

CHALLENGES AND OPPORTUNITIES OF TELEVISION RATING POINT (TRP) AND TELEVISION AUDIENCE MEASUREMENT (TAM) IN INDIA

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ABSTRACT

Television audience measurement/ Television rating points (TRP) is not new to India, have been in existence since 1993. Advertisers, broadcasters and media agencies invests decent amount of money and has large amount of interest in rating agencies. Rating agencies arise for the public autopsy only now, although concerns regarding the trustworthiness of these agencies were existed earlier also. Program availability, scheduling of programs and advertiser's decisions were affected by these rating agencies. Rating agencies were using small sample size to calculate the TRPs but large proportion of population or public cannot be ignored when we talk about the scope and even content of programs. Reliability, comprehensiveness, and accountability of ratings are to be taken in consideration with the ever increasing reach and impact of visual media.

Keywords: *Indian Television, TRP, Audience Measurement, Rating Services, TRAI*

I. INTRODUCTION

Television rating point provides information about which channel is viewed most. This tells about the interest, choice of viewers and the popularity of that particular channel. TRP measures the absolute rated points gained by any program. This gives us a measure of interest of the target people or viewers which account for the popularity of specific channel.

Television Audience Measurement particularly deals with media researches which quantify (size) and qualify (characteristic) the television audience information. TAM deals with those practices which help the advertisers and broadcasters to determine the number of viewers. The resulting number is known as audience share or in broader way market share. The broader meaning is referred as audience research. The ratings of programs reveal that the most of Indian viewers like to watch Indian programs rather than other nation's programs. [4] As larger chunk of Indian population still watch daily soap programs but nowadays urban young population is moving towards the American programs also.

In media industry TAM runs as authorized television viewership cell. India's TAM committee is in top 5 in the world with the largest population size of 36000 respondents across 162 cities and towns covered by 8150 people meters in TV homes of tier I towns where population of 1 lac and tier 2 or semi-rural where population is more than 1 lacs. [9]

II. OVERVIEW OF TELEVISION INDUSTRY

Indian Television Industry is very big with huge number of programs covering all the 28 states of India. This industry has given opportunity to many people to attain national fame. Daily soap programs broadcasted on television are extremely popular, mostly viewed by married women who stay at home as well as by working women. 50% of population of India has a Television set. In India total of 515 channels are available out of which 150 are pay channels (2010 data). [1]

Through the exploratory broadcast in Delhi on 15th September 1959 terrestrial television started in India. In 1965 All India Radio started which was considered as regular daily transmission. Later on in 1972 this service started in Bombay (now known as Mumbai) and Amritsar. Till 1975, Doordarshan was the sole provider for the television services in India. During that time only seven states of India had television services. In 1972 television services were segregated from the radio. In 1982 color television and National telecast came to exist in the Indian market. [10] At that time only Doordarshan was available which was the government owned. The most popular series during that time were the Ramayana and Mahabharata.

After 1980s more and more people started buying television. At that time only one single channel was available still television market had reached saturation and for that government opened up another channel, DD2 later on DD Metro which was the combination of both national programming and regional.

A wave of economic and social reform was started by central government under the Prime Minister Narashima Rao. According to new policies of government, private and foreign (CNN, Star TV) broadcasters were allowed to engage in limited operations in India. By 1991, 100 channels were running in India on which 400 million people were active and watching the program which was 41 sets in 1962. Cable television came into existence after the liberalization in broadcasting industry in 1992. [11] After this other foreign market troupes like Rupert Murdoch's Star TV Network, MTV etc. started seeing India as potential market to enter and grow. As a result of liberalization in broadcasting industry Star TV (Hong-Kong) came up with 5 major television channels into the Indian market. Before the entry of Star TV Indian government owned Doordarshan was dominating the Indian market. Broadcasting over cable was firstly done by ZEE TV (privately owned) in India. Thereafter other private channels like CNN, Discovery Channel, National Geographic Channel, Star TV network came to India.

The first private television channel in Tamil language was the Sun TV (India) in 1992. After the Sun TV various other channels like Malayalam network Asianet Communication Limited (the Malayalam network) etc. were launched in 1995. [1] Afterwards various regional, English and Hindi channels flourished in India. After 2003 various other international channels like Disney, Toon, and Cartoon network came into market.

III. VARIOUS CLASSES OF TV VIEWERS

Digitization of television industry has made entry for so many new players in the market such as cable television, DBS, and other multi-channel video providers (MVPDs). [6] Yet major chunk of viewers prefer to watch television programs through traditional mode rather than the new innovative way such as online or with the help of OTT players. But there is one thing which can be noted down that number of viewers in past few years is reducing year on year with the advancement of invention of this new online mode of watching programs. [18] Along with this classic couch class, a related segment of TV viewers was also highlighted in

the survey alias as Couch Chatters who also like watching TV more on an average but are majorly involved in chatting with friends what's there on TV. Rest chunk of viewers are least engaged in any sort of emerging activity like social networking related to TV or watching it online, and they account for 12% of total viewers.[18]

IV. MOBILE AND LAPTOP TV VIEWERS

Nowadays most of DTH operators are trying to seize the consideration of their clients on their Mobile mobiles and Tablets so that they can increase their customer base and revenue. Because of rise in the new viewing methods, Nowadays nearly 1 million DTH subscribers who was previously using traditional mode to watch television, migrating towards new way to watching same with applications on their smart devices. Private DTH companies like Tata sky, Dish TV, Airtel Digital TV and other companies have either flung APPs for smartphones and tablets or are planning to launch their apps so that they can engage with both ; their own subscribers and the new users who are in process of buying of smartphones and tablets so to seize their revenue also. Internet-enabled television systems, often referred to as Smart TVs, are a new development in television and home entertainment technologies.[3]

DTH operators say that the reasons of urgency to capture clients across numerous screens television, laptops, smartphones and tablets are two-fold. One, to launch an accompanying profits stream as all such requests come with a once-a-month payment ; and second, to get in touch with a huge base of clients of these smart devices so as to make from struggling mobile advertising. Airtel digital has been working a distinct Mobile TV application which let its users to watch live and recorded shows anytime on the move.

About 30 million of the DTH user base use smartphones, computers and tablets with high-speed Internet connections. Some are situated in metros and the highest 20 cities and these are the new users who will not notice spending Rs50-150 to use live television or widespread shows on their devices. Dish TV is the first one to launch TV application Anywhere Anytime on smart devices. Dish Online app was launched and it crossed 2.5 lacs downloads.[16]

The flourishing of connected mobile devices in the house has released up an entire fresh world of potentials when it moved towards showing TV and video content. Consumer observing traditions now consist of much more; not just the living room TV and old-fashioned broadcast services. Nowadays public take their entertaining device with them on the go. Viewing TV and video is now something that take place whole day rather than returning home after work or college, and as our revelation to content rises, so does our confidence and bearing towards it. Today a Mobile device counts up an increasing and large part of TV and video watching. Approximately 72% use mobile devices at least weekly for video viewing and 42% do this outdoor.[17] Video-On-Demand is progressively used for watching while linear and scheduled TV is shifting to selection viewing.

Nowadays the importance of linear TV is becoming more attentive for live sports, live cultural, political occasions and other content with high 'here and now' appeal. We are witnessing the start of accumulated, pick-and-mix TV solutions. It is not astounding that new age group is spending almost five hours and 16 minutes in front of a screen normally, but the amazing component involved by this point that this length of period is used up wanting of even changing on the TV groups. These Figures existed inferred by eMarketer, a community broadcasting research and analysis firm some time back which pointed out the better sanctification of the folks

to smartphones, laptops and tablets every day. From this time forth, these records evidently demonstrate that in contemporary times, there has been a fundamental revolution in the definition of what counts as TV-watching. Adaptation of new channels to watch television on other devices like smartphones and laptops is because of the diversification in the delivery channel of content and the change in the way information is presented in front of viewers in past few decades. New Generation wants to be informed 24x7 about the latest happenings of the nation and the world, so this has created a niche news market which has very much impact on audience's lifestyle and mind space.[8]

With the innovation in technology and availability of new wave of devices and platforms, most viewers got more addicted to watch television programs which were not much seen or popular in past few years. The numbers have surprisingly increased. The main reason for this changing trend has been the availability of the traditional cable TV online on mobiles and tablets either for free or exchange of some money. There are many options available for youth rather than traditional cable offerings. Moreover, the arrival of new television-related applications and technologies like multi-screen watching and social media interaction has totally changed the comportment towards television in today's scenario. But the degree of acceptance of these innovative modes of digital broadcasting has not been same for each section of society as not everybody have been preferring OTT TV or an Internet Television and yet there exists a traditional class of audiences who considers that their old idiot box to be far better than other new sources available.

V. LEGAL FRAMEWORK OF TRP

Various recommendation were given by TRAI to the Ministry of Information & Broadcasting, Government of India on the structure of Television Audience Measurement (TAM)/ Television Rating Point (TRP) and the policy rules which were reviewed and adopted by government for the rating agencies. Annexure-A contains the copy of that letter. Advertisers, broadcasters and production houses use the TRP to decide their media strategies. Broadcasters and Media agencies are competing persistently for higher TRPs. TRP rating often related with the likes and dislikes for any program and on the advertisement expenditure also. Pricing of channels can often be affected by the rating. Improper, wrong and misleading readings hurt broadcasters, advertisers and the viewing public as well.

VI. METHODS FOR TELEVISION AUDIENCE MEASUREMENT CALCULATION IN INDIA

6.1. Diaries

This method was used by Doordarshan for the first time and it was the oldest method and is one of its kinds. It has its own rating agency called as DART (Doordarshan audience rating). This method of recording data was introduced in 1989 and continued up to the 2001. Later on it was renewed in 2004. [12] In this method diaries are referred as booklets which consist of questionnaires. In this method selected or targeted people or sample records the programs they have watched daily. The sample size for the same was consisting of 3600 rural and 1600 urban homes. [2]

6.2. Electronic Method

Electronic method uses special equipment “people meters” which is installed in homes for the calculation purpose. The information gathered from this device is linked with the set tuning information and then given to the agencies who rate for TRP. This device has buttons, and a numerical value on the meter (like husband-1, wife-2) dedicated to each and every member of the family who is required to turn on and when he/she starts viewing and turn off the button when not viewing. Every meter monitors 24x7 and what is viewed by whom. All of the monitored data get stored in these devices. Then this data is transmitted through some gateways or through the phone line of households to the central server. This server process the average of the data which is taken for 30 day interval by using preinstalled specific algorithms, data sent by the data Sample “people’s meters” then it manipulates the Television Rating Points for particular program or channel.

It is calculated by following two methods

6.2.1. Frequency monitoring method

6.2.2. Picture matching technique

6.2.1. Frequency Monitoring

Sample homes are already equipped with the “people meters” which constantly and continuously records the data for the most viewed channels. This device (people meter) is very costly as imported from abroad.

6.2.2. Picture Matching Technique

In this technique ‘people meter’ relentlessly records a tiny portion of the picture which is being watched on that particular TV set in those sample houses which are considered for rating. Along with this, the rating agency records all the TV channels’ data in the form of a minute portion of a picture. This recorded data later gathered from the sample homes is then matched with the main existent data bank to interpret the name of the channel. By this method national rating is produced. This technique is comparatively more trustworthy and relatively modern to India. Currently, audience measurement reports of television programs are only available after a significant period of time, for example as a daily report but real time measurement of television audience is not available. [5]

VII. RATING SERVICES IN INDIA

Following rating agencies used electronic rating method

1. Television Audience Measurement Media Research
2. Audience Measurement & Analytics Limited

Initially, only DART i.e. Doordarshan Audience Ratings was followed which was gathered by Doordarshan’s viewing viewers study division done by its 40 Kendra’s and 100 All India Radio stations. [13] After that ORG-MARG’s Indian National Television Audience Measurement was recognized in 1994. [12] INTAM’s taster data magnitude was small and primarily limited to key metropolises in India. A subsequent rating agency TAM was emerged in 1998, while INTAM was still in operation. A Joint Industry Body (JIB) embracing delegates from the Indian Society of Advertisers (ISA), Indian Broadcasting Foundation (IBF) and Advertising Agencies Association of India (AAAI) worked meticulously with TAM in methodological situations. In 2001, INTAM and TAM were officially amalgamated together.

In 2004, Audience Measurement and Analytics Ltd (aMAP) came to market in India. So now, aMAP and TAM were the two agencies doing TV ratings on commercial basis. However, their processes are restricted to a few big cities where residents was about one lakh or more than that of; their tastermagnitude is restricted to about 7000 for TAM and 6000 for aMAP metered homes. So this sample size includes approximately, 30,000 respondents from major metropolitan areas; epitomize 120 million audiences, supposing five members per domiciliary. But in this rating scenario, the areas where population is less than one lakh which covers over 50% of the population of those who have admittance to Cable and Satellite channels and 75% of those who watch DD channels , it did not get measured at all.[14]

There are many concerns about the rating services which are lawful in themselves, but the major concern here is the necessityfor some kind of government rules, governance, and control for these small screen rankingorganizations, and whether they areabsent to be handled by the industry ingenuities.

With the joint effort of Media and advertising sector, and leading industry associations of the broadcaster ,a new non- profit body-Broadcast Audience Research Council (BARC) is formed ; under section 25 of the companies act ,1956 with an equal depiction of four members respectively from Indian Society of Advertisers (ISA), Indian Broadcasting Foundation (IBF) and Advertising Agencies Association of India (AAAI).It was formed to control and monitor the TV viewer's measurement structure in India for fair rating.[15]

The formation of BARC is an effort taken by advertisers, media and broadcasters industry experts by their own will to control and to keep an eye on television audience measurement system in India. [7] The main objective of BARC is to provide television related research information which is reliable, accurate, up to date and relevant; that too at reasonable cost to the users in transparent environment and objective manner. The cardinal effort for rating research is that it should be strictlyemblematic, wholesome and pellucid should be given by BARC.

VIII. OBJECTIVES OF THE STUDY

To study and analyze

1. The television viewer awareness, acceptance and perception about current system
2. The influenceof rules and regulations on the ratings
3. Use of new technologies to watch TV programs

IX. METHODOLOGY

Data was collected from a homogeneous sample comprising of 250 observations. Post consistency the sample size narrowed down to 226. Based on the study objectives of measuring effectiveness of TRP on overall viewer decision making a questionnaire was designed and administered online. The methodology adopted was an exploratory research.

Using different attributes of measurement we prepared questionnaire in order to collect appropriate data for achieving the objective of this study. Achieving accuracy in this research requires in depth study regarding the subject. As the primary objective was to study the viewer perception from TRP, the research methodology adopted is primarily focused on primary data through which the most recent and accurate piece of information

could be collected. Exploratory research was adopted so that the factors underlying decision making could be derived thus creating a scope for further research and analysis.

We analyzed data on different parameters such as Awareness of TRP, Use of new technologies and Acceptance of TRP in people.

X. DATA ANALYSIS

Total observations we considered for analysis are 226, out of that 42.92% were males and 57.07% were females. We considered different age groups to get the age wise data. In that 28.7% of 18-23 years, 57.07% of 24-29 years, 5.30% of 30-35 years and 8.84% of above 35 years. Out of these observations 54.86% are working professionals, 38.49% are students and 1.76% is self-employed people.

10.1. Awareness of TRP

Television rating point tells us that which channel is viewed most. Awareness about TRP and the regulatory body for TRP is less in India. The Ministry of Information and Broadcasting is one of the branch of the Government of India which is body for formulation and administration of the rules and regulations and laws relating to information, broadcasting, the press and films in India. Fig. 1 shows that 38% respondents agree that they are aware of current TRP system and 39% respondents agree that they are aware of Ministry of Information and Broadcasting.

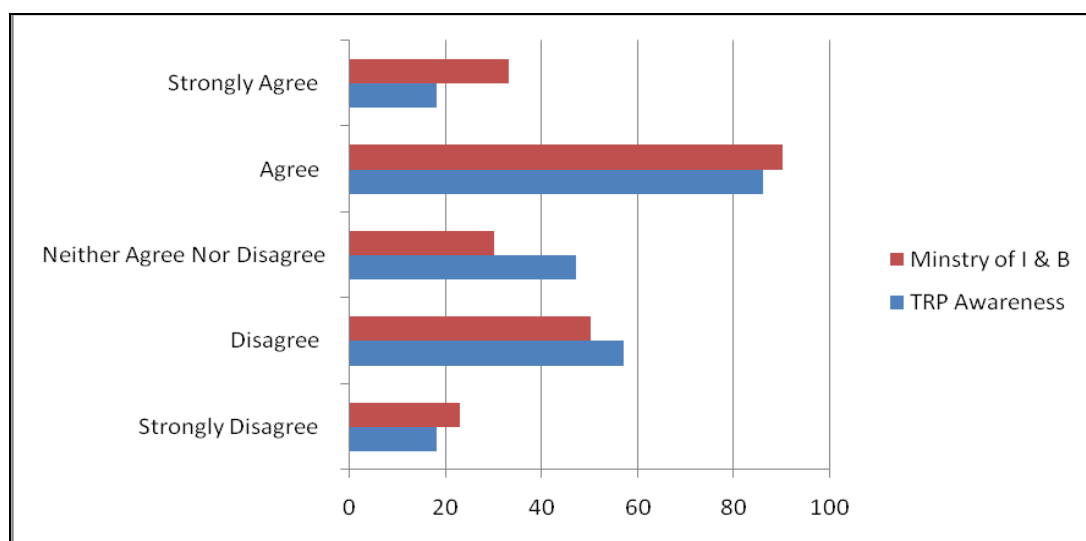


Figure 1: Awareness of TRP

10.2. Acceptance of TRP

Television rating point gives the measure of the absolute rated points gained by any TV program. With the help of TRP, popularity of specific channel can be measured. Many viewers prefer to watch programs which have high TRP. But if calculation of TRP is not transparent then this can mislead the audience as they solely rely on this TRP rating. With the help of following analysis, we can say that many people are not satisfied with the procedure which is considered for the calculation of TRP. Current procedure doesn't consider the interest of

whole population while calculating TRP. It only considers sample part of the entire population. Fig. 2 shows that 28% respondents out 226 are not satisfied with current audience measurement system.

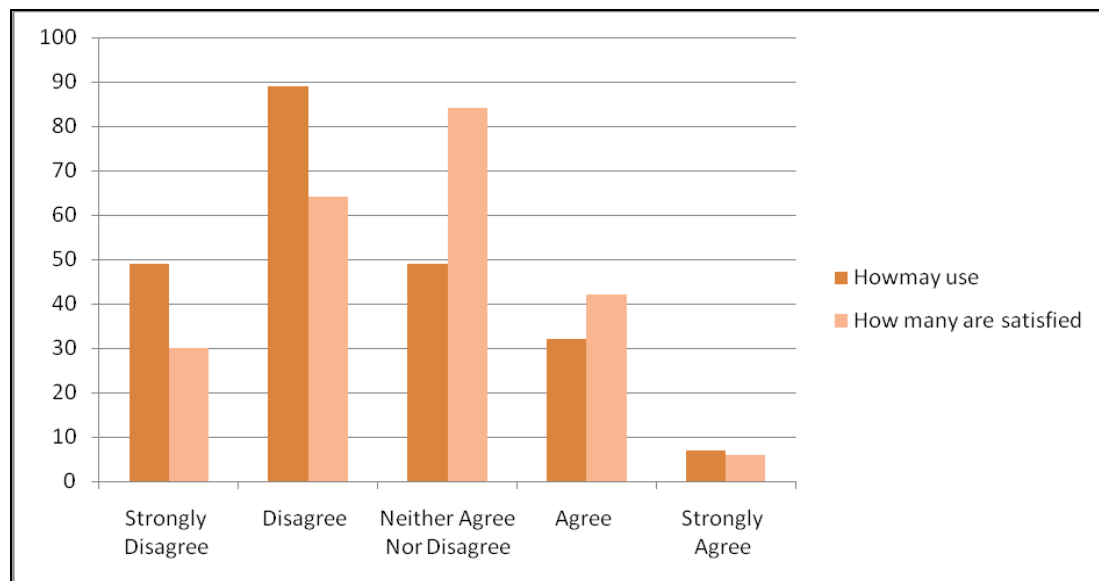


Figure 2: Acceptance of TRP

10.3. Perception about Current System

Fig. 3 shows that many people (fairly 25%) think that their opinion is not taken into consideration while calculating TRP. Reliability of these TRP ratings is very important for deciding the commercial airtime. The perception of broadcasters is based on the Television Rating Points. So if these ratings are tampered, then such a system might promote production of content which is really not such popular in the audience. TRP also help the advertisers to decide their media strategies.

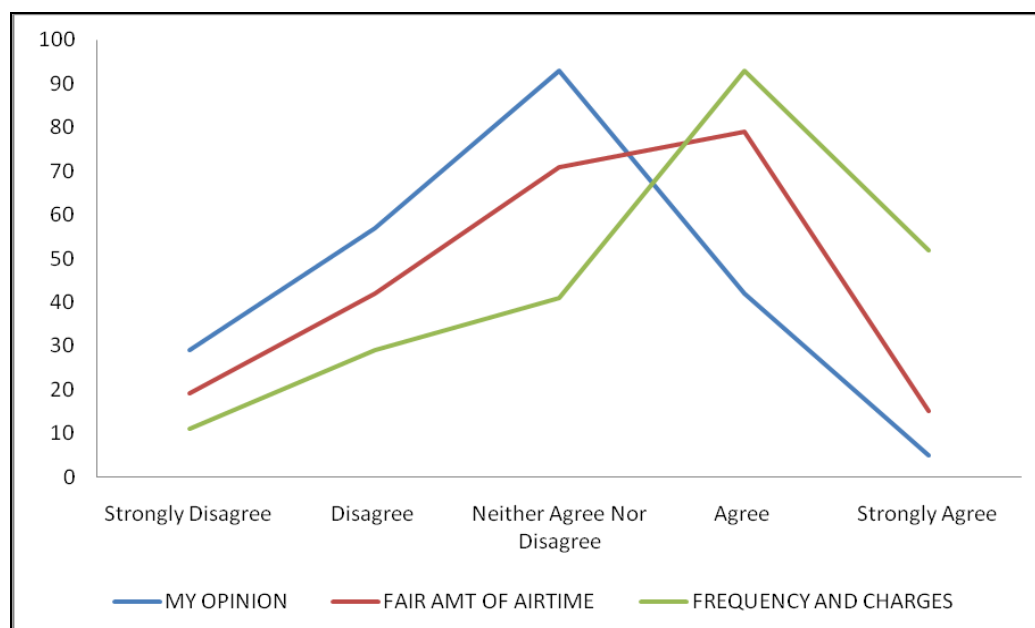


Figure 3: Perception about Current System

10.4. Regulations of Audience Measurement System

Fig. 4 shows that more than 53% of respondents think that current rating system is biased and done on the account of presence of interested parties. They feel that there is a lot of scope for improvement in regulation of TRP calculation system. There is a need for more transparency in system according to around 55% of respondents. Currently Television rating system is in the hands of interested parties and they can decide the fate of any program at their own profit and interest; viewer's opinions and likes does not matter for them so now this system needs to be replaced with the more regulated and transparent. More transparent and regulated system can bring the TRP as one of the best way to judge any program.

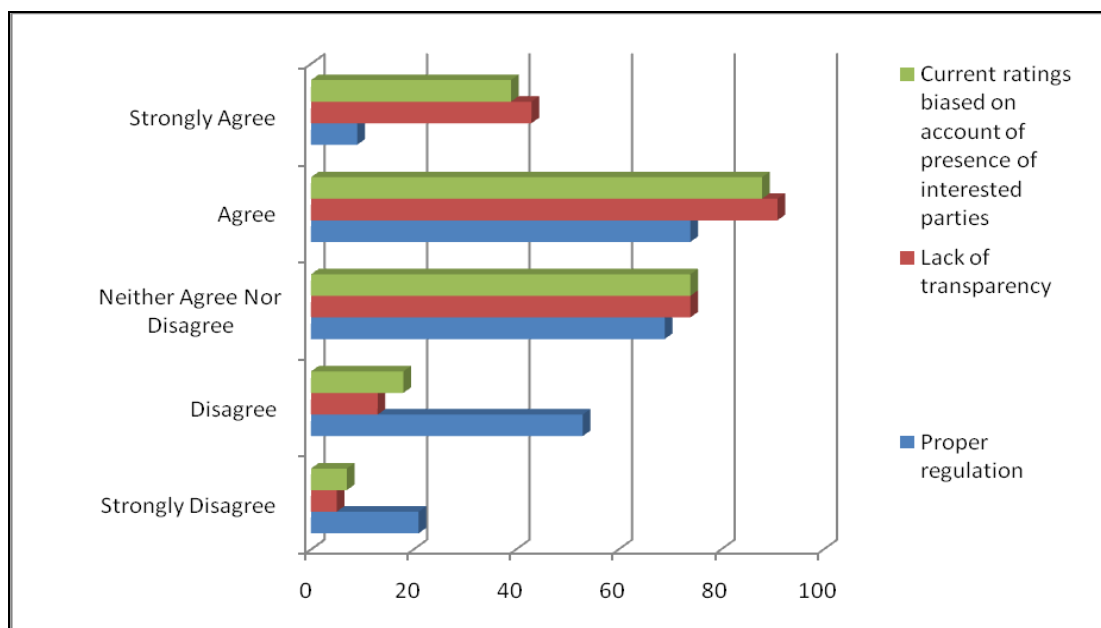


Figure 4: Regulations of Audience Measurement System

10.5. Use of New Technologies

Traditional TV viewer's opinion can be calculated using various methods. But nowadays large chunk of TV viewers is moving towards new ways. Young generation prefers watching programs over Laptop than TV. With the rise of Smartphones and Tablet, on the go watching of TV is also possible. So, count of all these population while calculation of TRP is also necessary for the fair measurement of Audience Measurement.

10.6. Suggestions to Add New Technologies in TRP Calculations

Fig. 5 shows that around 81.85% people think that online watches are also important to count for calculation of television rating point. According to this there is a need to look for online counts also as number of online watches are increasing day by day. As the technology advancements are on at their peak, lots of applications are coming where we can even store our content and view that content offline. Television rating point measures how many times that program is viewed and how many times it viewed repeatedly by a single user. Basically it talks about the popularity of that program which in turn comes from the number of watches for that particular program. Use of tablets, desktops and mobile phones has widened to watch online TV program also. Now this is the time to include these channels also under calculation of TRP for any program.

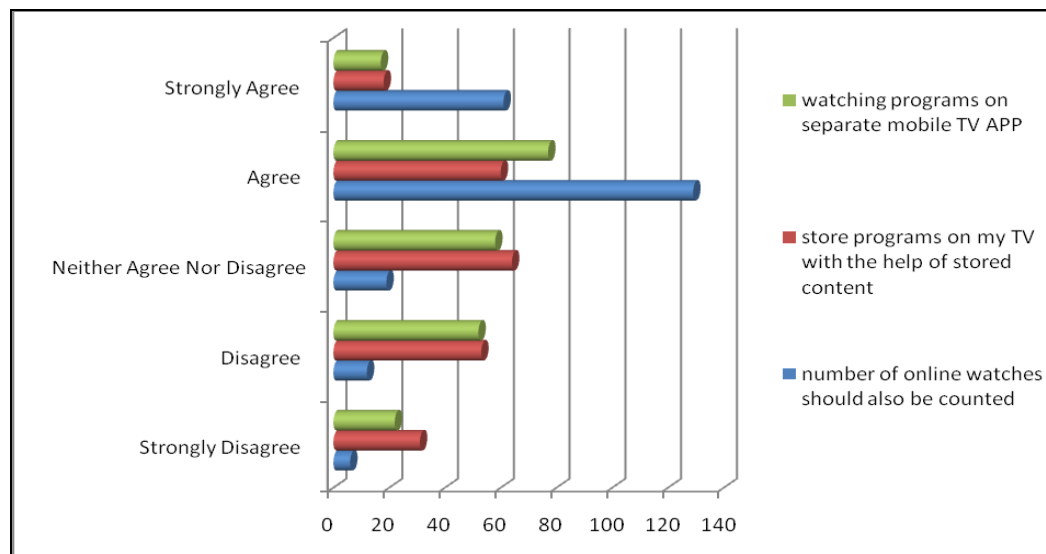


Figure 5: Suggestions to Add New Technologies in TRP Calculations

XI. RECOMMENDATIONS AND CONCLUSIONS

Table 1: Conclusion

	Positive Responses	Neutral	Negative responses
TRP system should be encouraged in India	58.84% Out of 226 respondents, 133 showed positive attitude towards TRP system encouragement in India.	22.12% Out of 226 respondents, 50 showed neutral attitude towards TRP system encouragement in India.	19.02% Out of 226 respondents, 43 showed negative attitude towards TRP system encouragement in India.
There is need for improvement in TRP system of India	7.52% Out of 226 respondents, 17 feel the need for improvement in TRP system in India.	77.43% Out of 226 respondents, 175 feel neutral about the need for improvement in TRP system in India.	15.04% Out of 226 respondents, 34 do not feel the need for improvement in TRP system in India.
I want more transparent TRP system in India	79.64% Out of 226 respondents, 180 more transparent TRP system in India	15.48% Out of 226 respondents, 35 were neutral about the TRP system in India.	4.86% Out of 226 respondents, 11 do not feel the need for improvement in TRP system in India.
TRP is the best way to judge any program	25.66% Out of 226 respondents, 58 think that TRP is the best way to judge.	26.54% Out of 226 respondents, 60 think that TRP is the best way to judge.	47.73% Out of 226 respondents, 108 think that it is not the best way to judge.

XII. CONCLUSION

Television audience measurement or Television rating Point gives the popularity of particular channel. It also indicates that which channel is viewed most by the audiences from different age group and from different social-economical background. Based on the popularity of the TV programme it is decided that which airtime slot is to be given to that program. Even the frequency and the cost of the commercials by advertising agencies and media planner during a programme on a given channel is decided on the basis of popularity of the program which is given by TRP. Rating for the particular program is given by different rating agencies in India such as INTAM. But there are speculations around the calculation procedure of TRP as it doesn't consider the whole population of India but a few sample homes. The method is not transparent as many channels have filed complaint against the abusing power of TAM's monopoly in India because they have witnessed the TAM's unfair trade practices and flawed methodology of calculation for many years.

- Above analysis shows that 79.64% Out of 226 respondent want more transparent TRP system in India
- 58.84% Out of 226 respondents showed positive attitude towards TRP system encouragement in India
- Out of 226 respondents, 108 think that TRP is not the best way to judge popularity of any program
- 17% respondents think that Current ratings of any TV program are biased on account of presence of interested parties

XIII. SUGGESTIONS

After doing analysis and study on measurement of TRP in some urban and rural areas we would like to make following suggestions:

- TRP measurement procedure should be more than the current measurement system
- Advertising agencies and media planners can pay premium price for the commercial aired during program only after verifying the authenticity of the rating
- Many respondents think that their opinion is not calculated during the calculation of TRP due to limited sample size of population so sample size should be increased
- Today's young generation prefers news modes like Mobile TV, Content storage application for watching television programs rather than on traditional TV. So their opinion is also need to be considered while calculating the TRP
- Even nowadays many DTH providers are giving the facility to store the live program so that it can be watched later, so this is also to be considered for the calculation of TRP

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