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FEELING THE PULSE OF CHANGING MEDIA AUDIENCES: SOME METHODOLOGICAL ISSUES

By

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At the outset I take this opportunity to thank AMIC, particularly Mr. Joe Ma. G. Carlos for inviting me to present a paper in the AMIC 8th Annual Conference and the organisers of AMIC local chapter, especially Mr. Suresh Mangaladurai for making the arrangements for my stay in Chennai.

Media research in India has a short history and that too not a strong and promising one. While All India Radio (AIR) has had several decades old audience research unit, television research tradition is not more than a quarter century old. Outside media organisations, very little is known about media research and equally pathetic situation exists in academic circles. Whatever little media research has been done and published are in the form of Masters, M.Phil. and Ph.D. theses and dissertations or sponsored research. Also some researches have been carried out by the students of professional management and consumer research institutions.

In absence of any strong communication research tradition in South Asia, scholars from social sciences and humanities have carried out media studies. (Agrawal, 1988). Due to lack of regular media research to understand the audience behaviour, what we have is smart guesses by media pundits, some consumer research ratings and findings of small size sporadic studies. There is little to go by to talk about feelings and pulses of the audiences more so their changing media behaviour.
In recent years, due to transnational satellite communication expansion, focussed and concerted efforts have been made to study viewers’ behaviour in selected urban homes. Media and market researches have been also carried out to improve the quality of television production to suit the taste and meet the needs of the viewers.

Since television is closely linked with advertising and marketing of the products, a whole lot of management and market researchers are involved in carrying out a variety of media researches. Now, television viewers are being referred to as “consumers”. The programmes have become “products” and channels are seen as “brands”. So a whole lot of new market research jargons are heard in media circles and business has turned into strictly time buying and selling trade. This business dimension has added a new element in a big way after the arrival of transnational satellite television in South Asia.

In this paper, I like to reflect a personal view on the experiences and insights that I have gained over quarter of a century of communication and media research. I came to communication from Social Anthropology. Forced by the circumstances, I got involved in the satellite television for education and development. In the process, I was pushed into looking at television viewing behaviour at macro and sometimes at micro levels. Let me narrate some of the methodological problems that I have encountered in studying satellite television viewing behaviour. Often, I have had to design research to answer changing behaviour of the viewers in the cultural context of South Asia, especially India.

I would also like to examine whether or not the national and transnational satellite television companies changed their television programme strategies and contents due to audience demands or advertisers and sponsors pressure. Further, I would like to discuss the general perception about the expressed and felt need; and desirability of media research by the advertisers and broadcasting companies. Also the trust ascribed to media research findings by advertisers, television companies and for media policy makers.

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1 Transnational satellite television refers to all those television channels which are owned by multinational/ national companies and telecast signals originating from a foreign country.
Salient Observations

In the quarter of century of television research, I observed that seldom decision makers have shown their trust in research findings, especially if the findings were contrary to their expectations. As late as in 1999, the Chief of South Asia’s largest transnational satellite television company repeatedly told me that this person had no faith in media research. Most of his judgements were based on the intuitive feelings as to what the audience would like to see. This person argues that there is not much one can learn from media research about the audience it being essentially consumer research. This person is not alone in sharing the kind of distrust in media research.

The second most important view expressed about audience is that the television viewers like to watch commercial films and film based programmes. Table 1 indicates the programme composition of Doordarshan National Channel at two points in time (1987 and 1997) and in a regional channel. Table 1 shows little shift in Doordarshan’s programme composition over a period of time. I have chosen this period because it is a period in which invasion from the sky took place in the form of transnational satellite television which is unparalleled in communication history. This is also the period in which there has been a remarkable jump in advertisement earning of Doordarshan (from Rs.933.1 million to Rs.5727.3 million) and total transmission time (Doordarshan 1998).

Entertainment programmes comprising mainly serials, sitcoms, films and film-based programmes take a major chunk of Doordarshan’s air time while news and current affairs show a decline. This decline is because the total airtime during this period increased and new slots were filled by entertainment programmes. In this respect, one does not find any major changes in news and current affairs transmission time. On the other hand news and current affairs time chunk has increased as the transmission time remained more or less constant for regional channel of Ahmedabad. Even in the regional transmission entertainment remained the most dominant. The picture of transnational satellite television channels are no different, especially those which are meant for general audience like Star Plus and Zee Television.
The third significant change can be observed in the growth of a number of transnational satellite television channels in Indian languages other than English and Hindi and specialised channels for sports, music and news. Prominent among them are Asianet and Surya TV in Malayalam, SunTV, Raj TV, Sun Movies, Sun Music and Vijaya in Tamil, Enadu TV and Gemini in Telegu and Udaya and Udaya Music in Kannada for the people speaking these languages living within India and in other countries of Asia. These channels have a large viewer-ship. They account for over 40 per cent of the estimated cable television viewers in country. The specialised channels are mostly in Hindi or/and English like BBC, Star News, Zee News and MTV, to mention a few.

Air time allotted for Serials, Sitcoms and Soap opera have gradually increased in almost all television channels across the region and languages in last eight years. It is believed, by many experts that over a period, movie viewing will be replaced by short duration serials and Sitcoms. Currently transnational satellite television channels telecast family serials during prime hours of viewing between 7 and 10 p.m. on all week days. Also, during afternoons a number of serials are telecast, some of which are repeat telecast of the previous night. Major transnational satellite television channels including Doordarshan have some of their programmes in this category.

Religious and mythological serials continue to be a major viewing in India in spite of declining trends of viewing such programmes. All major transnational satellite television channels have been showing such serials for avid viewers who are ready to watch even re-runs of these programmes. Since traditional religious and mythological live performances like Ramlila are viewed every year by the audience, television is being seen as an extension of the same behaviour having larger and home base access.

Within this broad framework of television programming, two major changes have been observed. First, reduction in English language programmes of foreign origin in transnational satellite television channels. The best example can be cited from STAR Plus which has reduced its English content through a process of 'indigenisation' or 'Indianisation' of its
programme content. To some extend this holds true for most of the television channels in India. Second, in order to please and attract the viewers of cable owning homes a process of “Anglicisation”, especially of Hindi can be seen. Also appearance of Hinglish in channels like Zee TV, MTV and others are quite visible.

Given these characteristics of the Indian television, I have been thinking, how could I gauge the feeling and pulse of the viewers? It has been an interesting but a difficult methodological issue for me all along.

Feeling the Viewers’ Pulse

By and large, the present television programming, followed by most television channels is mostly based on gut feelings of the media planners and fashioned around Doordarshan programming. The advertisers using limited audience research data and available sales figures of various products are not willing to take any risk. So, based on surveys of the selected urban viewers, a national generalisation is made for media planning (see Anonymous 1998). While there has been remarkable increase of rural viewers in last few years, little or no proportional data are collected from the rural viewers to understand their viewing habits, programme preferences, needs and expectations from the medium. “By 1995, over 30 percent of all colour television sets sold in India were sold in the rural market, and it is estimated this percentage has risen significantly by 1997, as larger cities reach a point of saturation in terms of colour television set sales” (Anonymous 1998:22). Understanding of the television viewers based on the feedback of selected urban viewers have lead to urban bias to the extent that the rural viewers are being totally neglected.

Three major methodological problems have been experienced while carrying out media researches in India. Time and again, I have faced with the dilemma of carrying out viewers surveys with the help of an “English” interview schedule knowing very well that less than 2 to 4 per cent can communicate in English. Two years ago, I carried out a television viewership survey in 14 cities of India (Anonymous 1997). The aim of the study was to examine the
quality of transmission and reception of Doordarshan Metro channel vis-à-vis a transnational satellite television. The viewers of the study lived in half million population cities and belonged to at least half a dozen distinct linguistic groups. Due to limited time, resources, and trained researchers the English interview schedule was used. The field supervisors were instructed to hire bilingual field investigators for data collection. During pre-data collection period, all field investigators were trained in English and wherever possible in the local language. The interview schedule was broadly translated in the local language by the field investigators. Each investigator was expected to carry out the interview in the local language while filling the interview schedule in English.

In spite of our best efforts, I am concede that no uniform data were collected from 2016 respondents, as it was left to the field investigators to translate the questions from English to the local language during interview and then translate the answers from the local language to English for recording the answers. This process was considered most efficient in order to avoid further problems at the time of coding, especially for the open ended questions. As most of the reports are expected to be written in English the qualitative statements are expected to be presented in English. Sometimes, I wonder, if I have reported what the respondents said or even intended to say while expressing his/her views. My experience is not unique, the experiences of most of the media and market researchers would be similar, except that some of us raise this issue as a major handicap in media research whereas others accept it as given.

In a multilingual setting, the language of interview schedule is a minor difficulty as compared to problems of sampling. On several occasions while drawing a sample for an appropriate representation of the respondents, I have faced serious problems. At times, the field investigators are the final decision makers in the selection of the respondents, though we are not tired of saying that a random sample was drawn for the given study using "right hand" or "left hand" rule for selecting the respondents. Given the highly stratified and hierarchical nature of the Indian society, and their spatial distribution of the population in any locality drawing a random sample, in most cases, remain a distant dream.
Until recently sparse distribution of television owning homes created another logistic problem in selecting respondents. So quota sampling using snow ball technique has been followed in several studies, leaving a great deal of desirability of drawing a sample using random sampling technique. Given the nature of television medium and the needs of the advertisers and media planners, market researchers are seemed to be hurry to provide “top of the line” results. Time constraint has had adverse effects on appropriate supervision and back checking during data collection.

**Changing Viewers’ Behaviour**

Since feedback studies related to television are considered as “perishable commodity”, I have not been able to carry out a well thought analysis. The same holds true for many similar studies. Hence, the pulse of the audience provided through such surveys in most cases remained a quick and dirty feedback for immediate decision making having low reliability.

Couple of market research companies and Doordarshan Audience Research Unit are involved in providing continuous feedback of the viewers in the form of programme rating. ‘Diary’ method continues to be used to provide viewers feedback. Doordarshan provides weekly Doordarshan Audience Research Television Ratings (DART) whereas Television Rating Points (TRP) are provided by Indian Market Research Bureau (IMRB). Both these ratings cover a limited number of cities. (DART covers 33 cities, in which 20 cities are covered every week whereas IMRB covers nine cities which has now been increased).

The other method for providing continuous viewers’ feedback is “People Meter” based system. Two major companies viz. AC Nielson and AGB People Meters are providing electronically measured data of viewers’ choices and preferences. People Meters were first installed in Mumbai cable television homes. Now the same is being extended to non-cable television homes. After the full implementation of ‘People Meter’ over two dozen cities and towns, it will provide regular viewers feedback.
The results of these feedback studies vary a great deal. It is one of the major areas of conflict among advertisers and advertising companies. In recent past some efforts have been made to have a single viewing feedback rating system in the country. So far it has partially succeeded. A number of market research leaders and television companies are demanding that the same should be done as quickly as possible. In spite of several methodological limitations DART and TRP are most used by advertisers across the country. It is important to mention that TRP covers metropolitan cities only whereas a substantial number of television viewers live in villages and small towns. To some extent the same holds true for DART except that its covers a large number of medium size towns and cities also and the panel size is about 7000 respondents every week.

Largely, these ratings have been used to gauge viewers' preference and their expectations from the television programmes. One thing that has emerged from these analyses is that seemingly changing viewers preferences are fairly consistent. In response to viewers needs the transnational satellite television companies have changed their pattern of programming. Changes that have been observed in some of the transnational satellite television programming provide ample testimony that viewers have, to some extent, dictated what they want from television.

Based on the viewership data and the total number of viewers of over 60 million homes, it is amply evident that today there are more viewers who, on an average, are viewing television for longer duration in the country. However discernible changes in their television viewing behaviour is yet to be established. Innovative research methods are required to gauge the changing viewers' behaviour and also culturally specific research methodologies are needed to go beyond rating.

Somewhat unique feature about television viewing in India is that it is a family or household activity rather than individual activity (anonymous 1998). Even after large scale expansion of television ownership in India, not even 2 percent homes will have more than one television (anonymous 1998). Television viewing remains a daily "family festivity" in which young, old,
men and women view television together. This kind of television viewing has remarkable influence in the programming strategy and programme content. Family viewing creates methodological problems in studying television viewing behaviour.

A number of small scale studies carried out in different parts of India indicated that an intricate method of decision making has evolved for choosing programmes, viewing time and channel. In a multi-channel environment, choice of channel, especially in 25 percent cable owning homes, is an exasperating experience. Typically, conflicting interests are resolved through negotiation and compromise. It has also been observed that certain hours of the day have been assigned to women, children and men separately even though the television is viewed together. Also, there are common programmes on which there is a general agreement. How can one study the feelings and responses of a family towards a programme? How can one separate the individual responses in a family viewing situation? Can these questions be answered through an interview through individual recall or is there a need to rely on observation and that too participant observation.

Over a period, I have come to realise that without certain amount of participant observation in which the family is treated as unit of analysis, little can be studied and understood about the dynamics of television viewing. In the past, I have utilised anthropological method of qualitative research and participant observation technique for this purpose with success.

It is common knowledge that an average television viewer regardless of his/her linguistic background is compelled to view television programmes having English titles and forced to listen a great deal of English words and phrases inter-dispersed in the television programme (current estimates indicate that not in more than 2 percent homes English is spoken). There is no doubt that viewers have learnt to live with it and begin to decode the meaning through gestures, symbols and the context in which the English is spoken or English words are used in place of the mother tongue of the viewer.

It has been observed that the visual literacy of even illiterate television viewer is extremely high. Name of the programme written in English and even the entire imagery is quickly interpreted and decoded by the viewers. It is done through memory recall, music, characters and opening shots of
the serial, sitcoms and films. It is equally important to mention that every Indian language has more than one dialect and even the English language has a great deal of dialectical and content variation in its communicative process in India. Hence, a Hindi television viewer living in Eastern Uttar Pradesh or Western Bihar faces the problem of comprehension of a television programmes produced in Hindi, the local dialect being Bhojpuri. This problem is acute for those who are illiterate or having limited education. Multiple communicative methods apart from symbols and gestures are used to ensure programme comprehension. As of now, very little research has been carried out to understand viewers’ changing media behaviour as result of “foreign language” programmes. This needs to be studied detail.

In early mid seventies this problem was identified by some of us who were involved in the production of children’s television programme during SITE. Pioneering work has been done in formative research at the level of “script testing” for improving the comprehension level of the programmes. I feel, there is a need to carry out formative research to improve communicative ability and to reduce communicative redundancy in television programmes.

Since, familial viewing and language comprehension are two important dimensions of television viewing. Briefly, I will describe two innovative methods that are being followed in the cultural context of India. These two methods are illustrative of the innovations required for evolving culture specific media research methods for better understanding of the feeling and the pulse of the audience and the changing television scenario.

'Anthropological Approach to Media Research

In 1981, I published the first paper on the use of anthropological method for television research in India (Agrawal 1981). It was based on the experiences gained during Satellite Instructional Television Experiment (SITE) social evaluation. It had become amply clear to many of us that given the cultural composition of India, it would not be fruitful to measure the pulse of the audience using existing techniques of media research. Hence, it was thought appropriate to look for other methods that would allow an in-depth and qualitative
understanding of the audience response to television viewing. It must be mentioned that such an approach is not new in the field of programme evaluation and consumer research (see Patton 1990). In mid seventies, in India such an approach had not been tried in media research due to survey orientation that provided head count while measuring the audience response.

The anthropological approach to media research has its roots in the holistic approach of anthropological research. Communication is seen in the form of cultural alliances being culture bound and dynamic in its nature. Now, qualitative in-depth media research has taken roots in India and being used to supplement the survey findings. I used anthropological method also to separate between emic and etic categories of image de-codification. For the purpose of classifying cultural and communication data between emic/etic categories assumes a great deal of importance in multi-lingual and multi-religious society like India.

My efforts to use anthropological approach communication research is documented in an edited volume Anthropological Methods for Communication Research (Agrawal ed. 1985). Basically, it takes the view that qualitative and in-depth information related to media provides an in depth understanding of the feelings and views of the audience. It because, an average Indian viewer has great difficulty in giving categorical answer about the preferences and opinions about television programmes. It is also because in the cultural tradition, expression of media preference in the form of “yes” and “no” is generally not verbalised. For an average Indian viewer, there is more than “yes” or “no” or “like” or “dislike” in a television programme. I have personally used anthropological approach in various communication studies in last 15 years. I strongly feel that a culture specific technique to decode the cultural meaning of moving images is essential.
Formative Research

Another innovative research technique to understand the viewers' preferences and choices was pre-production research, especially if programmes are meant or directed towards social change or development. My colleague and co-worker, Dr. Mira Aghi pioneered formative research in India. In the last quarter of this century it is being successfully used by several media and production organisations. The formative research concept was evolved during SITE by Aghi (1987).

Apart from being an active formative researcher, Aghi has also trained a number of media researchers in formative research. As part of formative research, Aghi evolved "script testing technique" as a handy and useful tool for ensuring high comprehension of the programmes by the target audience. This has immensely helped producers in improving their production quality. Script testing not only differs from any other established technique, but even the research reporting technique has also been modified, keeping in mind the purpose of the study. I find that a great deal of cost and time can be reduced by using formative research to provide meaningful programmes to the viewers. The formative research is now being used in other South Asian countries by a number of television production houses while developing prototype programmes for their clients. Hence, there is a need for rigorous training in formative research in India.
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