UNIT 3 INDIAN MEDIA SCENE

Objectives

After reading this unit you should be able to:

- trace the growth in each of the mass media and identify, both, intra-medium and inter-medium competition;
- identify the advertising expenditure on each media and the changing trends; and
- find out the reach of all mass media amongst various strata of society at which advertising is aimed.

Structure

3.1 INTRODUCTION

The oldest advertising professionals were the town criers (examples of which can still be found in the smaller Indian towns and during elections). The oldest classified advertisements were published in journals and periodicals that proliferated in the 17th century. Advertising became a profession with the first advertising agency, Reynell & Son, founded in 1812[1]. The advertising industry grew in volume and value during the first half of the twentieth century and, finally, advertising became a major service industry with the advent of films, radio and television in the twentieth century and with the growth of the press.

As the competition in both the manufacturing and services sectors has grown, the need for advertising has increasingly been felt by marketers. This has resulted in the growth of advertising services and the media.

3.2 STATUS OF MASS MEDIA

Mass media and advertising agencies work hand in hand with each other. On the one hand all commercial mass media need revenue from advertising, on the other advertising agencies need the mass media for communication. It is, therefore, relevant to understand the competitive mass media scene while identifying the competitive environment for advertising. In this section an attempt has been made to describe each of the mass medium in detail.

It has been observed since independence that the development of the media has been slow. For almost twenty-five years after independence, the growth of the media-print, cinema and radio followed a normal growth pattern. Pressures of urbanization and growth in literacy did not affect the media significantly'.

It was only in the early seventies that breakthrough in communication technology induced growth'. It is this technology and its products which have been responsible for the "communication revolution"[4]. As a result of this communication revolution, the quiet media scene got transformed into a competitive scene where both intra-media and inter-media competition became intense.

3.2.1 Press

The Indian press has passed through various stages of development. In 1972 glossy printing was introduced and by the end of the seventies 125 publications were available in colour. This medium got a second boost when offset technology was introduced in the early eighties. As a result of this change in technology, glossies were introduced amongst print titles.

Today, there are more than 40,000 publications in India. Of these, 716 are enrolled with the Indian Newspaper Society. The details are shown in Table No.1.

These 716 publications break up into 394 dailies, 2 bi-weeklies, 106 weeklies,

56 fortnightlies, 153 monthlies, 2 bi-monthlies and 3 annuals. The combined circulation of these 716 INS publications is 46 million. Of them 338 have circulation audited by ABC and these publications have a total circulation of 34 million copies'.

Table 1
Number of Publications and their Circulation

S.No.	Frequency	INA DATA		ABC DATA	
		No. of Members	Circulation (in million)	No. of Members	Circulation (in million)
1.	Dailies	394	22.2	172	17.3
2.	Bi-Weeklies	2	—	—	
3.	Weeklies	106	8.9	66	7.7
4.	Fortnightlies and Monthlies	209	11.8	100	9.2
5.	Annuals or Trade Publications	5	0.4	—	—
	Total	716	46.0	338	34.2

For the purpose of classification of publications following points are considered:

Publications are classified on the basis of their periodicity. Therefore, they can also be called periodicals.

- A daily, by definition, is a publication, which is published at least four times a week.
- Generally, all dailies are newspapers a publication primarily reporting news.
- A publication with news analysis, news features and other general interest material is called a magazine and invariably its periodicity is not daily.

Growth in Publications: If we analyze the available data (Table 2) of the past 10 years, we find that the number of publications grew by 57.7 per cent, from 23,616 publications in 1986 to 37,254 publications in 1995'.

Table 2 Number of Publications (1986-1995)

Year	Dailies	Tri/Biweeklies	Weeklies	Others	Total
1986	1978	119	7,147	14,372	23,616
1987,	2151	132	7,501	14,845	24,629
1988	2281	134	7,813	15,308	25,536
1989	2538	144	8,353	16,019	27,054
1990	2856	181	8,926	16,528	28,491
1991	3229	257	9,621	17,107	30,214
1992	3502	271	10,375	17,809	31,957
1993	3740	275	11,136	18,461	33,612
1994	4043	294	11,973	19,291	35,601
1995	4236	316	12,695	20,007	37,251

Source: Press in India - 1996 (New Delhi: Publications Division, Ministry of Information & Broadcasting, Government of India), 1996, p.17.

But, the total circulation of all publications did not grow at the same rate. On the basis of data available during the same period we find that the circulation grew only by 23.78 per cent, from 64,051 thousand (6.4 crores) in 1986 to 79,283 thousand (7.93 crores) copies in 1995, as shown in Table 3.

Table 3
Circulation of Publications During 19864995 ***(in thousands)***

Year	Dailies	Tri/Bi-Weeklies	Weeklies	Others	Total
1986	21587	262	18201	24001	64051
1987	22607	210	16527	17486	56830
1988	21563	177	16751	16382	54873
1989	23097	239	. 18293	16655	58284 ,
1990	22637	332	15229	14962	53160
1991	24290	206	15767	13622	53885
1992	28092	294	19184	16097	63667
1993	29258	230	21380	16743	67611
1994	31559	175	22595	17973	.72302
1995	35451	640	24770	18422	79283

Source: Press in India - 1996 (New Delhi: Publications Division, Ministry of Information and Broadcasting, Government of India), 1996, p.33.

It is interesting that the growth in the number of dailies was much more than the average of all publications (Table 4).

Table 4
Percentage Growth in All Publications during 1986 to 1995

	Number	Circulation
i) Dailies	114.2%	64.2%
ii) Tri/Bi-Weeklies and Weeklies	79%	37.6%
iii) Others	39.2%	-23.24%
Average of all Publications	57.7%	23.78%

During the period under review, the number of dailies grew by 114.2 per cent, from 1978 in 1986 to 4236 in 1995. Even the growth in circulation was higher than the average of all publications. The growth in circulation was 64.2 per cent, as the circulation of all dailies grew from 21587 thousand (2.1 crores) in 1986 to 35451 thousand (3.5 crores) in 1995.

In the case of weeklies the growth is comparatively less than in the case of dailies, but here also the same trends of growth of competition were observed. During the decade under review, the number of weeklies grew by 79 per cent per cent and their circulation by 37.6 per cent.

In the categories of other publications (fortnighlies, monthlies, etc.) the number grew by 39 per cent but the circulation fell by 23.24 per cent.

Language wise number of publications and their circulation: Contrary to common belief, the Hindi press is the largest in India and not the English press. This is what was revealed on the analysis of 1995 data. As high as 39 per cent of the total publication were in Hindi but their circulation was even larger 42.6 per cent). **In** the second position were the English language publications. It is interesting to note that in terms of circulation Malayalam was the third most popular press (8.9 per cent), although its share in the total number of publications was only 3.2.

The other striking feature of the Indian press was that only six regional languages (Bengali, Gujarati, Kannada, Malayalam, Marathi and Tamil), were constituting one fourth of the Indian press both in terms of their number (24.1 per cent) and circulation (26.4 per cent). The data clearly show that the print medium became more competitive with increased number of publications, each trying to gain a market share in a market growing at a slow rate of 2.4 per cent per year. It is also clear from the available data how the competition grew within the print medium and, due to the growth in literacy, the regional press grew and left the English language press far behind'. The details are given in Table 5.

Table 5
Publications and their Circulation (Number and Percentage Share) in 1995

Sr. No.	Language	Number of Publications	Publications Percentage	Circulation of Number	Publications Percentage
1.	Assamese	181	0.5	563	0.71
2.	Bengali	2,163	5.8	3,950	4.5
3.	English	5,712	15.3	10,751	13.6
4.	Gujarati	1,038	2.8	2,502	3.15
5.	Hindi	14,517	39.0	33,749	42.6
6.	Kannada	1,289	3.5	2,115	2.7
7.	Kashmiri	1	--		
8.	Konkani	5		3	
9.	Malayalam	1,192	3.2	7,034	8.9
10.	Manipuri	31	0.08	9	.01
11.	Marathi	1,691	4.5	3,077	3.88
12.	Nepali	50	0.13	10	.01
13.	Orriya	568	1.5	1,968	2.48
14.	Punjabi	749	2.0	2,232	2.8
15.	Sanskrit	48	0.13	4	
16.	Sindhi	92	0.24	93	0.12
17.	Tamil	1,611	4.3	2,744	3.46
18.	Telugu	873	2.3	3,161	3.99
19.	Urdu	2,458	6.6	4,113	5.12
20.	Others*	3,084	8.3	1,205	1.52
	Total	37,254	100	79.283	100

* Others include other languages, Bilingual and Multilingual publications.

Source: Adapted from "Press in India 1996" (New Delhi: Publications Division, Ministry of Information and Broadcasting, Government of India), 1996 pp. 19,34

3.2.2 Television

Television was started in India in September 1959 with just a few hours of black and white transmission from Delhi and its reach was restricted to a radius of a few kilometers. The main objectives for which television was introduced were education, information, development, science, agriculture and health. Then started the Mumbai centre in 1972 and gradually this medium started spreading into other areas. But till 1975 this medium was not available to an advertiser.

For advertisers this medium opened up in phases. It was only on the first of January 1976 that commercials were allowed on television by Doordarshan.

The second milestone in the growth of this medium was the introduction of a National Network on Doordarshan on August 15, 1982. As a result, the reach of Indian Media Scene television grew.

The third major development was the introduction of colour in 1982, which really put life into this medium.

The fourth milestone was July 7, 1984 when sponsored programmes were introduced'. With these policy changes by Doordarshan, television became commercially available to the. advertisers.

However, the reach of television was still restricted to select areas as the total number of transmitters was only 43. Between July and December 1984, this number increased to 168 (about four times) and a larger chunk of the population came under the cover of television.

Today, 38 years after of its inception, Doordarshan has becomes one of the largest broadcasting services in the world with over 781 transmitters and 41 production centres9. Doordarshan'3 National transmission (DD-I), which is an all India telecast, along with the metro service (DD-II) from 40 major cities, and 15 regional services, cover 86 per cent of the total population geographically and reaches 250 million people.

While the Government of India was making efforts to increase terrestrial transmission, transnational channels made an entry **in** 1991. The first to come was CNN **in** 1991, followed by ZEE in 1992. The number started increasing at such a rate that by the year-end there were 10 channels. In 1993 the reported number of channels was 15, which doubled by the end of 1994. In 1995 a total of 44 channels were available and by 1997 regional channels also grew. For details refer to Table 6 and Table 7.

Table 6
TV Channel Options

1990	**1991**	**1992**	**1993**	**1994**	**1995**
DD 1	DD-1	STAR PLUS	JAIN TV	RAJ TV	BITV
DD 2	DD-2 CNN	PRIME SPORTS PTV BBC ZEE TV CHINESE CHANNEL [V]	ATN . SUN TV ASIA NET UDAYA TV	DD4-DD14 JJ TV GEC GEMINI STAR MOVIES	YES DISCOVERY E-TV EL-TV SONY ESPN TNT DDCNN DD INDIA SUN MUSIC SUN MOVIE ZEE CINEMA
2 Channels	3 Channels	10 Channels	15 Channels	30 Channels	44 Channels

The result of this growth was that the channels were divided into two broad groups; terrestrial and satellite. Among satellite channels, the first ones such as Zee, Sun, Udaya, Eenadu, etc., continue to be front runners in the race for the viewer's attention. This increased number of channels resulted in the fragmentation of the audience and it is being . forecasted that this fragmentation seems to grow with the increase in channel availability.

Table 7
Television in 1997

DOORDARSHAN		SATELLITE	
National	**Regional**	**National**	**Regional**
D1	Ahmedabad	ABNI	Asianet
DD2	Bangalore	ATN	Eenadu
	Bhopal	BBC	Gemini
	Mumbai	Channel V	Raj
	Calcutta	CNN	Sun Movies
	Delhi	Discovery	Sun Music
	Guwahati	EL TV	Sun TV
	Jaipur	ESPN	Udaya
	Jalandhar	Home TV	Vijaya
	Lucknow	M TV	YES
	Chennai	NEPC	
	Patna	Prime Sports	
	rinagar	Sony	
	Trivandrum	Star Movies	
		Star Plus	
		TVI	
		Zee Cinema	
		Zee Music	
		Zee TV	

In fact, satellite television has divided the universe of television households into two broad groups. First, there are television homes having access to terrestrial channels, namely DD-I, DD Metro and DD Regional. Secondly, there are, TV homes with a cable and satellite connection having access to the terrestrial channels and a host of satellite channels.
The other impact of this growth in satellite channel, were two, namely, increase in TV viewing time, and audience specific channels/programmes. The introduction of commercial breaks within programmes was yet another development. As a result, advertising on television became much more effective[10].

3.2.3 Radio

All India Radio is wholly owned and controlled by the Government of India.. With 105 broadcasting centres,-transmitting entertainment programmes along side business, current affairs, educational programmes, news, sports and film based programmes in 170 languages and dialects, it has been able to reach out to everybody. The coverage of radio in India is 89.7 per cent by area and 97.1 per cent by population. The total estimated number of radio households in India is 104 million. Its penetration is highest amongst all the media, as it has 81 per cent penetration in urban households and 68 per cent in rural households. It is estimated that the total number of radio sets in India is about 111 million".

From the advertising point of view this medium became available in 1967 when the first Vividh Bharti station started. Today, there are 30 Vividh Bharti centres and 61 primary channels. In 1994, FM channel was introduced and today there are five FM centres broadcasting in India.

3.2.4 Cinema

The growth of television perhaps affected cinema most. The total number of theaters in India is 13,042 out of which 8,692 are permanent, 4,337 are touring and 13 are owned by the military[12]. **It is** interesting that more than 50 per cent of the total cinema houses are Iocated in the four states of South India (Andhra Pradesh, Karnataka, Kerala and Tamil Nadu). Although the home viewing of films on television led to a decline in this medium, but the distribution of foreign films, language dubbing of foreign films and improved technology gave it a re-incarnation.

3.2.5 Outdoor

Today, advertising agency have started specialized units or subsidiaries to buy rights for outdoor to advertise the brands of their clients.

Outdoor advertising has both conventional and innovative forms. The conventional form includes: billboards, bus panels, bus shelters and full buses, balloons, closed circuit TV at various places, dealer boards, digital boards (multivision/motionless), glow signs, glow cubes, kiosks etc. Its innovative use can be" seen in mobile vans, neon signs, postal stationery, sea sites, floaters, and video matrix display.

Outdoor advertising is becoming an increasingly important ingredient of the media mix. With new technology it is now able to enhance display quality. The other factor, which 26 contributed to its growth, is its low cost.

Activity 1

Identify the various publications/TV Channels which are targetted at youth and house-wives:

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3.3 EXPENDITURE ON ADVERTISING

On analyzing the available data of the past five years, an interesting trend was noticed (Table 8). During these years, the total advertising expenditure grew from Rupees 1,700 crores to Rupees 4,600 crores, a 270 per cent growth. Television's share grew from 18 per cent to 26.4 per cent, while the press was a loser, coming down from 68 per cent in 1991 to 61 per cent in 1995[13].

Advertising expenditure on cinema also declined from 2 per cent to 0.5 per cent and the others, i.e., radio and outdoor advertising, maintained their position.

Table 8

Advertising Expenditure by Medium: 1991-95

Year	TV	Radio	Press	Cinema	Outdoor	Total
1991	306(18)	51(3)	1156(68)	34(2)	153(9)	1770(100)
1992	420(20)	63(3)	1386(66)	46(2.2)	189(9)	2104(100)
1993	560(20)	84(3)	1820(64.7)	30(1.0)	320(11.3)	2814(100)
1994	750(21.4)	110(3.1)	2255(64.4)	25(07)	360(10.3)	3500(100)
1995	1215(26.4)	136(2.9)	2815(61.2)	24(0.5)	410(8.9)	4600(100)

Source. ORG

Top Spenders on Advertising: The details of top 20 spenders on advertising during 1994-95 are given in table 9. The table reveals that consumer goods companies and liquor firms spent a higher percentage of their sales revenue on advertising compared to large industrial firms like, Reliance Industries[14]. The average ad spending of firms during 1994-95 went up by about 30 per cent as compared to the previous year. Looking at the trend, the ad expenditure in India may grow to Rupees 10,000 crores by the turn of the century [15].

Table 9
Top 20 Spenders on Advertising (during 1994-95)

Sr. No.	Firms	Ad spend (Rs. in crores)	Sales	Ad spend % of sales
1.	Hindustan Lever	109.81	3,240.39	3.39
2.	ITC	107.67	4,558.16	2.36
3.	Videocon	70.06	1,117.98	' 6.27
4.	Brooke Bond-Lipton	60.68	1,879.61	3.23
5.	Colgate-Palmolive	57.91	682.19	9.49
6.	McDowell & *Co.*	41.92	864.80.	4.85
7.	Nestle	37.76	712.16	5.30
8.	Philips	36.36	1,213.80	3.02
9.	Indexport	33.97	190.74	17.81
10.	Godfrey Philips	33.89	752.34	4.50
11.	Herbertson	30.16	192.52	15.67
12.	Procter & Gamble	29.54	273.55	10.80
13.	*Bajaj* Auto	29.08	2,149.30	1.35
14.	BPL	28.54	837.59	3,41
15.	Reliance Ind.	27.39	7,019.05	0.39
16.	Dabur	25.92	405.58	6.39
17.	MRF	22.64	1,140.25	1.99
18.	Titan Industries	20.22	280.34	7.21
19.	Tata Tea	19.85	399.12	4.97
20.	Britannia Ind.	17.12	565.58	3.03

3.4 REACH OF MASS MEDIA

To know the reach of the various mass media, an extensive reference has been made to secondary information sources. In this section data collected from two major syndicated studies NRS-95 and IRS-95 are presented to identify the extent of the reach of the mass media. The National Readership Survey (NRS-95)'[6] has concentrated data on urban areas while the Indian Readership Survey (IRS-95)" covers both rural urban India. It is because of their sample size and the detailing of data that they are 'rated as two massive exercises providing critical data on media habits and reach among Indian consumers'".

The IRS covers the whole of India except the states of Jammu and Kashmir and offshore islands. The sample size of IRS 95 was the world's largest, 1,65,640. The rural sample size was 51,265. The IRS 95 does not report on unconventional media. This should not be taken to mean that unconventional. media are not potent.

The National Readership Survey 1995 (NRS 95) covered all of urban India except the offshore territories and the states of Jammu and Kashmir and Himachal Pradesh. A total of 345 towns, out of a total of 3,696 were covered by the NRS and a total of 431 publications with 628 distinct editions were surveyed. The NRS surveyed all urban dwellers above and including the age of 15 years. For the purpose of socio-economic classification, monthly household income was taken as the bases. Accordingly, they were labeled as SEC A, SEC B, etc., where Socio-Economic Class (SEC), A or Al represented households with a monthly income in excess of Rupees 10,000.
The information available from the IRS 95 and NRS 95 reports has been summarized in the following pages to develop a clearer picture of the reach of the mass media, both in urban and rural India.

3.5 MEDIA EXPOSURE

The average urban Indian spends almost 14 hours a week with various kinds of media. There may be some overlaps among media, especially in regard to radio. A good amount of this time (60 per cent) is spent watching television.

Television is the leading medium when it comes to exposures. This is true both across segments and zones. The details are given in table 10.

Table 10
Exposure to Mass Media (All India)

			ALL ADULTS		
Media	**North**	**East**	**West**	**South**	**All India**
Press	42	41	51	48	46
TV	73	70	79	73	74
Radio	30	40	35	54	40
Cinema	21	30	29	52	33

Exposure to the press shows a major improvement in SEC A&B. Other media also show an increased exposure except cinema which remains the same across the socio-economic classes (Table 11).

Women are less exposed to the press than men. Exposure to television is the same for both genders. Exposure to cinema is also lower among women.

The major pattern breaker is the South zone, with higher exposures to cinema and radio. This pattern holds for SEC A&B and women sub-segments also. The other significant deviation is the very low exposure to cinema among women in North India.

Table 11
Exposure to Mass Media in See A&B

			SEC A & B		
Media	**North**	**East**	**West**	**South**	**All India**
Press	72	73	79	78	75
TV	91	90	89	91	90
Radio	41	44	41	57	45
Cinema	24	29	32	51	33

Table 12
Exposure of Mass Media Among Women

			SEC A & B		
Media	**North**	**East**	**West**	**South**	**All India**
Press	30	27	37	34	33
TV	75	70	79	73	75
Radio	25	35	31	50	36
Cinema	10	19	18	40	23

3.5.1 TV Penetration

Penetration of television in households and the penetration of various terrestrial and satellite channels in TV households is presented in the following four tables (Table 13 to 16). These data have been displayed at the state level rather than the zone level due to language channels and significant variations across states.

The penetration of the Doordarshan satellite channel is higher than the penetration of cable and satellite. This could be due to confusion between satellite and terrestrial (DD1) channels and lack of adequate field control (The date are for "access" rather than viewership).

Table 13
Penetration of TV in North Zone

	Delhi	Uttar Pradesh	Rajasthan	Himachal Pradesh/Chandigarh
Total HHs (`000)	2027	4786	1895	2198
TV HHs	85	58	65	75
C&S HHs	26	25	31.	39
DD1	100	100	100	100
DD2	100	33	37	30
Cable	23	15	14	24
Star Plus	24	18	22	24
Prime Sports	21	13	20	20
Channel V	18	10	14	19
BBC	22	12	20	19
Star Movies 11	5	9	6	
Zee TV	25	24	30	26
EL TV	15	13	13	16
ATN	23	22	26	25

Table 14
Penetration of TV in East Zone

	West Bengal	Orissa	Bihar	North East/Arunachal
Total HHs ('000)	3989	919	1936	1089
TV HHs	53	49	49	57
C&S HHs	20	30	27	22
DD 1	100	100	100	99
DD2	81	48	17	18
Cable	7	8	13	10
Star Plus	10	24	21	19
Prime Sports	8	17	16	18
Channel V	7	16	16	18
BBC	8	18	17	18
Star Movies	5	2	1	6
Zee TV	10	28	25	20
EL-TV	6	15 .	15	12
ATN	9	23	23	12
DD7 (Bengali)	7	0	0	1
Bangladesh	10	0	0	0
DD6 (Oriya)	0	32	0	0

Table 15

Penetration of TV in South Zone

	Andhra Pradesh	Tamil Nadu	Karnataka	Kerala
Total HHs (000)	3618	4671	2928	1580
TV HHs	51	52	60	41
C&S HHs	32	39	37	14
DD 1	100	100	100	100
DD2	22	43	40	21
Cable	25	19	27	4
Star Plus	27	32	34	12
Prime Sports	23	24	29	11
Channel V	20	14	24	9
BBC	25	26	29	12
Star Movies	16	9	12	5
Zee TV	29	13	35	8

EL TV	7	2	5	2
ATN	24	23	28	6
Sun TV	5	38	24	10
Udaya TV	1	2	23'	2
Raj TV	1	37	9	6
Asianet	1	21	7	11
Gemini TV	1	1	1	0
DDS (Tamil)	0	16	1	3
DD8 (Telugu)	97	0	2	0
DD9 (Malayalam)	0	0	1	98
DD9 (Kannada)	0	0	91	0
GEC TV	0	14	0	.
JJAYTV	0	22	0	0

Table 16

Indian Media Scene Penetration of TV in West Zone

	Maharashtra	**Gujarat**	**Madhya Pradesh**
Total HHs ('000)	6979	3140	3100
TV HHs	68	61	70
C&S HHs	36	66	43
DD 1	100	99	100
DD2	54	51	23
Cable	28	56	17
Star Plus	31	61	33
Prime Sports	28	52	21
Channel V	26	47	18
BBC	28	50	20
Star Movies	21	12	6
Zee TV	34	65	42
EL TV	22	37	20
ATN	32	61	35

3.5.2 Readership and Leading Publications

The exposure to the print medium and readership information has been presented in tables 17 and 18. The first table is at the all India level and the second is specifically on SEC A&B.

All the information has been presented for six possible target audiences. At the first level we have all adults, men and women. Secondly we have the same demographics but restricted to the upper socio-economic groupings of A and 13 categories.

At the all India level, the information presented is for exposure to the print medium. This includes exposure to dailies, magazines and also to various types of magazines, like general interest, sports, business, etc.

We have presented readership data for leading publications in each of the six audience groupings. For each group, a leading daily and magazine, from English and the relevant Indian language, has been selected.

Table 17
Exposure to all Types of Publications (ALL INDIA)

Absolute/Percentage

			ALL ADULTS			
Total (°000)		**%**	**Men ('000)**	**%**	**Women**	**%**
Population	161781	100	86170	100	75611	10
Exposure to Press Exposure	74457	46	50109	58	24348	32
Any Publication	74457	100	50109	100	24348	10
Any Daily	63846	86	45421	91	18425	76
Any Magazine	49496	66	31983	64	17513	72
Any Gen. Interest Magazine	30629	41	20570	41	10059	41
Any Sports Magazine	3504	5	3121	6	383	2
Any Bus./Fin. Magazine	1865	3	1523	3	342	1
Any Women Magazine	17678	24	9419	19	8259	34
Any Ent. /Film Magazine	14760	20	10266	20	4494	18
Any Health Magazine	2652	4	1828	4	824	3
Any Children/ Youth Mag.	11995	16	7586	15	4409	18
Any General Know.	6899	9	5329	11	1570	6
Any Sunday Editions	14559	20	10425	21	4134	17
Any special Intt. Magazine	928	1	685	1	243	1

Table 18
Exposure to all Types of Publication in Socio-Economic Class A&B

Total ('000)		**%**	**Men ('000)**	**%**	**Women (`000)**	**%**
Population	44900	100	24234	100	20666	10
Exposure to Press Exposure	33856	75	20982	87	12874	62
Any Publication	33856	100	20982	100	12874	10
Any Daily	30097	89	19567	93	10530	82
Any Magazine	24932	74	15386	73	9546	74
Any General Interest	16362	48	10636	51	5726	44
Any Sports Magazine	1870	6	1634	8	236	2
Any Bus./Fin. Magazine	1492	4	1204	6	288	2
Any Women Magazine	9943	29	4987	24	4956	39
Any Ent. /Film Magazine	7256	21	4814	23	2442	19
Any Health Magazine	1823	5	1213	6	610	5
Any Children/ Youth	5572	16	3435	16	2137	17
Any General Know.	4606	14	3510	17	1096	9
Any Sunday Editions	8230	24	5633	27	2597	20
Any special Intt. Magazine	578	2	429	2	149	1

- All figures are based on average issue readership
- Base for "Exposure to Press" percentage is population
- Base for all other exposure / readership percentage is "Any Publication" readership

3.6 RURAL MEDIA SCENE

The North and West Zones have a higher percentage of farmers than the all-India percentage. The South Zone has a high percentage of labourers and the North the lowest. In Kerala, the percentage of farmers is only 3 per cent and that of these "not working", 67 per cent. The percentage of farmers is lower than the percentage of labourers in all areas except the West where they are equal.

If we look at the population dispersion according to the population strata, then we notice that the South zone has a very high percentage of rural people living in villages with a population strata greater than 5,000. All other zones have a lower percentage of people living in villages with a population greater than 5,000 than the all-India percentage. In the North, East and West zones the percentages of people living in the population centres below 1,000 is on the higher side. Kerala has the highest percentage of people living in villages with a population greater than 5,000, whereas Himachal Pradesh has no village with a population greater than 5,000.

While deciding the media options in order to reach rural areas, media performance needs to be considered. Where TV exposure is high, radio exposure is low. For example, in the North and the West the difference between the exposure levels of TV and radio is high, whereas in the South the difference is relatively small. Only in the East is the exposure to radio higher than the exposure to TV (though marginally).

Table 19
Percentage of Population exposed to Media

PRIVATE	All India	North	South	East	West
Press	27	27	31	27	27
T.V.	66	78	57	78	56
Radio	43	28	49	57	33
Cinema	27	9	50	17	16
Video	15	17	9	24	1.0
Any Media	46	36	71	39	49
Total (`000)	**448606**	**125272**	**104955**	**126881**	**9149**

- Any medium as the percentage of total population
- Other date as the percentage of any medium

TV undoubtedly is the single medium, which has a high exposure level in all the zones. Its exposure levels are relatively higher in the North and West. This may be due to the fact that most of the programmes are in Hindi.

Interestingly, the National Network alone has a very high penetration level ranging between 98 per cent and 100 per cent in all the areas viz., North, South, East and West. Other channels like Metro (10 per cent), etc. have a very low penetration level. Moreover farmers and "not working" categories have a high viewership compared to the other categories of the rural audience.

The print medium is the most important option for communication. The print medium has been receiving a major chunk of the media spend. It has a high exposure level in urban areas but its exposure level in rural areas is low. Its low exposure levels in rural areas can be attributed to low literacy rate, language barriers, etc.

The exposure to the print medium is relatively low as compared to TV or radio exposures. Only 13% of the rural population is exposed to any publication. Only the South has a high level of exposure. This is due to the high literacy rate in the South, especially in Kerala. On an all-India basis, exposure to "any Hindi publication" is the highest. This is mainly due to very high exposure of' any Hindi publication in the North.

Table 20
Exposure to Any Publication

Publications	All India	North	South	East	West
Any English	7	9	9	9	4
Any Hindi	31	92	Ng	34	31
Any Bengali	6	0	0	32	0

Any Oriya	2	0	0	12	0
Any Tamil	11	0	30	0	0
Any Telugu	6	0	17	0	0
Any Kannada	5	0	13	0	0
Any Malayalam	15	0	41	0	0
Any Marathi	7	0	Ng	0	54
Any Gujarati	4	0	0,	0	22
Any Publication	13	10	21	8	13
Total ('000)	448606	125272	104955	126881	91498

- Any medium as a percentage of total population
- Other date as the percentage of any medium
- Ng = Negligible

Individual states cannot be dealt with at the same time with some common publications. A publication in Andhra Pradesh would have a very low or a zero readership in Tamil Nadu. But in the Northern states, two or more states can be targeted at the same time with some common publications, e.g., Punjab Kesari has a readership of 58 per cent in Haryana and Chandigarh, 51 per cent in Himachal Pradesh and 20 per cent in Punjab. This is due to the common language, Hindi. Other hindi publications also play an important role.

Radio has an all India exposure level of 43 per cent. Among the available radio channels the Primary channel has the hightest listenership on an all India basis. Vividh Bharati also has a high listenership. Only in the North is the listenership of the Primary channel low. The South has the highest listeners hip of the Primary channel. In the North alone the listenership of Vividh Bharti is higher than of Primary channel. The Sri Lanka Broadcasting Corporation has a presence in the listnership with the highest listenership in the South.

Table 21
Radio Listenership

	All India	**North**	**South**	**East**	**West**
Vividh Bharti	64	79	51	78	64
Primary Channel	77	34	92	84	72
Sri Lanka B.C.	8	4	19	4	.1
Any Radio	21	10	35	23	16
Total ('000)	448606	125272	104955	126881	91498

All radio as a percentage of total population
Other date as a percentage of any radio

Radio has been an effective medium for reaching the rural areas. Orissa and Karnataka have a high listnership of the Primary channel (98 per cent). In the North, Punjab has the highest listenership of the Primary channel (95 per cent). Vividh Bharti has a listenership of 93 percent in Bihar and 90 per cent in Gujarat.

Another media option is cinema. The popularity of film stars in South India is reflected in the high exposure levels and the high cinema going habit in the South.

Table 22
Cinema Going Habits

PRIVATE	All **India**	North	**South**	**East**	**West**
Go to Cinema	13	3	35	7	8
Don't Go	87	97	65	93	92

- All figures as percentage of total population
- Cinemagoer is defined as a person who goes to cinema at least once a month

The lowest cinema going percentage is in the North. Himachal Pradesh has only 1 per cent of the population as cinemagoers, whereas in Madhya Pradesh it is 4 per cent and in Gujarat 6 per cent. In the South, Andhra Pradesh has the highest cinemagoing' percentage of 43 per cent, Tamil Nadu has 36 per cent, Karnataka 31 per cent, Kerala 23 per cent.

Last but not the least, Video is an option worth mentioning. It may not have very impressive figures to justify its usage, but taking it for its qualitative factors may justify its usage. Video exposure is the lowest in the South zone and highest in the East. West Bengal has the highest percentage exposed to video (32 per cent). The qualitative factor, which support its use is that there is great curiosity about video in rural areas, hence its viewership is "active" and has low cost also.

Activity 2

Visit a rural area **and identify** the type **of media vehicles** available to reach out to various . segments like, children, house-wives, **Young** Adults, **Senior** Citizens, etc.

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3.7 SUMMARY

The media scene in India has undergone changes and is, in fact, changing overtime. On the one hand new form of media are emerging, having repercussions on others, and, on the other hand, media habits of consumers are also showing changing trends.

Post-independence development of media have been seen to be slow. For twenty five years after independence, the growth of media such as print, cinema and radio followed the predictable normal pattern.

The pressures of urbanization, development in technology, growth in literacy rate did not significantly, affect the media. In this scenario where intra or inter media competition virtually did not exists.

It was only around the early seventies that one witnessed changes in the media scene. Induced by technological advances which facilitated sophistication both in print and electronic media expanded its reach and provided multiple options to the audience.

Introduction of colour among print titles, expansion of the TV network, establishing of TV network, establishment of radio commercial channel, made life more entertaining for a vast majority of the urbanites.

For the first time the audience were getting segmented by the newly introduced titles, new markets were opening up and large number of people were coming under media exposure.

Another interesting fact of this period was the development of novel relationships between audience and media, between housewives and television, between youth and gossipy titles, between women and Vividh Bharati, between urban youth and FM radio channel, etc. In addition, sponsored programmes became a regular feature on television.

These developments, along with the emergence of home video viewing facilities and cable network changed the social matrix. Habits of visiting cinema and reading magazines became apparent casualties during the early ninties. Easy access of filmy entertainment .through video and cable viewing significantly affected the composition of the cinema audience. Television, in fact, became an obsession with the vast majority, and the television audience, due to multiplicity of channels and programmes got fragmented into specific segments like children, women and the hitherto unreached rural affluent class.

The other major trend was the growth in the exposure levels. In the early seventies if the exposure of the urban adults to any mass media was around 30 per cent, the exposure levels crossed 80 per cent by ninties, can be seen from the table 3.27 on summary of the statewise media exposures. Similarly, the exposure levels of the rural affluents grew from 10 per cent to more than 40 per cent. he details.

In the early ninties, growing access to modern technology and emergence of new contours of market, prompted publications to add editions; specialized print titles, both in English and in other Indian languages. Similarly, the growth in satellite channels and cable networks introduced new elements of competition that the audience got fragmented due to a vast variety in audience specific programme.

These trends of growth created a clutter in the mass media as a result of which the advertisers started identifying innovative media and methods to reach out to their audiences.

Such a competitive environment, characterized by growing number of communication services organizations, multiplicity of brands, fragmented audiences, multiple channels and programmes, specialized publications, introduction of innovative media, created a compulsive need for the advertisers to adopt a strategic approach.

3.8 SELF ASSESSMENT QUESTIONS

1. What major changes have taken place in the Indian Media Scene, during the past decade?

2 It is being said that growth in Mass Media made it possible for the marketers, to target their products to newer segments like house-wives and children. Comment.

3. Write a brief on your understanding of the rural media scene.

3.9 FURTHER READINGS

You may select some of the titles mentioned under `References` for further readings.

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