

MAKING TRP SYSTEM FAIR

What's upsetting the Information and Broadcasting (I&B) Minister these days is the Television Rating Profile (TRP) system in India.

In a meeting held on 7th September, 07 to discuss the issue of Broadcasting Bill, the I&B Minister, Shri PR Dasmunsi expressed great disappointment towards the TRP system of the nation and asked the Ministry officials to examine the system, its application and how it can be made more authentic. Subsequently, a meeting was held on 7th October, 07 to discuss the issue.

TRPs that are the statistics of the viewer-ship and market share of a channel are worked out by two agencies in our nation – TAM and aMap. Among these two agencies, TAM is the older and more dominant player. Whereas, aMap is a recent entrant into this business. However, both the agencies work differently with different technologies.

Though, as of now TRP system may seem unsatisfactory but aMap's (Audience Measurement & Analytics Ltd.) entrance into this business may make the system of ratings more transparent and superior in future. Expectations are being driven in this direction because it's a well experienced fact that competition in business has always benefited the consumers. It may improve quality, reduce costs, provide additional services, better customer care etc.

TAM, the more popular one among the two agencies measures in-home minute-to-minute TV viewing for all TV owning households in urban India in towns having population more than one lakh. Sample is collected across 148 towns comprising 6917 Peoplemeter and responses from more than 30,000 individuals is taken into account every minute about what they watch and the viewing monitored for 300 plus channels to arrive at TRP Ratings. These ratings are released on a weekly basis. People Meter that is used by TAM is an electronic device attached to TV set which automatically records:-

- (i) The time that the TV is switched on/off
- (ii) The channel that the set is tuned to at any point of time
- (iii) Channel changed.

On the other hand, a-Map provides data on multiple dimensions like demographics, ownership, viewership, etc. These are released on a daily basis unlike TAM which releases the data on weekly basis. Their meters/devices are installed in 87 towns of population exceeding 1 lakh and include the states of J&K, Bihar / Jharkhand and Assam which is not covered by TAM.

a-Map collects viewer-ship data using Telecontrol VIII data collection units that are connected to the television receivers which automatically register/stores the information about the channel to which the TV set is currently tuned. The organization has established a pan-India panel of 6000 homes which is the largest overnight ratings panel anywhere in the world.

Looking into the matter, Mrs Roop Sharma feels that with barely 7,000 People's meters that have been put only in selected cities including mainly six metros and state capitals, how can one expect fair results? And then when highly populated states like Bihar, Jharkhand, North-East and J&K etc have no meters, accuracy of the statistics is always questionable.

As of now, the only criterion to judge the success of a channel is 'TRP'. The TRP ratings are used by PR and Advertisement companies to place advertisements of their clients on the TV channels. A higher TRP will get more advertisements for a channel but may not indicate its overall viewer-ship. It is a different matter that a higher TRP is also projected as a higher viewer-ship which is not true. This was proved by the SMSs which were received during 'Indian Idol 3' programme aired on Sony Entertainment channel for Prashant Tamang in Darjeeling and Shillong and during 'Fame Gurukul' for Qazi from J&K in 2006 where no People meters existed. In spite of that it was only the viewers of TV who watched the programme and sent the SMSs. This proves that the present TRP system ignores the Rural Communities and economically backward states.

There are several shortcomings in the television system that need redressal:

- In the greed of TRP's, the broadcasters have shifted their focus from informative, educational and

socially relevant content to sex, sleaze and violence. As an example: wildlife content, environmental programmes, welfare schemes by Centre and State Governments are totally ignored by the news channels.

- All these channels that form a part of Mass Media are meant to educate, inform and entertain the masses and mould their mindsets. Selling products through them should only come secondary.
- Broadcaster's commercial interest overrides the social purpose. 'Sun TV' is operating as a FTA channel in Chennai where CAS is implemented but a Pay channel in rest of India because it is likely to lose viewer-ship in CAS areas, lowering its TRP and ad revenue.
- The Carriage fee of Rs700 crore (as stated by the IBF President, Sh Jawahar Goel) does not reach any Last Mile operator. It only goes to the big metros and 28 cities where MSO's, who are also business partners / joint ventures of these broadcasters, operate. e.g.:
 - Ø SUN TV - Sumangali Cable Vision (MSO)
 - Ø Star TV - Hathway (MSO)
 - Ø Zee TV- WWIL (MSO)

There are many other drawbacks in the current system like: What happens when the meters get faulty? Who repairs them and how much time is taken to reinstall them? It is also vital to know that how this loss of viewer-ship time (when meters get faulty) will affect the TRP of a channel. For the sake of public interest, the government must investigate:

- i) How the People meters function?
- ii) List of the households where they have been installed.
- iii) Who operates the meters in a household?

The situation of the broadcast industry may become better if the Rural and Semi- Urban areas are equally represented in the rating system. Pay channels in rural areas or the areas where there are no People meters should turn FTA. Another effort for the enhancement of the TRP system is to introduce the concept of calculating two types of ratings:

- a) For the advertisers to sell their products
- b) Viewership of a channel must be addressed on all India basis including rural, semi-urban and backward areas to judge its popularity.

If the TRP system is transparent and authentic:

- Advertisers will get wide and fair coverage to sell their products.
- Broadcasters will have a fair representation in viewership ratings and there will be an improvement in the content.
- Cable operators and MSOs will be able to decide channels in their system based on the ratings in their area.
- Consumers will get value for money which they pay for 'Pay' as well as 'FTA' channels.
- Backward classes will get attention from the mainstream.

All the private channel broadcasters should stop thinking that it is only the duty of the Public Broadcaster to spread social messages in the rural areas. If electronic media wishes to call itself the fourth pillar of the society, it has to look after the interest of the society before its own interest.

Statistics say.....

According to industry statistics, the total advertising-spend on television is estimated at Rs6,200 crores. If we consider 5% of market size as an approximate amount of investment needed to ensure

the optimal utilization of Rs, 6,200 crores investment-spend, then the industry would need about Rs. 300 crores investment every year in a rating system.

India was far behind the world in the use of technology for TV audience measurement till aMap introduced 'Overnight Ratings'. For e.g., Countries like China, Dominican Rep, Poland, South Africa, Philippines, Romania, Greece, Hungary, Italy, Serbia, Turkey, Venezuela, Cyprus, Slovenia and Croatia already have overnight rating systems.

Though it's easy to say that 7000 meters are not sufficient but the main point of concern is that how many meters would India need to assess its TV viewership accurately across all meaningful segments? This is a question which is likely to elicit as many different answers as there are experts. According to aMap, an examination of the current state of technology and cost structure leads to the following conclusions:

With a 300 crore annual expenditure budget, it is possible to set up and operate a panel of 100,000 homes using the latest technology that would provide TV viewership data instantly (in real time). With an annual investment of just 2% of the 6,200 crores (Rs120 crores) on viewership measurement, the panel size could be 40,000.

If these are the economics of this business then:

1. Why were we stuck at 4,500 meters and kept justifying that 4,500 meters were adequate to cater to the needs of Indian consumers of the viewership data till aMap entered the market?
2. Why is India one of the very few countries in the world where the viewership data was available on a weekly basis when even countries like Romania, Turkey, Philippines, Slovenia, Cyprus etc had moved to overnight viewership data long back?

The clear answer to all these questions is 'Monopoly'.

In order to create super-profitable monopoly dynamics, the two rating agencies that at a time existed in India were merged into one. And after getting into monopoly situations, these companies did not invest in innovations and efficiencies.

Advantages of Overnight ratings that are generated over the telephone:

- Allows overnight delivery of data and non-intrusive data collection makes it easier for the higher SEC homes to join the panel.
- Tamper-proof and transparent since it depends on fewer people, with no data collection people involved.
- Since the feedback on discrepancies in data collection process is available on the very next day, therefore timely remedial action is possible.
- With falling telephony cost, over a period of time, the cost of data collection keeps on coming down.
- The system's easy scalability to new geographic areas has enabled aMap to cover currently uncovered areas like Bihar, Jharkhand, Jammu and North East and other Rural and Urban areas.
- Helps in growing media economy like India where broadcasters are investing heavily in bringing about plurality in content through numerous channel launches.
- Efficient measurement system will reinforce the faith of the advertisers to increase their communication investment.
- With the existing monies that are being put into buying television audience research it is but natural that the users get the latest technology for foolproof audience measurement at declining costs and not remain locked-into out-dated measurement equipment at the current market price.

Now that aMap has also entered into the rating business and made whole lot of claims of being far better than TAM, everybody expects that now we may have access to fair and accurate TRP of all TV channels. However, care must be taken we are be able to create a market structure with an oversight body to ensure adherence to best research practices and a level playing field be created to ensure free play for market forces.