing research (Tankard, 2001; Tewksbury and Reynolds, 2009; Tong, 2014). It is particularly interesting how many of the ambitions of early sociologists, such as Max Weber and Harold

Lasswell in the first half of the twentieth century, have been realised with the rise of digital media and the concomitant rise of analytical software for continuous monitoring of both media content and public interest and opinion. These developments have given new impetus to one of the most desirable uses of content analysis, namely as a key method for longitudinal and comparative research designs (Rössler, 2012). Such designs have been used productively in, for example, environmental communication research to examine what drives media and public attention to climate change and other environmental concerns (Boykoff et al., 2015; Hansen, 2015; Metag, 2016; Pollach, 2016) over longer periods of time or across national and cultural boundaries. Prominent media-focused research organisations, such as the Pew Research Center in their Journalism and Media section (e.g. Pew Research Center, 2015), similarly, frequently draw closely on content analysis methodology for their continuous monitoring of the media environment and for comparisons of how major political, economic and other events feature across different communications media, including both traditional news media and online media like Twitter and Facebook.

Content analysis: definitions and problems

The classic and much-quoted definition of content analysis comes from the first major review of the method: Bernard Berelson's *Content Analysis in Communication Research*, published in 1952: 'Content analysis is a research technique for the objective, systematic, and quantitative description of the manifest content of communication' (Berelson, 1952: 18). Much of the controversy over content analysis has focused on the notion that it must be 'objective'. Critics of positivist science have argued that objectivity in content analysis, as in any other kind of scientific research, is an impossible ideal, serving only to cosmetically cover and mystify the values, interests and means of knowledge production which underpin such research. Content analysis, of course, could never be objective in a 'value-free' sense of the word: content analysis does not analyse everything there is to analyse in a text (no method could, nor would there be any purpose in trying). Instead

the content analyst starts by delineating certain dimensions or aspects of text for analysis, and in doing so they are also making a subjective choice (albeit one generally informed by the theoretical framework and ideas which circumscribe the research), indicating that the dimensions chosen for analysis are more important than others not chosen. The criticism of positivist ‘objectivity’ criteria is by now both well rehearsed and generally accepted, and it is indeed possible that a strictly positivist ‘value-free’ notion of objectivity was never what was intended in the first place in definitions of the requirements of content analysis. Thus, it is perhaps symptomatic that later definitions of content analysis have omitted references to ‘objectivity’, requiring simply that it be ‘systematic’ (Holsti, 1969: 14) or ‘replicable’ (Krippendorff, 2013: 24). The definition by Riffe et al. (2014) captures the essence of content analysis methodology very well, while at the same time avoiding earlier definitions’ reference to ‘objectivity’ or the problematic distinction between ‘manifest’ and ‘latent’ content:

Quantitative content analysis is the systematic and replicable examination of symbols of communication, which have been assigned numeric values according to valid measurement rules and the analysis of relationships involving those values using statistical methods, to describe the communication, draw inferences about its meaning, or infer from the communication to its context, both of production and consumption. (Riffe et al., 2014: 19)

Content analysis is per definition a quantitative method. The purpose of the method is to identify and count the occurrence of specified characteristics or dimensions of texts and, through this, to be able to say something about the messages, images and representations of such texts and their wider social significance. The problem, however, is how far quantification is taken in content analysis and to what degree the quantitative indicators that this technique offers are read or interpreted in relation to questions about the intensity of meaning in texts, the social impact of texts or the relationship between media texts and the realities which they reflect.

As noted by Holsti, early 'definitions of content analysis required that inferences from content data be derived strictly from the frequency with which symbols or themes appear in the text' (1969: 6). More than half a century of communication research has, however, made it plainly clear that there is no such simple relationship between media content and its reception and social implications. Content analysis can help provide some indication of relative prominences and absences of key characteristics in media texts, but the inferences that can be drawn from such indications must be firmly anchored in a theory that articulates the relationship between media and their social contexts.

On the question of quantification, we might similarly ask: is the overrepresentation of certain occupations, types of (anti-)social behaviour, ethnic groups, etc. a case of media misrepresentation, distortion and bias? Or could the highly selective emphases of media images of reality be seen as an accurate *symbolic* reflection and perpetuation of dominant social values (see Gerbner, 1972)? The point arising from these two questions is again that it is not the practice of counting and quantifying as such that needs to be questioned, but rather the 'meaning'/interpretation which is attached to the quantitative indicators provided by content analysis.

Doing content analysis: key steps

The process of content analysis can be broken down into eight consecutive steps:

1. Define the research problem
2. Review relevant literature and research
3. Select media and sample
4. Define analytical categories
5. Construct a coding schedule and protocol
6. Pilot the coding schedule and check reliability
7. Data preparation and analysis
8. Report findings and conclusions

1. Define the research problem

The first step in content analysis, and one which logically precedes even the decision to use this method, is to define the research problem: what do we hope to be able to say something about by analysing a body of communication? What aspect of communication, media roles, social phenomena, textual characteristics does the proposed research aim to throw some light on?

Content analysis is a method for examining communications content. It is not a theory. As a method, it does not in and of itself provide any pointers to what aspects of communications content should be examined, or how those dimensions should be interpreted. Such pointers have to come from a theoretical framework, which would include a clear conceptualisation of the nature and social context of the type of communications content which is to be examined. In relation to the analysis of media content this may concern questions about its production (e.g. the influence of ownership, commercial interests, editorial policies, journalistic practices, news sources), its consumption (e.g. the role of news coverage in relation to social, political, ideological and economic processes, or in relation to individual audience/readership phenomena) or indeed broader questions about how communications content reflects wider social and cultural values.

Content analysis is not and should not be carried out simply for the purpose of counting what can be counted in media content. Any number of dimensions could potentially be categorised and counted, but it is only by making a clear statement about the objective of the research that the researcher can ensure that the analysis focuses specifically on those aspects of content which are actually relevant to the research.

2. Review relevant literature and research

A clear conceptualisation of the research problem – and the subsequent definition of what aspects and categories of content should be analysed – should always be anchored in a review of relevant literature and related research or studies. This is partly a question of not reinventing the wheel unnecessarily: reviewing

previous content analysis studies on similar or comparable media, types of communication, issues, events or phenomena will help in terms of discovering what kinds of theoretical frameworks have been used to good effect previously, and in deciding on both a relevant sampling strategy and analytical categories to focus on in the actual content analysis.

Identifying and reviewing relevant previous research is also a question of taking advantage of comparisons, where possible, with previous analyses in order to identify, for example, national or cultural differences in media coverage (e.g. Scott, 2009; Mody, 2010; Aalberg et al., 2013) or changes over time in media portrayal (see e.g. Gunter et al., 2010, on trends in the portrayal of alcohol and drinking in television entertainment, as identified in content analyses using similar coding definitions from the early 1980s through to the present century).

3. Select media and sample

It is rarely either possible or desirable to analyse absolutely all media coverage of a subject, area or issue. At the same time, it is precisely one of the major advantages of content analysis over, for example, semiotic analysis that it lends itself to the examination of large bodies of media content. Nevertheless, one characteristic of modern media and communications is the sheer enormity of the volume of text, sound and images produced. For conceptual and, more specifically, for practical reasons, therefore, content analysis must start with the selection and narrowing down of the type of coverage to be analysed. First, it is necessary to define clearly what body of media or communications content ('population' in sampling language) will be analysed, described and characterised. Next, it is often desirable and necessary to choose a representative sample from this body of media content. There are many different ways of creating an appropriate or representative sample in media analysis (see also our discussion of sampling strategies in [Chapter 9](#)), some more robust than others in terms of the types of analysis that they can support, but whichever sampling strategy is used the key thing is to be transparent and explicit (in the presentation of the analysis) about the approach chosen and

about the rationale for selecting material for analysis (see Lacy et al., 2015, for key issues in sampling for content analysis).

In practice the process of defining the media/type of communication (the population) and sampling comprises: (a) the selection of media/type of communication; (b) the selection of time period; (c) the sampling of relevant content.

The selection of media/type of communication

The term ‘media/type of communication’ is all-encompassing and might include anything from traditional mass media (film, newspapers, broadcast media, etc.) to digital media (online news, social media, etc.) to much more specialised types of communication such as political documents, government legislation, company reports, popular music lyrics, etc. In practice, any content analysis would start by specifying which media or type of communication, and which sub-categories within these, are to be analysed, and this choice in turn will depend on the nature of the research problem or subject.

The choice of media/type of communication involves considerations which may include one or more of the following: geographical reach (e.g. global, national or regional); audience type or user community (e.g. as defined by the nature of consumption of or interaction with the type of communication, and traditionally also by basic demographics such as age, social class, profession, ethnic origin, gender, etc.); format/content characteristics of media (e.g. ‘public service’ versus ‘commercial’ news providers; ‘popular’ versus ‘quality’; liberal versus conservative media) and accessibility and availability of the communications content to be analysed.

In general, content analysis studies tend – for both practical and conceptual reasons – to focus on one particular medium, although larger-scale research projects may indeed comprise analysis of several media types: Mody’s (2010) study of international news comprised both print news and selected online news sites; much of the Pew Research Center’s monitoring involves comparisons of news across social media as well as newspaper, television, radio and online news outlets.

The selection of time period

It is essential to clearly specify the dates or time periods to be analysed. The choice of dates or periods depends on whether the subject of analysis relates to a specific time-limited event/activity or whether it concerns the mapping of some general dimension of coverage such as the portrayal of women, immigrants, minority groups, violence, crime, science, environmental issues, health, etc. In the former type, the period to be analysed is ‘naturally’ defined by the time and dates of the event concerned. Thus wars and uprisings often have relatively clearly defined start and end dates. So too do major natural and non-natural disasters (earthquakes, wildfires, flooding; oil spills, chemical spills), political summit events and election or referendum campaigns.

It is important to bear in mind, however, that while event-specific coverage may be clearly defined by the dates of an event, understanding the role and nature of media coverage would often necessitate analysis of coverage both before and after the dates or period of a specific event. In their classic study of an anti-Vietnam War demonstration in London in 1968, Halloran and his colleagues (1970), for example, noted that the media’s emphasis on violence in coverage of an essentially non-violent demonstration could be explained largely as a self-fulfilling prophecy: media coverage in the period leading up to the actual demonstration had put great emphasis on the expectation that the demonstration would lead to violent clashes. Consequently this became the main frame for the coverage of the demonstration itself.

In the analysis of more general types of coverage – not specifically tied to certain dates or periods – there are numerous, more or less systematic, ways of obtaining what we may call a ‘reasonably representative’ sample of material. ‘Reasonably representative’ here is taken to mean a sample which is not skewed or biased by the personal preferences or hunches of the researcher, by the desire to ‘prove’ a particular preconceived point, or by insufficient knowledge of the media and their social context. It is thus important, when deciding on a sampling plan, to be aware of any major public events or seasonal variations which may affect media coverage.

A sampling strategy often used for obtaining a representative sample of news coverage is that of one continuous week – Monday to Sunday – followed by a ‘rolling’ or composite week –

Monday of one week, Tuesday of the following week, Wednesday of the following week, etc. (Riffe et al., 1993, 2014). Another strategy used for both broadcast and newspaper sampling is systematic random sampling: a start date is randomly selected, and then every *n*th day (the sampling interval) after that is selected throughout the chosen period.

The sampling of relevant content

Once the medium/media and time period have been selected, there still remains the task of identifying and sampling relevant content. This involves defining the appropriate ‘message unit’ (e.g. a news article, a blog post, a tweet, a television programme episode, an advertisement) to be searched and determining whether it contains content relevant to the investigation. The definition of ‘relevant content’ should be derived from the stated research objective and the theoretical framework of the study, and then selecting a manageable and representative sample for analysis.

Some studies have thus looked at the portrayal of certain phenomena or issues across all types of television programmes – fiction and factual – broadcast during peak viewing hours (Shanahan and McComas, 1999); others have focused on specific genres such as television news (Philo and Berry, 2011), popular television series (Russell and Russell, 2009; Hether and Murphy, 2010), sports programming (Christopherson et al., 2002), television advertising (Paek et al., 2011), or music videos (Wallis, 2011).

Similarly, the sampling in print media may be restricted to specific types (e.g. news magazine covers (Meisner and Takahashi, 2013)) or genres of content. Thus, general analyses of newspaper coverage of certain issues or phenomena tend to exclude advertising content, weather forecasts, stock market and related financial listings, sports pages, cartoons and perhaps more specialist newspaper sections such as reviews of the arts, or education or holiday supplements. For studies which are principally interested in the operation of news values and factors governing the production of news, such exclusions are reasonable on the grounds that these types of coverage are generally less directly driven by the news values and journalistic practices which apply in the main news sections of newspapers (although such boundaries

are not always clear in relation to, for example, sports pages). In all cases, the selection of types of content must depend fundamentally on the rationale and objectives of the study.

Having chosen the medium/media to be analysed, sampled titles or channels from these, sampled issues and dates, and sampled types or genres of content, there still remains the task of identifying content which is actually ‘about’ or relevant to the subject or issue under scrutiny. Should a newspaper court case report, in which reference is made to DNA analysis of hair samples found on a murder victim’s clothing, be included in a study of ‘science’ coverage? At what point can a television news item be said to be ‘about’ race, or to convey images of race? A classic question to have exercised a very large body of communication research is: ‘How do we define “violence” on television?’ These questions illustrate the need to define clear selection criteria and rules for the inclusion/exclusion of media reports, articles and programmes in the analysis.

As media and communications content is now predominantly communicated and archived in digital form, selecting content for analysis is primarily done with keyword searches. While this can be done reliably with great speed and efficiency and across large amounts of media content, it remains the case that this approach to sampling relevant content is only as good as the search terms used. Thus, the more general the topic under investigation (e.g. crime coverage), the more challenging is it to find a suitable combination of keywords. But even where the topic under analysis is identified by relatively unique terms (e.g. ‘solar energy’, ‘Zika virus’, ‘Brexit’), simple keyword analyses may still return a significant amount of communications content that is either peripheral or not relevant at all to the analysis. Lacy et al. (2015: 794) offer the following cautionary example of the importance of testing and refining keyword searches:

Sobel and Riffe (2015), for example, used LexisNexis to identify *New York Times* stories about Nigeria, Ethiopia, and Botswana to explore the importance of U.S. economic interests in coverage of those nations. Using the country names as keywords, they found 7,454 news stories mentioning at least

one of the three; however, screening revealed that 91% of the ‘hits’ did not have one of the countries as ‘primary focus.’ In terms of trade-offs among efficiency, validity, and context, this example points to the risk of using single keywords to locate content and to the need for precision in identifying the terms one selects to identify ‘relevant’ content.

4. Define analytical categories

The ‘task’ of content analysis is to examine a sample of media or communications output and to classify the content according to a number of predetermined dimensions. In conceptual terms, the most taxing aspect of any content analysis is to define the dimensions or characteristics which should be analysed. While any number of communications content characteristics could be categorised, counted and quantified, coding and analysis should focus solely on characteristics which are relevant to the theoretical framework, questions and objectives stated for the research. In short, don’t spend time on coding/counting content dimensions such as the number of words per message unit or the number of photographs unless these counts are relevant to – and will be analysed in relation to – the objectives of the research.

What categories then should be included in a content analysis? In general terms, there is no single or simple answer to this question as the analytical categories will, and always should, depend on the specific aims, objectives and focus of the research, on the theoretical framework and questions stated as part of the formulation of the research problem. There are, however, a number of categories which will tend to be standard in any content analysis, namely ‘identifier’ categories such as medium (which newspaper, magazine, television channel, etc. does the content appear in?), date (day, month, year), position within the medium (e.g. ‘page’ in print media, or ‘schedule time’ in broadcast media), size/length/duration of item (although, as indicated above, careful consideration needs to be given to the question of whether the analytical use of this dimension warrants the time and effort invested in the coding). Another descriptive identifier category often included in analyses of media content is a type/genre

classification. Thus, newspaper content is often categorised along the lines of ‘news report’, ‘editorial’, ‘letter to the editor’, ‘feature article’, etc.; broadcast programmes are categorised in terms of their genre: ‘news’, ‘current affairs magazine’, ‘documentary’, ‘quiz show’, ‘talk show’, ‘drama serial’, ‘film’, ‘advertisement’, etc.

Although at one level, type/genre typologies can be regarded as basic identifier categories for general classification and comparison of media output, it is important to recognise that these also have much more far-reaching analytical potential. Thus, different media formats, types or genres set different limits for what can be articulated, by whom, through which format or context (Altheide and Snow, 1979).

In addition to being informed by the general theoretical frameworks and research questions guiding one’s research project, there is at least one further principle which should be borne in mind when constructing coding categories for a content analysis: a content analysis should never be merely a fishing expedition applying a preconceived category set to an ‘unknown’ body of text. Thinking up appropriate content analysis categories is as much a question of immersing oneself in the textual material to get a general ‘feel’ for its content and structure prior to the construction of categories as it is a case of deriving category ideas from the theoretical framework and questions which guide the research project. In other words, the researcher needs some familiarity with the content/structure and general nature of the material to be analysed in order to be able to set up categories that will be sufficiently sensitive to capture the relevant nuances of the content.

Going beyond these basic identifier categories there is inevitably considerable variation in the kinds of dimensions that different content analyses have examined and counted, reflecting the many and varied research purposes for which quantitative analysis of texts have been used. In the following, we describe some of the most commonly analysed dimensions or categories in media and communication research based broadly in a political science or sociology oriented framework.

Actors/sources – and their attributes

The analysis of characters, actors or sources is important both from a straightforward narrative/literary perspective and from a

more sociologically articulated theory of media representations and media roles. Whether informed by a hegemony framework, a constructivist perspective, social learning and modelling theory, or a social representations framework, the analysis of who is portrayed as saying and doing what to whom, and with what key attributes, is essential to an understanding of media roles in social representation and power relationships in society.

Social stereotyping, misrepresentation and what Gerbner (1972) has termed the ‘symbolic annihilation’ (through underrepresentation or non-representation) of different groups and types of people in society have been central concerns of content analysts since the early days of media and communication research. In his study of radio daytime serials (soaps) Arnheim (1944) found, for example, that working-class people were numerically underrepresented. DeFleur’s (1964) study of the portrayal of occupational roles in television serials came to similar conclusions, showing that certain occupations were heavily overrepresented while others were virtually absent. Numerous content analyses have been carried out to examine further the highly selective representation of occupations, the sexes, race and ethnicity in both news/factual media content, drama/entertainment fare and advertising. The core approach of this type of content analysis is to compare how various groups of actors are portrayed/characterised in popular media content with official statistics describing these groups. This type of content analysis continues to provide benchmarks for policy debates about the accuracy, fairness, objectivity etc. of public communication. In a study of the ‘changing misrepresentation of race and crime’ on American television news, Dixon and Williams (2015: 26) thus describe this approach as ‘interreality comparison’ to ‘understand whether various groups are underrepresented or overrepresented in various roles’. They argue: ‘The most effective way to do this is to compare the percentage of African Americans, Whites, Latinos, and Muslims appearing in network and cable news in various roles to the percentages contained in official reports.’

Studies working within a cultivation approach or social modelling approach are concerned about the characteristics of those who are portrayed as the perpetrators of socially unacceptable behaviour, or of those who may serve as role models for media audiences.

Content analyses have been used for meticulously mapping not just the overall demography of popular entertainment media characters (in terms of gender, race, social class, age, etc.) but also the attributes and behaviours of characters along such lines as sexual conduct, moral values, drinking, smoking, drug taking and dietary habits.

Numerous studies, from the emergence of communication research in the early part of the twentieth century through to the present day, have successfully used content analysis techniques to show that public issues are defined in the mass media and for public consumption overwhelmingly by representatives of powerful institutions, agencies and interests in society, and that 'alternative' voices, critical of the status quo, are much less likely to gain access or prominence in the public sphere. But to merely conclude that communication in the public sphere is heavily skewed towards authority and authoritative actors is – not least in the much more diverse and heterogeneous digital media environment – an oversimplification of what are in reality complex communication processes involving not just media access, resources and abilities to communicate, but also questions about how sources/voices are framed.

Thus, the relative power of different sources/voices in media and public communications is of course not just a matter of their relative prominence, but significantly a matter of how they are framed or invested (for example through the arena or forum of their actions/activity) with credibility and authority, or alternatively undermined by the absence of an affirmative setting, an affirmative display of credentials, by counter-questioning, or indeed by humour or ridicule.

Content analysis – due to its systematic and transparent nature as a research method – has thus long been one of the preferred methods for examining perpetual journalistic, political and indeed regulatory concerns about accuracy, balance/bias, fairness and impartiality in media, news and public communications (Hansen, 2016).

A significant body of work – much of it relying on content analysis of key sources/voices – on media coverage of science, climate change, health debates and controversy has argued, for example, that the journalistic objective of 'balanced' reporting

results effectively in coverage which is biased because it strives to give equal prominence to voices on ‘both sides of the argument’. A classic content analysis demonstrating this trend in climate change news reporting is the aptly named ‘balance as bias’ study by Boykoff and Boykoff (2004), but this type of content analysis of key actors/voices in communications content has a long pedigree – and continues to be used prominently and productively – in relation to a broad range of public and political issues.

Important lessons arising from content analysis-based research focusing on actors/voices include the need to be sensitive to variations in voice/source prominence across different types of media, events and historical/cultural contexts. Shehata and Hopmann (2012) – in a comparative content analysis of climate change reporting in Sweden and the USA – thus show how the types of voices and arguments are influenced by national political context, but also by major events such as climate change summits. They also note how the ‘balance’ of voices, as measured through content analysis of the relative prominence of key actors, is not necessarily synonymous with the balance of arguments about climate change; thus, they argue, while numerous studies have demonstrated a balance of voices in the news, the overall media messages about climate change tended relatively early on to resonate with the emerging scientific consensus view about climate change.

The method of content analysis is eminently suited for the effective and reliable enumeration of key actors or sources appearing in media content, and when informed by and integrated with appropriate theory about communications in the public sphere can produce powerful explanations of the role of media and communications in relation to social, political and cultural change. The simple counting and mapping of relative prominences of different actors/sources is, however, just the starting point. As shown in the examples above, actor/source analysis needs to go well beyond the mere counting of actors/sources, linking this to questions about social and political context, type of controversy or event, topic, change over time, etc. Of particular importance is attention to the visual depiction of actors. In an analysis of television news images of climate change, Lester and Cottle (2009) thus demonstrate how different key actors (politicians,

scientists, environmental protesters, victims of climate change, etc.) are visually constructed in ways which associate very different degrees of authority, credibility and trust with these actors.

Rebich-Hespanha et al. (2015: 512), in a comprehensive longitudinal content analysis of news coverage of climate change, likewise note key differences in how ordinary people and authority figures are portrayed. Ordinary people are depicted as ‘suffering impacts of environmental conditions or engaging in efforts to mitigate or adapt’, while authority figures are shown in active agency roles studying, reporting (scientists), or urging or opposing action (political figures and celebrities). As the authors conclude, this conveys very different visual messages about who are invested as authoritative ‘agents of definition’ for environmental issues and, on the other hand, ordinary people whose voices are marginalised.

The importance of analysing the relationship between textual and visual depiction of actors, and relating this to temporal and event context, is borne out by Wozniak et al.’s (2016) research on actor roles in news coverage of selected climate change summits. In a sophisticated design combining analysis of visuals with analysis of text, they found that whereas non-governmental organisations (NGOs) were much less frequently quoted in textual content than politicians and other key decision makers (as commonly found in content analysis-based news research), they were ‘substantially more successful than government delegations in seeing their visual framing conceptions reproduced in print media coverage around the world’ (Wozniak et al., 2016: 13). This success, the authors argue, is in part due to the familiarity of NGO sources with the news values and visual needs of media organisations and journalists, and partly due to the nature and particular visual needs/opportunities of political summits like the Conference of the Parties (COPs) climate summits. They also recognise, however, the potential limitations of NGOs’ visual agenda success when concluding: ‘The very lopsided distribution of NGO-related or NGO-favoured content in written texts versus visual representation supports the conclusion that NGOs essentially serve as “camera fodder” for a policy debate that in its substance is dominated by political elite sources.’ (Wozniak et al., 2016: 14).

Content analysis of actors/sources is a core focus in media and communication research but, as we have seen, this needs to go well beyond the mere enumeration of different types of actors, to examine how different actors/sources are invested (textually, visually, contextually, etc.) with very different degrees of authority, agency and credibility.

Themes, topics and issues

A key objective of many, perhaps even most, content analyses is to determine how a general area/domain of coverage sub-divides into a range of specific themes, topics or issues, and to determine the relative prominence or importance of each of these in the overall coverage analysed.

The classification of what topics, themes or issues are covered within a general area is a common starting point for studies of media content for the simple reason that most studies would wish to establish which themes or issues are given prominence, and which are sidelined or marginalised in media coverage. In other words, how (by emphasising/marginalising certain themes, topics, issues) do different media contribute to the public definition of the social, political and cultural issues of society?

Historically, the categorisation of content by theme or topic has varied widely, from a relatively small number of macro-categories to highly differentiated lists of thematic/topic categories. Thus, Ericson and his colleagues, while generally concerned with the representation of ‘deviance and crime’ in the news media, sub-categorised ‘deviant activities into five general types for analysis: violence, economic, political, ideological/cultural, and diversionary’ (Ericson et al., 1991: 243–44).

Frequently, much more detailed classifications are used. Thus, Morgenstern et al. (2015), in an analysis of alcohol advertising identify 13 content themes (labelled as: Humour, Friends, Artistic, Sports, Relax, Sexy, Party, etc.) and proceed to analyse their relative prominence across the alcohol brands advertised. In a comprehensive and longitudinal content analysis of image themes and frames in news stories about climate change, Rebich-Hespanha et al. (2015) identify 118 image themes. This study is particularly instructive for its methodological and conceptual rigour both in terms of its inductive approach to identifying thematic

content and for its clarity about the relationship between ‘theme’ and ‘frame’. The latter is particularly valuable, as content analyses historically have often been vague about the difference between ‘theme’, ‘topic’ and ‘frame’. Rebich-Hespanha and her colleagues (2015: 500) explain their approach as follows:

Our coding scheme began with an initial set of themes based on existing research on themes and frames in climate imagery, and on knowledge of the basic concepts of CC science. Preliminary examination of the image set suggested additional themes, and the combined set of image themes served as a starting point for the coding process. Coding involved examining each image, caption, and associated headline to determine presence or absence of each potential theme (e.g., each image could be coded for multiple themes), and revising code operationalizations or adding new codes as necessary.

The approach of this study then is notable for the way that, rather than attempting to categorise content according to *a priori* categories, the researchers draw on categories identified by previous comparable research, but also importantly remain open and sensitive to discovering new thematic foci as they work their way through the sampled material. We would argue that this is content analysis at its best, as it combines drawing on extant published research while also remaining open and flexible to discovery of trends in the material analysed (as opposed to attempting to retro-fit communications content into *a priori* categorisation systems).

Vocabulary or lexical choice

Since the very early days of content analysis, considerable interest has focused on the vocabulary or lexical choice in the texts studied. Indeed, some of the very first documented uses of content analysis were studies which focused on the occurrence of specific words/symbols in texts (Krippendorff, 2013). In his pioneering work on quantitative semantics, Lasswell was essentially also interested in vocabulary and in the symbolic meaning of words. Much of his concern focused on the quantitative analysis of key symbols (such as ‘liberty’, ‘freedom’, ‘authority’) and he aimed to construct a

dictionary of symbols and their uses in texts. The idea, that dictionaries of symbol/word use could be created for coding and content analysis purposes, has also been central to developments in computer-assisted, electronic approaches to the analysis of texts since these were first formalised in the 1960s by Philip Stone and his colleagues through their General Inquirer programme (Stone et al., 1966).

The analysis of vocabulary/lexical choice continues to be a central component of many content analyses, often also drawing on a wider linguistic and discourse analytic framework. Van Dijk, for example, commences his discourse analytic study of press reporting of race with a lexical content analysis of headlines:

Words manifest the underlying semantic concepts used in the definition of the situation. Lexicalization of semantic content, however, is never neutral: the choice of one word rather than another to express more or less the same meaning, or to denote the same referent, may signal the opinions, emotions, or social position of a speaker. [...] Not only do they [words in newspaper headlines] express the definition of the situation, but they also signal the social or political opinions of the newspaper about the events. That is, headlines not only globally define or summarize an event, they also evaluate it. Hence, the lexical style of headlines has ideological implications. (1991: 53)

In a similar vein, Picard and Adams (1991) used content analysis to examine the characterisations of acts of political violence through such words as 'hijacker', 'bombing', 'shooting', 'seizure', 'assassination'. Picard and Adams distinguished between 'nominal characterisations', 'words that label or describe the acts in a manner that merely indicates what happened' (1991: 12), and 'descriptive characterisations', words that 'contain judgments about the acts or perpetrators within their denotative and connotative meanings' (1991: 12). Stahl (1995) used a lexical content analysis of *Time* magazine over a ten-year period to examine the use of explicitly magical and religious language in coverage of computers and related technologies. Fan (1988), Altheide (2002) and others (e.g. Einsiedel and Coughlan, 1993; Andsager, 2000; Hart, 2000;

Bengston et al., 2009) have also used vocabulary-focused computer-assisted content analyses for examining media coverage of a diverse range of topics and issues such as political campaign messages, anti-abortion pressure groups, AIDS, drug abuse and the environment.

With the rise of the digital media environment and the availability of digital communication content, word-focused computer-assisted content analysis techniques have rapidly become indispensable, offering efficient and powerful ways of analysing the large quantities of communication characteristic of the digital media environment. While the ease and speed with which comprehensive mapping of the vocabulary of communications content can now be carried out is tantalising, it is important to remember that any content analysis is only as good as the theory informing it.

Lexical content analysis essentially provides two foundations for understanding communications content: (1) the ability to determine the relative prominence of all the words used in a body of communication (and to deduce from that who (actors) and what (themes/topics) are prominent), and (2) the ability to examine correlations and relationships (e.g. how different actors are characterised (through the adjectives and verbs most closely associated with each actor-type) or the range and type of descriptors most closely associated with each topic, theme or frame).

Lexical analysis thus increasingly forms the basis for analyses of how various groups of people, issues or concepts are ‘framed’ or characterised in the public sphere. Atanasova and Koteyko (2016), for example, use lexical analysis as part of their identification of the dominant frames in British and German online newspaper coverage of obesity; Fløttum et al. (2014) use lexical analysis to examine ‘representations of the future in English language blogs on climate change’; while lexical analysis is also at the core of Baker et al.’s (2013) study of the representation of Islam in the British press and of Baker and Levon’s (2015) study of news reporting of masculinity.

Value dimensions and stance

A general category dimension which often forms part of content analyses is an attempt at classifying coverage in terms of value

judgements, or assessment of the ideological stance, accuracy or informativeness of coverage. In her analysis of Canadian press coverage of science and technology, Einsiedel (1992) analysed and coded the tone of stories in terms of whether they were predominantly ‘positive’, ‘negative’, ‘neutral’ or ‘mixed’:

Coders were instructed to read the story as they normally would and to indicate the ‘overall impression’ they got from the story. This impression could result from information conveyed in a number of ways including: what was highlighted in the lead, the balance (or imbalance) of consequences described, and the type of information or description included. For example, if a new treatment was presented in terms of being a ‘landmark discovery’, or compared favourably with current methods but at lower cost, these elements would result in a positive evaluation. A story coded as ‘mixed’ in tone was one which had both types of consequences described but neither as dominant in the lead, in the range of consequences described or in the descriptors applied. (Einsiedel, 1992: 93)

Numerous studies have focused on assessing the positive/negative or favourable/unfavourable stance of media reporting on anything from party politics, international relations and wider political issues to specific professions, public organisations and public services. Logan and colleagues (2000), in a study of science and biomedical news in the *Los Angeles Times* and *The Washington Post* from 1989 to 1995, for example, examined whether the key social actors in such coverage were portrayed in a generally favourable or unfavourable light.

Semetko (1989), in a study of television news coverage of the 1983 general election campaign in Britain, used a number of evaluative categories, including an evaluation of whether TV reporters’ commentaries on politicians’ campaign activities were predominantly ‘reinforcing’ (positive), ‘deflating’ (negative), ‘straight’ (descriptive) or ‘mixed’. This coding sought to analyse and evaluate reporters’ contextualising comments to determine whether: ‘in describing the scene they appeared to reinforce or deflate the activities or statements of politicians; the reporter

appeared to correct what a politician said; and whether there appeared to be any disdain in reporter comment' (Semetko, 1989: 465). Classifying media coverage as 'positive' or 'negative' has also been important in many agenda-setting studies which attempt to establish whether public attitudes or opinions are swayed one way or the other accordingly (e.g. Wanta et al., 2004).

Although evaluative categories in content analysis are often a variation on the relatively fundamental dichotomies of favourable–unfavourable, positive–negative, accurate–inaccurate, critical–uncritical, there are clearly many more possibilities, including the incorporation into more complex concepts such as framing (see below). Perhaps the main problem with evaluative categories is that they generally require a considerable degree of interpretation by the coder – they can rarely be deduced on the basis of single words or sentences, but require the coder to consider the 'overall tone' of a newspaper article or broadcast item. Unless very clear interpretation guidelines are laid down, content analysts often find it difficult to achieve a high degree of coder agreement in the coding of evaluative categories.

Frames and framing analysis

Increasingly, the relatively crude classification of value dimensions or stance into simple variations on positive/negative in content analysis studies has tended to assimilate the notion of stance into the more comprehensive and flexible concept of 'framing' (Entman, 1993; Reese et al., 2001). Nisbet and Lewenstein (2002: 359), in a comprehensive content analysis of biotechnology coverage in the American press, thus show: 'The character of biotechnology-related coverage has been overwhelmingly *positive* [emphasis added], with heavy emphasis on the frames of scientific progress and economic prospect.' A similar move towards incorporating stance under a framing typology can be seen in content analyses of political communications and the coverage of politics; compare, for example, Semetko's 1989 study, referred to above, with Semetko and Valkenburg's (2000) more nuanced study a decade later on the framing of European politics. While some of the same difficulties and subjectivities mentioned above in relation to the coding of value dimensions or stance in media content also apply in framing analysis (e.g. subjectivity in determining core frames,

difficulties in determining where one frame ends and another begins, overlap between frames), researchers have increasingly found ways of addressing some of these weaknesses (Matthes and Kohring, 2008; Entman, 2010; Nisbet and Newman, 2015), particularly through a clear articulation of how lexical choice relates to the constituent components of framing (problem definition, cause and cause agents, solution and moral evaluation).

5. Construct a coding schedule and protocol

Defining the categories which are to be analysed and constructing a formal coding schedule for the analysis and coding/classification of content are two dimensions of the same ‘step’ in content analysis. Once the categories have been chosen and defined, they need to be set out in a codeable form on a coding schedule. In the example content analysis coding schedule shown in [Figure 5.1](#), each row corresponds to a case (here: the individual news article) and the columns list the content analysis variables (here: date, newspaper, article type, etc.).

A content analysis protocol, also frequently referred to as the code-book, which sets out clear guidelines and definitions for the coding practice, also needs to be written before the content analyst can proceed.

The content analysis protocol sets out not only what variables are to be coded, and their associated values, but equally importantly it gives clear instructions about how the coding is to be done. It thus provides definitions, where appropriate, of the variables and their values, and it helps ensure that most fundamental aspect of content analysis, namely that it must be ‘replicable’: other researchers or coders applying the same rules and procedures to the same communications content should arrive at the same or very similar results. If they do, then the content analysis is not only replicable, but its results also meet the scientific criterion of reliability. The content analysis protocol then, in short, is the ‘manual’ that coders refer to when they code.

A range of examples of content analysis protocols or code-books are available in Neuendorf (2017), and Rebich-Hespanha et al. (2014) provide the full code-book used in their

comprehensive content analysis of the visual representation of climate change at <http://dx.doi.org/10.6084/m9.figshare.1213785>

6. Pilot the coding schedule and check reliability

Before embarking on a full-scale content analysis it is crucial to ‘try out’ the coding schedule on a small sub-sample. ‘Piloting’ and ‘fine-tuning’ the coding schedule are important in content analysis, just as it is important to pilot one’s research instruments, strategy or data collection tools in any other type of sociological analysis. Test coding of a small sub-sample often helps to reveal inadequacies and/or inconsistencies in the category systems of the coding schedule. Problems typically include: mixing different levels of classification; insufficient differentiation of a category system; confusing different units of analysis.

Examples of mixing different levels of classification include: confusing macro-categories and sub-categories within a single coding category, for example types of product advertising on television (cars, cosmetics, food, drinks, beer – ‘beer’ is of course a sub-category under ‘drinks’); confusing race and religion (Caucasian, Afro-Caribbean, Asian, Christian – any person belonging to one of these races can of course be ‘Christian’) or age and sex (male, female, children).

Where a category system may be insufficiently and inadequately differentiated, resulting perhaps in a large part of the coverage falling into just a single category, the results of a content analysis will offer few or no analytical pointers to the nuances of the coverage, and are consequently of little use to understanding the nature of the coverage. The solution is to make sure that categories are developed from and anchored in some familiarity with the content, and to redraw categories in a way that will usefully accommodate or capture the nuances of the coverage.

The opposite problem, starting out with a highly differentiated set of codes only to find that few of these are present in the communications content to be coded, is equally problematic and unproductive. The answer in both cases is to gain some insight – even if just in the form of browsing through a selection – into the content which is to be analysed in order to get a general sense of

the range of actors, topics and other dimensions likely to occur and to use this to inform the construction of coding variables and their values. Moreover, it is perfectly feasible – and indeed often desirable – to take a partially inductive approach and to simply add new values to a variable such as ‘actors/sources quoted’ as the coding progresses and as new actors/sources appear.

Confusing different units of analysis results in loss of ability to relate different categories and dimensions to each other. A mistake which is commonly made when researchers first set out to construct a coding schedule, particularly for the analysis of advertisements, is to confuse the *advertisement* as a unit of analysis with the *character(s)* appearing in the advertisement as the unit of analysis. If coding categories are constructed along the lines of subject of advertisement, scheduling time of advertisement, number of male and/or female characters, age of characters, race/ethnic origin of characters, dress code of characters, etc., the problem is that although the analysis would provide data on the distribution of male/female characters, young/old characters, etc. it would not be possible to say whether the young ones were predominantly smartly dressed black male characters, the older ones predominantly white, conservatively dressed, female characters, etc.; in other words, this coding strategy would not facilitate cross-referencing of the actor characteristics.

Piloting should also include some checks on how reliable the coding process is. Reliability in content analysis is essentially about consistency: consistency between different coders (inter-coder reliability), and consistency of the individual coder’s coding practice over time (intra-coder reliability). If checks on reliability reveal considerable divergence in how the same material is being categorised by different coders, or by the same coder over time, then it is necessary to tighten up on the coding guidelines, to make the coding instructions and definitions clearer. There are several different ways of checking or measuring reliability in content analysis, from a simple check on the percentage of coding decisions on which coders agree to more complex formulae which take into account the degree to which a certain level of agreement would occur simply by chance in a set number of coding decisions. Scott (1955) offers one such statistical test (referred to as Scott’s

Pi statistic), which is relatively easy to apply (see also the helpful discussion of reliability testing in [Chapter 6](#) of Neuendorf, 2017).

7. Data preparation and analysis

The act of coding involves reading/viewing each case (e.g. news article, advertisement, programme, webpage, etc.) and then entering the relevant codes straight into an appropriate data-analysis program.

Case Number	Date dd/mm/yy	Newspaper	Article type	Reporter type	Topic	Actor 1	Actor 2	Actor 3	Stance
1									
2									
3									

Figure 5.1 Example of a coding schedule/coding spreadsheet

Suitable programs for managing and analysing content analysis data include the powerful statistical analysis program SPSS (Statistical Package for the Social Sciences) as well as the widely available Microsoft Excel and similar. Most of these programs have a very similar-looking spreadsheet layout, which displays each case as the row and each variable as the column. Content analysis coding is then a matter of entering the coding values relevant to each variable, case by case and following the instructions set out in the content analysis protocol/code-book. [Figure 5.1](#) shows a content coding schedule set up in the spreadsheet format of programs such as SPSS or Excel, with the first three rows/cases of the analysis and the first few variables (date, newspaper, etc.) to be coded. The relevant codes, as described in the content analysis protocol, are then entered into the blank boxes, and we eventually – when the coding has been completed – end up with a spreadsheet of numbers that refer to the values outlined in the content analysis protocol.

In an SPSS data file or Excel spreadsheet, each column corresponds to the individual variables analysed (date, newspaper, type of article, length of article, main actor, main theme, etc.) and

each row corresponds to each individual ‘item’ (e.g. a news article, an advertisement, etc.).

How should the data be analysed? This depends on the objectives and research questions posed for the research. The data analysis needs to address the questions or hypotheses set out in the statement of research objectives. The statement of research objectives should thus ideally make it clear what kind of comparisons across different variables will be examined. These may, for example, include: comparisons across different media and types of content; comparisons of coverage across different time periods; comparisons of the media content of different countries; etc.

While the definition of the research problem should indeed give a good indication of what kind of analyses need to be done, it is also important to be flexible and open-minded in the process of analysing the data. In other words, it is quite possible that while examining basic trends in the coded categories it becomes apparent that some dimensions seem to co-occur, or that some dimensions only appear in certain parts of the coverage. Such discoveries, in turn, call for further analyses, perhaps with a different grouping of dimensions, or with different axes of comparison.

A good starting point for any content analysis is to establish simply the distribution or frequencies for each of the main categories analysed (e.g. type of medium, type of content, actors, topics, frames etc.) before moving on to conduct more complex crosstabulation analyses comparing two or more dimensions with each other.

8. Report findings and conclusions

As in all academic research, the final objective is to publish the research or to make it publicly available in some other form. The write-up of the research needs to be fully transparent about its own method and approach: it must be clear to the reader what the theoretical framework is, what the sampling rationale was, what sample was analysed, how the content coding schedule was constructed and how the variables included relate to the overall

objectives of the research, how the coding schedule was pilot tested, what the coder reliability was (and how it was calculated), what analyses were carried out and what was found. The presentation of content analysis results is best done either with tables or graphs. Finally, the conclusion should summarise the key findings and relate these to the problem/questions articulated at the beginning of the report, and should include critical reflection on how well the analytical approach succeeded in answering the objectives, as well as critical reflection on what was learned about the appropriateness of the method and the theoretical framework for this type of analysis.

Computer-assisted content analysis

Content analysis, like many other methods in media and communication research, has not been slow to take advantage of the change to a predominantly digital media and communications environment. As we have seen in this chapter and particularly in the examples given from the recent decade or so of content analysis research, many of the steps involved in content analysis (from identification of relevant communications content and sampling of relevant content to using simple lexical analysis for initial overviews and development of coding categories, to the management of data and analyses performed on the communications data) have long since ceased to be manual or pen-and-paper-based tasks, and are now done by computer and relevant computer applications or programs. We discuss some of these in more detail in [Chapter 11](#). Here we simply wish to refer briefly to what are undoubtedly some of the most exciting developments in content analysis, namely the prospect of automated content analysis procedures or algorithms capable of capturing and analysing large amounts of communications data, and to summarise key trends and relationships in such data without the use of human coders or manual coding on a unit-by-unit basis.

Developments in computer-assisted communications analysis – which have a long pedigree dating back to the 1960s (e.g. the General Inquirer computer program created by Philip Stone and

his colleagues) – come in an increasingly diverse range of approaches and are referred to under a variety of labels such as automated, algorithmic and ‘big data’ communications analysis. Helpful overviews with particular relevance to content analysis in media and communications research are those of Neuendorf (2017), Günther and Quandt (2016), Popping (2016), Thelwall (2016), and Guo et al. (2016).

Günther and Quandt (2016), surveying key approaches to automated text analysis, distinguish between deductive approaches, which start from a set of known categories, and inductive approaches, which use computer analysis of large amounts of text to identify key lexical and other characteristics that can then be used to inform and build particular analytical or coding categories.

Deductive approaches can be divided into text mining/text extraction approaches, which use logical operators and regular expressions to retrieve relevant and specified occurrences, and dictionary approaches, where sets of terms/words are identified as indications of particular themes or sentiments (see also sentiment analysis, e.g. Thelwall, 2016) and where dictionaries can be fed to computer analysis applications which then proceed to identify and quantify the presence of themes/sentiments or other clusters as defined by the dictionary in large amounts of text.

Inductive approaches are automated approaches which make no prior assumptions about the texts and proceed with a combination of lexical analysis (word frequencies) and statistical clustering techniques. Günther and Quandt (2016: 77) distinguish two types: *document clustering* and *topic models*. Document clustering approaches, they note, build on word frequencies to allocate ‘documents into thematic groups by means of a cluster analysis’. Topic models ‘also aim to discover links between the documents but work with a statistically more sophisticated model. Based on a multi-level probability model, this approach describes each document as a mix of several latent topics and provides a thematic representation of the text collection’.

The undoubtedly key advantages of ongoing developments in computer-assisted, automated or algorithmic content analysis are to do with increased savings in time, effort and cost, enhanced efficiency and reliability of coding and analysis, and their ability to

capture and analyse the very large flows and amounts of communication, ‘big data’, that characterise the digital communications landscape. But, as Günther and Quandt (2016: 86) rightly remind us, there are also clear limitations:

computers do not understand texts the way human coders can, and are only as good as the algorithms they perform. [...] Implementing methods that originated in disciplines with significant differences to the social sciences therefore requires careful preparation. A solid understanding of the underlying statistical processes is needed to be able to assess how they will work on a given dataset and how their results can be interpreted. We need to be careful not to rely blindly on the power of algorithms to achieve large sample sizes – welcoming their benefits, but keeping their limitations in mind.

In summary then, the opportunities afforded by developments in computer-augmented content analysis for exciting gains in speed, reliability and, not least, sheer ability to capture and analyse vast amounts of communication are immense. But many of the key challenges, present since the early days of content analysis, of handling the amazing flexibility of language/communication, and the concomitant problems of ambiguity and openness to multiple interpretations, are still with us. It is fitting, then, to finish with Neuendorf’s (2017: 302) conclusion to her discussion of future directions for content analysis:

The future of content analysis is bright with ‘big data’ potential – and also fraught with possible pitfalls of overreliance on facile technological solutions. [...] Our enthusiasm for seemingly unlimited opportunities for the systematic analysis of online text, images and moving image communications should be tempered with the realization that, although now easier to execute, our analyses are only as good as our human-generated conceptualizations, operationalizations, and theoretic underpinnings.

Conclusion

Content analysis is a flexible research technique for analysing large bodies of communications content. It follows a clearly defined set of steps, one of its attractive features, but is also vulnerable to abuse. Fundamentally, those choosing to use content analysis for the study of media content should recognise that content analysis is little more than a set of guidelines about how to analyse and quantify media content in a systematic and reliable fashion. What it does not, and cannot, tell us is what dimensions (categories) of content to analyse, or how to interpret the wider social significance or meaning of the quantitative indicators generated by content analysis. Both of these aspects need to be drawn and developed from the theoretical framework circumscribing one's study, a framework which, among other things, must articulate the relationship of the communications content analysed to its wider context of production and/or consumption.

Summary

- Content analysis is a method for the systematic and quantitative analysis of communications content.
- Content analysis is well suited for analysing and mapping key characteristics of large bodies of communications content, and it lends itself well to the systematic charting of long-term changes and trends in such content.
- While early uses of content analysis aimed principally at finding out about the intentions of the originators of media messages, the aim of content analysis in media and communication research has more often been that of examining how news, drama, advertising and entertainment output reflects social and cultural issues, values and phenomena. Content analysis is well suited to integration into larger research efforts which also involve a range of other methods of enquiry (surveys, experiments, participant observation, qualitative and ethnographic audience research).
- The process of content analysis can be broken down into eight consecutive steps: (1) define the research problem; (2) review

relevant literature and research; (3) select media and sample; (4) define analytical categories; (5) construct a coding schedule and protocol; (6) pilot the coding schedule and check reliability; (7) data preparation and analysis; (8) report findings and conclusions.

- In conceptual terms, the most taxing aspect of any content analysis is to define the dimensions or characteristics which should be analysed. While any number of communications content characteristics could be categorised, counted and quantified, only categories and characteristics that relate directly to the overall research questions or hypotheses of the research should be coded and analysed.
- While the categories singled out for analysis will depend on the purpose and objectives of one's research, content analyses in communication research have often included, in addition to basic 'identifier categories', one or more of the following substantive dimensions: (a) actors/sources and their attributes; (b) subjects, themes, issues; (c) vocabulary/lexical choice; (d) value dimensions and/or ideological/political stance; and (e) frames.
- The method of content analysis offers a set of guidelines about how to analyse and quantify media content in a systematic and reliable fashion. What it does not, and cannot, tell us is what dimensions (categories) of content to analyse, or how to interpret the wider social significance or meaning of the quantitative indicators generated by content analysis. Both of these aspects need to be drawn and developed from the theoretical framework circumscribing one's study, a framework which, among other things, must articulate the relationship of the communications content analysed to its wider context of production and/or consumption.

Further reading and resources

Neuendorf, K. A. (2017). *The Content Analysis Guidebook* (2nd edition). London: Sage.

The second edition of Kimberley Neuendorf's *Content Analysis Guidebook* provides a comprehensive updating of her classic

introduction to content analysis, including discussion of both classic content analysis and advances in computer-assisted content analysis (CATA). It introduces all aspects of the process of conducting content analysis, backed by instructive examples of coding schedules, code-books, reliability testing, etc.

Other classic and leading introductions to content analysis are Krippendorff (2013) and Riffe et al. (2014):

Krippendorff, K. (2013). *Content Analysis: An Introduction to its Methodology* (3rd edition). London: Sage.

Originally published in 1980 and now available in a much expanded and revised third edition, Krippendorff's introduction to content analysis continues to be one of the most comprehensive and rigorous accounts of this method.

Riffe, D., et al. (2014). *Analyzing Media Messages: Using Quantitative Content Analysis in Research* (3rd edition). London: Routledge.

Krippendorff, K., & Bock, M. A. (eds) (2008). *The Content Analysis Reader*. London: Sage.

Accompanying Krippendorff's (2004) *Content Analysis* book, this reader offers a fine and comprehensive collection of original publications thematically organised to address key dimensions, including the history and conception of content analysis, unitising and sampling, coders and coding, reliability and validity, and computer-aided content analysis.

The Pew Research Center's Journalism and Media site at www.journalism.org features a wide range of media monitoring and analysis reports, including content analysis-based research. Their media monitoring and content analysis-based reports, going back many years, are notable for their succinct accounts of methodology, including details about sampling, units of analysis, coding and reliability testing.

A meticulous and detailed example of a code-book is that accompanying Rebich-Hespanha et al.'s (2015) longitudinal content analysis of visual elements in news coverage:

Rebich-Hespanha, S., Rice, R. E., Montello, D. R., Agniel, F., Retzloff, S. & Tien, S. (2014). *Themes and Visual Elements in News Imagery about Climate Change: Codebook*. Retrieved 23 April 2018, from <http://dx.doi.org/10.6084/m9.figshare.1213785>.

CHAPTER 6

Critical Discourse Analysis

Introduction

In media and cultural studies there has been a growing interest in the particular set of tools for analysing texts and spoken language that is termed Critical Discourse Analysis (CDA), an approach founded in linguistics and associated for the most part with a number of key authors (Kress, 1989; van Dijk, 1991; Fairclough, 1989; Wodak, 1989; van Leeuwen, 1996; Caldas-Coulthard, 1994). One reason for this interest is the fact that CDA allows us to carry out a more systematic analysis of texts and language. Guided by linguistic expertise, CDA can allow us to reveal more precisely how speakers and authors use language and grammatical features to create meaning, to persuade people to think about events in a particular way, sometimes even seek to manipulate them while at the same time concealing their intentions.

Critical Discourse Analysis offers the promise of showing exactly what features of language, what language choices, have been used to accomplish particular kinds of communicative aims. Key here is the notion of ‘language choices’. CDA has a number of slightly different approaches largely based on the theoretical and subject interests of the key authors listed above. One key inspiration for CDA, however, has been the linguistics of Halliday (1978), originally applied in a more critical form by critical linguists (such as Fowler, 1987; Kress, 1989). Halliday was interested in the way that when we code events in language this involves choices among options that are available in grammar. These choices shape the way that reality is represented. For example, it is important which terms we use to describe people. Why might we want to emphasise that a soldier is a ‘father’ and ‘husband’ but not

do the same for the enemy? How does this coding of events in language shape how the world appears? Consider these two hypothetical news headlines:

Young people attack buildings

Youths attack family homes

Both of these describe the same event. But different language choices have been made to represent the attackers and the places they attack. In the second, ‘youths’ sounds much worse than ‘young people’. Youths brings connotations of anti-social behaviour whereas ‘young people’ sounds more positive and would be unlikely to be used in this case. In the second headline the use of ‘family homes’ also brings certain connotations. Here family suggests something moral and cherished, something sacred. In fact families can be dysfunctional, violent and themselves criminal and provoking. But we often find ‘family’ used in the news media to connote something that should be protected, something that suggests love and humanity.

In the same way, mentioning a soldier as a ‘father’ or ‘husband’ can bring the same set of associations. It therefore humanises him. It suggests that he is an ordinary decent person. In contrast the enemy will not be called such things but rather will be anonymised as ‘an attacker’, ‘an enemy soldier’ or a ‘militia member’. It is language choices among available options that allow us to foreground certain aspects of identities and background others. Doing CDA we look closely at language and grammar to show how such processes are able to shape our understandings of events and persons.

CDA offers a number of tools to reveal the ideas, values and opinions in texts and speech that may not necessarily be obvious on first reading or hearing. Some of these tools will be presented in this chapter. Often these meanings are ‘buried’ in the texts as their producers seek to conceal or evade making them obvious, for example in political rhetoric where politicians harness language for the purposes of persuasion. But this process of using language to persuade and influence is by no means confined to such official talk and is characteristic of everyday conversation, news and other media texts.

CDA takes an overtly critical stance towards language and society in general. Much linguistic enquiry takes the form of describing language features, of creating inventories of the nature of language or processes of language use. CDA seeks in the first place to be critical of the way that language is used for particular purposes. It is through such criticism, its proponents believe, that we can bring about social change. Kress (1996: 15) argued that this view of language is a 'political project'. Of course this motivated view of research may sound 'unscientific' since it lacks the objective stance to what we study which is normally required by academic ideals. But those who carry out such research would argue that this overt acknowledgement of its agenda is in fact its advantage, since researchers generally conceal exactly why they are carrying out research (Kress, 1990: 85).

In fact there is no neutral way to represent the world through language as all the words we use are motivated and laden with certain kinds of meanings and values. Even if a person says 'it a sweltering day', they have clearly chosen an adjective that is subjective and evaluates. Yet the untrained ear or eye may not be able to detect exactly how this process works in the language they encounter every day, even though we may often get the sense we are being encouraged to think in a particular way. In such cases, we may be aware *what* speakers or text producers are doing but not exactly *how* they do it. It is how language can be used to subtly convey ideas and values that can be drawn out by CDA. And through this we can get a much clearer idea of what is actually being conveyed.

The meaning of discourse

The term 'discourse' is central to CDA. In CDA the broader ideas communicated by a text are referred to as discourses (van Dijk, 1993; Fairclough, 2000; Reisigl and Wodak, 2001). These discourses can be thought of as models of the world, in the sense described by Foucault (1980). The process of doing CDA involves looking at choices of words and grammar in texts in order to discover the underlying discourse. One example of such a discourse is 'immigrants are a threat to a national culture'. This is a

model of events associated with the notion that there is a unified nation and an identifiable national identity and culture. Normally this discourse encompasses a mythical proud history and authentic traditions. A different discourse framing the same topic is ‘immigrants enrich the existing culture’.

We can see the first more negative discourse in the following editorial from the *Daily Mail* (25 October 2007) titled ‘Britain will be scarcely recognisable in 50 years if the immigration deluge continues’. The item goes on to discuss how ‘we’ need to ‘defend’ our ‘indigenous culture’. Who ‘we’ are remains unspecified as does the nature of our ‘indigenous culture’. In Britain’s evolving multicultural make-up and the diversity of ways of life and cultural values that have long been present based around social class, regional and other groupings, how can we pin such factors down? In the headline immigration is described using the term ‘deluge’, a metaphor that draws on the idea of masses of rainfall that overspills, creating floods and damage. While the author of this text is keen to point out that they are not racist, everything else they say suggests that they are. Of course it is clear that this *Daily Mail* text is anti-immigration and most likely racist. But by looking at the word choices in it we can pinpoint exactly *why* this is so, which is even more important in text where the discourse is less obvious.

There are other discourses for thinking about nation and national identity. A sociologist or historian would tell us that what we think of as nation and national identity are for the most part invented, with only a relatively short history (Gellner 1983; Hobsbawm, 1984). Here the proud history and indigenous culture under threat by the immigrants, as described in the *Daily Mail* article, is itself not factual at all, but simply a discourse that has come to be established in the interests of particular parties. Marxist thinkers would point to such an emphasis on difference on the basis of national identity as concealing actual divisions in society between the rich and the exploited and poor. It therefore serves the interests of the powerful. We can see therefore that CDA allows us to reveal just what these interests are even if at the surface level such views are denied.

Van Leeuwen and Wodak (1999) suggest that we should think about discourses as including, or comprising, kinds of participants, behaviours, goals, values and locations. We see this in our

example from the *Daily Mail*. This discourse involves participants: real British people and immigrants. It involves values or an 'indigenous culture'. It specifies that 'we' must 'defend' this culture. This discourse represents a 'we' who should not see incomers as opportunity for change and growth, nor as fundamentally the same as ourselves on many levels, but as a threat to be repelled and something that will change 'us'.

What we can see from the *Daily Mail* example of the national 'we' versus the deluge of immigrants is that discourses do not simply mirror reality but, as Fairclough and Wodak (1997: 258) point out, bring into being 'situations, objects of knowledge, and the social identities of and relations between people and groups of people'.

Fairclough (2000) explains that these discourses, such as of national unity or racial or cultural superiority, project certain social values and ideas and in turn contribute to the (re)production of social life. In other words it is through language that we constitute the social world or, put simply, how we talk about the world influences the society we create, the knowledge we celebrate and despise and the institutions we build. For example, if in a society the discourse that dominates our understanding of crime is that it is simply wrongdoing which requires retribution, then we build prisons and lock people away. Yet it is the case that most people who end up in prisons are from poor or more vulnerable sections of the population. Sociologists and criminologists will tell us that if we are born black in countries like Britain or America then our life position will mean that we are much more likely to end up in prison. This is because of the complex relationship of poverty, race and inequality. Yet we do not organise our societies on the assumption that crime is associated with such factors. Nor do we tend to associate crime with what global corporations provoke in Third World countries, or the acts of our governments when they go to war or reorganise society in the interests of the wealthy. It is our dominant discourse of crime that means we build prisons, use the police in the way that we do, take particular crime prevention measures and vote for political parties that will be tough on crime, rather than creating societies where it is less likely to take place. In this sense we can see that discourses represent the interests of specific groups. In the case of crime it will be in the interests of those who have

wealth and power to conceal its relationship to factors such as race and poverty.

Power and ideology

The question of power has been at the core of the CDA project. The aim is to reveal what kinds of social relations of power are present in texts both explicitly and implicitly (van Dijk, 1993: 249). Since language can (re)produce social life, what kind of world is being created by texts and what kinds of inequalities and interests might this seek to perpetuate, generate or legitimate? Here language is not simply a neutral vehicle of communication but a means of social construction. Therefore discourse does not merely reflect social processes and structures but is itself seen to contribute to the production and reproduction of these processes and structures. As Fairclough and Wodak (1997: 258) state, 'the discursive event is shaped by situations, institutions and social structures, but it also shapes them'.

Along with the idea of discourse, writers like Fairclough (1995) speak of 'ideology'. This is a term that is derived from the work of Marx and Gramsci which, like discourse, is used to capture the way that we share broader ideas about the way the world works. Ideology here is used to describe the way that the ideas and values that comprise these views reflect particular interests. The aim of CDA is to draw out the ideologies, showing where they might be buried in texts. Drawing on Gramsci (1971), Fairclough argued that, while many institutions and forms of social organisation clearly reflect ideological interests, one place where we can observe exactly how these interests operate is in language. This is simply because language is a common social behaviour where we share our views of how the world works, what is natural and common sense. It is through language that we share the idea of things like 'British culture', nationalism and what immigrants are like. People and institutions then draw on this language as it appears to be neutral and common sense.

Ideology characterises the way that certain discourses become accepted in this way and therefore obscure the way they help to sustain power relations. Ideology hides the nature of our unequal

society and prevents us from seeing alternatives. It limits what can be seen and what we think we can do. In present common sense we take for granted that ‘business’ should be at the heart of everything, that it is the lifeblood of our societies and of human existence. Such is the power of this view that alternatives are viewed with ridicule.

Ideologies can be found across whole areas of social life, in ideas, knowledge, institutional practices. In the case of ‘business’ this ideology comes to dominate everything in society, even how we run schools and hospitals. One of the authors at the time of writing had a daughter in primary school where she would plan her learning using corporate language such as weekly strategies and targets, and assignments often took the form of corporate-style presentations done in an open classroom as at a sales fair.

Halliday (1978) believed that language can create dispositions within us. Writers like Fairclough, following from Foucault, believe that one way to put this is that language constitutes us as subjects (1994: 318). This is because the person who comes to think through the discourses of business is thinking of themselves, their identity, their possibilities through this discourse. In this sense the ideology which champions business as a natural priority for society and culture has become infused deeply into everyday thinking and practices, as seen in the example of how things get done in schools.

We can summarise what CDA is and what it does using this quote from Ruth Wodak, one of its pioneers:

CDA may be defined as fundamentally concerned with analysing opaque as well as transparent structural relationships of dominance, discrimination, power and control as manifested in language. In other words, CDA aims to investigate critically social inequalities as it is expressed, signalled, constituted, legitimised and so on by language use (or in discourse). (Wodak, 2001: 2).

Analysing texts and discovering discourses

In CDA, texts are analysed in terms of the details of the linguistic choices that they contain as these allow the analyst to reveal the broader discourses that are realised. What follows is a list of tools drawn from CDA that allow us to ask particular questions about the lexical and grammatical choices found in written and spoken texts. Not all of these have to be used every time we carry out an analysis, only those that are useful in each particular case. In each case we give examples to illustrate the point.

Lexical analysis

To begin with, following Kress (1989) and Fairclough (2000) we can analyse the basic choice of words used by the text producer, referred to as simple lexical analysis. In essence, we ask what kinds of words are used.

Here is a short extract from a report in the British *Daily Mail* (7 June 2016). The story was written just before people in Britain were to vote on whether to remain in the European Union or whether to leave. One key issue for the 'leave' campaign had been the claim that immigration was a huge problem for Britain. Here we begin to show how it is useful to think more carefully about individual words that are used. In what follows in the chapter we show how to be more systematic in how we go about this.

David Cameron was mauled last night over immigration by a Tory voter who accused him of betraying supporters by allowing parts of the country to descend into 'no go areas'.

The Prime Minister was repeatedly battered on the issue by a live studio audience as he insisted that cutting ties with Brussels was a 'bad way' to cut numbers entering the UK.

In a bruising ITV referendum debate where Mr Cameron was told his Brussels renegotiation had been a 'humiliation', he pleaded with people not to vote for the 'Little England' of Nigel Farage.

But father-of-three Harry Boparai, who apparently works for British Airways at Heathrow, told the Prime Minister he had allowed 'uncontrolled immigration', which had caused his family's quality of life to plummet.

In this text it is fairly clear that the then Prime Minister David Cameron is being represented negatively. But we can use lexical analysis to point to some of the words that show how this is accomplished.

In the first place, we are told that Cameron was ‘mauled’ and ‘battered’ in a ‘bruising’ debate. Such terms are highly evaluative, drawing on metaphors of a physical fight. And it is emphasised that this was ongoing as he was ‘repeatedly battered’. Another reading of what actually happened could, in fact, see this in a different way – that he admirably sustained a stance throughout that refused to accept prejudices and scaremongering against immigrants.

There is also a clear difference in how different participants are depicted as speaking. At the debate Cameron is ‘told’ his renegotiation had been a humiliation. The father-of-three Harry Boparai ‘told’ Cameron he had allowed ‘uncontrolled immigration’. The word ‘told’ here is used to describe the way Cameron is spoken to. These are called ‘quoting verbs’. ‘Told’ sounds neutral compared to other words the author could have written such as ‘claimed’ or ‘argued’. After all the idea that there has been uncontrolled immigration is based on the speaker’s opinion and not any established facts. In contrast we see how Cameron is depicted as speaking, using ‘pleaded’ and ‘insisted’. People who plead and insist sound neither neutral nor simply to be reporting information dispassionately.

We find another use of a metaphor where ‘parts of the country’ have been allowed to ‘descend into “no go areas”’. No further information is given about what this means. The metaphor ‘descend’ (clearly nothing has actually physically descended) allows many complex issues and processes to be lumped together. Immigration is a complex process, which has indeed involved many people from within the EU going to work in Britain. It has also involved the arrival of asylum seekers from conflict zones. But how this relates to ‘no go areas’ is not clear. Indeed, Britain has many inner city areas which are highly impoverished and where crime rates are very high, where there are extremely high levels of unemployment and social problems such as drug issues. But these tend to relate to complex issues including wider changes in the structure of the economy and forms of politics which have shifted

to neoliberalism where full employment and social welfare are no longer priorities (Jessop, 2007).

Yet in the last paragraph of the extract, immigration is directly related to the plummeting of a family's standard of life. The use of the term 'family' here is important as is the decision to include the words 'father-of-three' and reference to where the speaker works. Above we discussed the way that British culture was being swamped by immigration. In this present text we find the same discourse. And typically in popular political thinking, as is found in these kinds of news reports, things like 'the family', 'motherhood' and 'local communities' are used to characterise the wholesomeness of the culture that might be under threat.

In sum, the story presents a very specific viewpoint and interpretation of a question-and-answer session with a politician. The actual nature of what is asked and what is said in reply is not evaluated overtly. Rather language is used to represent an outraged British public, exemplified by the hard-working father-of-three telling the politician in honest terms that immigration has both devastated parts of the country and decreased a family's living standards. The politician is clearly on the defensive, with his insisting and pleading in the face of the mauling from the public. Overall the discourse is one of the monolithic British culture and fixed way of life. This communicates a discourse where complex social and economic issues are unproblematically loaded onto immigration. A short time after this article was published just over half of British voters expressed a decision to leave the EU. The predominance of this discourse was arguably one very influential reason for that. There was no real argument for what would happen once leaving was achieved regarding the exact nature of international trade, finance, population movement and ultimately the nature of the Union of England, Scotland, Wales and Northern Ireland. We might argue that this was because certain discourse became more foregrounded.

Overlexicalisation

Overlexicalisation is where there is an abundance of particular words and their synonyms or where there is evidence of over-

description. This is normally evidence that something is problematic or of ideological contention. A simple example of overlexicalisation is:

Male nurse

Female doctor

Why do these job titles require further elaboration in terms of gender? While things have changed in society as regards accepted gender roles and who should do what kind of job, these terms reflect a previous time where men were doctors and women were nurses. It therefore signals a time when male nurses and female doctors represented a deviation from social convention or expectation.

We can therefore, look at where things in texts are over-explained, or where we find the same kinds of words repeated. For example, Teo (2000) carried out an analysis of the representation of drug dealers in the press. He found that there was an overlexicalisation of words for youth.

'looks and sounds like is he is about 13', 'The 16 year old', 'five other youths', 'two young Asian gang members', 'some as young as 12', 'these kids', 'their leader at 13', 'had beaten two murder charges by 17', 'at least two of the accomplices were of the same age (13 and 14)'

Of course such facts about age would be expected as the basic information of reporting. But why this excessive use of such terms? Emphasising youth in this way could be seen as one way to get sympathy. But Teo rejects that being young is a mitigating factor here. Rather this adds to the moral panic. 'The kids are out of control', 'What is society coming to?' 'We need greater discipline law and order in this society'. All these are common news themes that of course distract from broader social changes and the causes of what we call criminal behaviour.

Dunmire (2005) studied the speeches of former American President George W. Bush. Here is one of his examples:

The threat comes from Iraq. We resolved then and we resolved today to confront every threat from any source that could bring sudden terror and suffering to America.

While there are many dangers in the world, the threat from Iraq stands alone because it gathers the most serious dangers of our age in one place. Knowing these realities America must not ignore the threat gathering against us. Today in Iraq we see a threat whose outlines are more clearly defined and whose consequences are far more deadly.

Here there is overlexicalisation of ‘the threat’. In fact at the time no actual threat had been made against the US. But this overuse of the term suggests a point of anxiety, of contention and immediately should signal cause for concern as to the nature of what we are being told and why. The strategy in this case, of course, is to create an imagined global threat of terror.

Naming and reference

What we begin to do in the following sections is to show how we can be more systematic in our lexical analysis. In the example of David Cameron being attacked by the British public for uncontrolled immigration we looked at how participants were represented in the case of the man who was described as a father. We also looked at what the participants are doing in the text. We showed how this had an important role in communicating a particular discourse. Such an analysis of the naming of people and of what people are represented as doing in a text can be carried out more rigorously. This is a useful process as it allows us to create an overview of how different participants are represented differently. It also helps us to identify what is missing from a text or what has been foregrounded. To begin with, we look at naming strategies.

Kress (1989) and Fairclough (2003) have shown that the way that people are named in a text or speech can have significant impact on the way in which they are viewed. We have a range of naming choices that we can make when we wish to refer to a person. These allow us to place people in the social world. These

choices can allow us to highlight certain aspects we wish to draw attention to and silence others.

For example, take the following sentence:

Muslim man arrested for fraudulently claiming benefits

In fact there were many other possibilities that could have been used to characterise the man: an Asian man, a British man, a Midlands man, a local office worker, a Manchester United supporter, a father of two young daughters, a man named Mazar Hussein. Each of these can serve psychological, social and political purposes for the writer and reader (Reisigl and Wodak, 2001: 47).

This is shown in the following:

Father of two daughters arrested for fraudulently claiming benefits

In this second case the meaning is different. In the first case the headline locates the story in a news frame emphasising the man as 'other', part of something that is problematic. From 2005 Muslims became represented through news frames that emphasised their threat to the larger society and resistance to wider cultural values (Poole and Richardson 2006). Since the man was born in Britain the headline could equally have said that he was a British man. But this would have appeared odd and would have suggested 'one of us'. Crime reporting usually involves creating moral others, so that the perpetrator is not like us. In the second headline, in contrast, referring to the man in the first place as a father humanises him and has the opposite effect: that possibly the fraud was justified.

Van Dijk (1993) has shown that how the news aligns us alongside or against people can be thought of as what he calls 'ideological squaring'. He shows how texts often use referential choices to create opposites, to make events and issues appear simplified and, often, in order to control their meaning. For example, phenomena can be associated with old or new, future and past, etc. Van Dijk specifically gives the examples of sexual assaults in the press. Where the man is considered guilty he will be referred to as a 'sex fiend', 'monster' or 'pervert'. In this case he will *attack* innocent women who will be referred to as 'mother',

'daughter', 'worker'. However, where the man is considered innocent the referential strategy will be different. In this case the woman will be referred to as 'divorcee' or through physical features such as 'busty'. In this case she will provoke an innocent man referred to as 'hubby', 'father of four', 'worker'. In this way the referential strategy becomes part of the way we perceive people and their actions.

In the following example we can see how such an ideological square is set up in a text. This a short extract from a news report from the British *Daily Mail* (5 March 2016) on the refugee situation in Sweden.

Stockholm railway station isn't a nice place at nine on a winter evening. Smart young Swedes run to catch trains to the suburbs watched by groups of men in hoodies leaning against pillars in the shadows as they swap plastic bags of cannabis or heroin for wads of krona, the national currency.

Occasionally, police in twos and threes patrol through this scene of Nordic Noir as chimes ring from the nearby 16th century St Clare's Lutheran church, with spires piercing the dark sky.

Yet the police rarely stop and no one takes much notice of them anyway. 'I am here to buy cannabis with my friends,' Mustapha Drumme, a 31-year-old Ghanaian who came to Sweden seven years ago told me, as he hung around the station amid other African and Arab migrants.

On the one hand we have 'smart young Swedes'. At Stockholm station in the evening it is very unlikely that it is only young people. And in the capital many of the people in the station may not be Swedish. They are represented as running to catch trains to the suburbs, presumably travelling back home from work. We have the Swedish setting marked by the chimes ringing from the '16th century St Clare's Lutheran church, with spires piercing the dark sky'. In this setting are placed 'groups of men in hoodies', who are Ghanaian, African and Arab. These men 'le[a]n against pillars in the shadows', hang around the station, and watch the young Swedes. They also 'swap plastic bags of cannabis or heroin for

wads of krona'. What we find here are features of persons and settings used to set up a contrast.

So on the one hand the non-immigrants are described collectively as 'smart young Swedes' who go home from work in a setting which is marked for being traditionally Swedish through the mention of the church. On the other hand the immigrants from diverse places are represented as a collective, sat in shadows and watching; clearly not a natural part of the scene.

What could have been emphasised in such a story is the way that immigrants are not integrated. In Sweden immigrants have great trouble finding work and it is very difficult to learn Swedish. And it is also likely that some of the commuters also included some immigrants who had indeed found work. In fact Sweden has had a hugely open policy on immigration about which it has been very proud. Yet clearly this story sets up an opposition to support a discourse of a natural monolithic Swedish people, living alongside a shadowy and vaguely threatening immigrant population.

Classification of social actors

When carrying out analysis of participants and how they are represented, we can be more systematic by drawing on van Leeuwen's (1996) inventory of social actors.

Personalised or impersonalised

We can ask to what extent the participant is personalised or impersonalised. This can be seen in the following two sentences:

Prof John Smith requires academic staff to give notification of strike action

The University requires academic staff to give notification of strike action

In the second case impersonalisation is used to give extra weight to a particular statement. It is not just a particular person but a whole institution that requires something. It is, simply, not personal. Of course this conceals certain issues. We could argue that the staff, along with the students, are the 'University'. But here this has been phrased to give a sense that giving notification may be in the interests of the university as a whole. In texts personal pronouns

such as 'I', 'you' and 'we' can be used strategically to create what has been called 'synthetic personalisation' (Fairclough, 1989).

Individuals or collectivised

It is also useful to consider how participants are described as individuals or as part of a collective as in the following sentences:

Two soldiers, privates John Smith and Jim Jones were killed today by a car bomb

Militants were killed today by a car bomb

In the first case these soldiers are actual people. The details individualise them and therefore allow us to associate with them as real people. In the second case the militants are simply a collective.

Specific or generic

We can also look at whether participants are represented as specific individuals or as a generic type. In our earlier example, we saw that the person accused of benefits fraud could be either named or identified as a type. For example in the following:

A man, Mazar Hussein, challenged police today

A Muslim man challenged police today

In the second case the man who challenged the police is represented as a type. This is used here to place the story in a particular news frame. In this case the generic category of Muslim can place this story into a news frame where Muslims are a contemporary problem in Britain, either through extremism or whingeing about their situation.

Nominalised or functionalised

Participants can be nominalised in terms of who they are or functionalised by being depicted in terms of what they do. For example:

George Bush said that democracy would win

The American president said that democracy would win

This can have different effects. Use of functionalisation can sound more official, and nominalising can sound more personal. Functionalisation can also reduce people to their role which may in fact be assigned by the writer or be generic, for example.

The demonstrator was injured outside the embassy

The defendant was warned by Judge Peter Smithely-Smigely

In these cases the demonstrator and defendant are partially dehumanised by referring to them with functionalisations that highlight only their roles.

Functionalisation can also connote legitimacy. Machin and Mayr (2007) in an analysis of a regional newspaper showed that functionalisation, in the form of ‘shop owner’ and ‘office workers’ served to positively evaluate speakers represented as legitimate, decent members of a local community.

Anonymised

Participants can often be anonymised.

A source said today that the government would be focusing on environmental issues

Some people believe that globalisation is a bad thing

The first case is usual in newspapers. On the one hand we rely on journalists to have legitimate sources, but in fact this conceals the way that certain social groups and organisations have access to feed information to them. In the second case we can see how politicians can use such representations to avoid specification and developing detailed arguments. It allows us to conveniently summon up kinds of arguments that are easy to then dismiss.

Aggregated

Here participants are quantified and treated as ‘statistics’:

Many thousands of immigrants are arriving in ...

Scores of Muslim inmates at a high security prison are set to launch a multi-million pound claim for compensation after they were offered ham sandwiches during the holy month of Ramadan. (Daily Mail, 26 October 2007)

Van Dijk (1992) shows that this kind of employment of statistics can be used to give the impression of research, of scientific credibility, when in fact we are not told specific figures. Is ‘many thousands’ 3,000 or 100,000, for example? And what are ‘scores’?

We can use these categories to help us think about the way that one text represents participants. Here we look a short text from *Marie Claire* magazine (2010) under careers advice. The text deals with the subject of how to maintain career opportunities in times of economic downturn when your company is making colleagues redundant. Ideologically this text is very powerful as it recommends not that workers should support each other or operate through trade unions in times of redundancies but that the individual should work strategically to take advantage of the situation for their own gain. And in doing so the text clearly communicates and legitimises a set of ideas, values and identities that lie at the heart of the ideology of neoliberalism – one which sees the market, privatisation and business as the core priorities in society, with a shift away from things like welfare, full employment and strong central government regulation (Jessop, 2007).

Yes, it is still possible to scale the corporate ladder in spite of layoffs. Here, Bob Calandra, co-author of *How to Keep Your Job in a Tough Competitive Market*, offers advice for gingerly negotiating a title bump:

- **Act like the boss.** If your manager gets canned, set up a meeting with her supervisor right away. Calandra’s no-fail script: ‘I’m not looking to be promoted, but I also recognize no one wants chaos. I know the ins and outs of my boss’s job, so feel free to tap me for any of her work while we’re in this transitional phase.’ To come off a hero, you can’t appear as if you’re expecting anything in return.
- **Pollyanna gets the corner office.** Be a relentless cheerleader for the company, even if it means irking coworkers. Your manager is bound to pick up on your positive outlook and use you as a model.
- **Mind your alliances.** If watercooler gossip reveals your cubemate is on management’s hit list, publicly align yourself

with the office hotshot, even if it makes you feel like Tracy Flick. Appearances matter – and you can always commiserate with your axed colleague over cocktails later (your treat).

The actions that take place in this text are also important as regards the way these discourses are communicated. We will look at these shortly. Here we are interested in the representation of social actors.

The social actors in this text have been placed into a table. The first column are more formal work terms, the second more trendy language, the third are fictional characters and lastly we list personal pronouns.

Boss	Office hotshot	Pollyanna	I
Manager	Cheerleader	Tracy Flick	You
Management	Cubemate		Her
Supervisor			We
Coworkers			
Colleague			

To begin with we find a set of participants we have a set of participants we might expect when dealing with the work environment, as in ‘boss’, ‘management’, ‘supervisor’ and ‘colleague’, although markedly absent here is any reference to trade unions, given this is an issue of job losses. We can note that there are no specific named people, nor is the functionalisation specific. We are not told what particular job is performed by these people, only that they are generic ‘supervisors’ etc. Nevertheless these more official representational strategies place the events into a formal work environment, as is required for this to be a serious careers-related article.

In the next column we find a different category of participant. Here we find terms for people at work that use trendy language: ‘office hotshot’, ‘cubemate’ and ‘cheerleader’. This helps to lighten the text. But the trendy language also suggests the use of the latest expressions, an up-to-date way of seeing the world. This

value on the new, on the latest thing, on innovation as opposed to tradition is one of the core values of neoliberalism.

In the next column we find fictionalised actors used to represent types. ‘Tracy Flick’ is a fictional character portrayed by actress Reese Witherspoon in a comedy movie called *Election*. In this movie Flick is largely unpopular as she is ambitious and self-focused, although she is likeable and played by a very attractive Hollywood actress. Pollyanna is a girl from children’s fiction who is ‘naughty’ and assertive but in an endearing way. By drawing on these fictional characters the analysis offered by *Marie Claire* does not refer to real concrete issues of industrial dispute but is able to draw on connotations of assertiveness, likeability and individuality as well as light-heartedness.

We can imagine the effect of this kind of representational strategy if it were used in an actual case of an industrial dispute. It would appear bizarre if a news story of a strike at a manufacturing plant referred to workers as ‘Pollyannas’. Yet in the universe created by lifestyle magazines real-world terms and fiction blend seamlessly. The fictional references lighten the tone of the piece away from the ideological basis that we should all act only as individuals. In a time when the jobs of your colleagues are threatened you consider this only in the light of how it might influence the way you negotiate your own career improvement. But what does it mean when in the representation of industrial change fiction and reality are ambiguously juxtaposed?

Finally, in the fourth column what is important in terms of representational choices in this text is the use of ‘I’ and ‘you’. The use of personal pronouns is common in advertising and also in conversational language (Machin and van Leeuwen, 2007). Of course this text on one level claims to be neither, but it is drawing on some of their techniques. In advertising these pronouns help to personalise products and producers and their relationship with the consumer. For example, an advertisement for mortgages might read: ‘We agree with your wife. You can afford a new house.’ The conversational style of speaking to ‘you’ also prevents this from reading as authoritative knowledge, but rather as the language of an expert who speaks closer to the level of the addressee. This language therefore aims to be trusted not on the basis of proscribed status, as is the case in the professions, but in terms of

its claim to personal experience, which is communicated partly through being on your level through personal pronouns and partly through the up-to-date language.

One important use of the personal pronoun ‘you’ addresses the reader as acting alone and strategically. She is not concerned about the possibility of further redundancies or how she and her colleagues might work together to prevent further job losses. As well as the trendy, up-to-date language we find individualism, and acting competitively. Again all of these communicate the values of neoliberalism where we all struggle against each other, where the strongest and most adaptable wins.

What is also interesting about the representational strategies found in this text is that while it contains personal address through the personal pronoun ‘you’, at the same time personal characteristics are suppressed. The text creates a world of generic types, the ‘Tracy Flick’, the ‘Pollyanna’, the ‘office gossip’, the generic ‘boss’. Yet how we experience our work lives depends on who we are, our dispositions, our appearance, our qualifications and also those of our boss. At one level it is a call to individualism, but at another level it offers a one-size-fits-all set of solutions, typical of the language of management gurus. We will return to this text shortly to look at the actions that take place. First we look at how we can be more precise as to how we analyse social action as well as social actors.

Representation of social action

In the previous section we have shown that it is productive to look systematically at the language used to represent the participants in a text. We showed how this worked in the case of a magazine article. But it can equally work for news texts, social media discussions, and for film footage. We give an example of this kind of analysis in [Chapter 8](#) where we show how we can compare the representation of participants in language with how they are represented visually. In this section we show that it is possible to carry out the same systematic kind of approach to analysing the actions that are carried out in a text. How we perceive people and events can also be shaped by the representation of what they are

depicted as doing, or what linguists call ‘transitivity’. This too can help to promote certain discourses and certain ideologies.

The study of transitivity allows us to reveal who plays an important role in a particular clause and who receives the consequences of that action. It shows us who is mainly given a subject (agent/participant) or object (affected/patient) position. In other words who acts and how, who does not. Simply put, it is asking who does what to whom. Transitivity is an analytical component that allows us to fit the huge variety of goings on in the world into a small number of categories. But of course speakers and authors often seek to conceal, obscure or confuse who is subject or object. They might also wish to give a sense that other participants are doing more than they in fact are.

Categories of verb processes

Linguists have explored the lexical choices available for representing actions and found that verbs can be grouped into categories of ‘process types’ (Halliday, 1978). These can be used to detect the kind of agency attributed to an actor. Here we have glossed Halliday’s six processes:

- *Material*: This is simply doing something in the world that has a material result or consequence. For example, ‘The woman built the house.’
- *Behavioural*: This is where we act without material outcome. For example, ‘The boy jumped.’
- *Mental*: This is where a person thinks, evaluates or senses. For example, ‘The boy saw the dog.’
- *Verbal*: This is where a person is represented as simply saying something. For example, ‘The man talked about democracy.’
- *Relational*: This is where people are represented as being like, or different to, something else. For example, ‘The militia had crude weapons’ (in contrast to the US soldiers) or simply, ‘The boy was taller.’
- *Existential*: This is where people are represented simply in a state of existing or appearing. For example, ‘He sat in the chair.’

We can apply these categories to any text and observe the patterns in transitivity choices. For example, let us simply take the following sentences:

The pilot bombed the village

The civilians were in the street

The soldier protected the civilian

The mother worried

The militants were a Ragtag mob

The politician said it was time to act

At the most basic level we can see that some of these processes are ‘transitive’; that is, a transaction is involved, such as ‘The pilot bombed the village’, and others are non-transitive, where there is no direct outcome, such as ‘The civilians were in the street’. This in itself can give us a sense of who is represented as the agent in a text. In this case it appears that the pilot and soldiers are the doers in the text while the civilians remain passive. This passivity can be used by an author of a text where armed forces are occupying an area to give a sense that the soldiers are therefore required in order to defend the vulnerable.

Another way of thinking about this is in terms of the way that participants in a clause can be *activated* or *passivated*. Activated, social actors are represented as ‘the active, dynamic forces in an activity’ (van Leeuwen, 1996: 43–44), the ones who do things and make things happen. Being activated, in this view, is an important and generally positive aspect of representation. An activated actor’s capacity for ‘action, for making things happen, for controlling others and so forth, is accentuated’ (Fairclough, 2003: 150). Action processes foreground agency, contributing to representations of power (*ibid*: 113).

Other kind of verb processes can also play an important role in shaping how we perceive participants. It is often the case that participants who are made the subjects of mental processes are constructed as the ‘focalisers’ or ‘reflectors’ of action. These actors are allowed an internal view of themselves. This can be one device through which listeners and readers can be encouraged to have

empathy with that person. We might find that accounts of other participants in a text contain no corresponding details on their mental processes.

Mental processes can also be one way that these participants appear very busy even though they participate in no material transactions. And if these mental verbs are mainly about sensing and reacting this can also convey passivity. Machin and Thornborrow (2006), for example, use this model to show how in women's magazines women are highly active but in non-transitive processes, in other words those that have no outcome. So the women might be busy 'hoping', 'worrying', 'walking', 'watching', 'reading', in other words mainly behavioural and mental processes rather than material ones which actually bring about change in the world.

Unspecified reactions

Another category of reactions are those that are not defined. Such as:

The policeman reacted

The soldiers responded

These are often used to conceal certain kinds of actions, in these cases what the 'reaction' or 'response' actually comprised. This can of course be used to gloss over the fact that very little was done at all, for example, where a politician says that their party has responded appropriately.

Abstractions

This is when actions become generalised and non-specific and abstract away from the more specific micro-processes that make up actions (van Leeuwen, 2008: 69). For example, in the sentence.

It is important for staff to engage with Muslim prisoners

the details of what is done are obscured. In such cases what is done may not be so important as that staff appear to do something with the prisoners.

Passivised verbs without agents

One important quality of suppression is that this is one way that who acts and who has responsibility can be obscured (Fairclough, 2000: 163). One way that this can be accomplished is through passive verb structures. For example:

The civilians were killed during a bombing raid

The government found itself facing allegations of spin this week following the release of some confusing crime statistics

In all these sentences who carried out the action is missing. But passive verb structures can be used with agents such as:

The civilians were protected by the soldiers

Although this in itself can be ideological. We can ask which kinds of participants are described in passive verb sentences and which are not. Van Dijk (1991) has shown, for example, that ethnic minorities are only shown as active agents where they do something bad. Where they are associated with anything positive they are represented in a passive role where things are done for or against them.

We can apply these categories of transitivity to the *Marie Claire* text we analysed previously. Here are the actions that are represented in the text.

- *Scale the corporate ladder*
- *Negotiate a title bump*
- *Mind your alliances*
- *Be a relentless cheerleader for your company*
- *Align yourself with the office hotshot*
- *Commiserate with your axed colleague over cocktails*

In the first place these are all represented as directives. These are forms of verbs that are instructions. So these are not presented as gentle invitations such as ‘Why not try to scale the corporate ladder?’ but almost as orders. This gives the verbs a feeling of confidence and also of energy. This is a go-getting, can-do attitude, again typical of the neoliberal discourses we discussed above.

In the second place, in terms of transitivity, we find a predominance of abstractions where the action micro-processes are not explained and where actual goals are never very clear. Being a ‘relentless cheerleader’, a relational and verbal process, is unspecific, as is the verbal process ‘commiserating with an axed colleague over cocktails’. What exactly would you say to a colleague who has just lost their job when it is clear you are not supporting them but looking to turn this into an opportunity for yourself? ‘Negotiate a title bump’ is also an abstraction. These processes can connote material and behavioural processes that suggest something dynamic, as in ‘scale the corporate ladder’, but there are no specifics. It is a one-size-fits-all model.

We find mental processes described in Calandra’s no-fail script: ‘I’m not looking to be promoted, but I also recognize no one wants chaos. I know the ins and outs of my boss’s job, so feel free to tap me for any of her work while we’re in this transitional phase.’ However, this itself is represented as an act of manipulation as made clear by the statement ‘To come off a hero, you can’t appear as if you’re expecting anything in return’. So these are simply the mental processes that can be used strategically in order to persuade someone of our motives. In fact we find no mental processes for the ‘you’ who is addressed by the text. How does the ‘you’ feel about seeing colleagues and, we would assume, friends, losing their jobs?

Finally we find that the agent, in terms of who is making the decision about layoffs and why, is deleted. We see this in the phrase ‘If your manager gets canned’. Here the agent is missing. It is not clear who has carried this out.

What these actions sum up, alongside the representation of participants, is a sense that this ruthless and selfish competition is a natural state of affairs in a world where jobs and job roles are flexible and constantly changing and adapting, although on the other hand the use of trendy language, fictional characters and abstracted verb processes suggests that we are not yet so comfortable with this situation that it does not require softening mechanisms. But the message is clear. The worker has the responsibility to manage their skills and work identity in order to fit into the changing working requirements. Those unable to change, unable to act innovatively, will not keep their job. The agent of who

does the laying off is missing, but this agent as well as the causes are less relevant than the idea that change itself is inevitable.

Nominalisation

We can look at deletion of agency and abstraction of processes further through attending to what is called ‘nominalisation’ (Richardson, 2007). Nominalisation, which we encountered earlier in contrast to functionalisation, is the transformation of a process into a noun construction, creating further ambiguity. We will explain this and show how it can be applied to the *Marie Claire* text. For example:

The global economy was changed

The changed global economy

While the first of these uses a passivised verb to conceal the agent of the change the second presents it as a noun, as a thing. In fact ‘globalisation’ is often used as a noun when in fact it is a process. This itself can make it appear simply as a thing rather than the result of political decisions.

Fairclough (2000: 26) points out that such in constructions there is:

no specification of who or what is changing, a backgrounding of the processes of change themselves and a foregrounding of their effects. In backgrounding the processes themselves, nominalisation also backgrounds questions of agency and causality, of who or what causes change.

We can see how this process of turning verbs into nouns works in the following example:

The student lost their coursework and was rather upset

The student was upset about the loss of their coursework

In the second sentence the actual act of losing the coursework, how it happened and who might be to blame has been removed.

By turning an action (to lose) into a thing (a loss) a sense of the action is retained, but as a noun we can now point to it, describe its physical qualities, classify it and qualify it.

Nominalisations can be important ideologically. In the following example, through their use the prime minister is not confronted with processes to which he must react, nor by specific agents. Nor is it clear where he has acted. Therefore nominalisation can be used to create ambiguity and thereby distract the reader.

The Prime Minister rejected a call to carry out an inquiry into allegations of corruption. He announced that the tightening of sanctions was a decision that had been made through all the legal channels.

Here nominalisations are ‘a call’, ‘the tightening of sanctions’, ‘a decision’. These are all processes that have been transformed to remove agency. Also, importantly, here we can see that nominalisations are not marked for tense so they are outside of time. This has the effect of avoiding when and how likely something is, which is necessary with verbs. When did someone call for an inquiry? Who made the allegations or tightened the sanctions? When and by whom was the decision made?

Returning our article from *Marie Claire*, nominalisation is used in the article to background processes, agents and those affected and is one other strategy by which the advice offered by the magazine is legitimised. We find this in the first lines:

Yes, it is still possible to scale the corporate ladder in spite of layoffs. Here, Bob Calandra, co-author of How to Keep Your Job in a Tough Competitive Market, offers advice for gingerly negotiating a title bump

Here we find two important nominalisations. The first is the use of ‘layoffs’ in sentence 1. It could have been written using the verb process ‘laid off’ to explain that ‘colleagues are being laid off’. But here the use of nominalisation helps to background the fact that there are people suffering which might compel a different kind of more collective action.

The second nominalisation is found in the sentence 2 in ‘title bump’. By turning the process of ‘seeking promotion’ into a noun it distances its connection to actions, and also allows the use of the trendy language. Along with other linguistic devices in the text, this

aids abstraction and fosters a sense that this process is a simple one and with few moral implications.

In the second bullet point we find:

Be a relentless cheerleader for the company, even if it means irking coworkers. Your manager is bound to pick up on your positive outlook and use you as a model.

Again we have the use of trendy language in the nominalisation of ‘cheerleading’. Of course this is also a complete abstraction as it is not specified what micro-processes this ‘being a cheerleader’ constitutes. But the use of nominalisation allows it to become an entity, here an identity, that can be discussed as a thing rather than a process linked into a cause/effect chain.

Modals

Hodge and Kress (1988) and Fairclough (2003) discuss a characteristic of language that tells us about people’s commitments to what they say and also about their own sense of perceived status. These are modals. Modals express degrees of certainty. These are verbs such as ‘may’, ‘will’ and ‘must’ and adjectives such as ‘possible’, ‘probable’ and ‘certain’. We use them all the time when we speak. For example, as in ‘I will have a beer tonight’, as opposed to ‘I may have a beer tonight’. Modality can also be associated with hedging terms such as ‘I think’ or ‘kind of/sort of’. What modals do is set up a relationship between the author and the author’s representations – in other words what we commit ourselves to in terms of truth. This is clear in the difference between ‘This is the correct procedure’ and ‘I think this might be the correct procedure’. It also indicates a sense of the author’s identity. Some people feel they are in a position to be so certain. If we read a document from our employers saying that we ‘will’ do something rather than we ‘should’ or they ‘think we should’, these will give us very different senses of the power that they believe they have over us.

Modals expressing high degrees of certainty might be used in order to convince people. We can see this in a excerpt from a

speech on multiculturalism by then British Conservative leader David Cameron (2008).

We must not fall for the illusion that the problems of community cohesion can be solved simply through top-down, quick-fix state action. State action is certainly necessary today, but it is not sufficient. But it must also be the right kind of action, expressed in a calm, thoughtful and reasonable way.

Here he uses the modal ‘must’ frequently, asserting his certainty and confidence. Imagine if he said in the last sentence: ‘It should be the right kind of action’ or ‘It might be the right kind of action’. On the other hand he does not say ‘We will not fall’. In this case too much certainty is expressed, which was clearly not Cameron’s intention. Where we find texts filled with uncertainty and lack of commitment we are dealing with an author who feels much less confident. Later in the speech we do find lower commitment:

But I don’t believe this should mean any abandonment of the fundamental principle of one people under one law. Religious freedom is a cardinal principle of the British liberal tradition. But liberalism also means this: that there is a limit to the role of religion in public life.

Here, while there is certainty about what liberalism means, he slightly reduces his commitment with ‘I believe’. But this is clearly not the same as saying ‘I think’ as it shows much more of a commitment. And clearly it is important for the opposition leader to talk about beliefs where possible. But we can still look at where and how he uses them. In this case it allows him to not appear too much like he is laying out commandments. In this sentence he could have just said: ‘This does not mean any abandonment ...’. But the words he does choose show commitment without commanding, with the added advantage that it appears that he is speaking from his own convictions.

Finally, we can see how Cameron attributes less certainty and commitment to others:

Some say the risk is inflation. Others say it's recession. So some think there should be more intervention by the Government in the financial markets. Some say there should be less.

He does not specify who the some are, anonymising them, but they are not described as ‘knowing’ or even ‘believing’ there should be more intervention by Government but only that they ‘think’ it. This is a technique often used to detract from what others hold to be the case.

Murray (2002) gives an example of speech that shows a lack in confidence through use of modals. This is from a nurse:

Yeah. I think it, sort of, provided very holistic care for the elderly lady coming through the unit, who actually gained more benefits than simply having a wound dressed on ‘er leg. Erm, I think that had it, had she ‘a’ been seen in an ordinary unit without nurse practitioner cover, the chances are that the, er, medical staff there would’ve dealt with ‘er leg.

Such use of modals, ‘I think’, would not be found, for example, in the speech of a doctor even though the doctor may have no more knowledge than the nurse.

The analysis of modals is also important as they express an ambiguity over power. For example, ‘She may talk’ can be interpreted as either giving permission or to suggest a possibility. This can be seen if we provide some context:

She may talk, I have now finished speaking

She may talk, although she is often too shy

A speaker can use this ambiguity to build up a sense of power where it can always be denied. So coercion can be masked in surface forms of rationality. In some cases there is no ambiguity but this is rare. This suggests that the ambiguity is highly functional.

You cannot swim here

You may do any of the essay questions

The first might be legal, for safety, or put up by an annoyed neighbour. The second suggests both a sense of having an option but also that you are being *allowed* to do so. We can see the same ambiguity in a political speech:

We must take globalisation as an opportunity...

Again we have the sense of rationality against an order.

We cannot avoid the fact that we are now part of a global economic order...

Does ‘cannot’ here mean that since national economies are now subordinate to the World Trade Organization and World Bank there are legal reasons we cannot? Or does it mean that it would not be reasonable?

We often find that pop psychologists and style gurus on TV and in lifestyle magazines use modals like ‘will’ and ‘is’ to create a sense of their own authority over knowledge.

People who are successful in life are those who can adapt quickly. I call these ‘adaptors’. The next category are those that worry ...

We can see this confident guru style modality in the *Marie Claire* article from earlier.

Be a relentless cheerleader for the company, even if it means irking coworkers. Your manager is bound to pick up on your positive outlook and use you as a model.

This could have been written with lower modality: ‘You could become a relentless cheerleader for the company even if this may mean irking coworkers. I would think your manager likely to pick up on your positive outlook and could even use you as a model.’ In this case it sounds far less certain, far less go-getting, and immediately sounds like it is something that is unlikely to work out.

We see the same use of high modality in a news text from earlier in the chapter where causalities are represented with a high degree of certainty:

But father-of-three Harry Boparai, who apparently works for British Airways at Heathrow, told the Prime Minister he had allowed ‘uncontrolled immigration’, which had caused his family’s quality of life to plummet.

The Prime Minister had allowed uncontrolled immigration. And this had caused quality of life to plummet. Mr Boparai might have said: ‘I think that the PM has allowed uncontrolled immigration which may have contributed to the plummet in my family’s quality of life’. Yet the stronger modals present these issues as facts, rather than as the opinions which they in fact are.

Criticisms of CDA

While CDA appears to help us to reveal the ideology concealed in texts through pointing to a number of lexical and grammatical strategies in language, some people have been less convinced that it constitutes anything like a consistent methodology with a coherent set of tools that in fact help us to reveal what is otherwise less obvious. In fact some people who first come to CDA comment that its conclusions, after often rather intricate and technical analysis, were pretty obvious on no more than a cursory reading or that this kind of analysis only really works with particular kinds of texts such as political speeches. At worst, CDA can appear to be a rather excessive analysis of something that is obvious using what is a small and rather arbitrarily chosen sample. But we do believe that CDA provides an excellent way to increase our ability to examine what it is that makes texts work in the way that they do. Nevertheless there are a number of criticisms that should be taken seriously that for the most part suggest that CDA should be used in unison with other methods such as political economic research and ethnography, as described in this volume.

In the first place, and some students who first approach CDA appear to notice something of this, Widdowson (1998) has been highly critical of the nature of CDA as a consistent coherent approach. He argues that CDA is not so much an application of the broader theory of Halliday, on whom its proponents draw. It is, he argues, ‘a rather less rigorous operation, in effect a kind of ad hoc

bricolage which takes from theory whatever concept names come usefully to hand' (p. 137). For Widdowson there is no broader theoretical model of language that justifies all the bits and pieces that CDA brings together. In his first editorial for the journal *Discourse and Society*, editor Teun van Dijk points to the need for 'explicit and systematic analysis' based on 'serious methods and theories' (van Dijk, 1990: 14). However, Widdowson, analysing van Dijk's own work, suggests that for the most part there is little consistency in what analysis constitutes and that often it appears that concepts are used to justify observations rather than in fact to discover or reveal what is buried in a text and, further, that aspects of texts that do not fit the argument being made are ignored and suppressed. What more able students, seeking to understand CDA, also tend to notice is that across the leading proponents of CDA there are often competing concepts that appear to describe more or less the same thing. This of course is not a problem in itself, but the use of these concepts often merges and this certainly supports Widdowson's observations about there being a lack of broader coherent theory.

A number of writers are also concerned with the way that in CDA there is a tendency to make huge assertions about ideology based only on textual analysis. This is something that we feel is the most serious criticism of CDA. In media studies of the press it has been shown how much of the content we find in news and other texts that are often subject to CDA can be explained through the nature of production processes, institutional values and simple cost issues as much as ideology. In fact, as Widdowson (1998: 42) points out, the leading CDA proponents themselves continually say that it is not possible to read significance straight from texts but that we need to look at their production. However, none of them actually ever do this and at the same time they persist with their text-based analyses (p. 142). No attempt is made to ask what writers meant by a text or how it was put together. An analysis using CDA might reveal the suppression of a particular social actor in a news text due to their lexical under-representation. But a reliance only on textual analysis misses how this could have been a result of production processes, for example due to the way a journalist's sources presented the information. In a news industry where there is currently a great shortage of staffing due to

commercial pressures, sources who are in a position to provide ready-to-use news material are highly likely to have their material used directly by journalists. These journalists may not even have the time to leave their office and may only be able to verify stories through reference to the internet and the odd phone call to already established sources. The journalist may also be required to write specifically for a particular group of readers identified by market research. In such a case what does a text-based criticism actually tell us about these issues and the current nature of the news media?

Philo (2007) was also concerned with the lack of attention to production factors, but critical, too, of the lack of engagement with how those who read and hear texts receive them. What is the public understanding of the texts that CDA proponents deal with? And do all of the texts, such as political documents and speeches, actually have the natural result on social practice that CDA suggests? Research within the news industry itself suggests that the public have lost confidence in journalism, and this is certainly supported by plummeting circulations. Does this in part mean that readers have also been sharing in some of the same concerns raised by textual analysis using CDA? One journalist colleague recently joked that there would come a point soon when the only people reading newspapers were academics doing Critical Discourse Analysis and putting claims forward about the way that language makes societies.

Finally, one criticism of CDA that some of its practitioners seem to in some ways enjoy is that they are themselves not driven by an objective desire to carry out research but are politically motivated to identify and question issues of inequality. To many this is highly problematic as it is not in the spirit of doing independent scientific research. Fairclough, however, argues the contrary, that such motivations are an excellent basis for ‘a critical questioning of social life in moral and political terms, e.g. in terms of social justice and power’ (Fairclough, 2003: 15). He also argues reasonably that in fact all other research is equally socio-politically situated, selective, limited, partial and thereby biased. The difference is that this other research claims neutrality and objectivity.

Doing Critical Discourse Analysis

CDA is carried out on selected examples of texts or speeches. These can either come from a larger corpus or a smaller sample. In each case a smaller number of texts will be closely analysed using the tools provided in this chapter. For example, a project may wish to look at the representation of students in current university websites. Typically ten websites would be selected and then two or three sample texts could be analysed that were representative of the broader sample. The analysis might show that there were certain naming strategies used that presented the students as customers rather than learners. Analysis may find that certain actions were always represented through nominalisation in order to conceal who is the agent. Analysis might present a table of who the social actors are and of what they do. The aim would be to reveal the discourses of education that the universities use to present the nature of being a student. Conclusions might point to the market model used which emphasises value for money rather than education and self-betterment through knowledge.

Using corpus analysis

In CDA an analyst may gather a larger collection of texts which then form the basis of their data. This could be called a 'corpus'. This could be a collection of news articles on immigration, articles on careers from lifestyle magazines or feeds from social media which deal with particular issues. In CDA in general this corpus may be quite small. A corpus of newspaper articles may be between 50 and 100, for example. The individual examples chosen for closer analysis would be said to represent this sample; the wider corpus remains outside of the actual practical analysis. However, there are forms of CDA that do involve the whole collection of data, and also where the number of texts can be much greater. This is known as 'corpus linguistics'. Here, large number of digitalised texts are analysed using special software, such as WordSmith. This means that the kinds of words, phrases and uses of grammar can be statistically measured. So, for example, rather than analysing a single speech by a politician we could make, or

access, a digital corpus of all of their speeches and carry out an analysis to look for patterns. Using a program such as WordSmith the analyst can do a search for a particular word. The software will then present a list of all the instances of the use of this word in the form of what are called concordance lines. It will also say exactly how many instances of each have been found. The analyst can carry out filters to remove irrelevant kinds of cases and also to observe the way words tend to co-occur, or how close, as regards vicinity, different words tend to appear.

WordSmith can be used to analyse existing corpora or it is possible to build your own with the software. This is simply a matter of creating a folder with files which are in plain text format. You can then analyse these with WordSmith. But when creating a corpus you have to bear in mind the basic issues dealt with in other sections of this book such as how representative the corpus is of a specific kind of text – how did you choose the sample? If you intend to make some kind of comparison between two corpora, to what extent are they balanced?

There is a clear advantage in that very large collections of digital texts can be analysed very quickly. The findings also allow the analyst to make observations on the data that can be backed up statistically. So we might be able to say, for example, that the word ‘business’ was present in 80 per cent of all political speeches. We would also be able to make comments on how this was used, whether it related to words like ‘society’, ‘jobs’, etc. We could ask what verbs tend to be most associated with ‘business’, such as ‘help’, ‘support’ or ‘damage’. We could then use such observations to build the kind of critical analysis carried out throughout this chapter.

Often in corpus linguistics the linguistic qualities of texts can be drawn out by comparing them to existing databases which comprise huge corpora of naturally occurring language, such as the British National Corpus. Corpus linguists are often interested not so much in critical issues but in issues such as language use. So they might compare corpora that exist for different national versions of English to look for differences. But comparing any corpus with a larger database can tell us things about what is special or different about that specific domain. It is also possible to make comparisons of corpora over time. There are large digital

databases of British newspapers such as the 19th Century British Library Newspapers which contains 48 British newspapers from 1800 to 1900 and the Times Digital Archive. At the time of writing there was an ongoing project to create an accessible digital archive of all major European newspapers. Access to digital archives is on the increase.

An analysis might look at the use of ‘business’ over time. Which words tend to be associated with ‘business’? Or we could look at which words politicians link with the verbs ‘help’ and ‘support’. If we found, for example, that ‘help’ was formerly given to ‘communities’, or ‘people’ rather than ‘business’, this may point to some significant shifts in discourse and ideology in the press over time.

While corpus linguistics is often used to describe language use, it can be a highly useful tool for CDA. But one shortcoming is that the analysis can be very much driven by what the software allows you to do. Using CDA alongside corpus analysis can, however, help to overcome what can, from one perspective, appear to be a highly descriptive form of research. Here the software, the questions it allows us to ask and the data it throws up, is used as one set of tools in the process of analysis.

Summary

- CDA is a loose set of tools used to describe the language and grammar choices in a text. Its power is that it can allow us to produce a more systematic analysis of texts. For example, we may have a feeling that a political speech may appear very confident but seems to shy away from actually committing to something. CDA can show us exactly how this is achieved through language.
- CDA is an approach which seeks to draw out the ideology of a text by pointing to the details of language and grammar.
- The proponents of CDA believe that through this kind of critical analysis we can bring about social change. Therefore this view of language analysis and research is a political project. Of course this motivated view of research may sound ‘unscientific’ since it lacks the necessary objective stance to what we study that is normally required by academic ideals. This can be

countered by the argument that most research simply hides its motivations which are always ideological.

- CDA is a qualitative approach since while it can point to concrete linguistic and grammatical features these are highlighted by the analysis as significant.
- Some argue that its set of tools is not systematic and that it is actually neither a method nor a concrete approach as such.
- Some argue that CDA places too much emphasis on texts and in the end makes many assumptions about how readers will understand these without actually consulting the readers. Likewise it attributes ideology to texts which may be explainable through production factors.
- CDA can also be carried out alongside corpus analysis where software like WordSmith is used to analyse much larger digital databases of texts to allow more quantitative-type observations to be made.

Further reading

Machin, D., & Mayr, A. (2012). *How to Do Critical Discourse Analysis: A Multimodal Introduction*. London: Sage.

Provides more comprehensive and thorough coverage of the kinds of concepts and forms of analysis found in this chapter. Analysis is carried out on many examples from different kinds of media. The chapters also show how language analysis can be used alongside visual analysis.

Fairclough, N. (1995). *Media Discourse*. London: Arnold.

Classic text in this field. Slightly more advanced but highly recommended for how it presents a model for this kind of analysis and how it can reveal the way that texts seek to represent the world in the interests of the powerful.

CHAPTER 7

Analysing narratives and discourse schemas

Introduction

In this chapter we are interested in how we can research the narratives of texts. Here we look at how to research the narrative structure or underlying ‘discourse schemas’ that underpin texts or other media representations. Such analysis allows us to break down what appear to be quite complex stories and texts to reveal very basic messages about the kinds of values and identities, concerns and social boundaries that lie at their basic level.

Social anthropologists, like Levi-Strauss (1967), were fascinated with the nature of the stories told by people of different cultures. Levi-Strauss believed that while such stories may be intriguing and exciting, or even strange and bizarre, and particularly at times rather complex, what was most interesting about them was the way they could be used to reveal the fundamental values of that particular society at that particular time. At the heart of these stories were basic underlying structures which could be identified and analysed. These social anthropologists showed how oppositions in a story could represent broader oppositions in cultural values in society. So left and right or culture and nature might represent good and evil. In such cases analysis of these oppositions could point to the way a society made evaluations of kinds of identities and of how people should reasonably behave.

Scholars from other fields such as linguistics (Fowler, 1977; Rimmon-Kenan, 1983) and literary studies (Propp, 1968) showed

how long and complex stories could be broken down into basic stages and components that allowed the analyst access to some of the underlying social assumptions and evaluations found in them, although in literary studies and much of linguistics the aim was rather to show how individual stories work rather than to reveal deeper social and political values.

Of course the oppositions and evaluations found in stories are not simply based on the broader concerns of people in that particular society but will tend to reflect certain interests – of those who have the power to have their stories heard and to influence the stories others tell. For example in our own Western society crime stories found in novels, on television and in the news tend to represent crime, criminals and their victims in terms of an opposition of good versus evil. Yet sociological studies show that most of the people who come to be defined as criminals come from poorer sections of society, that those from certain ethnic groups will be more likely to find themselves in prison than those from other ethnic groups. An analysis of these stories would therefore point to basic values in our society that seek to exclude the role of social context in criminal behaviour. In such stories criminal behaviour is more about personal choices and morality as opposed to life opportunities and social justice. Clearly such values, such narratives, serve the interest of the wealthy and powerful. But nevertheless, analysis of some of the basic structures found in these stories can help to reveal something about the dominant social values held in the societies that create them. This chapter looks at the procedures through which researchers can break down narratives, isolating their stages, and then reveal their underlying values. The methods we consider in this chapter can be applied to many genres of communication such as movies, computer games, plays, news items, etc.

What is a narrative?

To begin with we need to think a little more about what we mean by narrative. In fact narrative has been defined and treated very differently both across and within different academic disciplines. Narrative is often confused with ‘story’. Or it is used in the sense

of ‘personal narratives’ where people talk about themselves and their lives. Or it can be used in a broader sense such as ‘The American Narrative’. Here we point to a specific meaning of narrative best shown through a number of examples. In this chapter we show how a number of scholars have demonstrated how complex stories and other texts can be analysed in terms of narrative structure, how this helps reveal deeper meanings. We then show how we need to think about this not so much as narrative structure but as ‘discourse activity schemas’. This view better serves, as we show, the aims of media text analysis, which are not to simply describe texts but to connect them to socially constructed ideas about the world, people and events. The discourse activity schemas that can be found within texts, we show, point at the basic underlying ‘practices’ that are the ‘doing’ of the ideas contained in discourses.

To begin to illustrate what we mean by narrative we can first show that it is not the same as ‘story’. The following examples demonstrate how the same narrative can be contained in different genres. The first is a news headline, the second a limerick:

Two Israeli soldiers were killed by militants today in the Gaza Strip. Israeli government pledges reprisals

There was a young terrorist called Bill
Who didn’t really ever want to kill
But when they took all his land
And his family died in the sand
He found he just couldn’t sit still

Both of these examples have a narrative. For a linguist a definition of ‘narrative’ is that it must contain a number of narrative clauses, which are clauses containing a verb. Thornborrow and Coates (2005) give the example from Sacks’ (1995: Vol. I, 236) ‘The baby cried. The mommy picked it up’. Here we can see that the two verb clauses set up a sequence of events. Of course in this case the meaning of the narrative would be changed were we to change the order of the sentences to ‘The mommy picked the baby up. It cried’. Toolan (1988) argues that narrative is a sequence of events that are not random but which have a

trajectory. So here we can see that in this definition it is a sequence of clauses containing a verb that sets up a sequence of events.

But what is important in this case is to point out that these two examples, the news headline and the limerick, are different genres of communication, yet both contain a narrative. Both describe a succession of events, where there is an attack and an aggressive response, but they are different types of communicative event. The same narrative could also be communicated through other genres such as personal letters, political speeches, legal testimony, dance, theatre, classical Hollywood movies or play.

In [Figure 7.1](#) we see a photograph of one of the authors' children at play with a friend holding a plastic toy machine gun. There was a great deal of imagination taking place in this play. But when asked what was going on it was clear that the son and his friend were playing as highly trained Special Forces soldiers dealing with a motley collection of attackers who threatened the social order of a locality where they had been sent on their mission. The genre here is different to the news item and the limerick yet we can see that there is the same basic type of narrative: territory must be defended from an external threat. We can argue additionally that while the actors and possibly the settings and even the details of how the attack and defence was accomplished in each case are different in the news story, the limerick and the play, the narrative is the same.

Narrative theorists have been interested in the infinite number of stories that can be generated from a small number of structures (Greimas, 1966). Of course the structures can become obscured in more complex stories, but nevertheless they can still be discovered. In the three different genres we could say that while the actors are different, all have the same deeper structure. All could be represented by the following:



Figure 7.1 Boy with gun playing at Special Forces combat

1. There was an attack on A by B
2. A takes action against B

Of importance here is that the way that the narrative is presented can exclude preceding events such as the occupation or exploitation of the territory of B by A in the first place. In the 'War on Terror' that took place in the early years of the twenty-first century, US president George W. Bush called for a move against the enemies of freedom which used just such a narrative sequence. Yet this glossed over the decades of political and economic activities on behalf of the US, and before that European colonialism, that played a part in the action of some of those societies or people then described as a threat by Bush.

To this sequence of events we can also add a third stage in terms of what is implied:

1. There was an attack on A by B
2. A takes action against B
3. A is safe

It is implied in the above examples, although often overtly stated by the likes of politicians such as Bush, that it is not subtle diplomatic and humanitarian actions that will lead to safety but a like-for-like attack. That we find two young boys playing as Special Forces soldiers eliminating a chaotic, inferior, yet fanatical evil enemy, points to the way such stories can come to appear neutral. It is of note that the promotion of Special Forces as a best possible solution was initiated by Ronald Reagan in the 1980s, presented as a strong US response in the face of the preceding 'weak' diplomatic strategies of Jimmy Carter (McClintock, 2002).

This process of breaking stories down into basic components has a tradition originating in the work of Vladimir Propp (1968). Propp used the idea of functions to look at the basic structure of narratives. He analysed 150 Russian folk tales showing that the same events kept being repeated. He argued that these were narrative functions and were necessary for narratives to take place. Breaking the stories down into their smallest irreducible units, he identified 31 functions, although not all of these need to be present at all times in stories. Examples of functions are: pursuit, villainy, lack, displacement, rescue, punishment, solution, difficult task, etc.

Importantly, through these functions, it is possible to identify the role played by characters. So, for example, at the beginning of a story a person might be displaced, which immediately allows us to recognise them as the hero. We find this in Disney's *Jungle Book* in the case of the character Mowgli (Simpson, 2004). He also has helpers, Baloo the bear and Bagheera the panther, who are identified as such by advising him of danger. Propp referred to this as the 'interdiction function', meaning that they prevent him from straying. There is also the villain, the tiger Shere Khan, who attempts to take possession of the hero, the sixth of Propp's functions. Finally, the hero battles with the villain using fire, Propp's twelfth function: the intercession of a magical agent.

Simpson (2004) shows how the very same functions are present in *Harry Potter and the Philosopher's Stone*. Here we find the hero Harry, his helpers, the villain, the battle and the use of the magical agent. These functions do not have to take place in any particular order and can be found in very long or very short stories.

What was important for Propp was that in each story we will have descriptions of settings, such as houses, landscapes and costumes. But these are details which are draped over the basic narrative structure. It is these details that Roland Barthes (1977: 92) called 'indices'. These enrich our experience of the environment of the story but are not necessary for the basic structure although, as Barthes argues, indices too should be the subject of analysis to understand narratives. And subsequent theorists (Toolan, 1988) have also pointed to the importance of character for telling the reader what kind of narrative we are dealing with and how it should be experienced. For example, in the example above where the two boys play at soldiers it is clearly of importance to the narrative that they are highly trained Special Forces soldiers rather than regular army. Toolan points out that it is often character in narratives that readers find so engrossing. Later in the chapter we will come on to the importance of analysing character.

Drawing on Propp (1968) and also on Burke (1969), Will Wright (1975) also believed that characters in narratives should be viewed as representing social types acting out a drama in the social order where each character represents a set of social principles. This can be most easily done through stock characters. Wright thought that by reducing narratives, in this case specifically those of movie westerns, to their basic functions, he could reveal the fundamental cultural values that form the driving force of the story and the way that characters are used to celebrate or challenge particular kinds of identities.

By analysing the basic narrative sequences of films from the 1930s and 1940s and comparing them to films of the 1950s and 1960s he was able to arrive at number of important observations. The earlier westerns depicted lone heroes who had special powers (fast with a gun, shrewd). The hero would be different from

the rest of society, which while basically good was also weak and in need of the hero to save it from a threat. In these films the hero is morally good. Often at the end the hero is unified with society.

The later westerns were different. The hero ceased to be a loner and began to work in teams, which Wright called the 'professional plot'. Society is no longer essentially good but has become petty and mercenary and amoral. Now the hero does not defend society but rather offers his skills to the group of other specialists. By doing this the hero shows they are superior to the petty, mercenary, amoral society.

Wright connects these changes in narrative to changes in feelings towards society becoming dominated by market capitalism. The hero lives out the contradictions in the values of individualism held in society and the difficulties of realising this in the rather cynical and mercenary market economy. Therefore the change in plot represents changes in attitudes to society, the self and our relationships with others.

In order to arrive at his observations, Wright broke individual movies into their most basic narrative structure. He gives the following example of the structure for a typical romantic film:

A loves B
↓
B ignores A
↓
A dies
(Wright, 1975: 26)

The actual movie may contain many characters, events, and minor issues, but this is what lies at its core. Like the examples given earlier of the news headline, the limerick and the children's play, the movie can be broken down into its basic activity sequence. By doing this we can then ask what roles the characters play in the sequence and what kinds of social values are being tested out. In the case of the children's play, for example, the boys take the role of the heroes who work in a team using their special powers (training and high tech equipment) to defeat the villain.

Wright suggests that in the case of the romantic film activity sequence we can ask a number of questions to help us to establish the kinds of values being dealt with specifically. For example, in this particular sequence if A is a man and B is a woman then this is a story about love between different sexes and what this involves. But if A is also upper class and very wealthy and B working class and very poor then it can also be a story about class difference and the clashes that such interactions can involve. The appearance of such a narrative might also indicate a concern about a changing society where earlier fixed boundaries have become challenged. This too would be the conclusion of the likes of social anthropologists such as Levi-Strauss (1967). He would want to look for some of the basic oppositions that were represented by characters or interactions and consider how these point to anxieties held in that particular society at that particular time.

In his summary of the kinds of values dealt with in westerns, Wright suggests that in earlier plots one individual deals with broadly felt cultural conflicts, such as progress versus freedom, law versus morality. In the case of the social class difference it could be the anxiety about breakdown of social boundaries by social change.

As regards the *Harry Potter* movies we also find a society under threat by evil. Harry is the hero, an outsider who possesses special powers and is also associated with the lower classes. But as with the later westerns Harry works to some extent in a team along with his friends who also have special talents, although these often play the interdiction function of warning Harry. In the *Harry Potter* movies society is basically good, although sometimes lost in the bureaucracy of the magic community, unable to see its own problems within, blind to the evil that threatens.

In this case scholars such as Levi-Strauss or Wright would want to ask what kinds of cultural concerns such a plot suggests. Do people now feel that society has become bureaucratically obscure and stilted, that there are impending dangers which our leaders appear either blind to or unwilling to address? Wright might want to connect this to contemporary concerns about rampant global corporate activity that seems to go unchecked

amid petty and irrelevant political debate, threatening the very nature of our social order. The very fabric of Western societies change as all manufacturing shifts to Asia and public services are slyly privatised. At the same time we appear to be involved in wars for which the purpose is never really clear against enemies who are never really identified. As with Wright's later westerns there is a sense that there are anonymous forces affecting our lives. Society is basically good but has itself become largely misguided and amoral.

Discourses and discourse schemas

On the one hand the Proppian-type analysis has been applied only to stories. What we are suggesting here is that narrative sequences can be found across genres of communication and also multimodally in and across language and images. But what we also want to stress here is the need to be able to draw out the narrative sequence of events, the deeper structure, in a way that shows how these are connected to broader social and political issues, issues that can be found in movies, news items, political speeches, children's toys, etc. This approach uses the term 'discourse schemas' (Machin and van Leeuwen, 2007) to emphasise the way that narratives are not simply stories, but draw on socially shared ideas about the world, people and events. It emphasises the way that narratives are socially produced ideas about what kinds of sequences of events are possible and necessary. Importantly the term 'discourse schema' links this kind of analysis to the kinds of knowledge disseminated and legitimised in society by media texts. 'Discourse schemas' are the activity sequences associated with the knowledge or discourse that is disseminated.

The term 'discourse' here is taken in a Foucaultian (1978) sense of 'socially constructed knowledge'. Discourses have been generally treated as the broader ideas communicated by a text (van Dijk, 1993; Fairclough, 2000; Wodak, 2001). These discourses can be thought of as models of the world. One example of such a discourse is 'immigrants are a threat to a national culture'. This is a model of events associated with the

notion that there is a unified nation and an identifiable national identity and culture. Normally this discourse encompasses a mythical proud history and authentic traditions. We can often see headlines that reflect this in right-wing tabloid newspapers, for example the title of an editorial from the *Daily Mail* (25 October 2007): ‘Britain will be scarcely recognisable in 50 years if the immigration deluge continues’. Other discourses might represent immigration as a good thing, as a contribution to diversity and a challenge to stagnant tradition, as would be the view of these authors.

However, in much discourse theory it is argued that knowing is based on doing (Martin, 1992). Fairclough (1995) and van Leeuwen (1996) have argued the case for discourses being closely interwoven with social practice. There is room, then, for the study of what exactly the basis of such social practice is. What are the activity sequences that comprise it?

Van Leeuwen and Wodak (1999) suggest that discourses have associated sequences of activity as well as related identities, values, settings and times. These sequences of activity can be communicated by a range of text types, genres and modes of communication, such as language, images and even sounds. We see this in terms of language in our example from the *Daily Mail*. This discourse involves participants: real British people and immigrants. It involves values or an ‘indigenous culture’. It specifies that ‘we’ must ‘defend’ this culture. In terms of sequence of activity we find a social order that is under threat by an intruder. The editorial wisely avoids presenting the case for what should be done, but what is implied is clear: that the social order should defend itself. It is this sequence of activity that leads us to the underlying socio-cognitive schemas that we can think of as the discourse activity schemas. It is not the details of the specific case but the basic underlying structure that is the focus of attention here.

The analysis we present here is essentially similar to the Proppian narrative analysis used by Wright in that it deals with the narrated events. But there is also a difference since this analysis not only applies to narratives but to all genres. It is not an analysis of the form of the text but of the knowledge that underlies the text.

And the analysis should seek to reconstitute links with the activities that the text recontextualises. In other words, what is the sequence of events that is present in the case of the *Daily Mail* editorial or the children's play described above?

It is important to note that even in the case of highly abstract texts we are able to find a narrative. Fabb (1997) noted that listeners will make an assumption that elements have some kind of sequential relationship even where they are very difficult to find and certainly not placed there deliberately. Social psychologists have shown that humans are predisposed to see narrative, as is demonstrated when people can describe character and plot for randomly moving shapes (Bruner, 1990) – for example, a bigger shape bullies a smaller one. Barthes (1977) stressed that as listeners and readers we are trained to place clauses and even words into causal chains. Todorov (1990) explains the process whereby humans appear able to find a narrative or discourse activity sequence where none is clearly present, what he calls an 'ideological narrative': actions may not be linked to each other yet we are able to interpret a link. This is one way, we might argue, that we often hear and interpret the lyrics of pop songs. We don't know exactly what they are saying but we decide they are about, say, a struggle or a journey. Here the perceived narrative may be built through the connotations of certain words or the way that they are delivered and in part it is for this reason that it is so essential that we also look carefully at the description of character, as we discuss later in this chapter. As Toolan (1988) points out, one important aspect of perceiving narrative is the predispositions a reader brings with them to the text, which will include their knowledge of kinds of people and the types of events to which they might be linked.

In summary, it is discourses that are the building blocks of narratives. Discourses allow different kinds of narratives to be composed. We can therefore analyse the sequences of activity to reveal the discourse building blocks and we can think of these sequences as discourse schemas. This level of analysis has been recognised in many other approaches to narrative such as those of Levi-Strauss (1963), Wright (1975) and Bettelheim (1976). In film studies it has been carried out by writers like Nichols (1981)

and Bell (1982) to look at non-fictional films. What was not necessarily made clear in these examples of excellent work was the fact that these activity sequences or discourse schemas can be applied to different genres which might have slightly different communicative aims. The model we present here is, we emphasise, only one possible form of narrative analysis which we believe suits the aims of media studies. Other forms of analysis include looking for expectations of audiences in narratives (Bamberg, 2004; Hyvarinen, 1998), and examining the genres of oral narratives (Riessman, 1990; Labov and Waletsky, 1997), narrative in social psychology (Bruner, 1990) and the structures of stories and myths (Leach and Aycock, 1983). These too provide valuable tools for the analysis and understanding of narrative. These all inform the model we present here and should be considered for a fuller understanding of the field.

Applying discourse schema analysis to different genre and modes

Let's think about the discourse schema to the headline analysed earlier in this chapter:

Two Israeli soldiers were killed by militants today in the Gaza Strip. Israeli government pledges reprisals

There is a social order

(Setting – Gaza)



There is a disruption of social order

(There is an unprovoked attack)



Order is restored

(There is punishment or eradication of threat)

It is this discourse schema that can be applied to a range of other genres. And it could clearly be used to tell a story, or create a political speech, or to play at soldiers. This is the same discourse schema that US presidents, from Kennedy to George Bush, have used to talk about world terrorism – often threats from populations

whose worlds have been under radical threat through the actions of the US for many decades. In the case of the news story the setting is relegated to after the events to give more impact. In a story genre we might have 'Once upon a time in the Gaza Strip'. In a political speech we might get 'The security of the Free World is being slowly nibbled away at the periphery by world terrorists'. Here setting, or social order, is established by the use of the rhetorical device 'Free World'.

At the peak of Bush's War on Terror the same discourse could be found in advertisements produced by the US government. A one-page advert appeared in the US *Oprah Winfrey* magazine (September 2004). It comprised a one-page close-up of a rack of neatly arranged used women's shoes as if in a regular closet. Across the middle of the page was written: 'But do you have a whistle?' Beneath the shoes was written: 'Ready.gov. You have the things that make you happy. Get the things that make you prepared. Make a plan. Get a kit. Brought to you by The America Prepared Campaign, Inc.'

Here we have a different genre but find the same discourse schema being drawn upon. However, in the genre of the caution advertisement, we find that different moves are used. This is a warning genre and can be used in adverts to sell things that can be marketed as safety products such as quality tyres for cars, or cars themselves that have advanced breaking systems, showed swerving gracefully past a deer on a deserted road through a forest, cutting back to the sleeping child seen through the back window. The same can go for insurance policies or 'healthy' foods for children. In each case problems, or dangers, are chosen, in order help to sell a product or particular kind of preventative measure. In this way the 'America Prepared' advert allows one kind of solution to be presented as naturally linked to setting and threat. (Another solution to the attacks on the US could be to seriously address US foreign policy.) The discourse schema again here is:

There is a society

(indicated here by the shoes rather than a place)



There is a threat to that society

(this remains unmentioned but implied)



Solution

(here we are left with the question as to whether you are part of the solution by, absurdly, having a whistle!)

The discourse schema underpinning a movie: the example of *Black Hawk Down*

Here we look for the discourse schema in the movie *Black Hawk Down*. This is a US movie about a US military mission in Somalia in the 1990s. In fact, as we will shortly explain, the movie excludes a number of key contextual issues and basically inverts what actually took place in this country, for which the US was entirely responsible in the first place due to its foreign policy of supporting and arming sympathetic rulers. This led to massive internal warfare and famine in Somalia. The film depicts US Special Forces entering Somalia to address this problem which, in fact, evidence shows they only made worse. What is important in this case is how a certain discourse theme is used to recontextualise these oversights. We begin with a synopsis of the film. In this kind of analysis it is always useful to first break the text down into a sequence of events before then proceeding to isolate the most basic sequence of activity.

1. We are shown gangster types taking control of a Red Cross food delivery. They shoot ruthlessly into the crowd of desperate civilians. This is watched by US soldiers from a helicopter who are unable to engage for political reasons.
2. We meet the US soldiers in stereotypical soldier representations, writing home, telling jokes.
3. We are told about the mission, which is to capture a warlord (Aidid) who is creating the problems.
4. The soldiers are taken to the location.
5. There are a series of difficulties.
6. The soldiers get back to base.
7. The soldiers talk about the meaning of soldiering.

At the deeper level we can find the same discourse schema as we have already seen above in several cases:

There is a threat to social order

(by a warlord Aidid)



There are some special individuals who could provide a solution

(The elite soldiers)



They are special individuals

(we hear about the men's commitment to each other)

In this film there is no complete closure in terms of the threat. But we learn about the special qualities of the soldiers and their commitment. We are told at the end: 'When the shit hits the fan and the bullets start flying politics goes out the window. All that matters is that man standing next to you.'

As with the advert we do not have closure in the discourse schema. Like the advert we have a kind of warning. In the advert we need to be ready, by having our whistle. In the film we need the Special Forces. While the politics might be complex – we are told at various points about the way that bureaucratic/political red tape often makes things overly complex where clearly matters are simple – we can rely on these soldiers. We are also told at the end that around 20 US soldiers died, but additionally that thousands of Somalis died. They are indeed effective soldiers. But like the advert we focus more on the solution than the nature of the problem.

The events as depicted in the movie are in fact a long way from what really happened. Since the early 1990s Somalia had been seen as one important way for the US to have military bases close to the Middle East before an agreement was later reached with Saudi Arabia. At the time the Soviet Union was in a similar situation in neighbouring Ethiopia. Both the US and the Soviets fed massive amounts of arms into these countries to support friendly rulers and to keep each other at bay. The six million deaths that happened in Somalia were as a direct consequence of arming violent warlords and the huge population displacements

that followed. It was only when the US left and ceased to provide 'aid' that relative stability returned to the country. And in fact it has been argued that the US army did nothing to help during the famine but rather provoked further population displacement and fighting. It was the Red Cross who provided most constructive aid working diplomatically with different clan leaders and advising the US military to leave. However, the film *Black Hawk Down* claims the opposite: we need the military as unlike politicians and bureaucrats it has a simply and easily comprehensible morality.

Importantly the same kind of analysis can be applied to news items and to a range of genres such as children's play.

The problem–solution discourse schema

We have focused so far mainly on a discourse schema for war. We now move onto a different kind of schema found here in a women's lifestyle magazine: the 'problem–solution' schema. Here we find a discourse schema, like that of the conflict resolution schema found above, that can make a sequence of activity appear natural, reasonable and all-encompassing when in fact it is highly ideological and selective.

Here is an extract from the problem page of *Cosmopolitan* magazine (November 2001). The first is a case story and second is the view of the magazine's own psychologist:

Liesbet (30) My partner often works late, as he has a very demanding job. I myself work from home. I used to start looking at the clock at 5. At 6 he would be home. A minute too late and I would be furious. I would throw his dinner in the bin, lock the front door at 5 past 6, go to bed alone at 10 and throw his duvet down the stairs. After many angry outbursts I realised the true reason of my anger. It was always me who had to clean up the mess in the house. I am also busy. I felt he didn't take my work seriously. Now he helps clean up in the evenings. And when I start my day in a clean house, I don't mind so much if he's late.

Lillien: You mention two extremes, and as so often, the middle road is best. The solution is to express your anger immediately or as soon as possible. In that way you rid yourself of it and the message hits home. An example: you have a shared job and your colleague always leaves your shared desk in a mess. You don't say anything, but you are extremely irritated. Your anger mounts up. Suddenly, you can't repress it any more and there is an enormous outburst. Result: the message does not hit home because your reaction is excessive. And afterwards you will feel even worse. If you had acted in time, your colleague would have understood you and you would have felt better.

There are many differences between these two sections of text, the case and the expert counselling. The first deals with a personal relationship, the second with a work relationship. Yet both are based on the same activity sequence: something upsetting happens, the upset person represses their anger which has bad consequences, leading to more anger. Finally communication leads to the final outcome where the solution is found. It is this problem–solution schema that dominates stories, advertisements and letters in women's lifestyle magazines. As in advertisements these can work, through making solutions seem natural and simple, to ideologically define what the problem is in the first place. We will explain this further shortly. First the schema can be illustrated as follows (the asterisk signifies a 'wrong solution' leading to a 'problematic outcome'):

Initial problem

(various)



***Solution**

(suppress anger)

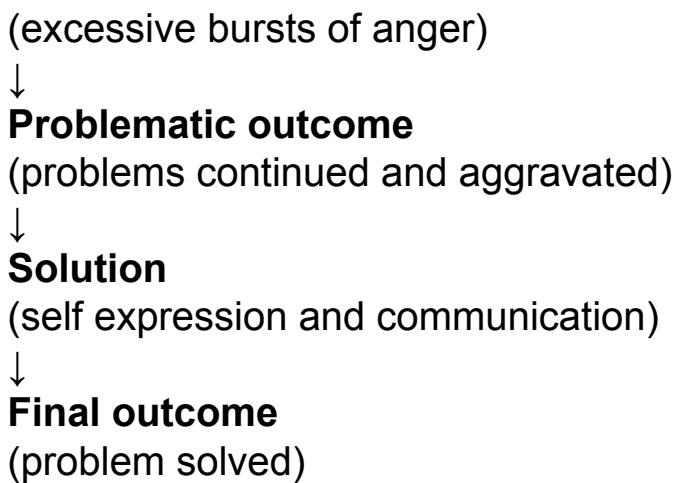


Problematic outcome

(physical and/or mental well-being affected)



***Solution**



We can see that this schema could fit a range of genre and modes. It could be realised through a story, a game or an advertisement, for example where a woman finds the correct solution for skin problems. But what is important to note here is that the problem itself, for which the solution is provided, is itself ideological and engineered to fit the solution. Magazines like *Cosmopolitan* work in part by providing women with snippets of empowering advice and expertise. In the case of the skin problems we could argue that this is in itself ideological as cosmetics producers seek to create the kinds of problems their products can resolve. As Western magazines move into new global territories, new sets of readers are able to find out that they should be thinking about kinds of skin problems that they had never before considered existed.

In terms of this extract we could argue that there may be many other factors that have caused the difficult situation to occur. Take the case of the desk sharing. One of the authors has a colleague, a university lecturer, who was asked to share a desk on moving to a new building which was open plan and required all lecturers/researchers to ‘hot desk’. The old building was sold as part of a process of managing finances and rebranding. Both she and her colleague found it stressful to share the desk as it gave them something further to juggle in their daily routines along with the usual business of teaching, writing emails, seeing students and doing administration. Both colleagues switched some of their work to home, but both found sharing a desk difficult. Formerly

they had their own office space where they could leave their things, marking and books and could take tutorials with students.

This change to ‘hot desking’ was part of a broader set of changes faced by British universities that involved waves of financial cuts and the deprofessionalisation of academics. But in the *Cosmopolitan* case study there is no mention of actual context, nor of the concrete situations nor disposition of those involved. This suppression of contextual matters allows the solution of ‘communicating’ to appear more feasible.

Cameron (2000) has given a thorough analysis of the way that communicating about our problems has become a replacement for actual concrete solutions. What was formerly simply ‘talking’, a commonplace activity, has become rather a technical skill in its own right with professional experts able to tell us how it should be done. Cameron connects this to changes in the economy and relates it to human resources and management trends where workers are not trained in subject/job-specific skills but in attitudes and styles of work practice. So talk is increasingly codified and communication is seen as an end in itself rather than as a means to bring about change.

Many employees will find themselves stressed, faced with heavy workloads and new increased demands on them as staff and resources are cut back. Due to financial constraints there is little they, or their employers, can do about this. However, they will most likely find that they have the right to counselling where they are able to talk about their problems and therefore be able, the theory goes, to understand their own responses, learn to manage their time and their stress better. In this *Cosmopolitan* text actual concrete issues of workloads and requirements, along with the personalities of the individuals, are omitted. The issue of the domestic task sharing is easily resolved through communication, irrespective of how much things like work, family and other personal issues may be making crushing demands on those involved. Of course it is clear that for organisations this is all an advantage as concrete issues can be more easily sidelined.

This problem–solution schema can be applied across genres and contexts, and non-specialised experts are able to provide the details of just what the problems and solutions are. In the careers

advice example from *Marie Claire* (2010) that we encountered in [Chapter 6](#) we are able to draw this out further. The text is preceded by a photograph of a woman dressed in casual clothing, sat informally holding a notebook as if musing. The setting here is comprised mainly of a large window. Here is a reminder of what the article says:

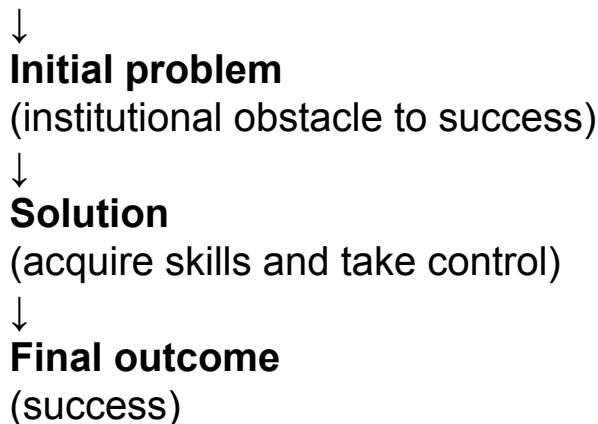
Yes, it is still possible to scale the corporate ladder in spite of layoffs. Here, Bob Calandra, co-author of *How to Keep Your Job in a Tough Competitive Market*, offers advice for gingerly negotiating a title bump:

- **Act like the boss.** If your manager gets canned, set up a meeting with her supervisor right away. Calandra's no-fail script: 'I'm not looking to be promoted, but I also recognize no one wants chaos. I know the ins and outs of my boss's job, so feel free to tap me for any of her work while we're in this transitional phase.' To come off a hero, you can't appear as if you're expecting anything in return.
- **Pollyanna gets the corner office.** Be a relentless cheerleader for the company, even if it means irking coworkers. Your manager is bound to pick up on your positive outlook and use you as a model.
- **Mind your alliances.** If watercooler gossip reveals your cubemate is on management's hit list, publicly align yourself with the office hotshot, even if it makes you feel like Tracy Flick. Appearances matter – and you can always commiserate with your axed colleague over cocktails later (your treat).

Again here we find advice from an expert that seeks to fit all cases. Here we find a woman faced with a situation where there are redundancies in her workplace. She is not encouraged to engage in collective action by seeking out union advice but to act alone and strategically. Here is the discourse schema:

There is a society

(indicated by setting in image and the generic word 'company')



Of course a woman may face many institutional obstacles in a male-dominated world. She may have difficulty accessing certain places or activities, getting promotions, etc. But this is in principle due to issues of social and gender inequalities. However, in women's lifestyle magazines such as *Cosmopolitan* and *Marie Claire* this is usually formulated as a personal problem and the social and political issues behind it are rarely dealt with explicitly. And in this case, as is also usual, we find an absence of any kind of contextual personal issue such as life situation, personal dispositions and abilities. In the problem–solution schema one size fits all.

We can ask what is omitted in this schema, in the same way that we saw what was omitted earlier in the case of the *Black Hawk Down* movie. Here we have a situation where the woman's colleagues are losing their jobs yet this is represented not as a problem in itself for others or for the woman to deal with on their behalf. It is presented as simply an institutional obstacle to her own success. The solution is to acquire a new set of skills. Typically in these lifestyle stories these skills are related to manipulating others or to issues of self-presentation or superficial organisational skills.

We can see from the text that the setting is also unclear. Here the setting is provided simply by an informal environment in the photograph that is used to connote or symbolise 'work'. In Proppian terms this provides the first stage of the discourse schema since it is the disruption of the regular social order in the workplace where promotions could be naturally gained that has triggered the sequence of events. In the text we also find lack of

specificity with the mention of your ‘company’ and ‘watercooler’. This is clearly a generic office environment. The woman is not told in specifics how she can up her workload or produce new methods of work with the reduced staffing. She improves her situation by alignments, self-promoting and by being positive.

One important question to ask here is how such texts appear as anything other than extremely callous and selfish. In order to answer this we need to take a step in the direction of Barthes’ (1977) ‘indices’; in other words, we need to think more about the details that comprise the narrative, the characters, and details of the action. In the case of *Black Hawk Down* it will be the way that US soldiers are represented as attractive and humane that will help to sell the narrative where thousands of local inhabitants of a town are killed. In this *Marie Claire* article, too, we can look closer at the participants. As Toolan (1988) pointed out, character is key to the way that people grasp narratives. As Todorov (1990) highlights, narrative structure can be more of an idea that is created in the heads of the reader or viewer as they come across key elements. Toolan (1988: 98) gives the example of us coming across the introduction of a ‘beggar’ in a story about Victorian Britain. He points out that this in itself sets up a narrative sequence in that we are likely to assume that this person represents some kind of social injustice which at some point will become an issue.

When we wish to understand the role of characters in a narrative we can do two things. First we can simply list the characters. We can then assess and classify them. In example of the movie *Black Hawk Down* above characters were the US soldiers, the enemy militia and civilians. The last two of these regularly blurred (where, for example, children were armed) in order to show the complexity of the world the soldiers needed to deal with.

In the *Marie Claire* text the characters are: boss, manager, management, supervisor, Calandra, office hotshot, I, you, her, we, Pollyanna, cheerleader, coworkers, colleague, Tracy Flick, cubemate. In [Chapter 6](#) we used a table (p. 130) to arrange these characters into four categories: formal work terms (boss, manager, management, supervisor, coworkers); more trendy

language (office hotshot, cheerleader, cubemate); fictional characters (Pollyanna, Tracy Flick); and, lastly, personal pronouns (I, you, her, we).

What we can now do is consider what kinds of character features each of these groups and individuals brings to the narrative, what is in linguistics called ‘distinctive feature analysis’ (Fowler, 1977; Bolinger and Sears, 1981). On the one hand we have a set of participants that we might expect when dealing with the work environment as in ‘boss’, ‘management’, supervisor’ and ‘colleague’. Although markedly absent here is any reference to trade unions. In this text the woman who is addressed acts alone and strategically.

These work-type characters place the events into a formal work environment, although we should note that there are no more specific terms to define exactly what kind of worker the woman is. We are not told what particular job is performed by these people, only that they are generic ‘supervisors’ etc.

It is the second type of participant that plays the role of lightening the topic. If characters were only of a formal workplace nature this may indeed have made the text too cynical. But this is changed on the one hand through the use of terms for participants such as ‘office hotshot’, ‘cubemate’ and ‘cheerleader’. This use of the latest expressions plays an important part in indicating that this is an up-to-date way of seeing the world, a crucial part of lifestyle discourse which is harnessed to the ‘latest-thing’ discourse of consumerism (Machin and van Leeuwen 2007).

On the other hand the tone of the narrative is lightened since some of the characters are fictionalised. Both Tracy Flick and Pollyanna are assertive and independent yet likeable characters, from a movie and children’s fiction respectively. In this text therefore real-world issues of redundancies merge with fun characters from popular entertainment.

In these texts, as we often find in advertising, the world is reduced to a simple problem–solution formula. None of this envisages personal issues. In the problems and solutions offered all persons can use them and they are universally applicable. Everything is displaced to a set of strategies.

Doing a research project with discourse schema analysis

Discourse schema analysis can be carried out on a sample of texts as in the case of Wright's (1975) study of westerns. Wright compared films from two different periods of time in order to draw out the differences. This would have followed usual sampling procedures. The sample could be defined as including texts from over a time period or that dealt with a particular topic. Machin and van Leeuwen (2007) collected versions of the women's lifestyle magazine *Cosmopolitan* over two months from all of the international versions. They then translated a sample from them and compared the discourse schemas.

Discourse schema analysis is a qualitative form of analysis since to some extent it involves interpretations of what can be viewed as the most basic sequences of activity in a text. It also involves a qualitative assessment of characters in the texts. But in the tradition of Critical Discourse Analysis it can be seen as one further way that we bring an analytical framework to texts that encourages us to ask a more systematic set of questions. As it is a qualitative form of analysis the researcher need not seek high numbers for purposes of representativeness but only ensure that they have enough examples to feel satisfied that they have indeed identified a pattern in the manner stated by Wright. On the other hand a discourse schema analysis might be carried out alongside other methods where the aim is to carry out an in-depth analysis of one or several films, or other media such as computer games. Semiotic analysis and Critical Discourse Analysis could be carried out to look at the details of the text and discourse schema analysis used to reveal the basic activity sequences.

Summary

- Discourse schema analysis is largely interpretive but can draw our attention to the basic underlying structures of any media text.
- Discourse schema analysis is used in order to look for the basic activity schema that is the doing part of the knowledge part of discourse. As such it is used to reveal the basic

sequences of events that are used to frame how a particular practice should reasonably be carried out.

- Discourse schema analysis is not the same as story analysis. It draws on narrative theories that seek the underlying structures to look at activity sequences across different genres of communication and across different modes of communication. A stage in a sequence may be represented by a sentence, a sequence of a movie or an image.
- When carrying out discourse schema analysis we should first attempt to summarise the basic events that comprise a text. We can then take this to the next step of looking for the underlying schema.
- The sampling of data for this kind of narrative analysis, in the tradition of Critical Discourse Analysis, involves collecting a sample that will depend on the aims of the research. For example a piece of research may seek to compare the schemas in representations of war reporting over two separate periods of time. The researcher would collect a sample of stories from each period and carry out analysis until they were certain that they had identified a pattern. It is common in Critical Discourse Analysis to collect a ‘corpus’ of texts that may include all those available on a topic, and then select a number for closer analysis that are presented as representative of the wider corpus.
- Discourse schema analysis may be carried out alongside other forms of discourse and semiotic analysis.

Further reading

Wright, W. (1975). *Sixguns and Society – A Structural Study of the Western*. Berkeley and Los Angeles, CA: University of California Press.

Classic study of structural comparisons of movies.

Machin, D. & van Leeuwen, T. (2003). Global schema and local discourses in Cosmopolitan. *Journal of Sociolinguistics* 7(4), 493–512.

A look at the various ways that a problem–solution schema can be used for different topics and genres.

Hyvarinen, M. (2008). Analysing narratives and story-telling. In P. Aluutari, L. Bickman, & J. Brannen (eds) *The SAGE Handbook of Social Research Methods*. London: Sage 477–460.

An excellent overview and explanation of the different kinds of narrative research done in different fields.

Hornig, S. (1990). Television's NOVA and the construction of scientific truth. *Critical Studies in Mass Communication*, 7(1), 11–23.

Looks at the narratives and binary oppositions of science documentaries.

CHAPTER 8

Analysing photographs and video

Introduction

While photographs and video form a major part of media communication there has, in comparison with other areas of media research, been a relative lack of attention to developing a strict methodology for their analysis. Even books whose titles suggest otherwise such as *Triumph of the Image* (Mowlana et al., 1992) and *Visualising Deviance* (Ericson et al., 1987) in fact provide little in the way of models for analysis. Other volumes, *Visual Studies* (Elkins, 2003), *The Visual Culture Reader* (Mirzoeff, 1998) and *The Photography Reader* (Wells, 2002) contain excellent essays about the nature of looking at photographs and how historically we came to see them as offering factual information rather than simply offering one particular point of view at a particular moment. But again there is little sense of how to study them systematically. In fact much analysis has been in the area of cultural studies where 'close readings' are given, but which are very much a matter of open interpretation.

This chapter brings together a number of approaches from traditional semiotics and linguistics-based Multimodal Critical Discourse Analysis (Machin and Mayr, 2012) in order to show how we can produce much more systematic analyses. In the main part of the chapter we provide a set of guidelines for how in the first place we can *describe* what we see in images. Often this level of investigation is what is overlooked where the analyst jumps immediately to *interpretation*. This is because in academic culture

we often value interpretation over description. We criticise student essays for being ‘too descriptive’. But description is a vital level of analysis in the case of both still and moving images. So this chapter is for the most part a guide in how to really be able to ‘see’ what we are looking at.

The methods described in this chapter are to some extent qualitative and are intended for detailed analysis of a smaller number of cases. Yet, since they draw on linguistic forms of analysis, they also have a quantitative aspect as we describe actual concrete features of images. So some of the tools in this chapter can lend themselves to quantitative research and can be aligned to content analysis as described in [Chapter 5](#). At the end of the chapter we will discuss specifically what a research project using this approach would look like in terms of things like sample size. But as with other chapters in this book it should become clear just how this approach should be used by the way the examples are dealt with and the models applied.

In this chapter we draw on a number of key observations of Roland Barthes (1977) as regards the simple contents of images and on a number of ideas from the Multimodal Analysis of Kress and van Leeuwen (2006) and Multimodal Critical Discourse Analysis of Machin and Mayr (2012). We use these to help us to describe and investigate more accurately what we see in images as regards the different ways that people, places, objects and actions are represented.

The semiotics of Barthes

Roland Barthes offers a simple set of questions that we can ask of an image. Simply put, these allow us to think about what ideas and values, the people, the places and objects in images stand for. But Barthes also points out that at one level we must describe carefully what we see in the photograph independent of our interpretation of it. In fact this first level of analysis can be the most difficult.

Denotation

At Barthes' first level of analysis, often overlooked, we ask what an image depicts. Literally, what do we see? Or, in his terminology, what does the image *denote*? Photographs or film shots of a family member or of a house simply depict or denote these things. They represent a particular person and a particular place respectively. A news photograph might document or *denote* a group of people in a particular place. [Figure 8.1](#) denotes two women in a room. It also denotes particular colours, objects and a setting with a particular kind of lighting and different levels of focus. So asking what an image denotes is asking: who and/or what is depicted here? What follows in the rest of this chapter are tools for drawing our attention to this process of denotation. It is surprising how difficult we can find this activity. But it is through enhancing this skill that we can develop our ability to produce more accurate interpretations.



Figure 8.1 Women in an office (Two women with a laptop. Per Magnus Persson/Johner Images/Getty Images. © 2012 Getty Images. All rights reserved.)

Of course we never really see any image in this kind of innocent way as simply depicting something. Images usually mean something to us. Writers like Bal (2006), in fact, take this idea of how images or any of their parts can trigger different meanings for

us as being crucial to any analysis. But denotation, for Barthes (1977), is one way to think about the first level of meaning in a photograph and it can help to direct our observations. Even at the level of denotation a photograph can define the subject. For example, whether we photograph or film a person alone or as part of a group can influence whether they are shown as an individual or as a type, whether we are encouraged to identify with a person or just see them as an anonymous part of a crowd. Denoting people in particular places or in groups, from different angles, in distance or close up, will have an effect on how we will see them. But all these too can be carefully described and classified as we will show later in this chapter.

Connotation

Here we ask what ideas and values are communicated through what is represented, and through the way in which it is represented. Once we have identified what is depicted we can ask what it means, what the cultural associations are of the elements and features in, or qualities of, the image. Barthes (1973), in *Mythologies*, called connotative meanings ‘myths’. Myth is the concept used to express the condensed associations of what is represented in an image or element or feature in an image. Myth here is very much like the term ‘discourse’ used by Foucault (1978). He used this term to describe the kinds of taken-for-granted models of the world that are broadly shared in society to understand how things work. These models will generally be pretty much arbitrary and will typically reflect particular interests of groups and powerful individuals. So, as we have discussed, in a society we might have a broadly accepted discourse of crime and punishment where it is understood that bad people commit crimes and are appropriately punished by being placed in prison. However, in fact, it is for the most part the case that prisons are filled with a society’s disadvantaged and those from lower socio-economic groups. In the US, for example, there are a hugely disproportionate amount of black men in prison. This problematises the discourse that frames crime as being committed by bad people who should be punished. This in turn

raises questions about the nature of how we organise our societies and why some people end up committing acts that are defined as bad. Barthes would call these accepted models of the world 'myths' as they are taken-for-granted models of the world that are basically unfounded. For Foucault these would be 'discourses' or the models of how the world works that dominate how we come to think about things. Such views will tend to support the interests of powerful groups in a society. So it is in the interests of the powerful and the wealthy that certain definitions of crime hold sway.

In [Figure 8.1](#), therefore, we can ask what meanings, myths or discourses are associated with the kind of women we find, the objects they carry and the colours we see. However, before we take this step of analysis we need to first begin to break the image down into its components and qualities in order to carry out more accurate observation. We need to take a step in the direction of more precisely describing what is denoted.

Barthes listed a number of key carriers of connotation. In turn we look at poses, objects and settings.

Carriers of connotation

Poses

According to Barthes there exists a dictionary of poses in our heads. These poses often carry connotations drawn from association. For example, a soldier, at attention, stands straight, rigid and tense. The pose is regular and precise. But why is it that a particular posture can connote discipline and respect? There are in fact a number of what we can call 'metaphorical associations' taking place here. Arnheim (1969) has shown that metaphorical association is at the core of much visual communication. For example, we might make a small distance between our thumb and forefinger to represent how close we were to verbally berating someone. In fact no physical proximity was involved in how close we felt at all, as it was simply a feeling of emotion. But the representation, the comparison, allows us to visualise this feeling and the way we felt close to a particular action.

Another typical use of metaphorical association in visual communication is in the shape and form of letters used in advertising. We will normally find that an elegant product will use a taller, slimmer, lighter font than a product that wishes to communicate durability which will use a wider, heavier-looking letter shape. Here the elegant product can use the association of height with status, and slimness with lack of heaviness which is important to signify elegance. In contrast the durable product will wish to avoid associations of lightness and elegance and emphasise stability. These associations come from our experiences of things in the real world. Wider, blockier objects are generally more stable and slimmer objects lighter, and possibly more agile.

The same kinds of metaphorical associations can be found in poses and there are a number of qualities that we can look for. The first is rigidity versus looseness. In the case of a pose where we make our body very straight and rigid this emphasises us controlling it consciously. This can have the association of discipline, subjection to the confines and restraint of authority. This is why standing in this manner can suggest the machine-like nature of the army, particularly where we find many people striking the same pose. In contrast we might find a young teenager standing very loosely with their shoulders drooping. This may be no less deliberate than the rigid pose, but can connote the opposite of control and rigidity.



Figure 8.2 Woman with attitude (Young business woman standing on desk, portrait. Tim Robberts/The Image Bank/Getty Images. © 2012 Getty Images. All rights reserved.)

Figure 8.2 was taken from an image archive where it was classified under the search terms 'women' and 'attitude'. A search of the archive under these terms or under 'women and confidence' throws up many images of women staring at the camera with their head slightly to one side and hands on hips. In these images 'attitude' is depicted, therefore, not through a person's attitude to a particular issue but rather by the pose that they strike. Therefore what in fact is a mental process is represented by pose alone. The

pose we find here is one that is rigid and controlled and designed to look deliberate. It is this which communicates ‘attitude’. Were the same pose done but with loose shoulders and neck it would not convey the same level of determination.

Another question we can ask of pose is the extent to which it involves the taking up of space or not. In the pose in [Figure 8.2](#) we find the woman taking up space by placing her feet apart. We generally associate taking up of space with confidence and lack of inhibition, although of course it can have the opposite meaning of arrogance and insensitivity. In [Figure 8.2](#) this taking up space, spreading oneself around, suggests lack of timidity. The woman indicates that she has the confidence to take up space. We can imagine the opposite effect if her feet were placed close together and her arms pulled in close to her chest. This would suggest timidity and vulnerability.

[Figure 8.2](#) also depicts the woman as leaning slightly away from the viewer. A person shown as moving into or out of our space can have metaphorical reference to physical proximity in the everyday world. Of course this can either mean something positive or something invasive. Imagine a picture of a policeman leaning over a desk towards you as opposed to one leaning away, which might mean them distancing themselves from you. A newsreader would maintain a neutral position in order to suggest no personal involvement. Imagine if a newsreader were to deliver the news leaning back away from us, or leaning right over towards us. Leaning back, as well as suggesting relaxation might suggest lack of engagement with the viewer and therefore lack of trust. Leaning forwards would suggest excessive intimacy and excessive desire to persuade us of something.

Angularity and curvature can also communicate important meanings. In [Figure 8.3](#), while the woman takes up space she also brings her hips slightly to one side. This creates curvature which is associated with femininity rather than masculinity. Again in terms of metaphorical association we often find in the letter forms used for products in advertisements that those aimed at male consumers use more angular fonts whereas those targeting women use curved fonts. Curved fonts suggest something softer and more organic, whereas angular fonts suggest something

more aggressive and mechanical. The pose of the woman in [Figure 8.3](#) therefore suggests confidence along with femininity. There is also slightly less rigidity communicated because of this curvature.



Figure 8.3 Woman and leadership/confidence (Portrait of an assertive female CEO standing with two businessmen. Rayman/Digital Vision/Getty Images. © 2012 Getty Images. All rights reserved.)



Figure 8.4 Woman jumping in nature

[Figure 8.4](#) draws on the meanings of poses that are open as opposed to closed. In the image archive from which this was taken this photograph was classified as ‘women’ and ‘freedom’. A search under these terms throws up thousands of images of women jumping or whirling, with their arms or legs out wide. This pose, particularly the openness of the body, is used to connote freedom. In contrast to the containment of the pose in [Figure 8.2](#) we get a sense of joy and energy. The idea of freedom, which can mean many things – freedom from financial worry or worry of job security, freedom from oppression, freedom of thought – are metaphorically represented through the freedom from restriction of physical movement. So images of women jumping in the air or raising their hands can be used for health products, insurance policies, etc., to connote freedom from worries. But it is not sufficient to see them jumping only. A photograph of a woman jumping but with her body otherwise closed, with arms pressed against her sides, will suggest that she is somehow closed to the outside world.

Summary of poses

- To what extent do they take up space or not?
- Is the body open or closed?
- Is the body aligned and controlled or liberated?
- Is there an emphasis on relaxation or intensity?
- Is there a sense of comfort or discomfort?
- Is angularity or curvature emphasised?
- Do they appear to lean/move towards or away from the viewer?

Analysing gaze

One important feature of the images we have considered so far is whether or not the person/people depicted look out at us, or if not where they are looking exactly. In pictures and in film, as in real life, the depicted people can *look* at the viewer, so that there is symbolic ‘contact’ or ‘interaction’ between the viewer and the people depicted. They can also be depicted as *not* looking at the viewer, so that this kind of ‘contact’ or ‘direct address’ is absent. Kress and van Leeuwen (1996: 127–128) suggest that we can think about these in terms of ‘offer’ and ‘demand’ images.

In [Figure 8.2](#) the viewer is addressed by the gaze of the woman on the desk. This is a ‘demand’ image where the viewer is acknowledged. It asks something of you in an imaginary relationship.

The kind of demand will be determined by other factors. In real life we know what happens when someone smiles at us or when someone strikes such a pose. We must smile back or take their anger seriously in each case. We understand the response in the case of images although we know of course that there will not be the same kind of immediate consequences if we do not respond.

Where the represented people do not look at the viewer there is a different kind of effect. Here there is no contact made with the viewer and no demand made of them. In this case the viewer can observe the people represented since they are not called upon for a response. Kress and van Leeuwen (1996: 124) call this kind of image, therefore, an ‘offer’. In [Figure 8.1](#) the woman with the laptop does not engage with us, nor invite us to share in her experiences. We are simply observers. We have no relationship with her.

In offer images it is important to consider where the person is looking. In [Figure 8.1](#) the women look at the computer. But often people are depicted looking off frame. In such cases the viewer is invited to imagine their thoughts or mood. For example a woman might be depicted looking off to the right of the frame, slightly downwards, basically expressionless. We are invited as an observer to imagine her thoughts, although since she doesn't look at us no response or action is expected. What she is thinking about, whether in a news item, feature or advertisement will be shaped by a caption such as 'Worried about your pension?'. Here off frame represents off world, or inner thoughts, even though, in fact, the image may be a cropped version of a scene where the person was actually looking at something specific.

When those represented do look off frame there is also meaning potential in terms of *where* they look. This can be based on the simple metaphorical association of up and down where up is positive, powerful, high status and down is negative, low energy, low status. In Western culture up and down have strong metaphorical associations. We say 'I am feeling down' or that 'things are looking up'. We can say that a person 'has their head in the clouds', or is 'down to earth'. We have upper and lower classes and people with higher status are often seated higher than those with lower status. In political party promotional films we often find politicians filmed looking off frame and slightly upwards. In images in women's magazines, in contrast, we often find women looking slightly downwards, alongside captions like 'Can you trust your boyfriend?', although where the woman is looking upwards the same topic can be made more upbeat. The politician looks upwards to lofty ideals and to high status whereas the woman in the magazine is worried that things are bad and requires the advice of the magazine to work things out.

Where people in images look directly outwards, although not directly at the viewer, this can communicate a sense of dealing with issues straight on. Again these meanings will depend on other features like facial expression and pose.

More observations on how people appear in photographs will follow in later sections. But importantly for now, all of these observations so far only deal with one element of the contents of

an image. The overall meaning depends on other elements and features that we now move on to.

Objects

Our second carrier of connotation is objects. In the first place, as with poses we need to first describe what we see in the photograph. We can then think about the meaning potential of this object. [Figure 8.1](#) was sourced from an image archive using a search for ‘women’ and ‘office’. It is an image that could typically be found in the careers section of a women’s lifestyle magazine. In this image the objects are the laptop, the sleek clothing and hair and also the lack of other objects that normally comprise the everyday clutter of a work environment. While we know nothing about these women these objects tell us something about them due to their associations. We have no idea where these women are yet these props suggest a particular kind of work and therefore create specific identities for the women. These identities would have been different had the objects been a PC rather than a laptop, had their desks been cluttered with files, had there been a landline telephone sat on the desk. Such images will depict women holding mobile phones rather than landlines. Both the laptop and the mobile telephone suggest a kind of work that is independent and not based solely in an office, or that does not tie a person to one particular desk. Even if this image were to be used in a promotion or advert to reference work in general, it is able to connote something of independence and mobility. This also suggests other values such as work being a challenge, creative and dynamic. A PC and a landline telephone would tend to suggest a more mundane job where there was less mobility and less independence. A slightly different meaning is present in [Figure 8.2](#) through the presence of the desk were there a phone it would mean a landline telephone. This suggests a more static role for the person who works there.

Pose too is important in [Figure 8.1](#) in the context of the work setting. The women do not appear to be slumped over the machine carrying out repetitive work. Both appear loose and relaxed and are sat in a manner that does not suggest they will be

positioned there for long, as if this may have been spontaneous sharing of ideas.

Important too in [Figure 8.2](#) are the objects that are missing – such as files, pens, papers. Imagine if an administrator in our own university was to stand on her desk full of her ongoing work. This would give a very different meaning. It would appear silly and give the impression even of mental instability. Here the lack of other objects serves to decontextualise the image and therefore increases its symbolic role.

In [Figure 8.3](#) the shoes worn by the woman are important, as well of course as the suits worn by her and the two men. The suits obviously tell us that they are professional business people. But the shoes have particular salience. The shoes have very high heels and the woman wears her trousers short to emphasise them. This photograph emphasises power through the suit but at the same time shows the woman as seductive and sexual. This is different to [Figure 8.2](#) where the woman is not seductive. In [Figure 8.3](#) we can see that the shoes work in a similar way to the pose. The woman strikes a confident pose but one where she curves her hips. She wears a suit but with shoes ready for seduction. Here power is not independent from her sexuality.

Settings

Barthes also pointed to the important connotations carried by the settings we see in images. In [Figure 8.4](#) the woman is depicted in an area of trees with ocean in the background. Here nature is depicted. But we can ask what kind of nature this is and what this connotes. Would the effect be the same had the setting been farmland, or were it a bleak overcast day or were she in the middle of a wide stretching open barren grassland? Firstly, this is a kind of nature associated with a particular kind of leisure. It is a mild kind of hiking, rather than a more extreme kind in wilder terrain. It is a free space which also affords open views, itself used to connote freedom from physical restriction. This image can be used in advertising, promotional and lifestyle images to connote freedom from psychological restrictions such as work and financial pressures.

In [Figure 8.3](#) we find an interior setting where there are a number of important features. The first is the size of the space in which the participants are positioned. We can ask how this image would be different were the three participants positioned in a very small entrance hall. Space means luxury and of course wealth and power. Were this woman, striking this particular pose, with her heels and slightly short trousers positioned in the entrance to a small shop her meaning would be changed. The glass and shiny surfaces are also important in this image. On the one hand in Western thought there is a metaphorical association of knowledge and truth with transparency and lack of knowledge with obscurity. In our language we say ‘it is becoming clear to me now’. The association here is with vision. On the other hand glass and shiny surfaces are associated with modernism, itself aligned with truth in Western thought. So business often wishes to align itself with clarity of vision and with modernity.

There is one other kind of setting that is increasingly important in the image that we see in magazines and newspapers. [Figure 8.1](#) is an example of this. Here there is no actual identifiable setting to speak of. We might easily assume these women are seen in a work environment were the photograph to be used in a ‘careers’ feature in a magazine. But apart from the laptop there is no concrete indicator of where they are. We can refer to such settings as ‘decontextualised’. In such cases the attention of the viewer is drawn to the role played by the participants and the props. Were these women in a real work environment with piles of papers, files and personal items this would not have been the case. The role of such decontextualised images tends to be more symbolic than documentary. They document not a particular moment in time, nor a particular event, but are used to symbolise an idea or a concept. The more an image is decontextualised the greater its symbolic role.

Salience: identifying the subject of the images

In this next section we look at some basic principles of salience, taken from the work of van Leeuwen (2005) and Machin (2007a).

These are ways that we can identify what is the central or most important element in a photograph or composition.

Potent cultural symbols

The first way to identify what might be the salient element in an image is to look for potent cultural symbols. These are often central in telling the viewer how to read an image. In [Figure 8.1](#) the laptop and the laptop have salience as these are all potent cultural symbols. The laptop and loft-type window help to connote mobility, independence, and therefore a high-powered business environment. In [Figure 8.3](#) the woman is salient due to her exaggerated posture. However, while these potent cultural symbols might be important criteria for saliency they will always interact with the others as we will see in the list that follows. The analyst has to work out which one, or which combination is in operation in each particular case.

Foregrounding

We can identify the most salient element as that which is foregrounded. In [Figure 8.3](#) we can simply say that the woman wearing the heels is the most salient in the image as she is placed in the foreground. However, it is the potent cultural symbols that clearly have the higher salience in this image. We must always take other criteria for salience into consideration before arriving at our conclusions.

Overlapping

The principle of overlapping is like foregrounding, since it has the effect of placing elements in front of others. In [Figure 8.3](#) we can see that the woman overlaps the outlines of the two men. Often in adverts the product overlaps the participants. There can be a hierarchy of overlapping of elements or persons. On film posters we can often identify how central characters are through such a hierarchy.

Size

This can simply be the element that is the biggest in the composition ranging to the smallest. It is important to note here that in advertisements it is common to find that products take up much less space in the composition than other elements. An advert in a magazine may contain a large picture of a model smiling at the viewer and a smaller picture of the product below. In older advertisements we would most likely find a product shown much larger, with a smaller illustration. What is emphasised in the newer advert is not so much the use value of the product but the lifestyle association, connoted through the photograph of the model or another potent cultural symbol. Often in promotional literature for banks the lifestyle photograph, say of a handsome professional woman staring confidently out at the viewer, a typical potent cultural symbol, will be bigger than the information given for the account itself, at least on the cover of a pamphlet. From all this we can conclude that these compositions tell us that lifestyle and branding is now more salient than the actual nature of the products and services themselves.

Colour

Colour is often used to give salience. The main element may carry a particular saturated or vibrant colour.

Tone

This can be simply the use of brightness to attract the eye. In [Figure 8.3](#) we can see that the faces have received extra lighting, drawing our attention to their expressions, particularly that of the woman who is salient due to foregrounding and overlapping. In [Figure 8.1](#) the whole scene is very well lit. In this sense we might assume that it is the scene as a whole that is to be viewed as meaningful rather than any specific element. In the scene as a whole there is nothing drawn out in terms of colour or particularly

through size. Only the objects and the window are potent cultural symbols.

Tone can often be seen to be used in advertisements where one particular element is highlighted through directional lighting. Often in promotional photographs the photographer will direct light specifically onto the product itself. While the rest of the elements and set might be well lit this may create a very slight aura on the product itself.

Focus

In [Figure 8.1](#) the focus is clearest on the participants. This would not have been the same were it an advertisement for laptops or furniture design. Often in such images of workplaces the setting becomes almost a blur. Here a single object such as a briefcase, laptop or should do all the work of signification.

In [Figure 8.3](#) the setting is out of focus. Our attention is drawn not to the setting, therefore, although it is sufficiently in focus to distinguish what kind of setting it in fact is. Our attention is drawn to the experience of the woman and to her posture.

Positioning the viewer in relation to the image

In this section we look at two aspects of the alignment of the viewer with the participants: angle of interaction and proximity. Both of these influence the way we relate to the participants, relative power relations and degree of association.

Angle of interaction

The angle from which a photograph is taken can suggest different relations between the people represented and the viewer. This is based on physical associations of experiences such as of height and power, and how we view scenes.

Vertical angle

This is to do with power and the association of height with superiority/inferiority or with strength/vulnerability. If you look up at someone this has the metaphorical association of them having higher status than you or of them being physically in a stronger position than you. We associate size with power and status. In social life we might stoop down to speak to small children if we do not wish to intimidate them. Yet when we look down at someone this can give us a sense of power. These kinds of associations influence the way we assess the relative power of a person depicted in a photograph. Imagine the different effects of two photographs of dirty-faced children shown with neutral facial expressions. One looks down on them, the other up at them. In the first they appear vulnerable, whereas in the second the same children appear threatening. A photographer might stoop or even lie on the ground to take shots that look up at children to make them appear imposing or intimidating, say if they wish to emphasise children out of control in a society.

If someone is depicted at the same level in a photograph then equality is implied. But once our viewing position is raised or lowered our status relationship is changed. In [Figure 8.1](#) we are positioned just slightly below the height of the women. Our viewing position is on a similar level and to some extent equality is implied. Of course all these are only meaning potentials and must be used in combination with other factors described in this chapter.

The communicative potential of power in angle of interaction can be used to change the meaning of elements in an image. For example, a newspaper might depict a politician from such an angle to connote oppression and arrogance.

Horizontal and oblique angles

While the vertical axis influences power relations to those we view in photographs the horizontal axis can influence involvement/detachment. On the horizontal axis we can see participants from the front as they face us. This gives the viewer a sense of involvement. If we view the scene from the side, in contrast we simply observe the scene. Consider the difference in effect if we view a photograph of a group of men in ski masks,

holding guns, looking towards the frame, directly at us, compared to viewing the same scene from the side. The first is threatening as it suggests involvement. The second is detached and creates objectivity. Just as the vertical axis is based on real-life associations of height and power, so the horizontal axis is based on our association with real-world experiences of being involved in situations where we are required to act, or where we are onlookers and the people we watch have business with others.

Once we move on the horizontal plane to go behind the person represented, when we see their backs as they look on to a scene, there is a different effect. This can have two kinds of meaning. First, it can have the effect of aligning the viewer with represented person since we stand with them, viewing the world as they do. Imagine a photograph showing the back of a person as if we were standing behind them. Beyond them we can see that they are held at gunpoint by another rather dangerous-looking person. Second, seeing the back of a person can also mean anonymity or them having turned their back on us.

Oblique angles

These are where the camera will be tilted, or ‘cantered’ so that the person appears at an angle, rather than being positioned vertically in the frame. These angles are used to give an unsettling effect, to suggest tension, or to give a sense of playfulness and energy through movement. The use of cantered images is increasing in news and features to give just this sense of surprise and creativity and can also therefore connote a more sophisticated design style.

Proximity and interaction

Distance

This is the association of physical proximity and intimacy. In images as in real life, distance signifies the closeness of social relations. We ‘keep our distance’ from some people we do not like and ‘get close to’ people we see as part of our circle of friends or intimates. This varies between cultures, but generally we feel uncomfortable if strangers get too close. In pictures distance

translates as ‘size of frame’ (close shot, medium shot, long shot, etc.). This is simply how close to the viewer a person is represented in an image. So a closer shot suggests intimacy whereas a longer shot is much more impersonal. In [Figure 8.2](#) the woman on the desk is seen in medium shot. The way we associate with her would differ were we close up seeing only her face or were she in the distance. In any photograph we can ask which participants are depicted as being close to our social space and which are kept at a distance. A photograph in a newspaper report on a war zone might show a close shot of a child in order to generate empathy. On the other hand angry, dirty civilians might be kept in long shot.

Close shots can also suggest claustrophobia or a threat; for example, if we imagine the photograph of the hooded gunmen staring at us in close shot, or a close shot of the faces of a crowd during a riot. In this second case this takes us too close to the energy of the moment suggesting the need to pull back from the madness of the situation.

Summary

- *Angle of interaction*: this can create power relationships and also involvement.
- *Distance*: this is like social distance, suggesting intimacy or remoteness.

Analysing participants in images

There are also a number of simple questions we can ask that help to draw our attention to how participants are depicted, based on the work of Machin and van Leeuwen (2005). This tells us more specifically what kinds of people are represented and how the viewer is therefore encouraged to relate to them.

Individuals and groups

In images people can be shown as individuals or *en groupe*. This can make a massive difference to the way that the people and the events in which they are involved are represented.

'Individualisation' is realised through language by singularity, for example 'a woman' as opposed to the plural 'women'. This has the effect of drawing us close to specific people, therefore humanising them. All tabloid journalists know that a story telling the experiences of one person will be far more compelling than statistics that speak of many. Visually, individualisation is realised by shots that show only one person. The woman in [Figure 8.4](#) is individualised.

Visual individualisation is a matter of degree. It can be reduced by increasing distance, making individual traits less easy to observe.

In language, 'collectivisation' can be realised by plurality or by means of mass nouns or nouns denoting a group of people (e.g. *clan*, *militia*, *terrorists*). We can immediately see the ideological effect of this where instead of individuals who might have specific motivations we are dealing with anonymous groups.

Visually, collectivisation is realised by images that show groups or crowds. The members of the groups or crowds can be 'homogenised' to different degrees. They can all be shown wearing the same clothes, performing the same actions or striking the same poses. In [Figure 8.3](#) we can see that the two men are collectivised through clothing and posture.

Collectivisation can also be achieved by focus on the generic features of a group of people so that they are turned into types. For example, a news photograph of Muslim people in London might foreground those individuals wearing traditional clothing.

Categorisation

Visual representations of people can also *categorise* them, regardless of whether they are also 'individualised' or 'collectivised'. Visual categorisation is either 'cultural' or 'biological' or a combination of the two.

Cultural categorisation is realised through standard attributes of dress, hairstyle, body adornment, etc. The woman in [Figure 8.3](#) is

categorised by her business clothing and her posture, as are the men behind her. In news photographs Muslim people are often culturally categorised through wearing clothing that Western viewers have come to associate with more traditional looks, even with Islamic fundamentalists. So we will see a woman wearing a veil to represent all Muslim women. These people will always be used in news photographs simply because they easily connote familiar news frames for audiences.

Biological categorisation is achieved through stereotyped physical characteristics. Such categorisation may be used to invoke both positive and negative connotations. In the first case images might depict soldiers as 'Action Man'-type stereotypes or women as 'Barbie'-type stereotypes of female attractiveness. Often in photographs of soldiers that appear in the press, 'our boys' might be shown with square jaws and muscular build. This is to emphasise strength and security. Soldiers shown writing home in the classic war photograph style, on the other hand, may be more youthful and slim built to emphasise vulnerability.

Non-representation

Finally it is crucially important if someone is *not* represented in an image. For example, a caption for a news story might read 'banks responsible for economic downturn' whereas in the photograph we see an image of houses with 'For Sale' signs in front of them. Here we can ask why certain participants are not represented. Wherever there is such exclusion we should always consider the political and ideological motivations and how this contributes to concealing responsibilities or specific details.

Summary

- *Individuals and groups*: this is important in connecting the viewer to the interests and experiences of the participants.
- *Categorisation*: these are resources for informing the viewer what kinds of participants are involved.

- *Non-representation*: this can create anonymity. It can be a way of concealing responsibility for actions, or can remove the role of some participants.

Analysing what is happening in an image

Of course in images we find not just people, objects and settings represented but also actions and behaviours. Many photographs depict people doing things and videos usually depict events and actions. In the analysis of written texts linguists have shown that a more careful and systematic analysis of what people are depicted as doing can reveal less obvious messages about who has agency and what kind of agency they have, and who does not. These same kinds of observations can be adapted to the analysis of agency in photographs and in videos. This is an approach that draws on the functional semiotic theory of Halliday (1985). Applying this to images gives us a more precise toolkit for thinking about action (what gets done) and agency (who does what).

Halliday distinguished a limited number of verb groups or process types. These are useful for analysing images. Some kinds of verbs are much more active than others. And some have the effect of aligning readers or viewers with the participant.

We came across Halliday's (1978) six processes in [Chapter 6](#). Here they are again, this time as they can be applied to visual analysis:

Material: This is simply doing something in the world that has a material result or consequence. We can see this in the sentence 'The woman built the house'. We can call this *transactional* action.

Behavioural: This is where we act without material outcome. For example, 'The boy jumped.' Here the boy acts but with no end result.

Mental: This is where a person thinks, evaluates or senses. For example, 'The boy saw them' or 'The girl thought about her

family.'

Verbal: This is where a person is represented as simply saying something. For example, 'The boy talked about football.'

Relational: This is where people are represented as being like, or different to, something else. For example, 'The boy was taller.'

Existential: This is where people are represented simply in a state of existing or appearing. For example, 'He was in London,' or 'He sat in the chair.'

Using these different processes as analytical tools we can reveal the level of agency and power or the lack of it. A person can be represented as being very active or busy, but in fact achieving very little. For example, a heroine in a romantic novel might be engaged in a lot of action, but this may involve many *existential* processes, such as being in different places, *mental* processes, such as wishing, missing and hoping, and *behavioural* processes such as watching and listening. All this produces no outcome on the world. She is not an active agent and is not depicted as having power. In women's magazines we often find lots of photographs of women leaping around, throwing their arms into the air, or twisting their bodies, as in [Figure 8.4](#). This brings a feeling of energy and agency to the magazine. Yet the women are not represented acting out material processes.

In women's magazines we also often find women depicted as the agents of mental processes. We find them looking thoughtfully off frame in images accompanied by titles such as 'How to seduce a man' or 'Do you get yourself heard at work?'. We could compare such representations of women's action with representation of men in a men's magazine such as *Men's Health*. Do we find men depicted in the same way or not?

In fact the association of agents with mental processes can suggest not only passivity but also sensitivity and thoughtfulness. Mental processes give the impression that we have access to the thoughts and feelings of a person. This will usually humanise

them, or allow us to empathise with them. In a women's magazine such a technique could therefore be used to align the readers to the world of fashion consumption depicted within its pages. It might also be used to align us to a particular protagonist in a news story to allow us to associate with their inner experiences.

In an analysis of agency in war photographs Machin (2007b) showed that images depicting the occupation of Iraq showed US soldiers as engaged in material processes of searching and guarding, whereas Iraqi people were shown in existential processes as passive and wandering around aimlessly.

These processes represented the actions of soldiers in Iraq to emphasise that the US forces are peacekeepers. They are not shown acting aggressively, nor as the victims of aggression in any kind of process. Occasionally they are shown in shooting poses, but not actually firing, where they hold focused yet calm facial expressions suggesting particular kinds of mental states. In contrast, images of local militia or rebel groups are depicted as yelling and raising guns above their heads. Here mental processes suggest a lack of professional detachment.

Modality: measuring truth and concealment in images

Many photographs and much film footage that we now see has been modified. While such alterations are as old as the medium itself, digital technology has made the process cheap and very easy. It is useful, therefore, that we have a toolkit or procedure that can help to draw our attention to exactly what has been changed and therefore to think about the effect of these changes. This allows us to more accurately identify and understand what has been enhanced and what has been 'silenced' or concealed in an image.

'Modality' refers to the way that we communicate how true or how real a representation should be taken to be. This is a term from linguistics, where modal verbs and adjectives such as 'certain', 'possible' and 'impossible' are used to express kinds of truth. These tell us how sure a speaker is about something. Looking at what is reduced in modality, or emphasised, therefore, allows us to reveal something about the ideology of that

representation. According to Kress and Hodge (1979) the same can be said for any visual representation. They concluded this by considering how qualities of an image might be different than if we had been at a scene to witness it ourselves. So we compare what we see in the photograph to the standard of what Kress and van Leeuwen call ‘naturalistic modality’. These authors provide a tick list of visual modality cues that we can use to carefully examine an image:

Articulation of detail of the main participants or objects

Here we consider the extent to which the subject of an image appears different from how they would have been had we actually been there to see them in terms of articulation of detail. This can be illustrated by the difference in articulation of detail between a photograph and a rough line drawing of a person. Much more articulation of detail can be found on the photograph. Many photographs and film clips we now see of people in the media and even on their own webpages have been digitally manipulated in order to remove blemishes or wrinkles on skin or to whiten the colour of teeth and eyes. In this case we see less articulation of detail than we would have seen had we been there. Modality is therefore lowered and the visual truth is therefore also lowered. The person appears ‘less real’. In men’s lifestyle magazines women models often appear heavily digitally manipulated in this manner so that they appear almost cartoon-like. Where detail is reduced in this way the person or object becomes idealised and simplified.

This measurement of modality should be seen as a continuum. Even lower down the scale of articulation of detail are cartoons and stick drawings. At the other end of the scale details can be enhanced by the use of close shots, lighting and contrast. This effect is often used to create a documentary effect, a sense of gritty realism or personal connection as opposed to the idealised models appearing in the men’s magazines. Where modality is increased in this way images become ‘more than real’. Kress and van Leeuwen (1996) say that in such cases we can call this a ‘sensory modality’ rather than a modality of truth.

In [Figure 8.1](#) the women are represented through a different level of modality than the background. The women appear to be slightly out of focus or overexposed whereas the background is much more out of focus. In this image, meant for promotional uses or editorial work, the women are therefore simplified and idealised whereas the blurring of the background shifts it into the realm of the symbolic.

Articulation of detail of the background

Here we ask the same questions as above but of the background. Again we have a continuum where in the middle we find things represented as we would have seen them had we been there and with lowered and increased modality levels either side. In [Figure 8.3](#) we can see that the background is out of focus, so reducing the detail. Again this has the effect of idealising. It also means that we see this as a generic setting rather than a specific one. Images that are intended to symbolise a particular event, kind of person or concept often use this level of focus. Where the background is shot in naturalistic if increased modality we tend to assume that it is the setting that is being documented, that it is not just the participants that are important but also time and place.

As with the subject of the photograph the details of the setting can be enhanced to give sensory effect, or can be reduced to the level of a sketch. What is interesting is when we find reduced modality backgrounds in news photographs. For example, in a local newspaper we have a caption that says 'Police report a reduction in racially motivated attacks against local shopkeepers'. The photograph shows two policemen and an Asian man seen from behind only. We take his point of view as he speaks to them. They are shown standing in a street of British late nineteenth-century terraced houses. Only the police officers are completely in focus. The street is out of focus, as is the Asian man. This indicates that this photograph is not intended to document a particular instance nor a particular victim of racially motivated attacks. In fact this image could in reality represent nothing of the kind. It is intended to symbolise police vigilance and protection in the inner city. The street, through reduced modality, represents a

generic street and the Asian man a generic person protected from racial attacks by the police.

In photographs and visual compositions such as graphics and advertisements in newspapers and television news it is interesting to look where modality has been reduced and enhanced. Often in advertisements we find idealised men, women and children in simplified settings but with the product shown in large size in enhanced detail and sensory modality.

Lighting and shadow

We can also ask the extent to which the lighting and shadow appear as if we had been present at a scene. We might find that shadows are missing as there are multiple sources of light. This is often not difficult to establish simply by looking at the highlights on objects in the image. If we look at [Figure 8.3](#) we can see that there are two main sources of light to either side of the three people. This has the effect of creating a shadow down the middle of their faces and bodies, making them appear more dramatic. The background in this image also contains more shadows, as compared to [Figure 8.2](#) where there is backlighting which normally indicates 'nothing hidden' and 'truth'. In [Figure 8.1](#) we can see that there are at least several sources of light. If we look at the woman to the left she carries no shadow. Of course these are all highly posed photographs and we would expect there to be manipulation of light. But it is important to draw attention to this as it helps us to identify levels of reduction in the kind of image we are seeing, for example on a television news crime report where light is positioned to create more shadows for dramatic effect.

We might also find that tone has been changed in order to reduce contrasts of light and dark or to increase them. [Figure 8.1](#) appears to have reduced levels of contrast where there are few shadows. Much advertising photography is of this order. This is a brightly lit optimistic world. We have metaphorical associations of light with knowing and truth and also with optimism and brighter outlooks, whereas darkness and shadow is associated with mystery and bleaker moods. Where light and shadow is

exaggerated we have the effect of high contrast between truth and mystery, optimism and pessimism.

Colour quality and range

In many of the images we now see in advertisements, promotional material and even newspapers, the colours have been modified. We have dealt with this in part already above when we described the connotations of settings. But to take this level of observation a little further, the colours in an image can be flattened in order to create a cleaner, simplified look. This is what we called reduced modulation. We see it clearly in [Figure 8.1](#). Modulation can also be increased to create a sensory effect where the play of light on a surface is exaggerated. Children's toys are often created using single flat, pure colours to suggest simplicity.

Colours can also be artificially saturated or muted. Saturated colours tend to be associated with emotional temperature and exuberance. Along with flatter colours they can be used by advertisers to create a mood of fun and vibrancy. More muted colours tend to be associated with reserved and mellow moods.

We can also draw our attention to the way that the colour palette has been increased or decreased. This can range from the whole spectrum of colours to monochrome. If you look in any *National Geographic* magazine you will see that the photographs have a range of saturated colours added to them. This is used to indicate that the natural and human world is filled with colour, diversity and energy. Advertisements or promotional photographs will use reduced palette or monochrome to give a timeless or classical feel. Note how many pop artists use monochrome in publicity shots. Of course boy bands wishing to target a younger market will tend to use a wider palette of saturated colours.

Analysing video

In this next section we show how the techniques of analysis presented so far in this chapter can be applied to a short video. As with still images it is productive to ask very concrete descriptive

questions about video, such as about who is represented and how, and what they are depicted as doing. Asking such questions can be useful to throw light on how persons and events are represented in a news bulletin, a promotional film or an advertisement, for example. The same process follows whereby we begin by breaking the components of the video down before we begin to think about the broader discourses or myths that are communicated.

Here we show how we can go about such analysis using the case of an advertisement for a car: a Peugeot advert called 'Motion & Emotion'. Often in such adverts we see cars being driven smoothly through stunning landscapes or through empty city streets. But in the case we analyse here, targeted specifically at women, we find something much more abstract. Here we find a woman in the interior of a highly modernist building with aluminium and minimalist furnishings (see [Figures 8.5 to 8.8](#)). We see only fragmented shots of the car edited in between shots of the woman. The advert appears to have a soft and dreamy quality. But we know from what we have learned in the previous sections that rather than describing advertisements in terms of adjectives, such as 'soft', or 'dreamy' it is important to describe and document the semiotic choices such as iconography, colour, positioning, poses, etc., which communicate such things to us. The aim of advertising is broadly to load products with ideas, values and identities in order to make them desirable. The process of analysis we carry out here allows us to more carefully point out what these ideas, values and identities are.

In the case of analysing a video we must also take into account the way that what is represented visually relates to what we hear. In this video we hear the voice of the woman. Important here is both what she says and how she says it. Of interest to the researcher in such cases should be what is communicated visually *and* what is communicated linguistically. These will work together to create the overall effect, but they may also be used by the designer of the advertisement to accomplish very different things. This is indeed the case in the example we consider here. To carry out the analysis of the language here we draw on some

of the linguistic form of Critical Discourse Analysis described in [Chapter 6](#).

In the example we have chosen we also hear music throughout. It is clearly a hugely important part of how the advert delivers its meaning. We will not discuss how to analyse the music in depth here, but will make some suggestions about how to comment on this part of the content and also suggest some sources for carrying out such an analysis.

What is represented visually in the advertisement?

Setting and objects

The setting is important in this advertisement. We see the woman in a modernist urban corporate-type space. It suggests something high-powered, up-to-date/forward thinking, and ‘aspirational’ – all very much associated with a neoliberal corporate discourse. It is a spacious structure comprised of bare metal and shiny surfaces. The open space of the design itself connotes both ‘order’ and ‘room to think’ and also brings a sense, therefore, of the luxury of time. The shiny surfaces and clean and sharp edges connote simplicity and the rational. In a sense, as we find throughout this advert, the woman is somehow removed from any actual concrete everyday context. As Barthes (1977) would observe, all indices or clutter, such as personal or everyday objects, are removed from the setting. This helps to create a feeling of de-contextualisation, but also allows the remaining elements to do better symbolic work.

In the video we see corridors and staircases. It is typical in corporate promotional images and films to show these, as they can connote movement, something dynamic rather than closed interiors (Ledin and Machin, 2015). Oblique and ‘exciting’ camera angles and cropping, as well as editing, are used to connote ‘creativity’ and ‘innovation’.

One of the remaining elements introduced as the advert progresses is a fencing sword, seen first on the ground and then afterwards in the woman’s hand. At the end of the advert, as well as being told that she is a mother, we are told that she is ‘mad about fencing’, the impression being that this is more of a

dedicated hobby than a profession. The delicate sword brings connotations of precision, technique and skill.

At the level of setting and objects we immediately find the car being aligned alongside a particular set of ideas, values and attitudes: dynamic, confident, forward thinking, high-level design/creativity, room to think. In fact it is such values that have been described as the very basis of the neoliberal ideology which now infuses society. This is an ideology that celebrates individualism and competition through promoting abstract ideas like ‘creativity’, ‘innovation’, ‘self-management’, ‘commitment’. Here the car becomes part of this woman’s self-management project.

Analysing the participants in the video

Here we can draw on our list from the earlier section to assess to what extent the participants are individualised, collectivised, made generic, anonymised, or simply absent, etc. In this advert while children are mentioned verbally at the end we see none represented visually. We find only the woman represented. She is not named and in a sense is a generic, attractive model, dressed in professional, formal clothing, although in the manner one might find at the end of the day at home when there is time to relax. There is nothing striking about her, as we found in the models seen in the photographs earlier in the chapter. But she is also individualised. We see her face and her expressions often in extreme close-up. She is the salient element in the sequence rather than the car itself. She is highly foregrounded or takes the central position at all times. The advert is about her and her needs and lifestyle as opposed to the product, the car, itself.

Analysing what is happening in the video

We can also draw upon our list of how to examine the goings on in images to help consider what the woman does in the advert. In fact she does very little that is concrete. Visually this is very much about existential (simply being) and mental processes (thoughts and feelings). We see her in this spacious interior, with time on her hands, looking ponderously around, being relaxed. The poses show her at ease, sensuous, pensive to some extent, but there is

a certain rigidity indicating her confident professional status, as we see in [Figure 8.5](#), where she stands with her hand on her hip. This is not the dreamy kind of physical looseness we might find used for a sensuous chocolate advertisement. This is a professional women musing things over.

At one point we see the woman holding the fencing sword. But we do not see her fencing, nor carrying out any active processes such as picking the children up, commuting to work, finding a parking place, fuelling the car. As regards gaze we find her looking off into space, leaving us to watch her in her moment of reflection.

Modality in the video

Here we can think about articulation of detail of objects, persons and settings. We are interested in the way that naturalistic representation has been altered. We can also draw attention to lighting – whether or not it appears naturalistic – and also think about the nature of colours that we see.



Figure 8.5 Woman alone in stylised space



Figure 8.6 Woman in interior devoid of personal objects



Figure 8.7 Washed out with high-key lighting



Figure 8.8 Fragments of the car

Most important in this advertisement is that the scenes are suffused, or washed out, with high-key lighting (see [Figure 8.7](#)). This is often used in advertising to bring a sense of optimism or even soft spirituality to scenes, what Kress and van Leeuwen (1996) would refer to as ‘more than real’ or sensory modality. The scenes appear almost overexposed with sunlight, creating a dreamy effect which on the one hand helps with the level of de-contextualisation, and on the other works alongside the words spoken by the woman, which we come onto shortly.

The colour palette in the video is highly restricted and muted. This adds to a sense of order, lack of clutter and also brings a sense of measure. A wide colour palette of bright vivid colours would rather have suggested that this car was fun and playful.

In sum, visually here we find fragmented shots of the car, until the end where we see it whole. What dominates the scenes are the innovative corporate designed interior and the salience of the professional woman. What is not represented is the use of the car, for example in traffic, getting the shopping, taking the children to school. And we also find no personal possessions apart from the fencing sword, which suggests accuracy, skill and dedication.

What is represented linguistically in the advert?

To understand this video we also need to analyse the way that the visual relates to, and interacts with, what we hear. Here we ask the same kinds of questions we asked visually. We ask what kinds of objects, things or places are mentioned. We can ask who is depicted and what kinds of activities and events take place.

The language in the advert is spoken softly and intimately by the woman. She says the following:

Act

React

Anticipate

Leaping forward and touching the heart

Quick and precise

Feel the purity of the gesture

Then returning to my loved ones

With their complete trust

Sheltered from the world

Showing them the way

In complete safety

'Lucy. 38. Three children.

Mad about fencing.'

On one level we could say this is simply an attempt to draw connotations from fencing to the car: ‘quick and precise’, etc., and also to point to its safeness, protecting the children who were not seen visually. If we look in a little more detail, however, we can learn a bit more about what is taking place.

Typical of advertising language, there is an abundance of directives, as in ‘Act’, ‘React’, ‘Anticipate’, ‘Feel the purity...’. Directives are a bit like instructions. They do not ask you gently to do something but tell you to do them. These are often used to bring a sense of ‘go-getting’ to adverts, typical of a positive ‘can-do’ world of marketing and also of managerial language. Yet in this case these behavioural processes, these actions, are not coupled to an actor or a goal. In other words it is not clear who is ‘reacting’ nor what they are reacting to. On one level this allows them to apply to both fencing and to the car. At another level, these actions are symbolised rather than specified. They symbolise the idea of ‘act’ and ‘react’ which themselves are highly unspecific verbs. Of course visually we do not see the woman ‘act’ or ‘anticipate’, only sit or stand thoughtfully.

We also find verbs that suggest sensuousness in the case of mental processes such as ‘feel’, ‘anticipate’ and ‘trust’ and behavioural processes such as ‘touching’ (Halliday, 1994). These are not specifically linked to the car, but the connection is suggested. These mental processes also have the effect of aligning us to the thoughts and feelings of the woman. We are given access to her internal world.

Typical of advertising language we find an abundance of adjectives which can load products with additional ideas and values, such as ‘loved’, ‘quick’ and ‘precise’. There are also noun processes used in the same way, such as ‘purity’, ‘the heart’, ‘the gesture’, and the symbolic ‘the way’ and ‘safety’.

And while the style of this is poetic, sensuous and musing, it ends with a colloquialism ‘Mad about fencing’. We learn this at the end when, after all the abstract shots of the ponderous and light-saturated professional woman, we see her standing by the car, seen for the first time in its entirety. Previously, like the words, it has been merely dreamlike visually or suggestive of a sensuous feeling. At the end it becomes concrete and also, as is often key in

much persuasive communication, it claims to speak to us on an equal level as in the end we find the woman is straight talking as well as poetical.

Finally, we come back to the issue of the music. As the woman is speaking we hear music that has two important qualities. At one level we hear a higher-pitched, delicate and intricate, yet repetitive riff, somehow related to the delicacy and reactions in the language. At another we hear a series of much deeper notes which rise in pitch in sequences, sometimes becoming distorted, bringing a sense of rising emotions and power. This is not simply the light musings of a poet but has gravity and salience.

In sum we find that visually this represents a high-powered professional self-managing woman in a kind of corporate space who has time to think and reflect. The woman represents classic neoliberal identity. Individualistic, creative, self-managing, successful. In language we find dynamic values of 'react' and 'anticipate', all part of the same discourse. We learn little about the car itself, but it is aligned with a very specific set of ideas, values and identities. We can also ask what and who is missing and from where, to tell us what is intentionally left out. Here the actual nature of work, of the family and what you do with transport is removed – as are the processes of labour and social relations which lead to its production. What is added is space, freedom, timelessness, and also individuality and choice.

Carrying out a research project

Many of the tools in this chapter, in the tradition of semiotic analysis, are to be used for qualitative observation. A study might compare, for example, how the participants of two sides of a conflict are represented in 20 photographs or in a single film clip. Or a study might compare the clips carried about certain news events on the sites of different news outlets. The researcher may decide to explain why the chosen examples are important and representative of a wider situation. In this case a smaller number of clips about a refugee situation might be chosen that are considered by the researcher to be typical of representations of

that conflict, or no more than six newspaper websites might be chosen. In such a scenario any relevant tool for observation and analysis would be applied where it was felt necessary. The point would not be to show statistically what the differences are, for example between different newspaper websites, but to point to some of the different strategies of representation used and the consequences of these in terms of ideologies. This would be in the same fashion in which we attributed certain meanings relating to identity and discourse to images of women at work in this chapter.

Of course a much larger sample could be used and many of the observations made in this chapter, such as about representation of participants, gaze, action and modality, could be used as the basis for a larger content analysis. For example, several hundred news clips of refugees could be analysed in order to make more confident generalisations.

These methods, used qualitatively, can be best employed alongside other methods. For example, a content analysis of a sample of newspaper stories on a particular topic might also then carry out more detailed analysis of a smaller sample of these. This analysis could be done using Critical Discourse Analysis and the visual methods described in this chapter.

The same criticisms would apply to these methods, if used interpretatively, that would apply to Critical Discourse Analysis (see the end of [Chapter 6](#) in this book). Such a form of analysis makes many assumptions about what is of importance in the image and how it should be understood. Visual analysts such as Bal (2006) and Elkins (2003) are highly critical of this reductive kind of analysis. Bal would argue that any single part of an image might set off a whole set of associations for the viewer.

Summary

- In comparison to other research tools there has been less in terms of a toolkit for analysis of images.
- Many of the tools provided in this chapter involve some degree of interpretation. But what is important is that they encourage

the analyst to describe what they see in images. The tools presented here push the analyst to ask a set of systematic questions rather than simply providing an interpretation. We might see an image that is part of an advertisement and make an interpretation that it represents ‘fun’. But asking a more careful set of questions requires that before we do this we ask who is represented, how, where and what precisely they do.

- Many of the tools presented in this chapter are drawn from linguistics. For this reason they tend towards greater levels of descriptive power. However, the point of such analysis, like that of Critical Discourse Analysis, is to reveal the broader discourses that are being represented. We aim to ask: what are the ideologies of these representations?
- These methods therefore are predominantly qualitative. This means that they can be criticised for being not representative of any broader sample if we only carry out an in-depth analysis of a small number of images.

Further reading

Barthes, R. (1973). *Mythologies*. London: Paladin. Classic book in the qualitative analysis of images. Does not provide an account of how this analysis can be used in a research study, but it is a basic book that should be read by those interested in visual analysis.

Hansen, A. & Machin, D. (2008). Visually branding the environment: Climate change as a marketing opportunity. *Discourse Studies*, 10(6), 777–794. A case study of how to carry out analysis of a set of images to answer a very specific research question.

Machin, D., & Polzer, L. (2015). *Visual Journalism*. London: Palgrave. Provides a comprehensive analysis of how images are used in a range of news and magazine-type media, providing an analysis and also looking at how photojournalists and designers talk about them.

CHAPTER 9

Survey research

If content analysis is perhaps the most frequently used method for analysing media content, then the survey is historically the most frequently used method for studying media audiences and people generally. Furthermore, the two methods have a great deal in common: they are quantitative methods, they both matured and came into their own as research methods during the first half of the twentieth century, they both use a coding schedule as their main research instrument, and – in media and communication research – they have frequently been used together, with considerable gain, to examine and explain communication processes and media influence.

While, as Babbie (2016: 247) reminds us with reference to ancient Egypt, the Bible and the Romans, ‘Surveys are a very old research technique’, it is to the beginning of the twentieth century that we need to look to find the origin of the uses of survey methodology in media and communication research. Around this time, prominent German sociologist Max Weber proposed that the systematic large-scale collection of data on people’s opinions, beliefs and behaviour be combined with the systematic analysis of newspapers to provide indications of the role played by the news media in influencing trends and changes in public opinion. However, neither survey methodology nor content analysis methodology had been sufficiently developed at the time to get this project off the ground and it took another couple of decades for the appropriate resources, methods and tools to advance to a stage where Weber’s suggestion could be realised.

Survey methodology is particularly interesting in the context of media and communication research because it has played – and

continues to play – a central role for economic, organisational and policy purposes, as well as of course in relation to communication models and theories about the role and function of media and communication in society. Media organisations have for a long time relied heavily, both in relation to the setting of advertising fees and to programming policy, on the systematic, regular and continuous monitoring or measurement of audiences' media consumption habits and preferences. In the US this has traditionally been done by such survey organisations as Nielsen (<http://en-us.nielsen.com>) and Arbitron – acquired in 2013 by Nielsen – while in the UK the Broadcasters' Audience Research Board (BARB – www.barb.co.uk) and British Rates and Data (BRAD or Brad Insight www.bradinsight.com/solutions/media-research) provide media consumption figures and other detailed information on the media industry and media audiences.

Survey methodology has been one of several key methodologies used in major inquiries or commissions/committees set up to look into the state of broadcasting and media regulation and to provide policy guidance on changes and developments in the regulatory framework for both public service and private media. Examples include most of the UK's Royal Commissions on the press and on broadcasting, and major US government-sponsored investigations into the relationship between media and violence, as well as such prominent and influential reports as the Kerner Commission report in the wake of civil/racial unrest and widespread rioting in the US in the 1960s. And survey methodology continues to be central to much of the research conducted or commissioned by key bodies such as Ofcom –the body charged since 2003 with regulating the communications industries in the UK. Likewise, survey methodology is at the heart of longitudinal research mapping the uptake and use of new media and digital technologies, as with for example the Oxford Internet Institute's *Oxford Internet Surveys* (OxIS), 'describing how Internet use has evolved from 2003 to the present day' (Oxford Internet Institute, 2016).

Survey methodology has played a prominent role in the history and development of media and communication research. Some of the major and most prominent models of media and

communication, particularly agenda-setting research, cultivation research, uses and gratifications research, diffusion of innovations research, the two-step flow model of media influence, etc., have all relied centrally on survey methodology, often in combination — particularly in agenda-setting and cultivation research — with content analysis methodology. One of the earliest studies of media reporting and voting behaviour – by Lazarsfeld et al. (1944) of the American presidential election campaign of 1940 – paved the way for a much more nuanced perspective than had hitherto prevailed on media influence, introducing the notion of ‘two-step flow’ of information and marking the beginning of the end of views of audiences as passive and the media as all-powerful. It also provided the panel survey research model (see later in this chapter) and inspiration for the influential *Personal Influence* study by Katz and Lazarsfeld (1955), which further cemented the ‘two-step flow’ model of mass communications. Survey methodology also played a key role in studies of persuasive communication – the use of mass media campaigns for deliberately influencing or changing people’s opinions, beliefs and behaviours in such diverse fields as health, politics, environment, science, business, international aid, etc. Early survey-based studies on media campaigns and persuasive communication in turn provided further strong evidence that media influence was anything but simple, direct or linear.

While much less prominent – compared with its uses in audience and media influence research – survey research has also been and continues to be an important tool in the study of media production, media organisations and particularly journalists and other media professionals. While classic studies of news production have predominantly been based on observation and newsroom ethnographies (see [Chapter 4](#)), several have also drawn on elements of survey methodology as a complementary method. By contrast, major overviews of journalists and media professionals have been predominantly based on large-scale surveys (e.g. Weaver, 1998; Sachzman and Valenti, 2015, on environmental journalists).

Definition

The word ‘survey’ comes, via French, from the Latin ‘super+videre’, that is approximately ‘above/over’ + ‘look/see/view’, and consequently to survey something means (among other meanings) essentially to create a comprehensive or commanding overview of it. The *Oxford English Dictionary* (2017) offers a more specific meaning relevant to the social sciences, namely ‘A systematic collection and analysis of data relating to the attitudes, living conditions, opinions, etc., of a population, usually taken from a representative sample of the latter’. In the social sciences literature – and as a social science method – we may consider the following prominent definitions:

Surveys are information-collection methods used to describe, compare, or explain individual and societal knowledge, feelings, values, preferences, and behaviour. (Fink, 2017: 2)

Survey research is a method for collecting and analyzing social data via highly structured and often very detailed interviews or questionnaires in order to obtain information from large numbers of respondents presumed to be representative of a specific population. (Wiseman and Aron, 1970: 37; cited in Berger, 2016: 290)

A *survey* is a study that collects information by asking people questions. The information collected – the data – is generally numerical and suitable for statistical analysis [...] The vast majority of survey research projects are *sample surveys* in which data are collected from a subset of individuals in the population. Inferences about the larger population are made from the information gathered from those people in the sample. (Shoemaker and McCombs, 2009: 379)

These definitions then indicate the key features of the survey in social science research:

- It is a systematic and structured mode of collecting data, by asking people questions.
- It focuses – ideally – on a *representative* sample of a larger population.
- It uses, as its data collection instrument, an interview schedule, that is a list of questions to be asked of the interviewee/respondent by an interviewer, or a questionnaire to be completed by the interviewee/respondent.
- The data collected, that is the answers to the survey questions, is subjected to quantitative analysis to produce descriptive, comparative and inferential statistics that can be extrapolated from the sample studied to the larger population from which the sample was drawn.

Two types of survey

Adams suggests three different roles of surveys: *exploration*, *description* and *explanation* (1989: 19). He labels surveys which are undertaken to ‘make an initial inquiry, simply to explore a domain to see if further study seems warranted’ as exploratory surveys and notes that these are also often referred to as *pilot studies*. In general, however, communications and social science researchers (e.g. Giddens, 1989; Berger, 2016) have tended to simply distinguish between *descriptive surveys* and *analytical* (or *explanatory*, or ‘*puzzle-solving*’ (Giddens, 1989)) surveys.

Descriptive surveys aim to collect information and describe patterns and trends relevant to a particular population. Their objective is to describe what is or what exists. Prime examples include the information routinely and regularly collected by broadcasting organisations on the size and socio-demographic breakdown of radio and television audiences (see Nielsen and BARB, mentioned earlier), but descriptive surveys also comprise research carried out to examine mobile phone ownership in different age groups, the number of homes with broadband access, and the rate of uptake of new media technologies such as high-definition television or smart watches.

Analytical surveys aim to analyse and describe the *why* and *how* of the opinions, beliefs or behaviours examined in a given

population. Analytical surveys thus focus closely on the relationship between different dependent and independent variables in a study; such surveys are often – but not necessarily always – guided by specific hypotheses that stipulate particular relationships between variables, and the aim of the survey will be to examine and explain how, for example, certain demographic characteristics and beliefs are related – causally or otherwise – to certain types of behaviour trends, patterns. It is normally possible to determine from the abstract whether a survey is descriptive or analytical: if the abstract mentions relationships between variables or more particularly if reference is made to hypotheses and testing of hypotheses, then the survey is likely to be analytical rather than purely descriptive.

Why use surveys? Strengths and weaknesses

Surveys, like any other method, have both strengths and weaknesses. Awareness of these is important, not least at the very early stage of developing a research project where decisions have to be made about which method or methods of data collection are most appropriate for the research objectives. In this respect it is always imperative to put a clear articulation of the objectives of the research first, and only then to decide on the most appropriate method or methods for collecting data that will enable the researcher to address the key research questions in a valid and reliable way. In the long history of research on media audiences, and on questions about the influence of the media and people's beliefs and behaviour, researchers have often been faced with choosing from laboratory experiments, focus group interviews, surveys and observational/ethnographic methods. Each of these methods has – as the audiences research literature is testimony to – features to commend it, but also drawbacks to be aware of. And the changing 'popularity' of each method over the history of audiences research also demonstrates a 'fashion' cycle in academic research that has parallels with fashion cycles in other areas of life. The strengths of survey research are often recounted with reference to laboratory experiments, whereas mention of the weaknesses of survey research tends to centre on

its shortcomings compared with more qualitative – and flexible – types of research, such as focus group interviewing (see [Chapter 10](#)) or observation (see [Chapter 4](#)).

The key strengths of surveys can then be listed as follows:

- Surveys provide a more realistic/natural setting than the laboratory experiment. Respondents are approached in their natural environment, and are asked questions relating to their natural context and everyday beliefs and behaviours. They are not, as in the laboratory experiment, subjected to an artificially created and controlled situation or to artificially manipulated stimuli.
- Surveys are a highly structured mode of collecting information or data. As such they enable the collection of large amounts of data in an efficient, potentially highly reliable and often cost-effective way.
- Surveys – because of their highly structured format – allow or facilitate the examination of a broad range of variables.
- Surveys – as a quantitative and structured method of data collection – make it possible (although this relies also on the robustness of the sampling strategy used) to use powerful statistical analyses and tests to examine not just important trends in individual variables but more importantly relationships between variables.

Some of the important weaknesses or potential flaws of the survey method include the following:

- The most common form of survey – the cross-sectional survey (see below) – provides only a snapshot of people's beliefs, attitudes and behaviour, while telling us little about how people have arrived at these or indeed about how they might be changing in the future. This is perhaps particularly troublesome in relation to research which tries to understand the role played by the media in influencing people's beliefs and behaviour, because a snapshot offers little or no insight into the dynamic ways in which our opinions are formed, shaped, negotiated and developed through interaction – whether direct or mediated – with other people's opinions.

- The survey focuses on the individual respondent's beliefs, attitudes and behaviour, and as such offers little that will help us understand how individual beliefs and behaviour are often formed and shaped in a social context. This is potentially troublesome if the aim of research is to understand how we – as media audiences and as consumers of media – develop and shape our views and opinions through conversation with others as well as perhaps in response to cues in our general symbolic environment, including of course our sense as media consumers and from the media of 'what everybody else thinks' about a particular issue.
- Answers to survey questions are easily 'framed', skewed or influenced by how they are worded and asked, that is by the choice of words and by the syntax or phrasing of questions. The importance of careful question construction cannot be overestimated in survey design, as results can literally to a large extent be a reflection not of some genuine trend or characteristic in the sample of respondents but of the way the questions have been asked.
- Surveys are excellent for demonstrating correlation between variables, but the cross-sectional survey in particular is poorly equipped to demonstrate causality. While two or more variables examined in a survey may thus appear to correlate or co-vary, it will often be difficult or impossible – depending on the nature of the survey design – to establish whether such co-variation is due to one variable's influence on the other variable or due to a third variable, which may or may not have been measured in the survey.

Before deciding to use the survey method, the researcher thus must consider the strengths and weaknesses of surveys when compared to other methods that may possibly be used to address the relevant research objectives. Beyond considering the strengths and weaknesses of the survey as a method of data collection, consideration also needs to be given to the feasibility of accessing a representative sample of the relevant population, and to questions regarding available resources for administering the survey (e.g. will interviewers need to be recruited and trained?).

If it is clear that the survey offers the best approach to collecting data that will address the stated objectives of a given research project, the next steps are then to choose from a number of possible survey designs; to decide on the most appropriate mode of data collection (i.e. whether to conduct the survey as personal interviews or through self-administered questionnaires); and to define the population relevant to the survey and a strategy for drawing a representative sample from this population. We shall look at each of these three aspects in the following, and then proceed to introduce the core data collection instrument of the survey, namely the questionnaire.

Main types of survey design

When considering types of survey design, we need to distinguish between the single one-off survey (properly called a ‘cross-sectional’ survey: respondents interviewed only once), on the one hand, and, on the other, longitudinal designs which facilitate the examination of changes over time. Longitudinal designs comprise principally the trend study (repeated surveying/interviewing; a new sample drawn of a given population for every iteration of the survey) and the panel study (the same sample of respondents interviewed repeatedly over a period of time). In the following we briefly consider the definition and characteristics of each of these designs.

The cross-sectional survey

The cross-sectional survey design is a one-off survey, where a (representative) sample of respondents is interviewed only once. It offers a comparatively cheap, potentially fast and efficient way of collecting information about, for example, people’s media consumption habits or opinions about relevant issues. It can be used for identifying characteristics of the respondents at the time of the survey, but it cannot tell us about change over time. It can help us identify associations between different variables (e.g.

along the lines that preference for particular television programmes is associated with various demographic characteristics of the respondents, such as age, level of education, social class, gender, etc.), but it cannot tell us about the causal relationships, if any, between variables. In other words, the cross-sectional survey is not at all a useful instrument for examining how patterns of media consumption might relate to particular opinions or beliefs held by media audiences. Simply put, the cross-sectional survey cannot tell us whether people who watch a lot of violent programmes become more fearful, or whether an association between amount of violent programme viewing and level of fear might reflect simply that people with a fearful disposition tend to prefer violent programmes.

The trend study

The trend study is a longitudinal design for examining change over time in a population. The same set of questions is asked in a series of (in effect, cross-sectional) surveys conducted at different points in time. A new sample of a given population is drawn for every occurrence of the trend survey. This design thus facilitates the measurement of change over time in the set of variables examined, for example changes in internet access within a given population, changes in political opinions held by a given population (e.g. the electorate) and changes in what respondents regard as the most important issues facing society. A prime example of trend surveying is the European Commission's Eurobarometer surveys, conducted regularly since 1974, to survey public opinion trends in the European Union (European Commission, 2018).

Other examples include the Pew Research Center's (2016a) *Global Attitudes* survey, and the *Global Warming's Six Americas* research programme tracking changes in how different population segments perceive and respond to climate change (Roser-Renouf et al., 2015). It is important to be clear that the trend study measures change in a given population's – not in the individual respondent's – behaviour, opinions, beliefs or perceptions. If it is change in the individual respondent that is of interest then a

refined version of the trend study is required, namely the panel study.

The panel study

The panel study is a longitudinal design that enables the mapping of change in the individual respondent's behaviour, opinions, beliefs or perceptions. The same initial sample of respondents is surveyed or interviewed repeatedly at a given interval over a specified period of time. The same set of questions is thus asked of the same sample of respondents over this period. This design therefore facilitates the tracking of whether and how the individuals in the selected sample change their behaviour, opinions, beliefs or perceptions over time, and it further enables the researcher to investigate how any such changes correlate with external changes that might be thought to influence or interact with respondents' behaviour, views, etc.

In media and communication research, one of the first and most famous panel studies was that of political campaigning, media and voter intentions in the American presidential election campaign of 1940 by Lazarsfeld et al. (1944). Lowery and DeFleur describe this sophisticated study as 'one of the most imaginative uses of survey designs and techniques in the history of social science' and include it as one of the 'milestones' in their book *Milestones in Mass Communication Research* (1995: 72). Simply described, the same panel of respondents were interviewed every month starting in May and finishing with the last survey conducted just after the election in November.

While the principal objective of the researchers was to explore 'all those conditions which determine the political behaviour of people' or, in short, to 'discover how and why people decided to vote as they did', a sign of the sophistication of this research was the endeavour to also examine whether the sheer process of repeated interviewing might influence respondents' answers and voting intentions (Lazarsfeld et al., 1948, cited in Lowery and DeFleur, 1995: 72). In other words, this was a classic case of researchers being sensitive to the possibility that the mere fact of respondents' knowing that they are being studied might affect the

results (a phenomenon commonly referred to in social science research as the Hawthorne effect, after the industrial sociology studies conducted in the early part of the twentieth century in the Hawthorne Works, a large factory complex outside Chicago, Illinois).

While the panel study is a powerful tool for examining how and why changes occur in a particular sample of respondents, its comparatively infrequent use – compared to trend studies and cross-sectional surveys – is symptomatic of the considerable difficulties of persuading respondents to agree to be interviewed repeatedly and of other types of attrition such as panel respondents moving away, disappearing or even dying during the planned survey period.

In media and communications, both trend and panel studies have been particularly important in agenda-setting research, as because time is a key independent variable their main strength is that they significantly enhance the possibility of plotting how changes in the media agenda (as measured through, for example, content analysis) may correlate with – and possibly ‘cause’ (at least the likelihood of showing cause-and-effect is considerably increased through the mapping of changes in the two agendas on a strict timeline) – changes in respondents’ opinions, beliefs or behaviour.

Ethics in survey research

Survey research, like other approaches to studying people, involves collecting information from individuals about their beliefs and behaviour, and in this respect the success of surveys depends on the willingness of respondents to answer and to do so honestly. While good and decent researchers have long acknowledged the need to be truthful to their respondents, not to obtain information through deception, and to ensure that data is collected and used only for clearly and explicitly defined purposes, such requirements have increasingly been codified into formal

professional and legal requirements in the form of ‘ethics codes’ or ‘codes of practice’. Thus professional societies (e.g. the Market Research Society), academic and professional associations (e.g. the British Sociological Association; the Association of Internet Researchers), government funding bodies (e.g. the Economic and Social Research Council in the UK) and universities and other research institutions now have detailed codes of practice governing research in general and that involving human subjects in particular.

Key concepts – where human subjects are involved – are the requirements that ‘informed consent’ be given by the respondent prior to commencing the collection of information, that no coercion or deception is involved, and that assurances be given to the respondent regarding confidentiality and the use of any information given. University staff and students alike need to ensure that their research conforms to their institution’s code of practice and associated ethics requirements, and that they have received the necessary ethics approval before embarking on research involving human subjects. This is imperative in all such research, but especially where children and younger subjects below 18 years of age are involved.

Modes of data collection in surveys

The central instrument of data collection in surveys is the questionnaire. A questionnaire is a list of carefully worded (see later on the importance of wording) questions either with a number of answer options (closed questions) or with space for respondents to enter answers using their own words (open-ended questions). Questionnaires are completed in one of two ways:

1. Through a *self-administered questionnaire*: the respondent fills in a questionnaire, which may be distributed by post or email, or – much less reliable in sampling terms – through a public venue or medium (e.g. a magazine, a website or similar).

2. Through an *interview*, in which the interviewer completes the survey questionnaire according to the answers given by the respondent. Interviews may be face-to-face, by telephone or by applications such as Skype.

A mode of data collection that combines features of these two principal forms is the ‘group administration’: a group of respondents – for example a school class – complete individual questionnaires under the general supervision/guidance of the researcher.

The main advantages of the self-administered questionnaire are low cost, ease of distribution, and ability to include more complex questions. The key disadvantages are an often very low response rate (the percentage of questionnaires completed and returned to the researcher), potential misunderstanding of questions, and difficulty verifying exactly who answered the questionnaire. The main advantage of the personal interview is its interactive nature, that is the interviewer can verify who is responding, and can explain difficult questions or instantly correct any misunderstanding of questions. The key disadvantages of the personal interview are cost and intrusiveness.

Sampling and samples in surveys

While the census is an example of a survey that aims to interview every (adult) person in a given population, most surveys are – for practical reasons – not censuses, but focus instead on a small sample drawn from the population in question. Whether broadcasting organisations wishing to know about their audiences’ media/programme preferences or political parties wishing to know about the electorate’s voting intentions or opinions on controversial political issues, it would be extremely expensive and time consuming, not to mention wholly unnecessary, to survey everybody in these two types of populations. Instead, survey researchers or organisations draw a smaller sample, ideally but not always a ‘representative’ sample, from the population that they wish to study or obtain information about. A sample is essentially

a smaller subset or miniature version of the population (Fink, 1995). Ideally, a sample should be ‘representative’, meaning that key characteristics (age, gender, social class, etc.) or variables relevant to the survey objectives are distributed similarly in the sample and in the larger population from which the sample is drawn. A sample is thus *not* a simple percentage of the larger population, nor is size per se a determining factor when deciding on how to draw a ‘representative’ sample – a sample of 4,000 people out of a population of five million is not necessarily any more representative than a sample of 2,000 respondents from the same population of five million. It depends, in very general terms, on the range and distribution of characteristics and variables relevant to the survey. A sample then ideally needs to: (a) match the distribution of key characteristics – relevant to the survey – in the population, and (b) be of sufficient size to enable the type of comparisons between variables that may be required in the analysis of the survey data (i.e. audience researchers may wish to break the audiences for a particular television programme down by gender, age, social status, level of education, etc. – the more variables included in this type of comparison, the smaller the numbers in each cell of a comparison table are likely to be, which then has implications for the kind of statistical conclusions that can be drawn).

There are two broad groups of sampling: *probability sampling* and *non-probability sampling*. All probability sampling deploys some kind of statistical randomness principle in the selection of respondents, whereas procedures to ensure randomness are not implemented in non-probability sampling. The choice of sampling strategy has implications for the kind and robustness or strength of statistical analyses/tests that can be applied to the data collected, and for the extent to which results can be generalised or extrapolated from the sample to the larger population examined. Probability sampling thus enables the use of much more sophisticated statistical tests and analyses – and ultimately much more confidence in the kind of conclusions that can be drawn from the sample data about the population examined in the survey. Within each of these two broad types of sampling, there are a

number of specific approaches that are introduced briefly in the following.

Probability sampling

Simple random sampling

Each member of a given population has an equal chance of being selected. In practice, this approach involves assigning a number to each member of the chosen population. Then researchers consult a ‘random numbers table’ (from a statistics book, methods book or from survey websites) to select – from the individually numbered members of the population – as many of the numbers listed in the random numbers table as they require for their sample, for example the first 20 random numbers listed, or the first 30 random numbers listed, depending on the size of sample aimed for.

Systematic random sampling

The first respondent is chosen randomly – again using a random numbers table – from a numbered list of each member of the population. Starting with the randomly chosen first respondent, every n th number in the population is chosen; for example if a sample of 20 respondents is required from a population of 100, then the sampling interval is $(100/20 =)$ 5, and if the first randomly selected number is 3, then the sample will consist of every fifth number starting from the first randomly selected number, i.e. the following numbers from the population: 3, 8, 13, 18, ... 93, 98.

Stratified random sampling

The population is first divided into a number of sub-groups/strata according to specified characteristics relevant to the survey, for example gender, age, ethnicity, etc. Respondents are then sampled using random sampling within each sub-group/stratum.

Cluster sampling and multistage sampling

It may be impossible or impractical to obtain a complete list of the full population to be studied; researchers therefore often first select particular naturally occurring sub-groups, such as electoral wards within a city, and then apply some form of random sampling to the selected sub-groups/areas. A form of cluster sampling is the *multistage sampling strategy*: for example for a nationwide survey of England, one might start by randomly selecting a number of shires; within each shire, we would then select – again using random sampling – a number of smaller administrative units, for example boroughs; from these we might select particular electoral wards; and, finally, within each electoral ward, we might randomly select – for example from the electoral register – a sample of individual respondents to be surveyed.

Non-probability sampling

Quota sampling

Bryman offers the following clear definition:

The aim of quota sampling is to produce a sample that reflects a population in terms of the relative proportions of people in different categories, such as gender, ethnicity, age groups, socio-economic groups, and region of residence, and in combinations of these categories. However, unlike a stratified sample, the sampling of individuals is not carried out randomly, since the final selection of people is left to the interviewer. (2016: 188)

The population is first divided into a number of sub-groups/strata according to specified characteristics relevant to the survey, for example gender, age, ethnicity. The required number or *quota* of respondents in each sub-group are then selected on the basis of whether they meet the criteria relevant to that sub-group (e.g. one sub-group could comprise 20 male television viewers aged 30–40 years).

Convenience sampling

Respondents are selected in terms of their relevance to the research objectives and on the basis of availability and willingness to be interviewed, for example a media researcher may survey fellow participants in an academic conference, a class of university students that they teach, cinema-goers as they enter or leave the cinema.

Snowball sampling

As in convenience sampling, a group of respondents is selected initially for their relevance to the research objectives (e.g. that they use Facebook) and on the basis of availability and willingness to be interviewed. These respondents are then asked to identify other people – of similar relevance to the research objectives – who would be willing to participate in the survey.

Designing questionnaires and asking questions

As indicated previously, the core research instrument of a survey is the questionnaire, and designing the questionnaire is one of the most important tasks in the process of conducting survey research. Not so long ago, this task also used to be both arduous and time consuming. Researchers using survey methodology have, however, been quick to realise the tremendous potential of the internet: in addition to the internet increasingly being used as a vehicle for conducting surveys and gathering survey data, there is now also a wealth of websites providing easy access to past surveys and/or excellent advice and guidance on how to design surveys and questionnaires. Rather than offering duplicate and generic examples of questionnaires here, we therefore refer you (at the end of this chapter) to selected sites, and we further emphasise (as in [Chapter 2](#)) the importance – in survey research as in any other kind of social science research – of starting by searching for, identifying and reviewing published research that has tackled comparable or similar research questions to those which you intend to investigate in your own research.

There is no need to spend valuable research time on ‘reinventing the wheel’, and, more often than not, already tried-and-tested survey instruments from previously published comparable studies can be a tremendous resource. This is true not only in terms of the format of the questionnaire and type of questions, but potentially also with regard to the wording of questions, where the process of designing new research and questionnaires can benefit from the testing, validity and reliability checks which have already been performed in relation to published survey research. With this preamble, we now turn to discussing some of the key considerations in relation to questionnaire design.

Question formats

A questionnaire is a list of questions, where each question offers either a set of responses from which the respondent can choose (closed questions), or a space for the respondent to record an answer in their own words (open-ended questions). Whether a question is asked in a closed or open-ended format may affect how respondents answer. The Pew Research Center (2018a), for instance, offers the following instructive example:

in a poll conducted after the presidential election in 2008, people responded very differently to two versions of this question: ‘What one issue mattered most to you in deciding how you voted for president?’ One was closed-ended and the other open-ended. In the closed-ended version, respondents were provided five options (and could volunteer an option not on the list).

When explicitly offered the economy as a response, more than half of respondents (58%) chose this answer; only 35% of those who responded to the open-ended version volunteered the economy. (Pew Research Center, 2018a)

One way to ensure that closed questions in a survey questionnaire contain answer options that reasonably reflect or

match how respondents think about the issue addressed by the question is to conduct a few focus group discussions (see [Chapter 10](#)). Focus group discussions can often be instrumental in demonstrating what issues people are concerned with, how they view these and, not least, how they ‘talk’ about such issues, in other words the types of words/labels that they use when referring to the issues.

While the open-ended form of the question referred to above in the Pew Research Center example ('What one issue mattered most to you in deciding how you voted for president?') asks for just a single 'issue' to be mentioned, open-ended questions will more often invite a longer and more elaborate response. Closed questions principally come in three different formats: *multiple choice*, where the respondent ticks/circles one answer from a given list; *ranking scales*, where the respondent ranks a list of options – for example a list of television programmes – in order of preference: 1, 2, 3 ... etc.; or *agreement rating scales*, where the respondent indicates their choice on a preference scale such as 'strongly agree', 'agree', 'neither agree, nor disagree', 'disagree', 'strongly disagree'.

As respondents often, and rightly, see their time as precious, it is important to keep survey questionnaires as brief, clear and succinct as possible. Important considerations to engage with when starting out on the design of a questionnaire include deciding on which questions to include; how they should be asked and in which order they should appear.

Which questions?

There is no such thing as a 'standard set of questions' that must or should be included in a questionnaire. A questionnaire should include questions – and only such questions – that are relevant to the research objectives or envisaged as potentially important independent variables relative to the particular (dependent) variables examined in the research. Surveys should not in general include 'fishing-expedition' questions that may or may not yield some interesting information but where it is not clear how or whether they will be used in the analysis of the questionnaire

data. There may, particularly in studies of a mainly exploratory nature, be exceptions to this general rule, but it is still important to have at least some idea about how such variables may illuminate or contribute to the research objectives at hand.

Framing questions: word choice, question order, response formats

Questions need to be intelligible and indeed possible for respondents to answer. ‘Intelligible’ refers both to the terms, concepts or phenomena referred to in individual questions (are they known or recognisable to the respondents?) and to the ‘route’ through the questionnaire (i.e. a particular answer may require the respondent to skip ahead a few questions) although this is not an issue in online questionnaires, where the route is automatically selected in accordance with the kind of answer given. ‘Possible’ refers to whether the information asked for is something that the respondent can reasonably be expected to know or reliably estimate. A typical example in media research is a question about the amount of television viewing in the last week or the number of hours spent on social media in the last week. Few, if any, carry this kind of information around in their heads, and it is therefore more sensible to ask respondents about ‘yesterday’ and perhaps the ‘day before yesterday’, or, alternatively, to ask respondents to keep a daily diary/log over a given period of the number of hours spent watching television or accessing the internet. ‘Possible’ also relates to the mode of data collection used, for example if filling out a self-completion questionnaire respondents may have time to check relevant written records (e.g. bills, medical records) for some of the information required, whereas this would not normally be practical or feasible in a face-to-face or a telephone interview.

Word choice/question wording, question order and response option format can influence or skew the answers. Studies of controversial public issues such as climate change mitigation and policy have provided ample evidence of this, although as Schuldt et al. (2015) note in a comprehensive review, not all of it pointing in the same direction. In an experimental survey design to test the influence of question wording ('global warming' vs 'climate change') and question order regarding key factors such as

personal belief, perceived scientific consensus and support for climate mitigation policy, Schuldt et al. (2015: 79) show significant ‘three-way interaction between question wording, question order, and political identification’. Their research thus shows, for example, that ‘survey respondents are more likely to perceive scientific agreement when the issue is referred to as “climate change” rather than “global warming”’ (p. 81) and that question order and use of ‘climate change’ versus ‘global warming’ also influenced groups of respondents’ (as defined by their political affiliation) support for mitigation policies.

Careful consideration therefore needs to be given to all of these dimensions and with the particular target sample audience in mind. The following is a checklist of some of the key considerations in questionnaire design:

- Questions should be clear (simple syntax and using words that will be understood by the target population), concise (getting straight to their core idea or point) and unambiguous.
- Questions should ideally be short and succinct, so that it remains clear to the respondent what kind of information is asked for.
- Each question should be focused on a single dimension, so that there is no doubt about what the answer refers to. As Wimmer and Dominick (2014: 197) advise, beware if a question contains an ‘and’, as this is often an indication that respondents are being asked about more than one piece of information. The trouble with so-called double-barrelled questions, of course, is that we don’t know which part of the question the respondent’s answer relates to. For example, ‘Politicians receive too much news coverage and are often ridiculed. Do you agree or disagree?’ A respondent answering ‘agree’ may agree that politicians receive too much news coverage, but disagree that they are often ridiculed, or vice versa.
- Avoid leading questions or questions which may make the respondent feel guilty, excluded, ‘labelled’ or similar.
- Avoid potentially sensitive questions, or questions which can be construed as offensive. If such questions are necessary, put

them towards the end of the questionnaire (see also below on question order).

- Avoid asking for detailed information that the respondent can't reasonably be expected to have or which may be embarrassing to the respondent, for example illness or similar conditions.
- In general, survey questions should progress from simple to more complex questions, and from innocuous questions to those, if any, that may be potentially sensitive or may touch on taboo subjects. Sensitive or taboo-type questions are best put towards the end of the questionnaire, by which time the respondent's confidence and rapport may have been gained and the respondent is perhaps also more willing to disclose relevant views, opinions or information that they would have been reluctant to discuss at the beginning of the questionnaire or interview.

Piloting/pre-testing

Before 'going into the field' to conduct survey interviews or to administer self-completion questionnaires, it is essential to pilot the questionnaire. This is to make sure that everything 'works' before embarking on the resource-intensive task of conducting the full survey. As indicated above, answers are easily influenced by the way questions are worded and asked, so it is important to ensure – as far as is possible – that (a) questions are understood as intended; (b) interviewers and respondents know how to work their way through the questionnaire; (c) respondents can answer the questions; (d) questions are worded such that they will yield useable and appropriate – that is to the objectives of the research – data; (e) answers are not unduly skewed by particular phrases or word choice.

One way of piloting a questionnaire is of course to simply try it out on a few colleagues and/or friends, but ideally piloting should be done on a 'genuine' sample, that is a small sub-sample of the sample that will actually be surveyed. The sub-sample should thus

ideally have the same general characteristics as the respondents who will eventually be surveyed in the full survey sample. Piloting is not only a necessary step to enhance both the validity and reliability of the research; it is also a cheap and efficient way to improve the design and to iron out any problems or errors before commencing the full-scale survey. Once the full-scale survey has been launched there is little or no opportunity to make changes or corrections without rendering any completions prior to such amendments invalid, so it is paramount that any problems are picked up before embarking on the full-scale survey.

Recording, managing, analysing survey data

The traditional questionnaire is a printed document where answers are recorded by handwriting in tick boxes or in the form of handwritten words (in the case of open-ended questions). However, increasingly questionnaires are completed on computer or equivalent electronic devices. In personal interviews this takes the form of ‘computer-assisted telephone interviewing’ (CATI), or ‘computer-assisted personal interviewing’ (CAPI). In self-completion questionnaires, this takes the form of questionnaires embedded in or attached to emails, or – increasingly, due to the much greater flexibility and scope for attractive graphical presentation – questionnaires on a website.

Online questionnaires have advantages of ease of construction, of administration, and of speed and reliability. Web-based questionnaires can be set up such that the data (answers) is automatically analysed in real time; complex questionnaires, which, for example, might have various filtering questions with associated branching routes, can be set up so that respondents are automatically transferred to the appropriate next question depending on their answer to the filtering question; data entry is more reliable, as answer categories can be restricted so that only valid answers can be entered, etc. Online questionnaires can of course also make use of audio and visual prompts, instructions or input.

Whichever medium or format is used for collecting survey data, the questionnaire remains the core instrument for collecting

data/getting respondents' answers. Once the data has been collected the next step is to arrange or transfer the data such that it can be analysed with appropriate statistical analysis programs (e.g. SPSS – see [Chapter 11](#)) or – in the case of open-ended questions consisting of textual answers – qualitative data analysis programs (e.g. programs for analysing vocabulary, word frequencies and co-occurrences – see [Chapter 11](#)).

Once the questionnaire data has been transferred and checked (e.g. for error codes and missing data), the researcher is ready to start analysing the data. Where to start and what kind of analyses to perform will of course depend on the objectives of the research, but generally it works well to start by familiarising yourself with relatively simple descriptive trends in the data, in other words by running simple frequencies analyses to show how many of this and how many of that, and how many said this and how many said that in relation to each question in the questionnaire. This will then be elaborated and followed by more complex analyses involving, usually, comparisons (cross-tabulations) between two or more variables, as well as statistical tests for significance and strength of correlation, etc.

Summary

- The survey is historically one of the most frequently used methods for studying media audiences. It has played a prominent role in the history and development of media and communication research and models.
- Survey research is a method for collecting and analysing social data via highly structured and often very detailed interviews or questionnaires in order to obtain information from large numbers of respondents presumed to be representative of a specific population (Wiseman and Aron, 1970: 37; cited in Berger, 2016: 290).
- Definitions of survey research stipulate that:
 - It is a systematic and structured mode of collecting data by asking people questions.
 - It focuses – ideally – on a *representative* sample of a larger population.

- o It uses, as its data collection instrument, an interview schedule, that is a list of questions to be asked of the interviewee/respondent by an interviewer, or a questionnaire to be completed by the interviewee/respondent.
 - o The data collected, that is the answers to the survey questions, is subjected to quantitative analysis to produce descriptive, comparative and inferential statistics that can be extrapolated from the sample studied to the larger population from which the sample was drawn.
- Surveys have both strengths and weaknesses:
 - o Strengths include: advantages of a more natural research situation than that of the laboratory experiment; a highly structured mode of collecting data, affording advantages of efficiency, reliability and cost-effectiveness; they enable the examination of a broad range of variables; as a quantitative and structured method of data collection they make it possible to use powerful statistical analyses and tests to examine relationships between variables.
 - Weaknesses include: the survey provides potentially only a snapshot of people's beliefs, attitudes or behaviour, while telling us little about the dynamic ways in which opinions are formed, negotiated or changed over time; the survey focuses on the individual's opinions, beliefs and behaviour and provides few clues to the social context circumscribing and impacting on these dimensions; answers to survey questions are easily framed, skewed or influenced by the way they are worded and asked; surveys are good at demonstrating correlation between variables, but generally not well equipped to demonstrate causality between variables.
- There are three main types of survey:
 - o *The cross-sectional survey*: a one-off survey, where a sample of respondents is interviewed only once.
 - o *The trend study*: a longitudinal design for examining change over time in a population. The same set of questions is asked in a series of surveys conducted at

different points in time. A new sample of a given population is drawn for every occurrence of the trend survey.

- o *The panel study*: a longitudinal design for examining change over time in the individual respondent's behaviour, opinions, beliefs or perceptions. The same set of questions is asked of the same sample of respondents in a series of surveys conducted over a given period of time.
- Survey research must always meet standard ethical requirements regarding informed consent, confidentiality, data protection, etc.
- Most surveys rely on sampling and are carried out on a sample of respondents that are representative of the target population of the survey.
- The choice of sampling strategy depends on considerations regarding cost, resources and access to respondents, as well as the type and strength of statistical analysis envisaged.
- There are two principal types of sampling: *probability* and *non-probability* sampling. The former comprises the four types: simple, systematic, stratified and cluster sampling. The latter comprises quota, convenience and snowball sampling.
- The questionnaire is the core research instrument of the survey. Questionnaires can be self-administered or administered by an interviewer in face-to-face, telephone or computer-mediated interviewing. Questionnaires must be carefully designed to reflect the objectives of the research. Care and thought must go into deciding on question formats (closed or open-ended; multiple choice, ranking or rating-scale questions, etc.), order of questioning, wording of questions (e.g. questions must: be clear, brief and unambiguous; questions must not: be double-barrelled or leading, or ask for complex, detailed or sensitive information that the respondent is unlikely to have to hand or may be embarrassed by).
- The questionnaire should be pilot tested in order to iron out any problems (e.g. in relation to question wording, comprehension) and fine-tune question wording before embarking on the full-scale survey.
- Surveys are increasingly conducted with the help of computers and other digital media, affording significant advantages of

speed and reliability in the collection, recording, processing, management and analysis of data.

Further reading and resources

As indicated earlier in this chapter, the process of searching for, identifying and locating previous relevant (to the focus and objectives of one's own study) and/or comparable survey research and associated sampling strategies and questionnaires has become infinitely faster (as well as potentially more reliable, comprehensive and systematic) since the rise of the internet in the 1990s. In addition to the results that can be gleaned from standard literature searches on key library databases, general searches on powerful search engines such as Google will help in quickly identifying potentially relevant publications or websites (which must of course be scrutinised carefully in terms of the quality of information and advice that they offer).

Below we offer a few web addresses selected for their relevance to survey and questionnaire design generally, and, in the case of some of them, for their relevance to media and communication research in particular. Following these, we then point you in the direction of books that provide excellently detailed and easy-to-follow guidance on how to design, conduct and report on surveys, including online surveys.

Selected resources

The Pew Research Center: <http://pewresearch.org>.

The Pew Research Center in the US is an excellent resource for anybody interested in media, news, politics and public/political attitudes and opinions, including in the interplay between news coverage and public interest:

Pew Research Center is a nonpartisan fact tank that informs the public about the issues, attitudes and trends shaping America and the world. We conduct public opinion polling, demographic research, content analysis and other data-driven social science research. (Pew Research Center, 2018b)

Particularly useful are the regular reports on methodological issues available at www.pewresearch.org/methods, and the detailed account of the survey methodology – including key topics such as ‘sampling’, ‘collecting survey data’ and ‘questionnaire design’ – in for example their US Survey research:

www.pewresearch.org/methodology/u-s-survey-research

or in their *Global Attitudes* survey

www.pewresearch.org/methodology/international-survey-research/international-methodology

There are many commercial websites offering interactive survey design, web and mobile surveys, survey analysis software and related services and products, free at certain levels and for a fee at more advanced levels of service. Many of these also have extensive free guides and tutorials, which may be worth consulting. Examples include:

- Survey Monkey: www.surveymonkey.com
- Creative Research Systems: www.surveysystem.com/sdesign.htm
- eSurveysPro.com: www.esurveyspro.com
- StatPac: www.statpac.com/surveys

Further reading

Fink, A. (2017). *How to Conduct Surveys – A Step-by-Step Guide* (6th revised edition). London: Sage.

Probably one of the best and most accessible introductions available, this guide covers all aspects of the survey process, from conceptualisation and design to analysis and presentation of the survey results. Each chapter is replete with illustrative examples (from question types and question wording to tables/charts and PowerPoint slides for presenting results) and ends with a concise and succinct summary of key points and practice exercises/questions.

Mytton, G., Diem, P., & Dam, P. H. v. (2016). *Media Audience Research: A Guide for Professionals* (3rd edition). London: Sage.

Now in its third edition, this comprehensive hands-on guide to quantitative and qualitative methods in audience research covers all aspects of survey methodology for researching media audiences. The lead author, Dr Graham Mytton, is a previous Head of Audience Research for the BBC World Service. The third edition is comprehensively updated, particularly in its treatment of the internet as a research tool, and of the internet, mobile phones and digital media as objects of research.

Wimmer, R. D., & Dominick, J. R. (2014). *Mass Media Research: An Introduction (International Edition)* (10th edition). Belmont, CA: Wadsworth Cengage Learning.

Now in its tenth edition, *Mass Media Research* continues to provide an excellent introduction to the key considerations for media and communication researchers wishing to use survey methodology in their research.

Vehovar, V. & Manfreda, K. (2016). Overview: Online surveys. In N. Fielding, R. Lee & G. Blank (eds), *The SAGE Handbook of Online Research Methods* (2nd edition), pp. 57–75. London: Sage.

This introductory chapter of ‘Part IV Online Surveys’ in *The SAGE Handbook of Online Research Methods* provides a succinct overview of issues in online surveying, with the other four chapters in this section discussing ‘sampling methods for online surveys’, ‘online survey design’, ‘online survey software’ and

'improving the effectiveness of online data collection by mixing survey modes'.

CHAPTER 10

Focus group interviewing

Discovering *how* audiences make sense of media messages is not easily done through survey research. Survey research is good at providing a snapshot of audience beliefs, attitudes and behaviour – the *what* of audience/media relationships – but is much less suited to telling us about the *why* or *how* of such relationships. For examining the dynamics of what experiential knowledge and frames of interpretation audiences bring to bear in their use of media content, what role media use has in the everyday life of audiences, or how audiences use the media as a resource in their everyday lives, it is necessary to turn to more qualitative methods, to methods which allow us to observe in a more naturalistic setting than that of the survey or the laboratory experiment how audiences relate to media both as technologies and as content.

Observational and ethnographic approaches are methods that meet these requirements, but problems of access often rule out their extended use for the study of audiences in their natural home environment (Silverstone, 1991). This is not to say that observation in the home setting is impossible: indeed, a number of media audience studies have successfully observed media use in a family setting, including Hobson's (1982) classic study of audiences for a popular British soap opera, Morley's (1986) study of family television in Britain, and several studies reported in *World Families Watch Television* (Lull, 1988).

Semi-structured individual interviews or semi-structured group interviews are approaches which allow the researcher a potentially much richer and more sensitive type of data on the dynamics of audiences and their relations to media than the

survey. At the same time, these approaches are comparatively cheap (although often time consuming), and they are not burdened by the resources and lengthy access negotiations often needed for observational studies.

The rise of the internet since the 1990s further brought with it exciting new opportunities for studying not only media audiences (as witnessed by numerous studies focusing, for example, on fan communities around popular television series, see e.g. Pullen, 2004; Hine, 2011) but also the increasingly interactive processes by which new media technologies are becoming an integral part of and being used for communication and ‘meaning-making’ (Kim, 2016). There are intriguing parallels between the kind of meaning-making that might take place in traditional focus group discussions, and that which can be witnessed – unobtrusively – in internet discussion forums, fan sites, blogging or tweeting. There are also significant and important differences, however, and the rise of the internet as both an object and a tool for research has thus extended and enhanced rather than replaced more traditional approaches to the study of media audiences such as surveys, experiments and focus group interviewing.

In this chapter, we introduce the focus group interview as a method for studying media audiences. While the individual in-depth interview and the focus group interview produce similar data in many respects, our reasons for focusing on the group interview are twofold: first and foremost, focus group interviews allow the researcher to observe how audiences make sense of mediated communication through conversation and interaction with each other in a way that is closer, although clearly not identical, to how we form opinions and understandings in our everyday lives. Second, group interviews are more cost-efficient than individual interviews – a wider range of people can be interviewed within the same limitations of time, resources and research funding.

Brief history

The focus group interview has gained widespread popularity as a research method for studying media audiences. With the rise of ‘reception studies’ in media research during the 1980s, the focus

group interview became a key component of the arsenal of approaches deployed by communication and media researchers. The history and origins of the method, however, extend much further back in time than the 1980s, as well as across to many other fields of study.

In a delightful account of personal history, Merton (1987), in his article on the focused interview and focus groups, traces the conception and development of the method back to the early 1940s. He refers to radio audience research at University of Columbia with Paul Lazarsfeld at the Columbia Office of Radio Research, and to research on film audiences, notably in Merton's own work on army morale boosting and training films for the Research Branch of the United States Army Information and Education Division. Merton and Kendall's article '*The Focused Interview*', published in 1946, and the book-length treatment published a decade later (Merton et al., 1956) are generally reckoned to mark the birth of the method as one for the study of media audiences and communication processes.

Despite the early origins in the social sciences, it was in commercial marketing research rather than in sociology and related disciplines that the method became widely used in the next few decades. Not until the late 1970s and early 1980s did the approach experience a renaissance in the social sciences, bringing with it renewed examination of its methodological merit and applications (Morgan and Spanish, 1984; Krueger, 1988; Morgan, 1988; Stewart and Shamdasani, 1990; Morgan, 1993), although, interestingly, some of the key discussions of the renewed interest in and use of the method in media and communication research did not appear until the 1990s (Liebes and Katz, 1990; Schlesinger et al., 1992; MacGregor and Morrison, 1995; Lunt and Livingstone, 1996; Morrison, 1998).

The renaissance since the 1980s of the focus group interview as a method for media and communication research relates to the turn away from the traditional effects paradigm, and variations thereof which include such predominantly survey-based approaches as cultivation analysis, agenda-setting, and uses and gratifications research. The turn in the media audience research of the 1980s and 1990s marked a move away from questions

about media influence and ‘effects’ on audience behaviour and beliefs, and towards concerns with how audiences interpret, make sense of, use, interact with and create meaning out of media content and media technologies. In the words of one prominent media scholar:

The form which ‘re-conceptualization’ took here involved an attempt to carry over cultural studies’ alertness to discursive and symbolic processes into an analysis of the organization and forms of viewing activities rather than those of media texts themselves. ‘Influence’, whatever its strength and direction, had to work through meaning, and it was to the formal and social complexity of meaning-production that the new research addressed itself. Meaning was seen as *intra-textual* (requiring analysis of textual structures), *inter-textual* (requiring analysis, among other things, of genres and relations between them) but also finally and decisively *interpretative* (requiring research into the situated practice of ‘receptive’ understanding). (Corner, 1991: 270)

For many of the audience ‘reception’ studies of the 1980s the choice of focus group discussions, participant observation and related ethnographic methods marked a deliberate and conscious rejection of traditional quantitative approaches. But as Schlesinger et al. have eloquently argued, while there are good reasons for adopting ‘qualitative’ approaches in the study of media audiences, there are no grounds for making the qualitative emphasis ‘into an article of faith that excludes any attempt at quantification’ (1992: 8). Schlesinger et al. advocate – and in this they reflect a more general trend in the new audience research (e.g. Schröder, 1987; Höijer, 1990; Livingstone, 1991) – the use of quantitative methods *in combination with* qualitative approaches and techniques.

In this context, it is also instructive to remind ourselves that in the early formulations of focus group methodology in the first half of the twentieth century, focus groups were indeed seen as a useful complement to survey methodology, both as a way of generating better-focused and better-formulated questions for

surveys and as a method for pursuing interesting trends identified in surveys in a much more detailed way.

While media research of the 1980s may still have been characterised to a large extent by entrenched antagonism between quantitative and qualitative approaches and their principal proponents, media and communication research since the early 1990s has been characterised by ever-increasing *convergence* between quantitative and qualitative research techniques and approaches (see our discussion in [Chapter 1](#); see also e.g. Schrøder et al., 2003; Hansen, 2011; Philo and Berry, 2011; Happer and Philo, 2016). In the same period, the method of focus group interviewing itself has also been developed and applied in new and innovative ways, particularly – in relation to understanding how audiences ‘deal’ with and make sense of media content – through the use of editing tasks and active engagement with media content (MacGregor and Morrison, 1995; Philo and Berry, 2011; Wibeck, 2014; Williams et al., 2015; Kim, 2016).

When to use focus group interviews

As in all research, the choice of method should principally reflect the purposes and objectives of the study to be carried out, although other more pragmatic factors, such as convenience, available resources and time will often play a role in determining how to approach a particular problem.

Focus group interviews may be the single substantive mode of data collection in a piece of research; but more frequently the approach has been used in conjunction with other, complementary, types of data collection. In media research, it has notably been used together with questionnaires, observation (ethnography) and analyses of media content. Likewise, the use of focus groups may be appropriate at different points in the progression of a study: they may be used at a very early stage for exploratory purposes, to investigate which issues and topics people are concerned about within a particular domain/field, and how they talk about these issues. Such exploratory data will help in the construction of relevant questions for a larger survey study

using questionnaires; in this respect, focus group interviews are invaluable both in terms of providing pointers to relevant issues, themes and concerns and, much more specifically and crucially, in terms of ensuring that survey questions deploy vocabularies and reference frames which resonate with those of the respondents who are to be surveyed. Alternatively, a survey study or a content analysis of media may have drawn attention to a number of topics that require further and more detailed examination through the use of focus group discussions.

Discontent with the ‘passive’ audience view and with the stilted view of media influence seen as the defining characteristics of traditional approaches to the study of media audiences, the new reception and ethnographic audience studies emerging in the 1980s and 1990s were keen to employ methods of investigation which allowed for a more active and meaning-constructing role for audiences. The choice of focus group interviews as a method of investigation was thus governed by the desire to examine, through a more ‘natural’ setting and frame than that of the survey or experiment, how media audiences relate to, make sense of, use, negotiate and interpret media content:

[T]he aim was to discover how interpretations were collectively constructed through talk and the interchange between respondents in the group situation. (Morley, 1980: 33)

[W]e wished to include as a primary element of our study an investigation into how viewers made sense of, and evaluated, the programmes we chose for analysis. (Corner et al., 1990: 47)

While the qualitative depth sought by these studies could equally well have been obtained through in-depth individual interviews, there are at least two important reasons for choosing the focus group discussion over the individual interview as a method of investigation. The first reason concerns the argument that the generation of meanings and interpretations of media content are ‘naturally’ social activities, that is audiences form their interpretations of media content and their opinions about such

content through conversations and social interaction. Liebes and Katz thus argue that by using the method of focus group interviews, they ‘were, in effect, operationalizing the assumption that the small-group discussion following the broadcast is a key to understanding the mediating process via which a program such as this enters into the culture’ (1990: 28).

The second reason for choosing focus group discussions over individual interviews is that focus group discussions offer dynamics and ways – not available in individual interviews – of eliciting, stimulating and elaborating audience interpretations. It is precisely the group dynamics and interaction found where several people are brought together to discuss a subject that is seen as the attraction of this mode of data collection over individual interviews (Morgan, 1988; Kitzinger, 1994). Interaction between participants in a focus group ‘allows researchers to study how people respond to each other’s perspectives and mobilize or resist media accounts in debate with one another’ (Kitzinger, 2004: 174). Philo and Berry similarly note that the focus group discussion format often leads to participants ‘opening up’, that is as rapport is established within the group participants become ‘less guarded and more prepared to say what they really believe’, but, more significantly, as discussion develops and participants hear arguments and information that they may not previously have been aware of, it becomes possible for the researcher to see how participants’ ‘beliefs are modified and develop’ (2011: 281).

Of course, some of the reasons for choosing focus groups may also be used as arguments against this approach. Some individuals inevitably exert more influence than others in a group situation, to the extent that they may begin to dominate the discussion (although this can often be countered and minimised by a skilful moderator – see later on the role of the moderator). Group discussions also tend to work towards ‘consensus’ ground – dissenting views may be marginalised and disagreement among participants becomes less visible as the group pressure moves discussion towards a common frame. These are well-known processes. Both Gamson (1992) and Liebes and Katz (1990), however, argue that these processes make the group discussion a more ‘natural’ form of data generation:

Group dynamics are such that opinion and participation are *not* equally weighted; some people have disproportionate influence. But real life is like that: opinions are not as much the property of individuals as public-opinion polling would have us think. Opinions arise out of interaction, and ‘opinion leaders’ have disproportionate influence. (Liebes and Katz, 1990: 29)

While the idea of getting groups of people together to ‘talk about media content’ may sound like a productive way of generating rich, natural, detailed and complex data about how people interpret, accommodate, negotiate and use media content, it is also symptomatic of a rather media-centric perspective. Rather than using focus group research to explore variations across different groups in interpretation and decoding of specific media content, researchers have increasingly used focus groups for examining meaning-making – including with reference to media content – in relation to particular social issues, such as for example energy and climate change (Philo and Happer, 2013; Wibeck, 2014; Williams et al., 2015).

Focus group discussions, in order to produce useful data, require active input and structuring on the part of the convenor or moderator (see below for more detail about this role). Indeed, the ‘focus’ of the discussions needs to be set very clearly, and the framework within which participants are being asked to articulate their views and comments needs be clear. While focus group discussions will often work gradually from relatively general and unstructured talk towards the more specific areas of interest to the researcher, the success of focus groups as a method of data collection ultimately depends on the (moderator’s) ability to focus the discussion around the processes and issues relevant to the overall objectives of the research.

Steps in focus group research

The main steps involved in conceptualising, carrying out and analysing focus group discussions are very similar to those of survey research (see [Chapter 9](#)) or content analysis (see

[Chapter 5](#)), but there are also some features that are unique to focus group interviewing, such as the use of a moderator to lead the line of questioning and discussion in each focus group session. The main steps can be summarised as follows:

- Definition of the research problem and deciding whether focus group interviewing is the most suitable approach (see the discussion above)
- Sampling and recruitment of groups (including deciding on the number of groups, and arranging participation and venue)
- Identifying the moderator and defining their role
- Creation of the research instrument/interview guide
- Pilot testing
- Conducting and recording the focus group interviews
- Analysis and interpretation of focus group data
- Reporting the focus group study and its results

In the following, we discuss some of these steps in more detail and with reference to and illustrations from media audience research which has used focus groups. Before doing so, however, we start with the all-important requirement for any research that involves human subjects, namely to ensure that the work is conducted in accordance with institutional and professional regulations regarding research involving human subjects.

Ethics: regulations and requirements for research involving human subjects

Unlike research on media content, any research involving human subjects must conform strictly to the relevant regulations and ethics requirements as set out by the researcher's university, professional or other institutional code for human subject research. In practice, this means that ethics approval must be obtained *prior* to any involvement of human subjects, even if this is only for the purpose of piloting the research instruments, from the university's or research organisation's ethics approval panel or equivalent committee. There are particularly strict requirements where children or young people are to be involved in the proposed

research, but in all cases ethics regulations require that participants ‘must be informed of the study’s rewards and risks, told the study is voluntary and confidential, and told they can quit participating at any time’ (Krueger and Casey, 2015: 34).

Sampling and recruitment of groups

Focus groups are conducted to obtain specific types of information from a clearly identified set of individuals. This means that individuals who are invited to participate in a focus group must be both able and willing to provide the desired information and must be representative of the population of interest [...] A focus group is not just a haphazard discussion or brainstorming among people who happen to be available; it is a well-planned research endeavor that requires the same care and attention that is associated with any other type of scientific research. (Stewart and Shamdasani, 2015: 57)

That ‘individuals who are invited to participate in a focus group must be both able and willing to provide the desired information and must be representative of the population of interest’ may seem obvious enough, but it is important to note that, unlike in surveys, the total number of participants in a focus group study is comparatively small; it is therefore essential that the sampling of groups takes careful note of any particular demographic, occupational, ethnic, cultural or other dimensions expected or hypothesised to be of relevance to the subject under investigation.

Indeed, focus group studies in media research have rarely sought to obtain groups representative of the general population as such. Rather, they have selected groups according to specific dimensions thought to be of significance to the way in which people use and interpret media content. Additionally, audience studies using focus group methodology have often aimed to draw participants from what Philo and Berry term “normally occurring” groups, that is, people who would meet and speak with each other in the normal course of their lives’ (2011: 276). Indeed in some studies, focus group methodology is deployed specifically with a

view to exploring how social interaction mediates audience understandings, and it therefore becomes important to 'work with pre-existing groups' (Kitzinger, 1993: 272), that is groups of people who live, work or socialise together.

Corner and his colleagues similarly anticipated that public views and understanding would be shaped by a range of demographic, political, professional and other dimensions and they thus chose their principal participant groups from 'pre-constituted' 'interest groups':

We anticipated that the main political parties would have reason to be interested in this topic (even though nuclear energy is not a simple partisan issue). We accordingly obtained the participation of respondent groups from the local Labour, Conservative and SLD parties. The net was extended to groups from the local Rotary club, one from the Labour and Trade Union Resource Centre of unemployed people, a women's discussion group, a group of comprehensive school pupils, a group of medical students, some Friends of the Earth members and a set of workers at the Heysham nuclear power plant. (Corner et al., 1990: 48–49)

Burgess and Harrison (1993), in their research on the circulation of claims and the role of media in relation to a controversial environmental issue, complemented a general household survey with a focus group study involving just two groups. However, each of these groups was convened not once but six times over a half-year period with a view to examining how claims developed during this period. Burgess and Harrison deliberately chose one group consisting of local people who were generally supportive of the development in question, and another group consisting of local people who were 'all paid-up members of nature conservation and environmental organizations' (1993: 202), and who were, by implication, against the controversial development examined in the study.

In a study of press coverage and public understanding of the new genetics, Durant and his colleagues (Durant et al., 1996) chose a combination of types of groups. In addition to a number of

'general population' groups, they chose groups consisting of participants who, through their interest group membership or occupation/profession, had 'specialist' knowledge or concerns (moral, legal, health and commercial) relevant to the subject under investigation.

The idea of selecting from already naturally occurring groups – for example, people who work or study together – and on the basis of existing geographical, demographic or professional relationships with the topic under investigation continues to feature prominently in focus group research. In their research on climate change and energy, Happer and Philo (2016: 140) thus recruited focus groups:

on the basis of their being from the same socioeconomic group and being naturally occurring. By this, we mean groups who would normally congregate and speak to one another in the regular course of their lives and therefore have a pre-existing rapport which can be tapped into in the groups. [...] The groups were recruited to represent the normal socio-demographic criteria and were also geographically diverse. We included groups of specific interest [...] We also had a particular interest in the views of young people since there is continual debate on their consumption of media via digital technologies which is an increasingly important aspect of contemporary communications. (Happer and Philo, 2016: 140)

Williams et al. (2015: 4) in their research on public views regarding hydraulic fracturing ('fracking') in the UK likewise selected groups 'purposively as representing theoretically significant interests in the risks and benefits of fracking'. Arguing 'that diverse public groups can make well-informed contributions based on shared and topic-specific experiential knowledge' they thus selected their groups on the basis of shared experience (e.g. work-related) or existing group membership such as membership of local industrial history societies.

If the objectives of the research allow that participants be recruited from already naturally existing groups or communities, this clearly makes the task of finding, contacting and engaging the

desired types of participants a great deal easier than drawing participants completely at random. Constituencies where they can be drawn from already existing lists – provided access is granted – include, for example: local, regional or national pressure groups, consumer organisations, special interest groups or party political organisations who can be contacted through their administrative offices or headquarters, and who may provide access to their membership lists; large employers, companies, trade associations and trade unions who, likewise, may allow access to directories of employees and members; public institutions; associations (e.g. viewers' and listeners' associations, fan clubs, parents' groups, women's associations, ethnic societies, religious societies, housing associations); and professional societies (e.g. of doctors, scientists, solicitors, accountants, journalists).

Where the types of participants sought do not belong to already existing groups or communities, or cannot be drawn from pre-existing directories or membership lists, it is necessary to resort to the same kinds of sampling/recruitment methods normally used in survey research. These include contacting people in shopping centres, 'on the street' or in other public places; advertising for participants on public notice boards in parks, community centres or shops; advertising in local/regional media outlets; or contacting people by post (perhaps by randomly sampling names and addresses from electoral registers), phone, email (if lists or directories are available), or through social media.

Numbers of groups and participants

How many groups? How many participants in each group? There is no single right answer to either of these two questions. The number of groups will depend on the aims of the research and on available resources. If focus groups are used merely for exploratory purposes and/or for generating ideas for a larger – perhaps survey-based – study, then as few as two, three or four groups may be sufficient (Hedges, 1985; Morgan, 1988). Where focus groups form a central and more substantive part of the data collection of a study, it would generally be difficult to justify fewer than six groups. As indicated by Morgan, one approach is to vary

'the number of groups according to whether the additional discussions are producing new ideas' (1988: 42). This strategy was followed by Livingstone and Lunt in their study of audience interpretations of television talk show programmes: 'The number of focus groups was determined by continuing until comments and patterns began to repeat and little new material was generated' (1993: 181). Livingstone and Lunt thus conducted 12 focus group discussions with a total of 69 participants in groups of between four and eight people.

The single main factor (cost and resources notwithstanding) in deciding on the number of groups must be the types of comparisons across different group or population characteristics specified by the objectives of the research. Thus, if the aim is to examine how audience interpretations of a television programme vary according to social class, sex, age, interest group membership, profession/occupation or lifestyle, then there must be sufficient groups to represent these dimensions/populations.

One important determinant of the number of groups is the number of different population subgroups required. The more homogeneous your groups are in terms of both background and role-based perspectives, the fewer you need. [...] [I]f there are several distinct population segments in the groups that you are studying, you may want or need to run separate groups in each, e.g., groups composed entirely of men and run separately from groups composed entirely of women. Running a minimum of two groups in each distinct segment will obviously increase the total number of groups. (Morgan, 1988: 42)

The number of groups used in the media audience studies of the 1980s and 1990s has varied considerably. Morley (1980), in his classic study of audiences for the UK current affairs programme *Nationwide*, interviewed 29 groups (although three of these were omitted from his analysis due to faults in the tape recording) of, mainly, between five and ten people. Morley's later study, *Family Television* (1986), involved 18 families. Liebes and Katz's (1990) study of cultural differences in the interpretation of *Dallas*

comprised 66 groups of, usually, six participants (three married couples) in each group. Kitzinger's (1993) study of audience understandings of AIDS involved 52 groups with a total of 351 participants, and group sizes were generally in the region of four to nine participants. In their study of women and television violence, Schlesinger et al. (1992) conducted 14 group discussions with a total of 91 women (with group sizes of between five and nine participants). Durant et al. (1993) conducted 12 focus group discussions with groups of between seven and nine participants.

More recent studies have generally used fewer groups than the studies of the 1980s. Thus, Philo and Berry (2011) in their study of audience perceptions and understanding of the Israeli–Palestinian conflict used 14 focus groups (of on average seven to eight participants). Shepherd et al. (2007), in their study of media coverage and public attitudes regarding human cloning, used ten focus groups (with on average ten participants in each group). Shaw, Whitehead and Giles (2010), in their study of media coverage of celebrity drug use and its influence on young people's perceptions of drugs, conducted just four focus groups, with four to six participants in each group. Vicsek and Gergely (2011), in a study of 'Media presentation and public understanding of stem cells and stem cell research in Hungary', similarly used just a small number of focus groups, in this case seven groups with, on average, eight participants per group.

For their research on public views on hydraulic fracturing in the UK, Williams et al. (2015) conducted six focus groups with an average of eight respondents per group. Happer and Philo (2016), in a series of studies from 2011 through 2014 examining public interpretations of climate change and energy conducted a total of 26 focus group studies with on average six respondents in each group (a total of 150 respondents).

As indicated by these examples, the number of participants in each group may vary considerably – from as few as two people to as many as 25 (one group in Kitzinger's (1993) study of AIDS representations and interpretations). There also, however, appears to be a general consensus that the optimum group size for focus group discussions is in the region of five to ten people

per group. Krueger and Casey note that while the ‘traditionally recommended size of the focus group within marketing research is 10 to 12 people [this] is too large for most noncommercial topics’ (2015: 81). They go on to advise:

[The] ideal size of a focus group for most noncommercial topics is five to eight participants. Don’t plan focus groups with more than 10 participants because large groups are difficult to control and they limit each person’s opportunity to share insights and observations. (Krueger and Casey, 2015: 81).

The cost advantage of using group discussions in preference to individual interviews clearly deteriorates with very small groups. With fewer than six participants in each group it may also be more difficult to generate and maintain a dynamic and lively discussion. Conversely, larger groups, while more cost-efficient and less likely to be atypical, also have distinct disadvantages. The larger the group, the more likely it is that less vocal and less confident participants will be marginalised and will tend to ‘hide’ behind the more articulate members. It becomes more difficult for the moderator to keep the discussion focused, and to avoid participants speaking at the same time (Hedges, 1985).

In summary, then, the trend in media and communication research using this method appears to be moving in the direction of deploying fewer than 20 groups with a group size of, ideally, around six to ten participants per group.

Arranging participation

Once the appropriate type of participants have been identified, these should be contacted and if – possibly after additional screening questions – they are indeed the type of participants looked for, they should be formally invited to participate in a group discussion. At the point of invitation, prospective participants should of course be told in general terms what the purpose of the focus group discussion is, where it will take place, with whom, and who the researchers are and what they represent.

Most people are rightly reluctant to give up what could easily be a whole morning, afternoon or evening of their time, if travelling is included. Indeed some studies require significantly more, in the case of Schlesinger et al. (1992), for example, a whole day, and other studies have required participation in not just a one-off focus group interview but in two or more focus groups spread out over a period of time (in a design similar to the panel design often used in surveys, see [Chapter 9](#)). It is therefore common practice to offer an incentive, and the nature and form of any incentive should be made clear to participants at the point when they are invited or recruited. Incentives can take various forms, but will normally include covering travel and other expenses (e.g. childcare arrangements) incurred in relation to participation in a focus group. In addition, participants are often offered a cash payment for their time. Amounts inevitably vary widely and change over time, but should ideally bear some kind of relationship to the hourly pay that participants could normally expect to command (Krueger and Casey, 2015: 93–98, offer a particularly helpful discussion of incentives).

If the participants who have been approached agree to take part, it is important to send a written confirmation of their agreement along with details of the location, date and time of the focus group. It is normally advisable to contact participants again a few days prior to the date of the focus group interview to remind them and to give any final details about how to get to the location.

Interview setting/location

The location chosen for focus group discussions will vary depending on the purpose of the research, convenience and practical feasibility. Liebes and Katz (1990) held their focus group discussions in people's homes – this being important both to the purposes of the research and in terms of bringing together families who knew each other. Gamson likewise stressed the need to involve people who knew each other for discussions on the 'participants' turf rather than in a bureaucratic setting' (1992: 193). Consequently, Gamson's focus group discussions were held in the homes of individual participants. Durant et al.

(1996) held the focus group discussions in the private homes of people who for a fee specialised in making them available for such purposes. This approach had the advantage that a non-threatening, non-bureaucratic setting combined with a ‘homely’ atmosphere in which the host served light refreshments to the participants.

In contrast, Schlesinger et al. (1992) held the majority of their focus group discussions in a university setting. As their subject of study included domestic violence towards women and a large proportion of their focus group participants were women who had been at the receiving end of domestic violence, a domestic setting would clearly not have been appropriate for the focus group discussions, let alone conducive to ‘open’ and ‘frank’ discussion.

While a domestic setting may be a more ‘natural’ location than an institutional setting (e.g. a university department, an office in the workplace of a professional group) for focus group discussions, the choice of setting always needs to be considered in relation to the nature of the topic/issue to be discussed as well as practicality, and it needs to be borne in mind that the setting – any setting – inevitably exerts a ‘framing’ influence on the nature of participants’ responses and on the group discussion as a whole.

The moderator role

With the groups selected and convened we come to the core part of the process, the focus group discussion itself. There are two key components to be considered here: the moderator role and the interview guide. The role of the moderator will vary depending on the subject of analysis, the type of response which is sought and the nature of the participants. It is in the nature of focus group discussions that the role of the moderator or facilitator is essentially to ‘facilitate’, ‘moderate’ and ‘stimulate’ discussion among the participants, not to ‘dominate’, ‘govern’ or unduly ‘lead’ such discussion. In practice, however, the degree to which the moderator plays an active steering role is a sliding scale from continuous active intervention to a much less active, opaque background role.

Typically, the principal roles of the moderator are to ensure that the issues, topics and foci outlined in the interview guide are covered in the course of discussion (this task includes managing the time spent on each topic), that a reasonable balance of contributions is maintained (i.e. no single individual is allowed to commandeer and dominate the group), and that the discussion is kept on course and not allowed to drift off in directions of little or no relevance to the study. However, these roles can be fulfilled in either more or less active ways. Gamson, for example, was keen to minimise the facilitator's intervention:

To encourage conversation rather than a facilitator-centered group interview, the facilitator was instructed to break off eye contact with the speaker as early as politeness allowed and to look to others rather than responding herself when someone finished a comment. (Gamson, 1992: 17)

Other scenarios, and other types of participants (e.g. children), may call for more active steering by the moderator.

In media and communication research it is often the researchers themselves who act as moderators for group discussions. This has the distinct advantage that the moderator is fully aware of the nature of the research and its objectives, although it also carries with it the danger that the moderator may be tempted to steer responses in the directions which best fit the researcher's preconceived expectations of the research. If the moderator is someone other than the researcher(s), it is important that they be appraised fully of the aims of the research, the topics/issues to be covered, the extent of active steering and probing required. These requirements should be clearly stated in the interview guide (see below).

Depending on the nature of issues/topics to be discussed and on the type of participants, it may also be desirable to specify particular socio-demographic and other characteristics of the moderator. Thus, the gender and age of the moderator will be important where groups of teenagers are brought together to discuss their sexual behaviour. There may be types of issues and group constellations where it would be desirable to match the

race, ethnicity or religion of the moderator with those of the participants in the groups. Social class matching could also be important. Such specific requirements notwithstanding, the successful moderator will more generally be a person who has such difficult-to-define attributes as the ability to establish rapport with group participants, the ability to put participants at ease, the ability to stimulate discussion among participants rather than with the moderator, and the ability to gently keep the discussion on course without imposing an overly restrictive agenda or format on the participants.

The interview guide

While a major strength of the focus group discussion, compared with a survey questionnaire study, is precisely its openness and the flexibility it offers for participants to respond, at length, in their own 'language' and on their own terms, this characteristic should not be confused with a free-for-all unstructured chaos. Focus group discussions must have a 'focus'. While it is the job of the moderator/facilitator to ensure that the discussion in a focus group stays on the subjects or issues relevant to the research, it is the job of the researcher to draw up – on the basis of the definition of the research problem and issues or phenomena to be investigated – a guide or manual for the moderator to work from and follow.

The focus group interview guide is principally a menu of the topics, issues or areas of discussion to be covered, but, in addition to simply listing these, it should also give directions as to: (a) the sequence of topics/issues to be covered; (b) the nature and extent of prompting and probing; (c) the nature and use of visual or verbal aids, and the points during the course of a group discussion where these should be introduced; (d) the nature, format and timing of any exercises, such as the news writing/editing exercises used by Philo and Berry (2011: 279).

One of the main reasons why it is important to have a clear interview guide, and to ensure that it is followed consistently through all the focus groups involved in a study, is to enable comparisons between groups. Focus groups, as we have seen above, are often constituted with a view to examining variations

relating to the particular socio-demographic, experiential, professional or other characteristics of the participants. Only if the topics/issues discussed across different groups are the same, and only if the way in which discussions progress and are conducted is consistent, is it possible to say with some confidence that whatever differences and variations occur are the product of factors and characteristics other than those of the prompting used or manner of moderator intervention.

Focus group discussions in communication research generally follow a funnel approach, that is they progress from the general to the more specific, from non-directive questions (which allow participants to choose their own frame of reference and articulate their thoughts) towards more focused questions, requiring participants to discuss particular specific aspects of 'the problem'. In studies of media audiences, the start of a group discussion would often consist of the group viewing a television programme (or an excerpt, or an edited compilation); this is then followed by asking the participants in very general and vague terms 'What they thought about the programme' or 'What the programme was about', thus giving the participants the chance to define not only the 'frame of reference' for discussion of media content but also, of course, the types of issues seen as important *and* the language for discussion. The mode of progression followed by Schlesinger et al. is typical for research in this field:

The format for programme discussions was broadly standardised, although where necessary, due allowance was made for specific issues raised within a given group. After filling in the short questionnaire on immediate reactions, the discussion of each programme opened with a request for initial reactions and responses. Group members were invited to offer judgements on specific aspects of the programme: for example, whether they liked or disliked the programme, regarded it as 'good' or 'bad', or found it entertaining. By permitting the initial reaction to remain open, we sought to elicit the themes and issues which were most salient for group members. Initial reactions were followed by more focused discussions guided by a series of questions posed by the researcher, who acted as

moderator [...] Although group members were free to raise any topic they wished, the researcher raised a standardised set of issues in each session, thus ensuring a degree of comparability across groups. (1992: 28)

The sequence typically followed in media audience research using focus group interviews is that of, first, exposure to selected media material (a television programme, a film, selected newspaper coverage, etc.), followed by, second, undirected general discussion, moving gradually – under the moderator's direction – towards more specific foci, issues, topics and questions. This, however, need not be the sequence. In particular, it will not be the sequence in studies which aim in the first instance to establish how different groups of people talk and think generally about particular issues before introducing specific media content into the discussion. Press (1991), for example, aimed to first establish how working-class and middle-class women talk about morality and abortion, and, second, to examine how the viewing of a television programme with an abortion storyline influenced the language and mode of discussion employed by the groups.

Similarly, Durant et al. (1993) were keen to explore general public thinking and meanings regarding genetics before introducing particular media 'stimuli' into the group discussions. Thus initial discussion about genetics, stimulated only by a three-dimensional model of the DNA double helix, was followed, some way into the group discussions, by a second stimulus consisting of two newspaper articles (one negative in its coverage of genetic research, the other positive), and, later still, by a third stimulus, a controversial documentary programme dealing with advances in genetic engineering. As in the case of the study by Press (1991), a major objective of the research was to examine how far group sentiments, vocabulary and mode of discussion were influenced by exposure to the media material. In cases such as these it is clearly essential therefore that the 'script' – that is the sequence of discussion and introduction of stimuli – is laid out clearly in the interview guide, and strictly adhered to by the moderator.

The focus group schedule and interview guide used by Hughes et al. (2008) in their research on media discourses and public

framing of risk is exemplary, and may serve as a model. It details (see [Figure 10.1](#)) general introductory comments to be used, formal requirements such as explaining the ‘ethics sheet’, the progression of questioning and the types of questions/issues to be addressed, as well as the place and questioning relating to the ‘picture exercise’ and the progression from there.

As with other types of research instrument, it is always important to pilot test the interview guide for focus group discussions by conducting one, two or sometimes more pilot group discussions. Pilot testing will throw up potential problems with the type of stimuli used, with sequencing, with the framing and wording of questions, etc.

Appendix 2: Example of focus group schedule

[2 hours session focussing primarily on stem cell research]

Welcome and introduction

Thank-you for attending [help yourself to sandwiches – it's a long session so I'll give you a break in the middle]

Distribute name stickers [explain – makes it easier for me to remember everyone's names as well and for you to address each other]

Check approval for taping, read out and explain ethics sheet.

Explain modes of discussion e.g. You do not have to know lots to take part, no right or wrongs, I'm just interested in what you have to say. What I really want is for us to have a conversation and to explore the issue and what you think individually and as a group. Try to hear from everyone in the group, talk to each other – not just to me.

Go round circle asking people to introduce themselves.

Discussion

Has anyone heard of stem cell research? – you don't have to know much about them but I want to check that at least the phrase is familiar to you. What do you think it is?

What's the first thing that comes to mind when I say 'stem cell research' – what do you immediately associate with those words? [Prompt afterwards: any visual images?]

Can you remember how you first learnt about stem cell research ['cloning' if that is only word they can associate with] – one particular event?

What do you think are the benefits of stem cell research?

What do you think are the risks?

What do you think *might* happen in the future? What has *already* happened?

Where do you think you have got most of your info on stem cell research from? If you wanted to find out more about stem cell research where would you go for that info?

Picture Exercise [Invite them to use set of photographs to construct a 'typical' television news bulletin about stem cell research. Followed by questions such as: Do you think your bulletins were typical of a news bulletin? Does this bulletin reflect your own views on stem cell research? What would you do differently if you were constructing a news bulletin? What did you think of each other's bulletins?]

Do you have an opinion about how the media has covered stem cell research?

Any other comments on stem cell research?

Repeat questions for GM – why similar/different?

Repeat questions for nanotechnology – why similar/different?

Figure 10.1 Focus group schedule and interview guide (from Hughes et al., 2008)

Williams et al. (2015), in their study of public views on the energy-extraction method known as fracking, thus explain how the list of questions, topics and associated stimulus material ('concept boards') were developed through piloting, and how care was taken in developing a moderating style that did not unduly close down discussion or presume particular alignments. [Figure 10.2](#)

shows extracts from their topics, stimulus or concept board materials, and associated discussion themes.

Topic	Concept board materials	Discussion themes
Introductory and contextual discussions	None	Personal relationship with energy Problems and benefits associated with energy Energy in the media Different sources of energy Discussion of priorities
Introducing fracking	Brief history of the fracking technique (source: Cuadrilla's website) Brief technical description (source: Total's website) Brief description of the purpose of the process (source: DECC) [...]	Initial impressions and questions
Potential benefits of fracking	Description of increase in production in US gas production (source: US Energy Information Association) Prospect of a 'golden age of gas', including the role of unconventional sources (source: US Energy Information Association) [...]	Discussion of benefits, opportunities, and reasons for optimism. What it might mean personally and for society as a whole.
Potential risks of fracking	Scientific debate over the possibility of groundwater contamination Information about seismicity from DECC and the Tyndall Centre Debate on further possible impacts from the Tyndall Centre Headline from <i>The Times</i> , 'Fracking for shale gas caused Lancashire earthquakes, report' [...]	Discussion of concerns on risks and of best strategy to adopt when faced with uncertainty. Discussion of potential benefits versus potential risks.

Figure 10.2 Excerpts from Williams et al. (2015: 6) ‘Stimulus material used in the focus groups and topics of discussion.’ Reproduced here under Creative Commons Attribution 3.0 Unported (CC BY 3.0).

What is the data produced by focus group discussions? The principal data produced by focus groups is the verbal responses, statements, opinions, arguments and interactions of the participants. Additional data may include observational accounts of facial expressions, gestures and body language more generally, although it is not often that such observations – if recorded at all – have been used to any great extent in focus group-based media and communication research.

Focus group discussions should as a minimum be audio recorded on a good-quality digital recording device. Participants should always be made aware at the outset that the discussion will be recorded, and reassured of the confidential and anonymous use of the material. Generally, it will be the responses of the group as such, rather than individual contributions, which are of relevance to the research, but where the research aims are such that individual contributions need to be identifiable, it is important to keep a record of who is who in the group – and on the audio recording. A good starting point for the group discussion is therefore an introductory round where each participant is asked to briefly introduce themselves (e.g. name, interests) – if this is recorded the researcher then has a voice identification for each participant for the remainder of the recorded discussion. The voice identification is often matched with a standard questionnaire (sex, age, occupation, media consumption, special interests and/or relevant experience, etc.) filled in by each participant prior to the discussion.

Video recording of interview discussions offers the advantage that the contributions of individual participants can be identified more easily, and gestures and body language observed directly. Video recording is, however, also considerably more complicated (e.g. changing camera angles) than audio recording, and it is potentially rather more intrusive.

The principal record of a focus group discussion, then, normally consists of an audio recording and additional observational notes

jotted down by the moderator or an observer during the discussion. While it is possible to commence analysis directly from listening to the recording, it is more often the case – and there are strong practical and methodological reasons for this – that audio recordings are first transcribed before starting analysis. A written transcript is easy to browse through, to annotate and, indeed, to share with colleagues, where the research is a team effort. An electronic transcript also opens up possibilities for computerised textual analysis with significant scope for faster, more systematic, more reliable and more in-depth analysis than is feasible or practical by conventional ‘manual’ annotation and analysis. And this brings us to the final step in the focus group interview: the analysis and write-up.

Analysing and reporting focus group discussions

Focus group interviews produce a large amount of textual data. Even a relatively small number of focus group interviews can result in several hundred pages of transcription. How to analyse this material? One dilemma facing the researcher is between, on the one hand, reading through the interview transcripts to select ‘striking’ or ‘typical’ quotes which illustrate, confirm and enhance the researcher’s (preconceived) ideas of the processes and phenomena which are being investigated and, on the other hand, to remain open to new ideas, unanticipated responses, unexpected conflicts in the statements of participants, etc. In the words of Höijer:

When analysing reception interviews you certainly need sensibility and intuition, but you also have to be methodical, because you cannot grasp the totality of an interview and even less the totality of a set of interviews. Whether you are generous with citations or not, you will be influenced by your hypothesis and expectations as well as the very natural phenomenon that some individuals’ statements will have a greater impact on you than others. (Höijer, 1990: 40)

Schlesinger et al. likewise caution against the subjective selection of quotes sometimes seen in presentations of qualitative data:

Qualitative results arising from interpretative methods, such as participant observation, in-depth interviews and group discussions, present researchers with a series of dilemmas regarding analysis and presentation. Various strategies, such as case studies and the presentation of verbatim accounts, are often employed. These have the benefit of 'fleshing out' and illustrating the significant themes and patterns identified by the researcher(s). Often, however, it is difficult for readers to understand *how* certain materials are chosen over others and *why* certain quotes take precedence over those which never appear. In this study we have attempted a systematic approach to the development of significant themes and illustrative quotes arising from group interviews. (1992: 31)

While focus group discussions will almost inevitably generate some topics, frames, references and argumentative angles which are new and unanticipated, it is also of course in the nature of such discussions that they are *focused* around the topics and phenomena determined by the researcher. One task for the analysis then is to examine, categorise and analyse the types of responses generated in relation to the 'headings' and specific 'foci' determined by the research framework and set out in the interview guide. The need to do this in a systematic fashion was emphasised above.

The way to commence the analysis task, then, is to start by developing a scheme for categorising and labelling the responses, statements, arguments and exchanges recorded in the interview transcripts. The 'categories' may be the 'headings' used in the interview guide, or, more often, they will be a modified version of these combined with any additional categories which may have presented themselves, unexpectedly, in the course of the group discussions. As in content analysis (see [Chapter 5](#)), a prerequisite for developing good categories is to 'soak oneself in the material', that is to read through the interview transcripts several times to

become familiar with the spread of arguments, topics and issues covered. Additional observational notes taken during the interviews may also contribute to the development of analytical categories.

The categories which are used for classifying the contents of interview transcripts will of course vary entirely depending on the foci, purposes and objectives of the research. Additionally, it will often be necessary to systematically classify and analyse the contents of interview transcripts along both different *types* and different *levels* of categories. Thus, one coding sweep through the material may be concerned with coding statements and arguments in terms of the principal frames (Gamson, 1992), themes and sub-themes (see Höijer, 1990; Durant et al., 1993). A second coding sweep, at a more detailed level, may be concerned with classifying 'causes, motives, and justifications' (Schlesinger et al., 1992), anchors, metaphors and positive/negative evaluations (Durant et al., 1993), etc.

The coding and analysis of interview transcripts is now (in sharp contrast to the situation only a few decades ago at the start of the resurgence of focus group interviewing in media and communication research) most powerfully done with the help of text analysis software. A wide variety of software is available for the coding, analysis and retrieval of qualitative data, such as the open-ended, unstructured text produced by focus group discussions. Text analysis software ranges widely between: basic index and retrieval programs which enable you to go directly to any word or string of words in the entire body of interview transcripts, to examine specified words in their immediate context, to list the entire vocabulary (in alphabetical order, or in order of word frequency) of the group interview transcripts; and more complex and elaborate programs which enable you to attach 'codes', 'tags' and 'labels' to words, sentences, arguments, statements – any string of text – and to perform quantitative analyses of the coded units, as well as analyses of 'networks' of arguments and 'associations' between related types of statements, subjects, contributor characteristics, etc. A more detailed discussion of ways of managing and analysing the data

generated by qualitative methods such as focus group discussions and participant observation is given in [Chapter 11](#).

Reporting the results of focus group interviews is, like all data analysis, an act of synthesising, summarising and the reduction of an unstructured mass of textual data to its essentials, key trends and representative examples. While it is tempting – with the rich qualitative textual data produced by focus group interviews – to quote comprehensively from the transcripts, to, as it were, ‘let the data speak for itself’, this approach to reporting does not achieve the task of summarising, let alone analysing the material. Verbatim quotes to illustrate key points, modes of discussion, vocabularies, frames, etc. should indeed be used in the reporting of results. Not to do this would negate one of the major reasons for using focus group discussions: to capture the way in which participants naturally talk about, make sense of, reason about and generate meaning in relation to specified issues, topics and phenomena. But verbatim quotes should be limited to ‘representative’ illustrations. Any quantitative coding which has been done on the transcripts is helpful when reporting the results both in terms of finding and selecting (this is where text-retrieval programs come into their own) representative verbatim quotes relating to particular dimensions of analysis, and in terms of justifying that the quotes presented in the report are indeed representative of some larger body or trend in the data.

Reporting the results of focus group interviews is also an act of relating the textual data to the research problem/objective as it was articulated before commencing the research (and before the decision that focus group methodology would be the most appropriate method for studying the research problem) and to the wider theoretical framework of the study. Faced with the large and rich body of textual data generated by focus group discussions, it may often seem difficult to decide which aspects to report on and which to leave out. Essentially, the analysis and reporting should proceed along the lines of the headings outlined in the interview guide – these were drawn up in relation to the problems, objectives, issues and hypotheses articulated as part of the theoretical framework for the study and the statement of the research problem. Additional headings (that is concepts, issues,

frames, phenomena) may, and most often do, present themselves in the process of reading through the material and immersing oneself in the textual data – these headings and their associated results are added to the write-up.

The report of focus group research – again like the report on any other kind of empirical research – should not simply present the reader with results/findings, but must also enable the reader to understand the process of the research: what was done, how it was done, with what subjects it was done, where and by whom it was done. It is particularly important to remember to include in the report a full account of: who the participants were (and what they represent); how they were recruited; where and by whom they were interviewed; the nature and format of the group discussions; the use of stimuli; the nature of probing; and the ways in which interviews were recorded and analysed. Much of this information should be presented in a design, sample, and methods chapter, sandwiched between introductory chapters (outlining the research problem, theoretical framework and reviews of related research) and the presentation of results and findings. In order to maintain a reasonable flow and in order not to burden the reader unnecessarily with technical detail, it may well, however, be preferable to relegate some of the more detailed methodological descriptions and accounts to an appendix.

Summary

- Focus group interviewing generates a potentially much richer and more sensitive type of data on the dynamics of audiences and their relations to media than the survey.
- Focus group interviews may be the single substantive mode of data collection in a piece of research; but more frequently the approach has been used in conjunction with other, complementary, types of data collection. In media research, it has notably been used together with questionnaires, observation (ethnography) and analyses of media content.
- Unlike individual interviews, focus group interviews more closely approximate the ‘naturally’ social activity of generating meanings and interpretations in relation to media use and

content. Through group dynamics they also offer ways – not available in the individual interview – of eliciting, stimulating and elaborating audience interpretations, and they can provide insight into how participants' beliefs and opinions take shape as they encounter, resist, assimilate and/or negotiate new information and arguments.

- It is rarely the case that people will 'naturally' volunteer elaborate interpretations of media content. Focus group discussions therefore require active input and structuring on the part of the moderator. Indeed, the 'focus' of the discussions needs to be clear, although the structuring and focusing will often progress from the loose and open-ended to the more disciplined during the course of a focus group interview.
- Focus group methodology entails research involving human beings, and must therefore always be circumscribed by clear and explicit ethical considerations. In practical terms, researchers must ensure that the proposed research conforms with the ethical regulations and requirements of their university, organisation or professional association, and that appropriate ethics approval has been obtained prior to the commencement of focus group discussions.
- The main steps in focus group interviewing are: definition of the research problem; sampling and recruitment of groups; identifying the moderator and moderator role; creating the interview guide; pilot testing; conducting and recording the focus group interviews; analysis and interpretation of data; reporting the focus group study.
- The sampling and constitution of focus groups are important, particularly where comparisons between groups are envisaged and where group answers and arguments will be related to independent variables such as demographic and other characteristics. A case is often made for selecting groups from naturally existing constituencies, for example pressure groups, political organisations, professional associations, religious communities or simply groups of people who normally work or socialise together.
- The number of groups in a study will depend on the aims of the research and on available resources. If used for exploratory

purposes, as few as two, three or four groups may suffice. If this method constitutes a more substantive part of a study, a larger number of groups would be desirable, although it is relatively rare for media and communication studies to use more than 20 groups, and often the number of groups has been in the region of six to 12.

- There is a general consensus that focus groups should be no larger than ten to 12 participants, and that the ideal group size is between six and ten.
- The choice of a location or setting for focus group interviews is important. The setting inevitably exerts a 'framing' influence on the nature of participants' responses and on the group discussion as a whole. The choice of setting needs to be considered in relation to the nature of the topic/issue to be discussed and, of course, in relation to practical feasibility.
- The role of the moderator will vary depending on the subject of analysis, the type of response which is sought and the nature of the participants. The essence of focus group discussions is that the role of the moderator is to facilitate, moderate and stimulate discussion among the participants, but there is considerable flexibility as to how forcefully this is done. The role of the moderator must be clearly defined in the interview guide.
- The focus group interview schedule or guide is principally a menu of the topics, issues or areas of discussion to be covered, but, in addition to simply listing these it should also give directions as to: (a) the sequence of topics/issues to be covered; (b) the nature and extent of prompting and probing; (c) the nature and use of visual or verbal aids, and the points during the course of a group discussion where these should be introduced; (d) the nature, format and timing of any exercises to be performed by the participants.
- While focus group discussions will almost inevitably generate some topics, frames, references and argumentative angles which are new and unanticipated, it is also in the nature of such discussions that they are *focused* around the topics and phenomena determined by the researcher. One task for the analysis then is to examine, categorise and analyse the types

of responses generated in relation to the headings and specific foci determined by the research framework and set out in the interview guide.

Further reading

Stewart, D. W., & Shamdasani, P. N. (2015). *Focus Groups: Theory and Practice* (3rd edition). London: Sage.

Now in its third edition, this continues to provide a clear, well-structured, detailed and accessible introduction to focus group methodology.

For exemplary accounts of the use of focus group methodology in media and communication research, we particularly recommend the following two studies:

Hughes, E., Kitzinger, J., & Murdock, G. (2008). Media discourses and framing of risk. *Social Contexts and Responses to Risk Network (SCARR) Working Paper 27*. Retrieved 11 April 2018, from <http://orca-mwe.cf.ac.uk/17531/>.

Schlesinger, P., Dobash, R. E., Dobash, R. P., & Weaver, C. K. (1992). *Women Viewing Violence*. London: BFI Publishing.

CHAPTER 11

Managing and analysing communication research data

Media and communication research tends to produce large volumes of data. This is so pretty much regardless of the method or approach adopted, and of whether the research and data are principally qualitative or principally quantitative. While in the distant past much of the planning, design, execution (including the collection of data), analysis and writing up of research would have been done with pen and paper, most or all of these tasks are now done on electronic devices for the simple reasons of advantages of speed, organisation, retrievability, documentation, collaborative potential, power of analysis, etc. We have already seen in previous chapters how important digital technology is in relation to retrieving information and data, reviewing literature, managing bibliographies and references, conducting content analyses or surveys.

In this chapter, we introduce ways and tools for managing and analysing quantitative and qualitative communication research data. In the first section, we introduce the analysis of quantitative data using one of the most powerful and widely used statistical analysis programs in the social sciences, SPSS (Statistical Package for the Social Sciences). The screenshots used in this chapter refer to version 24 of IBM SPSS Statistics. In the second part, we consider computer-assisted management and analysis of qualitative data, and we introduce some of the ways of using qualitative analysis programs in the analysis of qualitative communication research data.

The analysis of quantitative data using SPSS

The media and communication researcher of today can choose from a wide range of powerful or less powerful data management and analysis programs ranging from databases and spreadsheets with some statistical calculation facilities to statistical programs designed specifically for the full range of statistical analysis appropriate for social science research.

Here, we wish to introduce the reader to the very basics of a powerful program developed, as its name suggests, for the analysis of social science data, namely SPSS – Statistical Package for the Social Sciences. In the first section of this chapter we introduce the reader to: (a) how to enter data (e.g. from a content analysis or a survey) into an SPSS data file; and (b) how to do relatively simple, but useful, types of analysis with SPSS. Our introduction refers to the Windows version of SPSS, but SPSS is also available for other operating systems.

Three types of variables: continuous, categorical, and string

Content analyses, surveys, and potentially other kinds of approaches use research instruments such as content analysis schedules and questionnaires on which answers are recorded in the form of numbers or codes. The main reasons for using numbers or codes are speed and the need to standardise the way in which answers are recorded so that they can be subjected to quantitative analysis.

There are two different kinds of numeric codes used for the kinds of variables that you will find on a survey questionnaire or a content analysis coding schedule, *continuous* and *categorical* variables. In addition, it is also possible to record information in a non-numeric format, namely as text or *string*. The reason why we need to know the difference between these types of codes is that the type of code determines what kind of analysis can be done in a program such as SPSS. Continuous variables lend themselves to more powerful statistical analysis than categorical variables, while text or string variables can only be subjected to relatively limited statistical analysis. The three types of codes or variables can be defined as follows:

1. *Continuous* variables ('real' number variables): Answers are recorded in terms of 'real' numbers, where the number recorded on the questionnaire means just that – that is, a person's age might be recorded as '28' meaning that the person is 28 years of age, or a respondent's height might be recorded as '165' meaning that the respondent is 165 centimetres tall.
2. *Categorical* variables: Answers are recorded in terms of arbitrary or nominal 'codes', where the code or number refers to particular dimensions of a variable; that is for the variable 'sex', the code '1' might be used to mean 'female' and the code '2' to indicate that the respondent is 'male', or for the variable 'newspaper' on a content analysis schedule, the code '1' might be used to indicate the '*Daily Telegraph*', '2' for '*The Times*', '3' for '*The Independent*' etc. These are just arbitrary codes of convenience – we could equally well have used the codes '1' for 'male' and '2' for 'female', or the codes '6' for 'male' and '8' for 'female'. Being merely arbitrary codes of convenience, these codes have none of the numeric properties associated with real numbers. In other words, it would not make sense to calculate the 'difference' between 'male' and 'female' respondents in a survey by subtracting '1' from '2', nor would it make sense to perform any other arithmetical calculations such as finding the average of '2's and '1's (males and females).
3. *String* variables (text variables): data is entered as natural textual information, that is in non-coded form. Survey questionnaires, for example, will often have open-ended questions, where respondents are invited to enter their answers or comments in their own words. Such textual answers can be entered in full, with a view to later coding or categorisation, or with a view to statistical analysis of the frequency and distribution of individual words or phrases.

From coding sheets or questionnaires to SPSS

While it is possible to manually record data, writing by hand on a content analysis coding schedule or a questionnaire, content analysis and survey data are now predominantly entered directly

into electronic devices, and we would certainly recommend this for reasons of speed, reliability, efficiency and convenience. The first step towards using a program such as SPSS for data management and analysis is to get the data into the SPSS program. There are two principal ways in which this can be done:

1. The data can be entered directly into an SPSS data file. As indicated in [Chapter 5](#) on content analysis, the content analysis coding schedule can be set up as an SPSS data file where columns correspond to content analysis variables and rows correspond to individual cases. Content analysis ‘coding’ then consists of entering, for each case and directly into the SPSS data file, the relevant value for each column/variable. The same process can be used for a survey questionnaire, although researchers may prefer the more traditional format and look of a questionnaire. If this is the case then the second approach (below) may be used.
2. Transferring/importing the data into SPSS from another program or format. The data may have been recorded in a spreadsheet such as Microsoft Excel or similar, including online programs or formats. In such cases, data can be transferred or imported either through the ‘import’ options available in SPSS or by simple cutting and pasting from another program into SPSS.

Open SPSS and create and name a new data file

SPSS opens, by default, with an empty data entry window ([Figure 11.1](#)), called ‘Data View’ (see the bottom left corner of [Figure 11.1](#)). The data entry or Data View window is divided into rows and columns, and is of course empty because we have not yet typed in any data. As soon as some information has been entered, the file should be given an appropriate name and saved (using ‘Save’ or ‘Save As’ from the File menu).

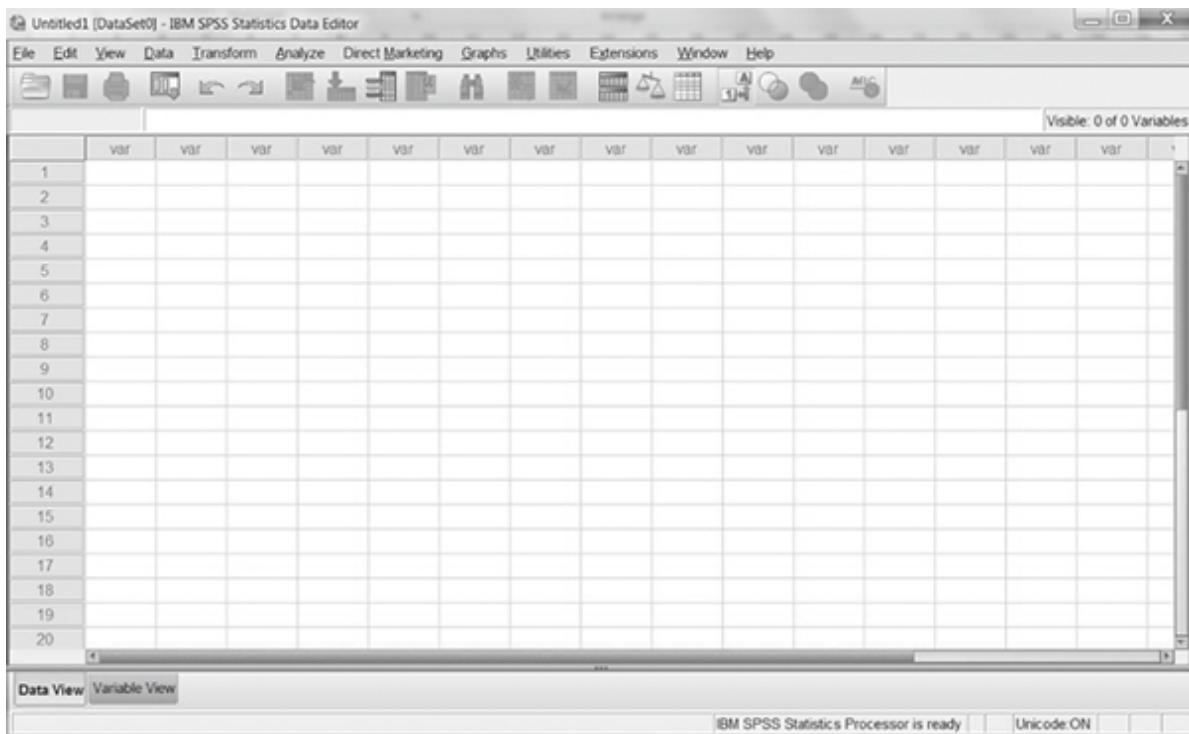


Figure 11.1 The SPSS Data View window. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company

Case, variable, values

Each row in the 'Data View' window represents a *case*. In a content analysis, a 'case' may be an individual news article/item, an individual blog entry or a webpage. In a survey, a case would normally be the individual respondent/person interviewed, although there are other possibilities, for example a household.

Each column represents a *variable*. A variable is an individual dimension or characteristic analysed, such as, in a content analysis of news articles, the 'date', 'which newspaper the article appeared in', 'the number of words in the article', 'the topic of the article' etc. In a survey, a 'variable' would be such dimensions as 'the age of the respondent', 'annual income of the respondent', 'main news source used by the respondent', 'daily amount of television viewing', etc.

Each variable in a content analysis or survey can take on a number of *values*. Thus, a survey may record the *variable* 'respondent's sex' using the *values* '1' for male and '2' for female. Or a content analysis of television news may record the variable

'news channel' using the values '1' for 'BBC World News', '2' for 'Al Jazeera', '3' for 'CNN' etc. The relevant values are typed into each cell of the 'Data View' window: each cell then represents a *single value* of the particular *variable* in question, relating to the single case recorded in the particular row in question.

Defining variables and entering data

The first task, before entering or importing data, is to define the variables and the values associated with each variable. We do this by changing from the present 'Data View' to 'Variable View', by clicking on the 'Variable View' button in the bottom left corner of the screen. This brings up the screen shown in [Figure 11.2](#).

The screenshot shows the SPSS Statistics Data Editor window titled 'Untitled1 [DataSet0] - IBM SPSS Statistics Data Editor'. The menu bar includes File, Edit, View, Data, Transform, Analyze, Direct Marketing, Graphs, Utilities, Extensions, Window, and Help. Below the menu is a toolbar with various icons. The main area is a grid table with 21 rows and 12 columns. The columns are labeled: Name, Type, Width, Decimals, Label, Values, Missing, Columns, Align, Measure, and Role. The 'Name' column contains numerical values from 1 to 21. The 'Type' column is empty. The 'Width' column is empty. The 'Decimals' column is empty. The 'Label' column is empty. The 'Values' column is empty. The 'Missing' column is empty. The 'Columns' column is empty. The 'Align' column is empty. The 'Measure' column is empty. The 'Role' column is empty. At the bottom of the window, there is a tab bar with 'Data View' and 'Variable View', where 'Variable View' is selected. A status bar at the bottom right indicates 'IBM SPSS Statistics Processor is ready' and 'Unicode ON'.

	Name	Type	Width	Decimals	Label	Values	Missing	Columns	Align	Measure	Role
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											
18											
19											
20											
21											

Figure 11.2 The SPSS Variable View window. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company

The 'Variable View' screen shows, in each row, the detailed definitions relating to each variable, as follows (here we describe just the first six characteristics listed):

1. Name (column 1): here we enter a short name describing the first variable in our data set.

2. Type (column 2): click in the right hand side of the cell and a dialogue box pops up, allowing us to choose from a set of types, including Numeric (the default choice), Date, String, etc.
3. Width (column 3): refers to the width of the data column; in most cases, this can be left as it is.
4. Decimals (column 4): most variables in content analyses or surveys are likely to be coded using integers, that is whole numbers, so for clarity the default of 2 decimals should be changed to '0'. Click in the cell, and use the up/down arrow to choose 0 (zero) instead of the default 2.
5. Label (column 5): this allows us to enter a longer label than the single brief name entered in column 1, to describe what the variable refers to. For example, a variable name such as 'Programme' can be labelled 'Title of news programme' to clarify that this refers to the title or name of the news programme analysed.
6. Values (column 6): this is of key importance, as it is here that we define what each of the numbers/codes associated with a (categorical) variable refers to. If the variable consists of *continuous* data/real numbers then it is of course not necessary to define labels, as each number represents its own numeric value, '1' means '1', '2' means '2' etc. (an example would be the Duration variable in our example data set, where each number represents the duration in seconds of the news item). For *categorical* data, however, the numbers represent codes and we therefore need to indicate what each number or code means or refers to. Clicking in the right hand side of the Values cell brings up a dialogue box that allows us to do this by defining a Label for each Value. Start by typing in the first value/code, 1, in the Value box. Then click in the Label box and type in the label, for example, BBC1. Then click on the Add button, and the value and label will appear in the large box. Then enter the next value, 2, in the Value box and the label, for example, BBC2, in the Label box, click on Add, etc. When all values and labels have been entered, click on the OK button in the top right corner of the dialogue box. In the example shown in [Figure 11.3](#), we have defined, for the Channel variable, the codes 1, 2, and 3 as referring to the following three television channels: BBC 1, BBC 2 and Channel 4.



Figure 11.3 The SPSS Value Labels dialogue box showing three values relating to the variable Channel. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company

When all variables in your study have been named and defined – in the example shown in [Figure 11.3](#) we have defined three variables for a content analysis of a sample of British television news coverage – you are ready to start entering data. Change back to the Data View screen (by clicking Data View in the bottom left corner of the screen), which now shows each of the variables (just defined in the Variable View screen) as column headings, that is each column corresponds to a single variable. To enter the data for the first case (row 1), click in the top left cell to type in the value for the first variable. Then click in the second cell along this row to type in the value for the second variable, etc. continuing until all values for the first case have been entered. Then move to the second case (row 2) and repeat the process.

As we have indicated above, it is also possible to enter data by cutting and pasting from another program or by using SPSS's Read Text Data (see the File menu) import feature. However, for content analyses we recommend coding data directly into SPSS on a case-by-case basis, as described above, as the most efficient way to code content analysis data.

Analysing data with SPSS

Once the variables have been defined and the data entered into the SPSS data file, we can then proceed to the interesting and exciting part of the research, namely the analysis of the data. Here we wish to introduce four basic types of analysis which are useful for describing and summarising the results of the data collected, regardless of whether the data comes from a content analysis, a survey or other types of research data collection.

The first thing one would often want to do is to get a general feel for what the data shows in terms of the distribution of different variables in the data set: for example, how many men and how many women were there in the survey? What was their average age (and the minimum and maximum ages of respondents)? What percentages of men and women respectively use Twitter? Or, in a content analysis, how much news coverage was there on each television channel? Were the news items on some channels on average longer than those of other channels? Who were the most frequently quoted sources/actors? etc.

Frequencies and Descriptives

We can begin to get a good picture of the distribution of individual variables with two types of SPSS analysis: one for analysing the *frequencies* of individual values in a variable, and the other for a *descriptive* summary of the values of a variable in terms of calculating the average (also known as the mean) of its values and showing its minimum and maximum values. Using our example data set of selected variables from an analysis of television news, we start by examining the distribution (frequency) of the three television channels analysed and the distribution (frequency) of the four news programmes analysed.

From the menu bar (File, Edit, View, etc.) shown near the top of the SPSS Data View screen (see [Figure 11.1](#) above), select the **Analyze** menu. From this, choose **Descriptive Statistics** and then, from the sub-menu, **Frequencies**. In the remainder of this chapter we will, for clarity and simplicity, show the sequence of menu selections as follows, that is from the top-bar menu through to sub-menus:

Analyze > Descriptive Statistics > Frequencies

This brings up the Frequencies dialogue box shown in [Figure 11.4](#). The left side of the dialogue box shows the five variables in our example data set. Click (to highlight it) on the variable showing as ‘Television channel...’, then click on the arrow between the two boxes in the dialogue box to move the selected variable into the right side box. Repeat this process for the variable ‘News programme...’. With these two variables transferred into the right side box, click on the ‘OK’ button showing at the bottom of the dialogue box.

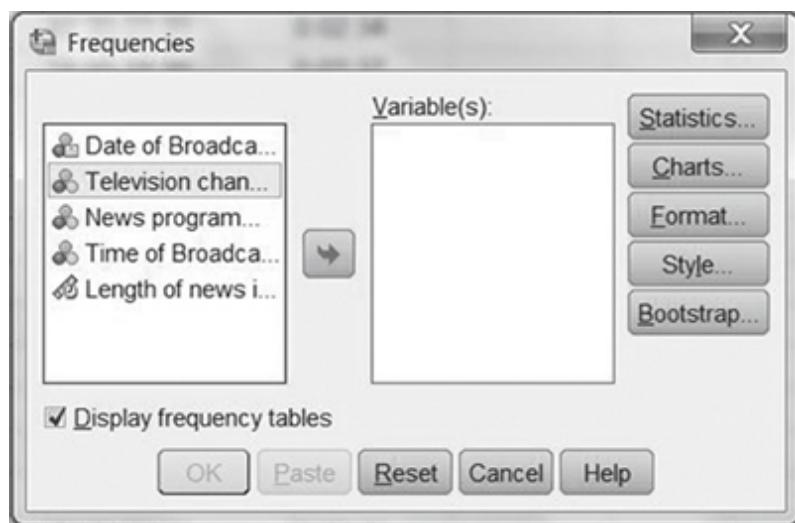


Figure 11.4 The SPSS Frequencies dialogue box. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company

Having clicked ‘OK’ in the Frequencies dialogue box, SPSS proceeds to calculate the frequencies for the two variables which we have specified. The results of this calculation appear in a new window (see [Figure 11.5](#)). In the output window, SPSS shows a table for each of the two variables used in this analysis.

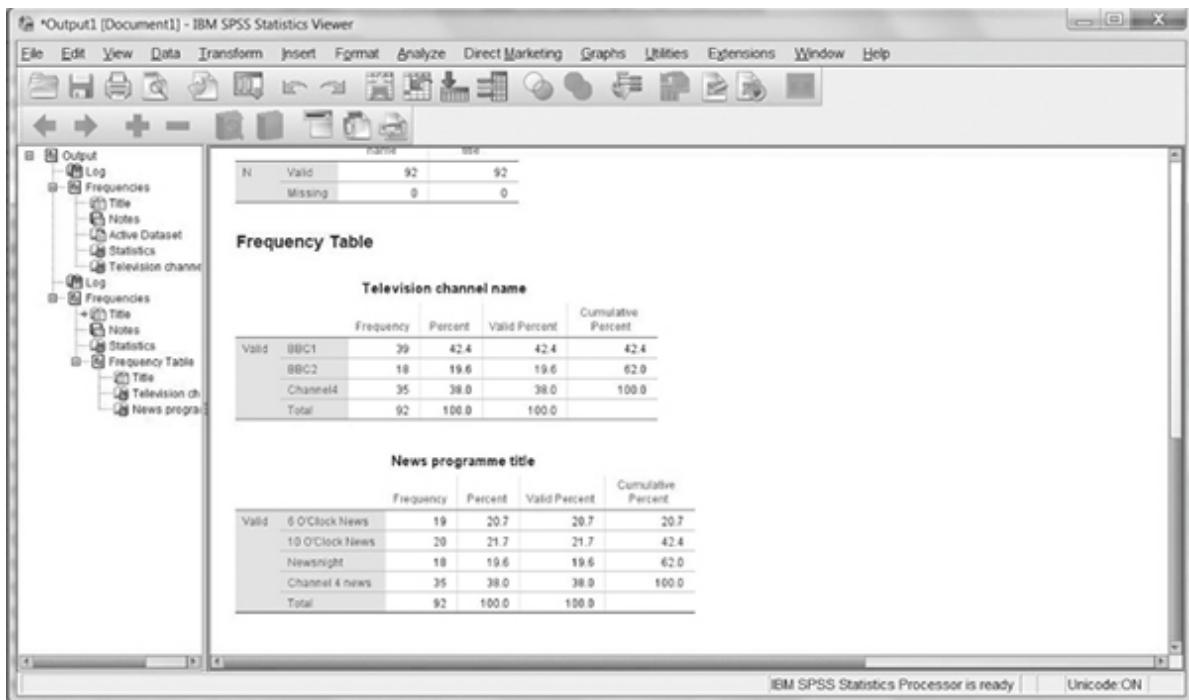


Figure 11.5 The SPSS Output screen showing frequency tables for two variables. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company

The two variables analysed above with the frequencies command are both categorical variables, that is they consist of arbitrary code numbers indicating the limited range of values for each of these two variables. As indicated at the beginning of this chapter, it would not make much sense to carry out arithmetic calculations on these types of numbers which are simply numeric codes but have none of the properties of ‘real’ numbers. In other words, it would not make sense to try and calculate such arithmetic measures as the sum or the average (mean) of the values used as codes for these variables.

One variable in the data example used here which is not a categorical variable but consists of ‘real’ numbers is the ‘Duration’ variable, which records the length in seconds of the individual news item. For this variable then it does make sense to summarise the data in terms of such measures as the average length of news items or the total length of time devoted to this type of coverage.

To summarise the information coded regarding the duration of each news item (or indeed of any other variable consisting of ‘real’ numbers – for example in a survey this may be the age, height,

weight, etc. of respondents), we choose the **Descriptives** procedure in SPSS, as follows:

Analyze > Descriptive Statistics > Descriptives

In the resulting Descriptives dialogue box ([Figure 11.6](#)), we click on the variable ‘Length of news item’ in the left rectangle, then click on the arrow button between the two rectangles to transfer the variable to the rectangular box on the right. We then click on the ‘OK’ button at the bottom of the dialogue box.

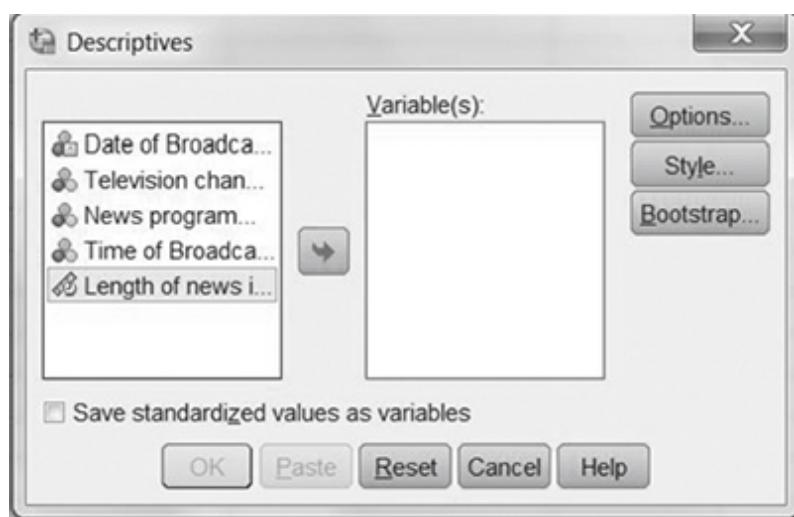


Figure 11.6 The SPSS Descriptives dialogue box. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company

SPSS produces, in the Output window, a single table that summarises the distribution of the Duration variable by showing, for the 92 items in our sample, the minimum and maximum duration and the mean (or average) duration, as well as a statistical measure called the standard deviation (which is a measure of how much variation or dispersion there is in the data set in relation to the average; in other words, it tells us how close or far from the average the recorded values are).

Crosstabs and Means

So far we have used two SPSS commands, Frequencies and Descriptives, for describing and summarising individual variables.

But what if we wanted to know how much coverage each television channel (the Channel variable) devoted on different dates (the Date variable), or if we wanted to know whether the news items on one television channel (the Channel variable) were on average longer or shorter (the Duration variable) than those on another television channel? Then we would need a command that could compare two or more variables with each other. In SPSS these commands are **Crosstabs** (for comparing categorical variables) and **Means** (for comparing a continuous variable – such as the Duration variable in our example data set – across a categorical variable).

To examine the number of news items across television channels by dates of coverage, a comparison of the two categorical variables ‘Channel’ and ‘Date’, we use the SPSS Crosstabs command as follows:

Analyze > Descriptive Statistics > Crosstabs

This brings up the Crosstabs dialogue box shown in [Figure 11.7](#). Now click on the ‘Date of broadcast’ variable to highlight it, then click on the arrow next to the box labelled ‘Row(s):’ to transfer the Date variable to the Row(s) box. Next select the ‘Television channel name’ variable and transfer it, by clicking on the second arrow down, to the box labelled ‘Column(s)’.

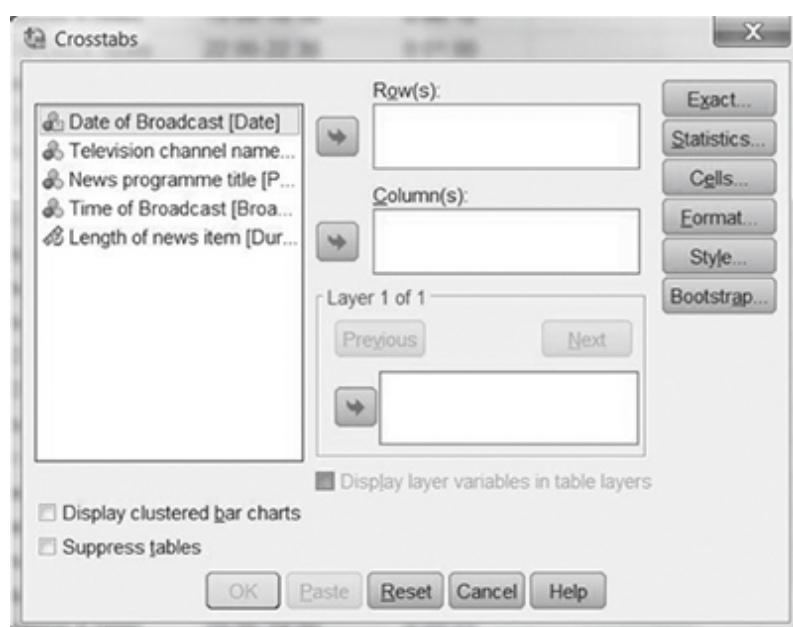


Figure 11.7 The SPSS Crosstabs dialogue box. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company

Then click on ‘OK’ at the bottom of the dialogue box. SPSS produces the output table shown in [Table 11.1](#), which shows the number of news items broken down by each of the three channels (the columns) by each of the dates (the rows of the table) analysed.

Table 11.1 Crosstabs table of Date by Channel. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company.

Date of broadcast by television channel name Crosstabulation					
<i>Count</i>		<i>Television channel name</i>			
Date of Broadcast		<i>BBC1</i>	<i>BBC2</i>	<i>Channel4</i>	<i>Total</i>
08.12.15	3	1	2	6	
09.12.15	1	0	2	3	
10.12.15	0	0	3	3	
11.12.15	3	2	1	6	
12.12.15	2	0	3	5	
14.12.15	6	2	3	11	
15.12.15	4	3	3	10	
16.12.15	4	6	6	16	
17.12.15	4	1	4	9	
18.12.15	7	3	4	14	
19.12.15	4	0	3	7	
20.12.15	1	0	0	1	
21.12.15	0	0	1	1	
Total		39	18	35	92

Table 11.1 shows only, in each cell of the table, the actual number of news items by each date and each channel (and the row totals in the right side column, and the column totals in the bottom row). Often, however, it would be desirable to have considerably more information per cell, for example column and

row percentages, as well as perhaps some statistical tests to see whether the differences observed are statistically significant (as opposed to being potentially chance occurrences). Such information could easily be included in the table by selecting from the sub-menus shown on the right side of the Crosstabs dialogue in [Figure 11.7](#). Thus, to include column and row percentages in the cells of the output table, click on the ‘Cells’ button in the Crosstabs dialogue box. This brings up the ‘Crosstabs: Cell Display’ dialogue box. Now click in the box next to ‘Row’ and the box next to ‘Column’ in the area labelled ‘Percentages’ to put a tick in each of these boxes. The dialogue box now looks like [Figure 11.8](#). Then click on ‘Continue’, which closes the ‘Crosstabs: Cell Display’ dialogue box to reveal again the Crosstabs dialogue box. Then click on ‘OK’ to close the Crosstabs dialogue box and to produce an output table of Date by Channel, with each cell showing the number of items and the row and column percentages.

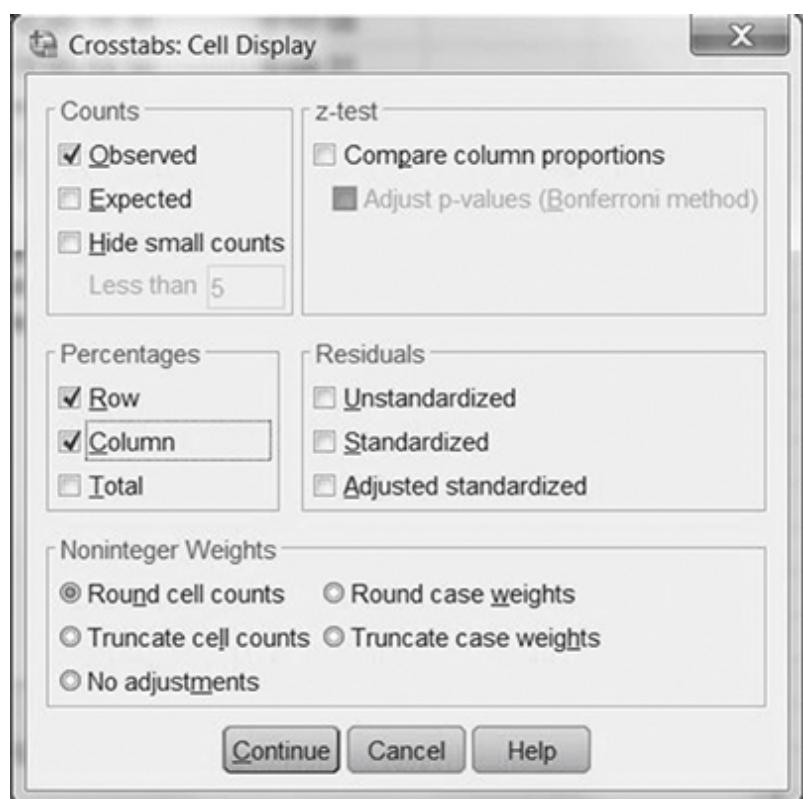


Figure 11.8 The Crosstabs: Cell Display dialogue box.
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Let us finally introduce an analysis command for comparing a continuous variable (Duration) across a categorical variable (News programme). As one of the variables (the Duration variable, which measures the length in seconds of the news item) consists of real continuous numbers, we need an analytical procedure which will calculate the average duration of news items for each of the news programmes analysed. The SPSS procedure for this is called 'Means' and we find this command in the Analyze menu, as follows:

Analyze > Compare Means > Means

This brings up the Means dialogue box (Figure 11.9). Click on the 'Length of news item' variable and transfer it, using the top arrow, to the 'Dependent List' box. Then select the 'News programme' variable and transfer this, using the bottom arrow, to the 'Independent List' box. Now press OK. SPSS produces the table shown here as Table 11.2, which shows (in the columns) the average duration, number of news items, and standard deviation for each of the news programmes in the sample (the rows of the table). From this, we can, for example, instantly see that the *Newsnight* items were the longest (at, on average, 4 minutes 48 seconds) and the items appearing on the *BBC News* in the early evening were the shortest (at, on average, 1 minute 57 seconds).

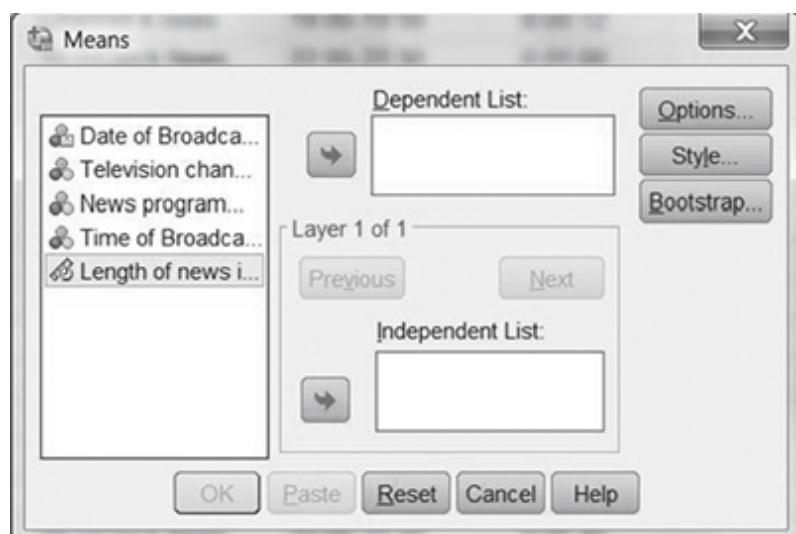


Figure 11.9 The SPSS Means dialogue box. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company

We have introduced four basic analytical procedures in SPSS: Frequencies and Descriptives for analysing individual variables; Crosstabs and Means for comparing two (or more) variables. As we said at the beginning, it is important to know whether the variables to be analysed are continuous/real number variables or coded as categorical variables, because this determines what kind of SPSS analysis commands are appropriate: thus we use Frequencies and Crosstabs for analysing categorical variables, and we use Descriptives and Means when continuous (real number) variables are involved.

Table 11.2 Mean duration of news items by news programme. Reproduced with permission from International Business Machines Corporation, © SPSS Inc., an IBM Company

Report			
Length of news item			
News programme title	Mean	N	Std. Deviation
6 O'Clock News	0:01:57	19	0:01:27
10 O'Clock News	0:02:15	20	0:01:53
Newsnight	0:04:48	18	0:05:51
Channel 4 News	0:03:53	35	0:05:28
Total	0:03:19	92	0:04:28

Selecting and transforming data with SPSS

Before ending this section, we draw attention to three additional procedures or commands within SPSS, procedures which are useful for manipulating or transforming data in ways that will further facilitate particular types of analyses. Unlike the analysis commands just introduced, these procedures do not produce output tables, but are used for transforming, selecting or rearranging the data in ways that will facilitate further analysis with the analysis commands:

- **Data > Select Cases.** The Select Cases command in the Data menu enables the user to select a subset of the full data set for analysis; in our example data set, we might, for example, for some purposes, wish to exclude the BBC *Newsnight* programme and to perform analysis only on the mainstream news programmes. This can be specified through the Select Cases dialogue box. Note that the Select Cases command does not change or affect the basic data set, but only specifies what cases should be included in any given analysis. Any selection can be ‘reset’ at any time to revert back to the full data set.
- **Transform > Recode into Different Variables.** The Recode command in the Transform menu is useful for re-grouping the values of a variable. In our example data set, we might, for example, wish to rearrange the current four programmes into just three groups by grouping the early evening *BBC News* together with the late evening *BBC News* into just a single category called *BBC News*, while retaining *Newsnight* and *Channel 4 News* as distinct categories. Similarly, in an analysis of a selection of individual newspapers, it may often be desirable – in addition to analysing the characteristics of individual newspapers – to group the papers into such groups as Popular and Quality.
- **Transform > Compute Variable.** The Compute Variable command in the Transform menu is used for combining or computing two or more variables into a single expression. This may, for example, be necessary where information – for example a person’s length of time at their current address – has been recorded as years and additional months. In this case, it would be desirable for ease of analysis to express the length of time in either whole months (i.e. by multiplying the ‘years’ by 12 and adding this figure to the ‘months’) or in years with decimal points (i.e. by dividing the ‘months’ information by 12 and then adding to the ‘years’).

Conclusion

As we have already glimpsed in the various dialogue boxes, there are many more formatting, information, data manipulation and analytical options available than we have covered here. SPSS is, as we have indicated, a powerful and highly flexible program for managing and analysing media and communication research data. Our modest aim here has been to provide the basics to get started on using SPSS for data management and to introduce basic analytical procedures that will go a long way towards describing/analysing the kind of data that is frequently collected in media and communication research, whether through content analysis, survey methodology or other approaches.

For further exploration of these and other more sophisticated types of analysis, we refer the reader to the SPSS program itself – experiment with it, and use the online help functions as well as the online tutorials which come with the program. The program itself offers advanced and sophisticated help menus and guidance. In addition, we list at the end of this chapter a few selected reference books and guides which provide excellent and much more detailed introductions to SPSS and to statistical analysis of social science/communication research data generally.

Handling, organising and analysing qualitative data

Qualitative data in communication research comes in a number of different shapes and forms. We can use a ‘negative’ definition and refer to as ‘qualitative’ data any data which is not primarily numerically coded, quantified or consisting of numbers. We say ‘not primarily’ because the distinction between qualitative and quantitative data and analysis has become increasingly less marked and indeed we would argue that the best type of sociological analysis often moves seamlessly between the two types, taking advantage of the significant potential gains of exploiting complementarity and convergence between quantitative and qualitative analysis. Thus, many of the software programs created for the management and analysis of qualitative data have sophisticated facilities for subjecting qualitative data to quantitative analysis.

Typical examples of qualitative data in media and communication research include: transcripts of focus group interviews or in-depth individual interviews; field notes from observational or ethnographic research; news articles; transcripts of television or radio programmes; online text from blogs, websites, social media etc. Of course qualitative data need not necessarily be ‘text’, but would increasingly include audio or visual material such as audio recordings/sound bites, photographs, images, drawings or video recordings posted on internet websites and other media. All of these forms could also be subjected to quantitative analysis.

Just as communications media themselves have evolved dramatically since the early 1990s, so too have computer programs for handling and analysing audio and visual data. While early advances in the development of programs for handling qualitative data were very much focused on translating traditional manual approaches (e.g. card-indexing and organisation of analysis notes in relation to interview transcripts) into computer-based approaches, much work in this century has been focused on developing tools for handling and analysing the enormous amount of multimedia information (text and images) facilitated by the exponential growth in internet, mobile and other digital communications. We shall refer briefly to some of these developments towards the end of this chapter, but our primary objective here is to offer a brief introduction to programs for handling and analysing primarily digital text, such as news text, blogs or interview transcripts.

The computer-assisted management, organisation and analysis of textual qualitative data can be broken down into three distinct steps: (1) entering or capturing text, (2) organising and preparing text for analysis, and (3) analysing text. These three steps still predominantly apply in relation to the handling, management and analysis of historical media content that was not initially produced for the internet or other digital/electronic dissemination and for qualitative data such as the recordings of individual or focus group interviews. However, as electronic media and media content such as websites, online communication, social media etc. themselves become the principal object of analysis, Steps 1 and 2 are increasingly eliminated as analysis software is applied directly to

the digital media content itself without the need to first capture, download or organise the data on a personal device.

Entering or capturing text

Analysis of digital/electronic media and forms of communication notwithstanding, the first step for much computer-assisted analysis of qualitative data still revolves around the need to store and organise such data on a personal computer. In the past, this was very much a case of laboriously typing handwritten notes, questionnaire answers or text which existed in print only form into a computer file. While typing or scanning may still be the only option available in much research on historical media text, most media and communications text is of course now produced in digital form, and this first task then becomes mainly a question of sampling and capturing digital data for analysis. As we have seen in [Chapter 9](#) on survey research, questionnaire data is also predominantly now recorded in digital format, bypassing the need for typing or scanning. Likewise (although advances here may have been rather slower), media and communication researchers who conduct participant observation or ethnographic research would increasingly be recording field notes directly onto laptops, tablet computers or smartphones. If the data exists only in audio format – such as radio recordings or interview recordings – it is necessary to transcribe these into computer text files. If the data exists in printed text form only – for example, historical newspaper text, policy documents, annual reports, etc. – these will need scanning or transferring to digital format.

While there are still cases where the first task for the researcher is that of transcribing or scanning qualitative data into a computer, the exponential growth in the last few decades in the digitisation and electronic availability of all types of media, documentation and text means that the nature of this first step in the management and analysis of qualitative data has changed. As the variety and range of media and communications data are increasingly produced in digital format, the key considerations for the communication researcher for this step revolve around questions to do with navigating the wealth of qualitative data available and questions

about sampling, that is how to obtain samples that will accurately reflect the medium, subject or population that the research focuses on.

Organising and preparing text for analysis

Qualitative data, such as interview transcripts or news text, is stored and organised in the form of individual computer ‘files’, which are located within ‘folders’, which may, in turn, be organised hierarchically, that is a top folder or master folder with a tree structure of sub-folders and folders within sub-folders. While computer programs for the analysis of qualitative data can increasingly handle a variety of file/text formats, a simple text file format (ASCII files) will ensure the widest compatibility. Key considerations in the organisation of qualitative data are deciding on what ‘unit’ of analysis each file should represent and deciding on the most sensible hierarchy of files and folders. ‘Units’ of analysis are often more or less ‘given’, for example an individual interview, an individual open-ended question, a news article, a research memo, a day’s participant observation notes, etc.

There is no single best way of hierarchically organising individual units into folders (groups of files) and sub-folders; it all depends on ‘what will work best’ for the researcher in terms of keeping track of the data/information, and in terms of achieving the analytical goals set for the research. Thus, files may be divided into folders on the basis of ‘kind’ – that is, for a participant observation study in a newsroom, daily write-ups of observational notes may be in one folder, formal interviews with news professionals in another folder, policy documents extracted from the news organisation in a third folder, research memos and emerging ideas in a fourth folder, etc. Alternatively, folders may be organised on a chronological basis: a new folder for each day; or it may be that some combination of ‘kind’ and ‘chronology’ classification will work best.

For a study of news text, a useful folder set-up would normally consist of a folder for each news medium, with sub-folders arranged chronologically, for example separate folders for each month, year or other timespan best suited to the study in question.

This set-up immediately facilitates comparisons between different news media and comparisons of changes over time in the nature of coverage (for example changes in the vocabulary and terminology used for characterising certain phenomena). Textual data from a survey or from focus group interviews could sensibly be grouped in folders according to the main controlling or independent variables used in the study, for example sex, social status, age, occupation, geographical location, education, etc.

Qualitative data analysis

The analysis of qualitative data is very much a matter of discovering what occurs where, in which context, discussed in which terms, using which vocabulary or terminologies, and it is a matter of discovering trends, relationships and differences. A large part of the task facing the qualitative researcher then is one of keeping track of what came from where in the body of data, what was related to what, which terms were used by whom, which ideas arose in relation to what observations, etc. These are precisely the kind of tasks that computers are good at. They offer fast, reliable and powerful ways of managing, manipulating, and searching large bodies of textual data, although Renata Tesch's (1991: 25–26) admonishing at the dawn of computer-assisted analysis of qualitative data is as true now as it was in the early 1990s: 'The thinking, judging, deciding, interpreting, etc., are still done by the researcher. The computer does not make conceptual decisions, such as which words or themes are important to focus on, or which analytical step to take next.'

The types of software available for managing, manipulating, searching, coding and analysing qualitative textual data are many and varied. Furthermore, they are – like the host technologies themselves – in continuous development. Our modest objective here is to introduce two principal categories of computer programs for the management and analysis of qualitative data, and to give a brief indication of what they can do and how they can be useful in media and communication research.

The first category consists of programs that are primarily for indexing and searching text, for retrieving segments of text, and for

examining word use/vocabulary – also often referred to generically as text- or opinion-mining programs. The second category consists of programs that are primarily for coding text, examining relationships between (coded) segments of text, and for building theory. We say ‘primarily’, because, as with technology and software development generally, there is continuous enhancement and increasing convergence. See also our discussion at the end of [Chapter 5](#) of key categories of programs for the analysis of digital communications data.

Text indexing and retrieval

Identifying occurrence, location and context

As a starting point for analysis of qualitative textual data, it is useful to be able to identify the occurrence and location of specific words, terms, references and mentions across the different and multiple documents or files which make up the body of data. In much the same way as the index at the back of a book provides a shortcut for the reader who wishes to look up a particular concept or issue, indexing programs enable the researcher to go straight to the particular places in the body of data where a certain word or reference is used. Rather than flicking or browsing through what could easily be hundreds of pages of interview transcripts to find, say, all the times that interviewees had mentioned a particular celebrity or drama series character, this type of program enables the researcher to jump from one occurrence of the character’s name to the next, or alternatively to produce a list of all occurrences of the character’s name, complete with identifiers showing the location (folder name, file name, page number) of each occurrence.

Often it will not be sufficient to simply identify the location of specific words or terms – one would want to see these ‘in context’ in order to determine the meaning and use of a specified term or word. Such a listing is known as a ‘keyword-in-context’ list, or KWIC for short. A keyword-in-context list shows a line of text for

each occurrence of the specified word – that is, the specified search word in the middle of the line with a specified number of words of context on either side.

Keyword searching can include the specification of synonyms (e.g. find all occurrences of ‘car’ or ‘automobile’ or ‘vehicle’); the use of ‘wildcards’, that is find any word that begins (or ends) with a specified string of letters regardless of what the ending (or beginning) letters are (e.g. ‘scient*’ would find all occurrences of ‘scientist’, ‘scientists’, ‘scientific’, ‘scientifically’, ‘scientology’ etc.); and the use of boolean operators ('and', 'or', 'not') with or without proximity conditions – for example find all occurrences of the words ‘nuclear’ or ‘atomic’ within ten words of ‘weapons’ or ‘arms’, but not within ten words of ‘energy’.

Examining vocabulary and word frequency

Almost regardless of the nature of textual data (news articles, interview transcripts, policy documents, tweets, blog posts), a useful starting point for the qualitative researcher is to examine the vocabulary used for discussing, talking about and writing about the topics, themes and issues concerned. What words, terms, slang expressions etc. are used? What differences exist in the vocabulary used by some respondents or media compared with that of other types of respondents or media? What are the most frequently used words and, perhaps equally revealing, which words or terms are used very infrequently (or not at all, as the case may be)? Which new terms or concepts are added over time? Analysis programs of this kind – known generally as concordance programs – can provide vocabulary lists detailing each individual word used in a body of text as well as concordances showing all occurrences of each individual word in its context. Vocabulary lists can be ordered by frequency of occurrence or alphabetically (in ascending or descending order) to instantly provide an overview of which words are most, and least, frequent or common in a body of text.

Examining co-occurrence and associated words

Perhaps one of the most powerful and productive uses of programs in this category is for examining the co-occurrence of words and which words are associated with or tend to occur in the context of which terms. Co-occurrence and word association provide important clues and pointers to the ‘framing’, ‘thinking behind’, perspective or ideology of a text. As a prominent linguist noted long ago, ‘You shall know a lot about a word from the company it keeps’ (Firth, 1957). Moreover, while crucially important in itself, this insight extends – as we shall see in the example below – beyond the meaning associations of individual words to wider discourse analytic concerns with syntax, grammar and agency.

At the immediate level of word associations, it clearly, for example, makes a difference whether, say, ‘alcoholism’ or ‘drug abuse’ are discussed in terms of ‘treatment’, ‘health’, ‘victims’, ‘patients’, ‘social skills’, or, alternatively, in terms of ‘deviance’, ‘crime’, ‘law enforcement’, ‘punishment’. Similarly, the analysis of co-occurrence may help reveal not just the general ways in which key actors are described – their characteristics and attributes – but also the legitimacy and authority with which they are, differentially, invested by the text: some sources and actors, for example, may be quoted as ‘saying’, ‘testifying’, ‘stating’, ‘declaring’, ‘arguing’, ‘explaining’, while others may be quoted as ‘alleging’, ‘asserting’, ‘speculating’, ‘claiming’ – two sets of associated words which invest the quoted actors or sources with different degrees of authority or legitimacy.

Concordance programs have the dual advantage of being geared towards and able (like content analysis) to cope with very large quantities or bodies of text. By providing almost instant summaries of the type and frequency of words used in a text, and by enabling the researcher to see all occurrences of selected individual keywords in their immediate context, these programs and analytical procedures allow researchers ‘to objectively identify widespread patterns of naturally occurring language and rare but telling examples, both of which may be overlooked by a small-scale analysis. Such language patterns can help to illuminate the existence of discourses that may otherwise be unobserved’ (Baker and McEnery, 2005).

Using a concordance program, and drawing principally on keyword-in-context analysis (in this case, the keywords ‘teacher’ and ‘teachers’) combined with collocation analysis, Hansen (2009) – in an analysis of the changing portrayal of teachers in UK newspapers between 1991 and 2005 – found that the types of words most closely associated with the keywords ‘teacher’ and ‘teachers’ changed from a relatively singular emphasis on a lexicon of crisis, confrontation, conflict and problems to a much more nuanced lexicon emphasising both the challenges and achievements of the teaching profession. But possibly more significant was the finding – based on close scrutiny of the KWIC list of the two keywords ‘teacher’ and ‘teachers’ – that the syntactic position of teacher(s) changed considerably between the earlier and the later part of the period examined: thus the position of teacher(s) in news headlines changed ‘from an almost exclusive position as object/target of government and other actions to a much more active position as the subject/agent of various actions’ (Hansen, 2009: 340).

MacDonald et al. (2015) used concordance software (WordSmith Tools – see further details at the end of this chapter) to examine discursive and linguistic features of how nuclear proliferation was discussed in UN Security Council resolutions and in prominent UK and US broadsheet newspapers in the period 2006–2012. [Figure 11.10](#) reproduces a figure from their analysis showing a partial concordance of the keyword ‘Iran’ ordered to show instances where the keyword appears in close proximity to the word ‘not’. The authors use the full concordance of the keyword ‘Iran’ to demonstrate that Iran is most frequently positioned as the ‘receiver of verbal processes’ and that: ‘Of the instances where Iran is actually accorded agency in the resolutions ($n = 86$), it is regularly ($n = 78$) subject to some form of coercion or negative evaluation for non-compliance or failure to carry out some prescribed action’ (MacDonald et al., 2015: 180), as shown in the concordance excerpt in [Figure 11.10](#).

N	Concordance
139	Tehran Research Reactor, regrets that Iran has not responded constructively to
140	and related materiel; 9. Decides that Iran shall not undertake any activity
141	, in the event that the report shows that Iran has not complied with resolution
142	in paragraph 23 above shows that Iran has not complied with this resolution
143	and 14 November 2006 (GOV/2006/64), Iran has not established full and
144	report of 8 June 2006 (GOV/2006/38) Iran has not taken the steps required of
145	Atomic Energy Agency (IAEA), Iran has not established full and
146	and enrichment-related activities, Iran shall not begin construction on any
147	and S/2006/815 the export of which to Iran is not prohibited by subparagraphs
148	in paragraph 12 above shows that Iran has not complied with resolution
149	I to this resolution; 5.Decides that Iran shall not supply, sell or transfer
150	Atomic Energy Agency (IAEA), Iran has not established full and
151	Expresses its intention,in the event that Iran has not by that date complied with
152	(2006) 4 06-68142 7.Decides that Iran shall not export any of the items in
153	water-related facility; 7.Decides that Iran shall not acquire an interest in any
154	,in the event that the report shows that Iran has not complied with resolutions

Figure 11.10 Excerpt from a keyword-in-context listing/concordance of the keyword ‘Iran’ in close co-occurrence with the word ‘not’ (from MacDonald et al. (2015: 181))

Concordance software then enables the researcher to examine selected key terms both in terms of their syntactic positioning in the analysed body of texts and by the types of words or phrases that the keyword tends to co-occur with. Keywords may have been selected in the first instance on the basis of simple vocabulary/word frequency lists as occurring highly frequently or very infrequently, or may be of interest for other reasons articulated by the study’s underlying framework.

Two programs that handle the above procedures well and powerfully, while at the same time being both accessible and straightforward to use, are *WordSmith Tools* and *AntConc* (see the resources section at the end of this chapter). Perhaps the single most important virtue of these types of program is that they enable the qualitative researcher to ‘stay close’ to the data. That is, the programs are used primarily for identifying what appears where, how frequently, in which context, associated with what, etc. and searches and analyses are not based on complex assumptions or formulae about proximity etc. The programs lend themselves well

to examining key linguistic patterns, which can then be explored in the light of linguistic theory, discourse theory and other relevant theoretical frameworks.

Text coding, relationships and model building

The second category of analysis programs are programs designed for coding or tagging of text segments, for examining relationships between coded segments of text and, on the basis of such relationships, for building and graphically representing models of relationships in texts. A ‘segment’ can be a word, a sentence, a paragraph – in fact, almost any length of text. In the same way as programs in the first category, described above, enable the retrieval of all occurrences (with location identifiers) of a word or group of words, programs in this category allow the researcher to retrieve and list all segments of text with a specified code.

Thus, the researcher analysing a series of interviews with specialist journalists may have coded all references to or mentions of source agenda-setting – situations where the agenda for news coverage is set by sources rather than by media professionals – and would be able to retrieve these and compare what different journalists say about this aspect. The point is that the concept of source agenda-setting may be talked about and referred to in many different ways, indirectly and directly, and indeed in ways which do not deploy either the word ‘source’ or the word ‘agenda-setting’. Unlike the word-based searches of programs in the previous category, coding or tagging thus is not dependent on the particular vocabulary or words used in the textual data.

Once the textual data has been coded, it would often be desirable to go further than simply examining and comparing text under each of the codes used, and to start exploring whether and how different topics, themes and categories are related to each other. Do those interviewees who talk about source agenda-setting, for example, also tend to emphasise strong editorial intervention into the work of the specialist correspondent? Do references to concept X always co-occur with references to concept Y? Is the presence of concept Y conditional upon concept X? etc. Qualitative data analysis programs of this kind thus not

only facilitate complex coding of textual segments and fast and flexible retrieval of coded segments but, more importantly, they enable the examination and modelling of complex relationships, links, co-occurrences and perspectives in qualitative textual data.

Increasingly, qualitative data analysis programs – whether of the concordance type or the coding/tagging type – are also capable of performing quantitative statistical analyses of their own or they have facilities for exporting the codes attached to segments of text to statistical analysis programs such as SPSS or Excel, so that further quantitative analysis can be carried out in these.

Two of the most prominent programs in this category are *Atlas.ti* and *QSR NVivo* (see the resources section at the end of this chapter), both of which provide a powerful framework for organising, managing, coding and analysing textual and visual information in a variety of formats.

Summary

- Whether dealing with quantitative or qualitative (textual) data, computer-assisted analysis involves three major steps or areas of consideration: (1) the transfer of ‘raw’ data from their original form/medium (e.g. coding schedules, questionnaires, handwritten notes, printed text) to the computer medium; (2) the organisation of data (e.g. in data files, text files, folders, etc.) on the computer medium; (3) analysis of data, using appropriate computer applications or programs.
- SPSS is a powerful and flexible program for the statistical analysis of social science data, including communication research data. Coded data from, for example, content analysis coding schedules or survey questionnaires are entered into an SPSS data file, where each column represents a variable (e.g. sex, age, occupation) and each row represents a case (e.g. a survey respondent, a newspaper article). ‘Data’ may take the form of one or more of three principal types of variables: categorical variables, continuous variables and ‘string’ variables (e.g. words, text).
- The choice of analytical procedures in SPSS will depend in large measure on the types of variables to be analysed, as well

as, of course, on the aims of the research. We introduced four fundamental analytical procedures in SPSS: two for examining the distribution of individual variables in a data set (Frequencies and Descriptives); and two for examining relationships between two or more variables (Crosstabs and Means).

- We introduced two types of program for the management and analysis of textual data: (1) concordance-type programs for indexing and the analysis of vocabulary, context and collocations; and (2) programs for the coding and code-based analysis of text.
- Concordance-type programs enable the researcher to examine and analyse keywords, vocabulary, word frequencies, keywords-in-context, co-occurrences and words associated with specified keywords. These programs allow the researcher to move quickly and reliably to relevant occurrences and references in a potentially very large body of text, and to retrieve identified relevant occurrences/segments of text for further analysis and comparison, or for inclusion as examples in research reports.
- Some text analysis programs extend beyond concordance-type analysis, and enable the researcher to attach codes, tags or labels to segments of text (e.g. words, sentence, paragraph, etc.) which refer to or express the idea, phenomenon, concept, theme, issue, or topic denoted by the particular code. Coded segments can then be retrieved and examined, and further analysis can be carried out to establish how different coded segments interact with and relate to each other.

Further reading and resources

SPSS

Formally known since 2010 as IBM SPSS Statistics:

www.ibm.com/uk-en/marketplace/spss-statistics

The IBM SPSS Statistics website offers details of SPSS products, example uses/application and selected software trial downloads.

For a very accessible and clear introduction to SPSS, see:

Bryman, A. (2016). *Social Research Methods* (5th edition). Oxford: Oxford University Press, Chapter 16.

For a comprehensive, detailed and yet accessible introduction to statistical analysis with SPSS, see:

Field, A. (2013). *Discovering Statistics Using SPSS* (4th edition). London: Sage.

Qualitative data management and analysis: programs and resources

AntConc

www.laurenceanthony.net/software/antconc

AntConc is a ‘freeware corpus analysis toolkit for concordancing and text analysis’. This free and downloadable program is suitable for indexing textual data, producing word lists, examining vocabulary, producing keyword-in-context lists, examining collocations and word associations, etc. It offers a powerful way of analysing text in a way that makes few assumptions and always stays ‘close’ to the original source text in the sense that no (potentially subjective) coding or tagging is involved. For an example of its use in media and communication research, see:

Branum, J., & Charteris-Black, J. (2015). The Edward Snowden affair: A corpus study of the British press. *Discourse & Communication*, 9(2), 199–220. doi: 10.1177/1750481314568544.

WordSmith Tools

www.lexically.net/wordsmith

Mike Scott's WordSmith Tools offers a suite of tools for producing word lists, analysing word frequencies, producing concordances and collocations and examining textual patterns. Key introductions to the use of WordSmith and to the variety of powerful analyses drawing from corpus linguistics, linguistic theory and discourse analysis are the following:

Scott, M., & Tribble, C. (2006). *Textual Patterns: Key Words and Corpus Analysis in Language Education* (Vol. 22). Amsterdam: John Benjamins Publishing Company.

Baker, P. (2006). *Using Corpora in Discourse Analysis*. London: Continuum International Publishing Group Ltd.

For a considered and instructive discussion of the combination of Critical Discourse Analysis with corpus linguistics, see also:

Baker, P., Gabrielatos, C., Khosravinik, M., Krzyzanowski, M., McEnery, T., & Wodak, R. (2008). A useful methodological synergy? Combining Critical Discourse Analysis and corpus linguistics to examine discourses of refugees and asylum seekers in the UK press. *Discourse & Society*, 19(3), 273–306. doi: 10.1177/0957926508088962.

Atlas.ti (www.atlasti.com) and NVivo (www.qsrinternational.com)

Atlas.ti and NVivo have evolved since the 1990s to become two of the most versatile and powerful programs for managing, organising, coding, analysing and visualising qualitative data such as interview transcripts, audio data, textual and visual media content, research notes, etc.

For a comprehensive introduction to the steps involved in computer-assisted qualitative research – with particular reference to, among others, these two programs mentioned – see:

Lewins, A., & Silver, C. (2014). *Using Software in Qualitative Research: A Step-by-Step Guide* (2nd edition). London: Sage.

See also Lyn Richards' (one of the original developers of NVivo and its predecessor NUDIST) introduction to qualitative data analysis:

Richards, L. (2015). *Handling Qualitative Data: A Practical Guide* (3rd edition). London: Sage.

and:

Friese, S. (2014). *Qualitative Data Analysis with ATLAS.ti* (2nd edition). London: Sage

Glossary

Agenda-setting

Term referring, in communication research, to the power of the news media to set or influence the hierarchy of issues, events and actors/agencies perceived by the public or considered/addressed by social and political forums, including other media. The classic reference on agenda-setting in communication research is McCombs and Shaw, 1972.

Algorithm/algorithmic

An algorithm is 'a precisely defined set of mathematical or logical operations for the performance of a particular task' (*Oxford English Dictionary*, 2017). In media and communication research the word is often used to refer to the formulae or rules that determine how internet search engines work (i.e. the criteria rules used to order the results of searches) or the rules used to extract or analyse keywords, contexts,

co-occurrences, links or other features of digital data. Algorithmic analysis is computer-assisted or automated analysis based on defined formulae or rules.

Analytical survey

See **Survey**.

Angle of interaction

A photographer might capture a subject by looking up or down at them, looking straight at them, from the side or behind. These decisions, these angles of interaction, will influence the way that the subject is represented in relation to the viewer in terms of power and in terms of engagement. Looking up at a subject makes them appear more powerful; looking down at them makes them appear less powerful. If we look straight at them there is a greater degree of involvement than if we look side on. If we are positioned behind them we tend to take their point of view.

Anthropology

The broad academic field that studies human cultures and societies. While associated with studying more ‘primitive’ societies, it was the early anthropologists that challenged the view that these societies were somehow primitive in terms of the way they think. It was

shown that belief systems of contemporary Western societies were no more rational and that those of smaller-scale societies were as rich and complex and often served much the same purposes. Anthropology can equally be the study of contemporary societies. Its main research method is ethnography.

Big data

'Data of a very large size, typically to the extent that its manipulation and management present significant logistical challenges' (*Oxford English Dictionary*, 2017). In media and communication research, the term tends to refer to digital communication data of such a volume, complexity and variability that they are not easily or comprehensively analysed with conventional methods, but rather call for the development of computer-assisted approaches to both the collection and analysis of multiple types of data and data sources. Applications to date include, for example, social media analysis (Thelwall, 2016) and newsflow analysis (Guo and Vargo, 2017). See also Lazer and Radford (2017),

for an introduction to big data.

Binary oppositions

The concept of binary oppositions is, in semiotics, based on the notion that signs derive their meaning from relationships with other signs and, consequently, the meaning of a sign is defined principally by its position within the system of signs (e.g. language) and by what it ‘is not’, that is by its companion opposite: we know what ‘good’ is because it contrasts with ‘evil’. Semiotics takes this principle further to note that all texts are organised around a core set of binary opposites, which are key to how texts communicate meaning and ideology. Binary oppositions should not be confused with simple negations.

Categorical variable

A variable consisting of arbitrary codes assigned to indicate the range of values that the variable can take. In content analysis, for example, the names of the newspapers being analysed may be coded as: (1) *Daily Mail*; (2) *Daily Mirror*; (3) *Daily Telegraph*; etc. In a survey, for example, a variable such as the social class of the respondent may be coded as: (1) Lower class; (2) Middle class; (3)

	Upper class. Categorical codes may have some of the properties of the numerical scale, for example they may be rank ordered and/or they may be equidistant, but mostly they tend to have none of these properties, which in turn limits the type of statistical analysis that can be done. Compare with continuous variable .
Census	A survey of all members of a population.
Closed-ended question	A survey question that offers the respondent a limited set of pre-formulated answers, from which one or more – as specified in the questionnaire – must be selected. See also question formats .
Code-book See	coding protocol/code-book/coding frame
Coding	The act of classifying by assigning values or tags to images or text segments in analysis of media content or to respondents' statements/answers in surveys, interviews or observational studies.
Coding frame	See coding protocol/code-book/coding frame .
Coding protocol/code-book/coding frame	The content analysis protocol (also frequently referred to as the 'code-book' or 'coding frame') is

the coding instruction manual that coders refer to when they code. It sets out not only what variables are to be coded, and their associated values, but equally importantly it gives clear instructions about how the coding is to be done. It thus provides definitions, where appropriate, of the variables and their values, and it helps ensure that most fundamental aspect of content analysis, namely that it must be 'replicable'.

Coding schedule

Like the questionnaire in a survey, the coding schedule is the core research instrument in content analysis. It is a list specifying the variables (and their associated values) or dimensions that are to be coded in the selected sample of content. Instructions about how to code each variable are normally given separately in the **code-book** or **coding protocol**, but are sometimes included on the actual coding schedule.

Collocation analysis

The study of word co-occurrences to see whether/how selected keywords routinely appear together with specific other words.

Concordance

A list (ordered alphabetically)

or by frequency) of all individual words in a body of text, with each word shown in its immediate context.

Connotation

Refers to meanings that go beyond the basic literal meaning of a word or an image. A photograph of a woman with long hair depicts – at the literal or denotative level – just that: a woman with long hair. But images and other representations can also communicate or connote broader meanings, depending on what associations/connotations they trigger in the viewer/reader. So a photograph of a woman with long hair may also invoke or connote meanings of beauty, romance, desire, freedom etc.

Content analysis

Quantitative content analysis is the systematic and replicable examination of symbols of communication, which have been assigned numeric values according to valid measurement rules and the analysis of relationships involving those values using statistical methods, to describe the communication, draw inferences about its meaning, or infer from the communication its context, both of production and

consumption (Riffe et al., 2014: 19).

Continuous variable

A variable consisting of ‘real’ numbers with the properties of the numerical scale (i.e. ordered, equidistant and with an absolute zero), as opposed to arbitrary ‘codes’ which may have some or none of these properties. Continuous variables in content analysis may be, for example, the length of newspaper articles measured in terms of number of words or the length of broadcast news items measured in number of seconds. A typical continuous variable in a survey is the respondent’s age in years. Compare with **categorical variable**.

Corpus linguistics

The study of linguistic patterns in a selected corpus of text, for example, all national newspaper articles published over a specified time period. Corpus linguistic analysis examines vocabulary, selected keywords in their context, patterns of co-occurrence in selected keywords, etc. It combines the strengths and advantages of quantitative analysis with enquiry guided by linguistic and discourse theory.

Critical Discourse Analysis

A broad approach to the

study of language which seeks to point to the linguistic and grammatical features of texts that allow the analyst to reveal the **discourses** buried in the text that may not be so readily apparent to the casual reader. This process seeks to make explicit the ideology and interests promoted by the text.

Cross-sectional survey

A survey design in which the selected sample of respondents is interviewed once only.

Crosstabulation analysis (crosstabs)

A procedure in **SPSS** and other statistical analysis that compares two or more variables, for example a crosstabulation of *sex of respondent* by *age* in a survey would produce a table showing the number of male and female respondents in each age category.

Cultivation analysis

Cultivation analysis, originally introduced by American communications scholar George Gerbner, posits that the more time is spent watching television (or other media), the more likely is it that viewers/audiences form a view of the world which is consistent with dominant media/mediated representations of reality.

Cultural symbols

In any image, photograph, or other kind of representation we can ask which are the important cultural symbols and think about the role that they play. In an advertisement, for example, we might say that red lips are a potent symbol since they are used in our culture to communicate sensuality and beauty. In a photograph a woman in an office might speak on a mobile phone. This is a cultural symbol for mobility and independence, as opposed to the meanings communicated by a woman speaking on a landline in an office.

Denotation

This is what an image or other representation simply depicts. So a photograph may depict or denote a house. There is an implied assumption that this is a neutral judgement. But when we look at any image we will of course always assume what kind of house it is, if it is where wealthier people live, for example. There is no neutral denotation. The term is used to distinguish between what is depicted and what its associated meanings are.

Dependent variable

The variable under study or observation to see how or whether it is influenced by

	one or more independent variables .
Descriptive statistics	Statistical analysis summarising the distribution and frequency of variables, but without drawing statistical inferences from the relationship between variables (inferential statistics).
Descriptive survey	See Survey .
Descriptives	A procedure in SPSS for summarising the distribution of a continuous variable, by showing the mean or average value of the variable as well as the minimum and maximum values of the variable.
Discourse	Discourses are the broader chunks of knowledge we share about how the world works. A society may favour a discourse about crime and punishment, that crime is committed by bad people who deserve to be punished in prison. However, discourses always reflect certain interests. In terms of crime, prisons tend to be filled with poor, less privileged people and powerless ethnic minorities. This suggests that the dominant discourse of crime and punishment reflects the interest of powerful groups.
Discourse schema	Discourses have associated

identities, values and ideas. They also have associated sequences of activity. So we tend to have particular scenarios, particular sequences of activity associated, for example, with crime and punishment. Only one part of a discourse need be established in order to connote the whole. Therefore only one aspect of a discourse schema need be present for the whole to be understood.

Ethnography

The research approach associated in the first place with anthropology. Ethnography can consist in obtaining any kind of data to get a picture of how a culture works. But for the most part ethnography involved observation and participation in social life.

Focus group/ focus group research

A group interview or discussion, conducted by a moderator, and involving – usually – between 5 and 12 respondents.

Framing

Framing in communication research refers to the way in which *selection* (i.e. of events, actors, attributes, issues, but also of lexis and linguistic paradigms) and *emphasis* (i.e. the relative prominence given within a text to events, actors, issues etc.) shape the messages

that are communicated and the way in which they are (likely to be) received. The classic reference in communication research is Entman (1993).

Frequency analysis (frequencies)

A procedure in **SPSS** and other statistical analysis programs for summarising the frequency distribution of the values of an individual variable (normally a categorical variable). A frequency analysis of the variable *sex of respondent* in a survey produces a table showing the number of male and female respondents in the survey.

Genre

A term often used to refer to different types of film or television narrative and format, for example, comedy or drama, although it is frequently noted that the boundaries of such genres are always blurred. In linguistics it is used more specifically to consider the way that different forms of communication rely on certain assumptions and expectations. So we have different expectations from a lecture than a conversation. We must have expectations if we are to accomplish communication. This assumption allows us to look at the way that different

media texts follow certain genre principles or moves. What is important is that genres can be shapers of information, something that is often easy to overlook.

Globalisation versus localisation

In media studies there has been an interest in the way that transnational corporations have spread their products around the planet. This is part of a perceived process of globalisation. Of particular interest, however, is the extent to which these products transmit values, ideas and discourses that reflect dominant cultures, or the extent to which these products must be localised and adapted for the new markets. Often this is difficult to identify since the 'global' is located in the formats and genres whereas the 'local' can be a useful tool by which the global operates and may be no more than a gloss over these formats and genres.

Hypothesis

A statement or prediction, subject to testing, about the relationship between two or more variables; used to guide the formulation of types of analysis/tests to be conducted in a study.

Ideology

Ideologies are ways of thinking about the world, a

set of ideas and beliefs, which claim to be the truth. These reflect the needs and concerns of individuals or groups. For example, capitalist ideology embodies the belief that all of society should be based around making money, around profit and business. So schools and universities should equally, in this view, not have a role primarily of making the lives of students better, of making society a more creative and open place, but of providing business with suitable workers.

Independent variable(s)

The variable(s) analysed and presumed to influence the **dependent variable**.

Statistical comparison/testing is used to test whether or how variation in selected independent variables cause or influence variation in the dependent variable.

In-depth interview

These are carried out with individual persons who are chosen as they can provide detailed insights into our research topic. Each interview may be based around prepared questions, but will take the form of open discussions as it may be assumed that the interviewee can provide unexpected, as yet

	unknown, information. This information can be used to develop and target subsequent interviews.
Inter-coder reliability	A statistical measure or test used in content analysis to establish the extent of agreement between those involved in coding. The higher the inter-coder reliability, the more consistent or reliable – and hence replicable – the content analysis. See also: intra-coder reliability.
Interview guide	The set of instructions that tells interviewers how to conduct the interview and record the answers, that is how to introduce and ask questions, which prompts – if any – to use, which explanations/elaborations are permitted in relation to each question, how to end the interview, etc.
Interview schedule	See questionnaire .
Intra-coder reliability	A statistical measure or test used in content analysis to establish the extent to which a single individual coder remains consistent over time in his/her coding. The higher the intra-coder reliability, the more consistent or reliable the content analysis. See also: inter-coder reliability .
KWIC – Keyword-in-context	A list of all occurrences of selected keywords in their

	immediate context, that is, the keyword is centred on the page and is shown in the context of the 5–8 words appearing either side of the keyword.
Lexis/lexical choice/ vocabulary analysis	The study of the types of individual words that are used and are characteristic of the text or communication content under investigation.
Lifestyle	A term used to refer to a newer kind of identity that is associated with late capitalism and consumerism. Formerly people had more stable identities based around gender, social class, occupation and location. In contemporary society, it is thought, we can modify our identities through products, fashion items and leisure activities. One criticism of this process is that the way we are now encouraged to realise who we are is always closely aligned to acts of consumption.
Mean or mean value	A type of average value, that is the sum of values divided by the number of cases.
Means	A procedure in SPSS that summarises the values of two or more continuous variables across a categorical variable, for example a means analysis of age by sex of respondent in

a survey produces a table showing the **mean**/average, minimum and maximum age of respectively male and female respondents in the survey.

Media de/regulation

We cannot understand media content unless we know something about the way the media are owned and run. And we must place this in the context of how the media are regulated, what they are permitted and not permitted to do. Crucial to understanding the nature of commercial radio and newspapers, for example, are the changing number of stations and titles that companies are entitled to own. Media regulation documents for different countries may be available online from relevant government departments.

Metaphor

Important in Critical Discourse Analysis. Metaphor should not be thought of only in the literary and poetical sense. Metaphors underpin the way we think and involve a process where we try to understand one thing, process or event through another. ‘Our country is flooded with immigrants’ is one such use of metaphor. Flooding has a number of

properties: it is out of control; it can wash existing things away; it can be a natural disaster. These properties can be transferred to the new domain in order to shape understanding of it. In this case it has been used to represent immigration not as a process of enrichment but of damage.

Multimodality

In linguistics in the 1990s there was a concern that analysis had been focused on one mode: language, whereas much of the meaning-making in many of the texts analysed was done so by images and visual communication. Theorists began to apply linguistic models to visual communication in order to provide some kind of equivalent systematic analysis. This analysis was therefore 'multimodal' rather than 'monomodal'. However, what constitutes a 'mode' is difficult to establish. Visual communication, in itself, cannot be reduced to one single mode. For example – is the way a traffic light communicates the same mode as a person communicating through hand gestures?

Narrative

The basic sequence of events that underpins any

story or genre of communication. When we carry out narrative analysis we seek out the basic stages of the story (who/what causes what?) that may be either concealed by details or only partly overtly apparent in the text.

Nominalisation

Occurs when verbs are transformed into nouns in language in order to conceal agency, temporality and causality. So the phrase ‘the changed economy’ transforms the process of changing into a nominalisation ‘the changed economy’. Details like who specifically has changed the economy, when and how it has been changed, are glossed over.

Observational methods

Methods of simply observing people. We may observe people as they watch television to see how they interact with it. We may observe a person in different contexts in order to understand how their identity relates to certain media definitions. We may also observe processes of media production. For example, we might observe the way a photo-grapher prepares images for a newspaper or website. We may observe them in editorial meetings, at

a photo shoot and in the editing process. In both cases observation will throw up insights that would not have been available had we simply asked the participant. It also allows us to study people over time and in different contexts where they may behave slightly differently.

Offer and demand

Drawing from linguistics is one way by which we categorise whether people in images engage with the view, therefore demanding a reaction from us, or whether they do not, in which case they are offered to the viewer, like the rest of the contents of the image, as information.

Open-ended question

A survey question that allows the respondent to answer in his/her own words, with no prompting or restrictions. See also **question formats**.

Panel study/panel survey

A longitudinal survey design in which the same sample of respondents is interviewed at two or more different points in time. Compare with **cross-sectional survey**.

Participant observation

An ethnographic study design in which the researcher observes work routines, behaviours and practices of fellow workers,

while him/herself working/engaging in these. A type of research much used in the study of journalism/journalists, news production and newsrooms.

Pilot study/piloting

A test or trial run of a study, conducted on a small subsample to test whether the research design and research instruments, questions or coding categories ‘work’ as intended, that is capture what they are supposed to capture.

Political economic analysis

The study of ownership, control and financing of media. Here we might study a particular magazine title. We look at who owns it, how this has changed over the years, ask how this might relate to content. We also look at the way the magazine is financed. Is it through advertising, state funding or cover price? All these answers help us to build up a picture of why content may be the way it is. Underpinning this kind of analysis is the idea of whether there may be unfair and uneven distribution of control over media content.

Population

The entire group or universe of people, media, programmes, objects or cases that the

researcher/study is aiming to find out about and say something about with regard to the dimensions being studied. As it is rarely feasible or indeed necessary to study the entire population. A representative sample is drawn, and this then forms the basis for the research and extrapolation – depending on how representative the sample is – to the population.

Presupposition

Points to what is assumed as the ‘taken for granted’ in a text. For example, the sentence ‘We must take this opportunity to move forward’ makes the presupposition that the event in particular is an opportunity and not in fact a problem. This is one rhetorical device through which speakers, such as politicians, can lay claim to what is widely thought or already established when it is in fact contestable.

Primary definers/ sources/actors

Interchangeable terms used in media and communication research to refer to the people, agencies or sources who are quoted or referred to in news reporting. A variable often included in content analysis of news.

Qualitative research

From the Latin ‘qualitas’ = ‘of what kind’, is perhaps best described by contrast to

quantitative research in the sense that qualitative research is *not* concerned with counting the number of times different dimensions appear, but rather with examining and understanding *what* appears and what it *means*. Qualitative methods include focus group research, in-depth interviews, observation, ethnography, discourse analysis, semiotic analysis, narrative analysis, genre analysis, etc. Due to its intrinsically interpretive and more subjective nature, it is often difficult to obtain high reliability or replicability in qualitative research, while, on the other hand, it tends to benefit from a high degree of validity.

Quantitative research

Focuses on counting and quantifying relevant dimensions according to clearly specified rules. Consequently, it lends itself to a broad variety of statistical ways of describing data and testing relationships between dimensions/variables. Key quantitative methods include surveys for studying people and content analysis for studying text/documents/media content. Due to its rule-

governed and transparent nature, quantitative research has the potential to be highly reliable and replicable, while it is frequently more difficult to obtain a high degree of validity.

Question formats

Can be divided into two principal groups: **closed** and **open-ended** questions. Closed questions in turn may take a number of formats: for example, selection of a single answer from a restricted list of answers; multiple choice (selecting one, two or more – as specified – from a restricted list of answers); rank ordering by preference of a restricted range of answers; agreement scale (the respondent indicates the extent to which he/she agrees or disagrees with selected statements on a predefined scale).

Questionnaire

An ordered list of questions forming the key **research instrument** in a survey and, where necessary, including instructions about how to ask/answer the questions and how to navigate through the sections of the questionnaire.

Reliability

A measure of the extent to which research and research procedures are replicable

	and consistent over time and across different researchers.
Replicable/replicability	Where other researchers or coders applying the same rules and procedures to the same communications content should arrive at the same or very similar results. If they do, then the content analysis is not only replicable but its results meet the scientific criterion of reliability.
Representative/ Reasonably representative	A sample is said to be representative of the population from which it is drawn when key variables and dimensions (e.g. demographic characteristics such as sex, age, social status, etc.) appear in the same proportions in the sample as in the population. ‘Reasonably representative’ here is taken to mean a sample which is not skewed or biased by the personal preferences or hunches of the researcher, by the desire to ‘prove’ a particular preconceived point, or by insufficient knowledge of the media and their social context.
Research	We define media and communication research as the planned, critical, systematic and transparent investigation into or gathering of information

about media and/or communication processes.

Research instrument(s)

In practical terms, the research instrument and definition of variables for data collection will differ depending on the method used – see under each method discussed in this volume – but in very general terms the research instrument is the researcher's menu of questions/variables and manual of how to collect the information. In a content analysis, this is the code-book that specifies what content dimensions are to be coded and how; in a survey, it is the questionnaire and any associated instructions to interviewers/respondents; in a focus group study, it is the script indicating the moderator's role, speech and menu of questions/topics to be discussed, as well as directions for any prompts or stimuli that are to be used; in an observational study, it is the plan for who will be observed where, what dimensions will be observed, what questions will be asked, how answers and observations will be recorded, etc.

Rhetoric

Language that is used for

	<p>purposes of persuasion. The study of rhetoric involves documenting and classifying the different strategies that can be used by speakers and authors in this process.</p>
Rolling week sampling/composite week sampling	<p>A simple sampling strategy often used in content analysis, this consists of sampling media content from Monday of the first week, Tuesday of the second week, Wednesday of the third week, etc., continuing until a full week (or more, if required) has been sampled.</p>
Salience in images	<p>Refers to the way that elements and features of images can be made to stand out above others. There is a range of ways that this can be accomplished and this can create a hierarchy of elements. For example, an element can be placed in the foreground, it can overlap others, carry a particular colour or tone.</p>
Sample (noun)	<p>A sub-group of respondents, objects or cases selected for analysis or study from a larger population or universe. The general and ideal aim is for a sample to be representative in the sense that the key characteristics under study are approximately equally distributed in the sample and</p>

	the population from which the sample is drawn.
Sample/Sampling (verb)	The act of selecting a – preferably – representative sub-group for study and analysis from a larger population . There are two principal types of sampling: probability sampling (including various types of random sampling) and non-probability sampling (including quota sampling, convenience sampling, snowball sampling, etc.).
Sampling interval	The interval or gap between sampled units in systematic sampling, for example a population of newspaper articles may be sampled by systematically selecting every fifth article – that is, a sampling interval of 5 – from a chronologically and number-ordered list of the articles in the population under study.
Semiotics/semiology	Literally, ‘the science of signs’. Drawing on the linguistic theories of Swiss linguist Ferdinand de Saussure and American philosopher Charles Sanders Peirce, semiotics is the study of how signs (words, icons, images, sounds, etc.) derive their meaning and are made to mean through their position within systems of signs and their relationships

with other signs in the system (e.g. the language system). In communication research, the work of French semiologist Roland Barthes has been particularly influential.

Social actor analysis

The systematic study of the language or visual techniques used to describe and represent the participants in texts and images. We look for whether they are represented as individuals or collectivised, as generic or particular persons, etc. As part of the project of Critical Discourse Analysis the idea is that we look for the kinds of discourses that are signified through these patterns of representation that may not be overtly stated. For example, in a sequence of texts we might find that one set of participants is regularly collectivised, whereas another set is individualised. We can ask then what broader message about the events in which they are involved is being communicated to us.

Social construction

We live not so much in an objective reality as one which is filtered, or even constructed, simply appearing as objective, through the beliefs of our

cultures. Anthropologists are interested in the ways that different societies and cultures construct reality, or see the world, in different ways. So the kinds of identities that we play out, the kinds of knowledge that we hold at different times as important, are a result not of anything inherent in the world but due to the ways particular groups of people have come to define and accept them as such. Of course the media can play a large part in this process of social construction.

SPSS

Statistical Package for the Social Sciences – a powerful program for the management and statistical analysis of social science data, such as – but not limited to – the data generated by surveys or content analyses. It is now formally known as IBM SPSS Statistics.

Stance

A content analysis variable designed to code/measure the attitude/perspective or stance of news content to establish whether this conveys a primarily negative or primarily positive representation of the actors, topics or issues under investigation.

String variable

A variable consisting of text,

for example answers to an open-ended question in a survey questionnaire, or the headline or the name of the reporter in a content analysis of newspaper articles. String or text variables contrast with numerical variables, and – not being numerical – do not lend themselves to the kind of statistical analysis that can be performed on numerical variables.

Survey

Literally, ‘over-view’, but in communication and social science research specifically referring to the quantitative method of collecting data from and about people. A distinction is sometimes made between ‘descriptive surveys’ – which simply or mainly aim to collect (descriptive) information, the ‘what’ of a research scenario – and ‘analytical surveys’ – which aim to collect information on a specified number of variables and then to analyse the relationship between variables, the ‘what-causes-or-relates-to-what’ of a research scenario. Surveys can further be classified into the **cross-sectional survey**, the **trend survey** and the **panel study**.

Systematic random sampling

A sampling design that starts by randomly selecting a first

item from a numbered list and then proceeds to select every *n*th item in the list, where 'n' is the **sampling interval**. For example, a population of newspaper articles are arranged in chronological numbered order; it has been decided that a 20 per cent sample should be drawn from the population of newspaper articles. A first number is chosen randomly from the first five articles, for example, article number 2, and the sampling then proceeds by selecting every fifth article: articles 7, 12, 17, 22, etc.

Theme/topic/issue

Interchangeable labels often used for a content analysis variable designed to measure broadly what topics or issues are addressed in the content under study.

Trend survey

A longitudinal design for examining change over time in a population. The same set of questions is asked in a series of surveys conducted at different points in time. A new sample of a given population is drawn for every occurrence of the trend survey.

Unit of analysis

That which is counted, can be the individual word, the sentence, the paragraph, the article, the news programme,

the news item, an individual character/actor/source, the scene, the ‘incident’ (e.g. a violent incident, the consumption of alcohol), etc.

Validity

The degree to which a study does indeed examine or measure what it claims to be examining or measuring.

Value

See **variables and values**.

Variables and values

‘Variable’ refers to the specific individual dimensions under study, for example in a survey variables would often include the age, sex and social status of respondents, while in a content analysis variables would often include medium, type of programme, actors quoted or referred to, theme etc.

Each variable can take a number of ‘values’, for example in a content analysis of newspapers, the ‘newspaper’ variable may be coded using the following values: (1) *Daily Mirror*, (2) *Daily Mail*, (3) *The Times*, (4) *The Guardian*, etc.

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