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Audience Measurement in the 'Dual Economies'

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AUDIENCE MEASUREMENT IN THE 'DUAL ECONOMIES' OF POOR COUNTRIES[1]

Globalisation of 'professional' culture raises new issues and opportunities: A case study from Pakistan

Ijaz Gilani
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INTRODUCTION

The paper introduces the "duality of economies" prevailing in developing countries such as Pakistan, and the general implication for advertising and media research. The co-existence of two management cultures and modernity amidst poverty creates opportunities for the emergence of certain services yet also creates tensions for service providers as they exist in poverty but service a management socialised to work at much higher levels of prosperity. The focus becomes sharper when it comes to providing a modem television audience measurement service for the advertising and media community in Pakistan. The paper focuses on a case study on the development of this service, and the "ground realities" in setting up this service in Pakistan. By the application of practical methodologies, the paper shows three critically important areas for enhancing the chances of success: educating stakeholders through effective marketing; harmonisation of the measurement panel through testing; and acceptability of the service through equitability and accreditation.

MEDIA RESEARCH IN A DUAL ECONOMY

There are several reasons why we characterize Pakistan as a dual economy. We can name at least seven of them:

1. State of the art high tech coexists with extremely primitive technology. The country is fairly advanced in rocket science or missile technology, but bullock-carts are abundant at the same time in rural and even many urban areas.

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[1] Gilani, Ijaz Shafi, and Mansoor Khan. "Audience Measurement in the 'Dual Economies' of Poor Countries: Globalisation of 'Professional' Culture Raises New Issues and Opportunities: A Case Study from Pakistan." In Excellence in International Research 2003, ed. Deborah S. Fellows, pp.317-37. Amsterdam, Netherlands: ESOMAR, 2003. Selected for publications in 2007 by Wiley Press, in a series publishing Best Papers presented in 10 years.

2. A small segment of the market consumes world-class branded products in garments, toiletries and household gadgets. However a large section of the population consumes homemade items, unpacked, unprocessed and on occasions exchanged in a barter market.

3. A few corporate-owned large organisations with modem management run alongside hundreds of thousands of micro-enterprises that are owned by individuals and operated out of their personal residence. A few large organisations in the private sector employ 20,000 or more persons, whereas the majority of enterprises operate on an average of less than five persons including family members. (FBS, 1999).

4. The country is a significant exporter of professional manpower such as doctors, engineers, and IT specialists and has educational institutions that train them. However a little over half the population is completely illiterate. Less than 1% of the adult population is qualified from a university. (Census, 1998).

5. The country can boast having an advanced fibre optic based telecom structure. It has been fairly fast in introducing fax machines, computers, Internet cyber-cafes and cable TV in both urban and increasingly rural areas. However one-third of rural households do not have electricity so far, and more than 50% do not have a latrine and use open fields for faeces (Gallup a and b, 2001).

6. The country has attracted large international names (or inherited them from the British colonial period) such as Unilever, Shell, Proctor and Gamble, Colgate, Nestle, Coca-Cola, Pepsi and many others in consumer products. It has attracted major international banks as well as fast food chains. However annual direct foreign investment remains under half a billion dollars; exports have unsuccessfully struggled to reach ten billion dollars and total advertising expenditures in electronic and print media is so far around 100 million dollars. (Aurora, 2001).

7. While two out of three Pakistanis live in small villages and rural areas, one in five homes have at least one person who has travelled or worked abroad. The lifestyle thus combines extremely local features with a touch of globalisation. (Galiup, 2000). Alongside low levels of foreign investment and exports, globalisation is very apparent in the field of advertising where all of the top ten advertising agencies are now affiliated with global giants in their field.

IMPACT OF THE DUAL ECONOMY ON ADVERTISING AND MEDIA

In an attempt to introduce Pakistan from a macro perspective, we ask a relevant question - how does a dual economy affect advertising and media? As a result of its sheer size (140 million people), modem and global economic trends have made inroads into the country. However a majority of the population is either excluded from it or its participation is very fragile and peripheral in quantitative terms.

To illustrate the point, global soft drinks have successfully penetrated the entire country but per capita consumption is tiny; Nestle has introduced a wide range of its food items, but the total turnover from them may be a few million dollars. Haifa dozen food and personal care global giants control two-thirds of the entire television advertising. But all of them taken together contribute barely 30 million dollars a year to this activity.

Since TV advertising is so heavily dominated by global players, their management expects globally recognized tools of operation. This is one important reason as to why despite low levels of foreign participation in investment, manufacturing or trading in the country, the advertising sector has already gone global in a big way. It is from there that we receive the big push for providing television ratings and advertising expenditure research that meets international standards. The inherent duality in the economic environment creates many tensions:

The global marketing companies are increasingly penetrating the entire country, urban as well as rural. Thus they can no longer focus on a small geographical core. The peripheries present the opportunity, and yet, the business generated from them is small in dollar terms.

Advertising has to expand into new markets for realising their promise. Expensive state of the art *(international standard)* research is to be carried out and it is mostly relevant if its locus of operation is beyond the traditional narrow geographical core. Thus, it finally boils down to two difficult issues:

Money for advertising and advertising research has to come from a *narrow revenue base for a vast geographic and demographic mass.* An interesting duality!

Modem and expensive research is to be carried out on international standards for a market which is so diverse that some of its members enjoy housing which is comparable if not superior to their European counterparts and at the other end 30% of

urban TV viewers live in a one-room house which serves as bedroom, living room, kitchen and TV lounge all combined into one. (Census, 1998).

The house is electrified but sockets are makeshift. It may even have a phone that is shared between several complex users of an extended family and may often be out of order because of unpaid bills. It has a TV, possibly a cable connection. But everything is tenuous.

Fragile living conditions rest on a balance that every now and then falls apart. This happens when a new guest arrives and decides to stay for a few days, or events such as a wedding, a funeral or birth of a child in the extended family for which this may be the only available living quarter.

This is not to forget that such fragile and miserable customers may at the end of the day be generating more revenue for the products being sold by leading advertisers compared to the upscale consumers. This could be true for tea, soaps, detergents, dental care and many other leading advertisers.

It is in such exciting and tension ridden, paradox laden conditions that brand managers seek advertising budgets that might stretch the limits of what is merited by their revenues. They may find themselves handicapped without providing state of the art research to their global and regional bosses but still wish to commission it at local miserly amounts.

They may receive an excited interest in the peculiarities of local living conditions but fail to convince or receive much attention when it comes to spending resources on how to reconcile local oddities and global standards. The struggle for a researcher in a dual economy is both financial and intellectual, that is to address difficult and complex research issues that outweigh the complexities at an economically prosperous environment with financial resources that are minuscule in comparison.

Having introduced Pakistan in the topical context of this paper, a case study now follows of how we initiated and started the process of devising and implementing suitable strategies, so that a viable and modem peoplemeter based television audience measurement service could be established in Pakistan - a developing country with its own hard-core set of unique idiosyncrasies (like most countries), coupled with the duality of its economy.

NEW MEASUREMENT TECHNIQUES INTRODUCED THROUGH EDUCATION, NOT BY DICTATING TO THE MARKET

Innovate: To change a thing into something new; to alter, to renew, to bring in something new for the first time; to introduce as new.

Innovation: The action of innovating; the introduction of novelties; the alteration of what is established by the introduction of new elements or form. A change made in the nature or fashion of anything; something newly introduced; a novel practice or method etc. (Oxford English Dictionary)

Innovation is defined as developing and delivering products or services that offer benefits which customers perceive as new and superior. The need for innovation arises due to environmental changes plus the changing needs of the customer or simply because it offers better answers to the present needs through its revamped appearance or a new product altogether.

But why innovate? Today in this ever-changing world, the pressures are far greater than ever to innovate. In our case, the changes in technology and living standards create new needs, which in turn puts pressure on research companies to constantly update or re-design their measurement products.

The last decade has witnessed dramatic changes in the business environment, but acutely more so in the 'business jungles' of the developing countries, some of the relevant changes being:

❍ rapid and radical technical developments in computers, telecommunications, and information sciences, particularly the explosive growth in the diffusion and impact of television and multi-channel broadcasting, cable and satellite reception, and of course, how can we not forget to include the Internet and Intranets;

❍ globalisation of business, including increased international competition and the emergence of regional and global customers and resource markets

❍ changing demographics, values, expectations, and behaviour of the population;

❍ increased government and public scrutiny of business decisions, with greater focus on the ethical dimensions of these decisions

The cumulative impact of these changes and their implications on media research has brought opportunities, challenges and problems for the industry. The media research

community is very much on the sharp end of these changes. As fragmentation makes its task harder, the research contracts and budgets are becoming tighter, but the expectation and demand of clients is for ever-more sophisticated data and reassurance that measurement techniques are available that can meet these challenges.

Fuelled by this notion and through the frequentative need for innovation, eventually the peoplemeter - the 'de facto standard' methodology for measuring television audiences worldwide - came to be developed and now used. It is for the same reasons now required in Pakistan and other such comparable countries that have reached a threshold and need to transition from using diaries to peoplemeter based technology.

So what is the issue? Technology by itself is rarely a solution. The innovation field is full of new examples of new products that employed exotic technology but failed to achieve customer acceptance or satisfaction, e.g. in the early years of videocassette recorders, JVC's VHS video format 'killed' off the technically far superior Sony's Betamax format.

In examining the failure of technologically sophisticated products, one of the major reasons seems to be the pioneer's failure to recognise the importance of the *sociotechnological context of the innovation. People do not buy technology; they buy products and services that deliver specific benefits and solve certain problems:* an important point that media research service providers might wish to take heed of.

Technology is the facilitator that enables the development of the products and services and helps shape customer's needs and wants. Therefore, understanding the socio-economic and cultural context in which the technology will be used is critical to the design of effective new products and services.

Following the same vein of discourse, from our experience and knowledge of Pakistan *(readers may wish to draw parallels with other similar countries if they so desire),* there appears a tendency to be 'myopic' in truly knowing the benefits or limitations of new products or services. The reasons can be numerous, but some of the obvious reasons that stand out are the following *(this is by no means an exhaustive list)*:

❍ very high levels of illiteracy;
❍ lack of quality education and proper training;
❍ limited financial resources;
❍ 'blind' product/brand/service loyalty - usually a result of tradition and hearsay;
❍ language, cultural and religious limitations or prohibitions.

For media research service providers who intend bringing in new technology- based measurement techniques (like peoplemeters), the implications in not recognising or addressing these concerns upfront could severely compromise the whole service.

From the authors' own experiences whilst interacting with the market, there manifested a general lack of true appreciation in terms of the 'real" benefits and the 'limitations' of peoplemeters. On many occasions, market feedback contained ludicrous preconceived misconceptions like "peoplemeters have microphones and cameras inside them". Televisions are one of the most valued and treasured possessions in Pakistani homes. Rumours were rampant that television sets would need to be completely taken apart, modified, and many electric cables would sprouting from the back: all these preconceived notions had to be dispelled, and quickly.

The culmination of what has been discussed until now clearly points to the fundamental and imperative need for developing an effective marketing communication strategy and pro grain me. This needs to be begun at the earliest practicable moment, as delaying this may defeat the whole purpose and the objective in mind.

Identifying the target audience *(stakeholders)*, and their relevant! importance is the first step. We intend to do this by using and adapting to our needs the *stakeholder mapping* model, and in particular the *power/interest matrix* method as shown in figure I. This classifies stakeholders in relation lo the power they hold and the extent to which they are likely to show interest in the organisation's strategies. This map clearly shows that the marketing communication needs to target essentially two groups, the *key player' (primary)* should be given key consideration, and the *keep satisfied (secondary)*, in general are relatively passive but often can also prove to be the most difficult.

Figure 1
WHO ARE THE STAKEHOLDERS?

	Low Level of Interest High	
Low	**Minimal Effort** Government & Utilities Depts.	**Keep Informed** - Academics - Shareholders - Other Research
Power **High**	**Keep Satisfied** Panel Members (Respondents)	**Key Players** - Broadcasters - Advertisers - Advert Agencies - Progrm. Makers

Adapted from A. Mendelow, 1991

Next, the need to communicate, educate and influence the following people in each of our target groups will need to be initiated. First the primary group *(media and advertisers)* will need to be approached. The secondary group *(panellists)* should be targeted later, usually at time of recruitment, and again at the time of peoplemeter installations, and then by regular intervals thereafter.

If one is to significantly influence key players, it is important to not only build contacts with individuals but also to maintain them. Hence this should be considered when planning suitable communication tools, as part of the marketing communication mix.

The authors recommend from their own experiences the following marketing communication mixes that have proven to be highly effective:

❍ *Direct visits (media and advertisers).* According to Knect's five phases of integrated marketing communication, "phase 4 involves optimal integration of elements of the marketing mix, the most vital component is personal selling, although price and distribution are also important" (Knect, 1989). Personally approaching the key people in the primary group and introducing yourself and the technology can pay significant dividends, e.g. lowering mistrust, people relate better to the faces in front of the products, first hand and prompt removal of any preconceived doubts or concerns people may have, etc.

❍ *Direct mail* - a flexible method allowing a range of messages to be delivered to the target audience.

❍ *Newsletters and/or cyberletters* - as part of the marketing mix, newsletters especially targeted at panel members offer a cost-effective method to motivate, provide relevant and up-to-date information, quizzes and competitions, and importantly a mechanism to re-educate and remind the panellists of their 'own' responsibilities'. In Pakistan, an initiative was taken to target the primary group by cyberletters (monthly Internet delivered and posted newsletter). This method proved to be very popular and successful by keeping key players posted on topical issues and on general media research-related developments and trends. There was such appeal that many in the industry considered this to be 'groundbreaking'.

❍ *Seminars, workshops, informal get-togethers.* Periodic face-to-face contact is one of the most effective ways to get your message across. To maximise this opportunity, seminars, workshops and even informal open session get- togethers are a cost-effective way of getting groups of media people together, not only to explain what you can do but also importantly to be able to listen and gain a greater insight into their views and agendas. Hence, in Pakistan we organised

periodic 'media research get-togethers and round tables' held in settings ranging from informal social clubs to formal hotel conference rooms. This initiative again proved to be successful and well appreciated.

○ *Mass media (television and business magazines).* If opportunity arises, which we were fortunate to receive, there can be no better medium than using television to impart information to a mass audience. We made a documentary that was featured in a regular business programme, enabling us to target to a specific audience. We also featured articles in leading national media magazines.

CHALLENGES IN THE DEVELOPMENT OF
PEOPLEMETER-BASED TAM IN DEVELOPING COUNTRIES

Presently, through the many manifestations of the effects of globalisation of research practices, there seems to be one prevailing factor - *standardisation* in research methods and techniques. Some good examples of standardisation are:

○ harmonising of procedures and practices which dictate global quality standards;
○ data capturing techniques, such as the use of peoplemeters in audience measurement have become de facto standards.

This *standardisation phenomena,* although prevalent across much of the globe, has a far more accentuated and complex impact and effect on developing countries, hence involvement with such countries requires a higher level of consideration, sensitivity and empathy.

This has also brought about a paradoxical situation for organisations. Organisations today involved in, or responsible for setting up, television audience measurement services in countries throughout the world are under incessantly growing pressure to deliver services that meet ever increasing local market expectations and demands, coupled with a tacit requirement from both within the country and externally, that the service will at least meet international quality standards, or in other words, that they want to seek standardisation.

Organisations exist and function in the context of a complex commercial, economic, political, technological, cultural and social world. For the purposes of this paper, we intend calling this the *operating environment.*

One of the core principles frequently preached in the field of modem management strategy is that the *organisations who have been successful and profitable in delivering quality products or services in the market place, are those that have made*

concerted efforts in developing and applying strategies designed in maximising the "harmonisation" of their activities with the environment in which they operate. This is a time-tested concept which holds tme to most, if not all, of the different organisational types and their product or service.

Unfortunately, many of today's organisations go into countries with inflexibly set-standardised mandates, by virtue of their heritage and experience in the field, or because they consider they possess the latest so-called *future proof* technological products or expertise.

We are not implying all these attributes are not important - they certainly are - but you may seriously run the risk of compromising all of these competitive advantages, and ultimately even the service you intend providing. Therefore it is imperative that *prior* and *realistic* assessment of the recipient country's 'on the ground' realities and challenges are first identified, so that these can eventually be overcome. In effect, the intention is to try to adjust or modify the standardised approach by incorporating the key *environmental* factors so that the chance of 'harmonisation' is greatly enhanced.

Therefore the identification of these environmental factors will be critical, developing or modelling an approach that can assist in exploring and seeking out these factors is essentially required. The authors will attempt to achieve this by utilising and adapting established management models, which may permit a more integrated and analytical understanding of the environment. It is also hoped this technique may prove useful for other organisations as well.
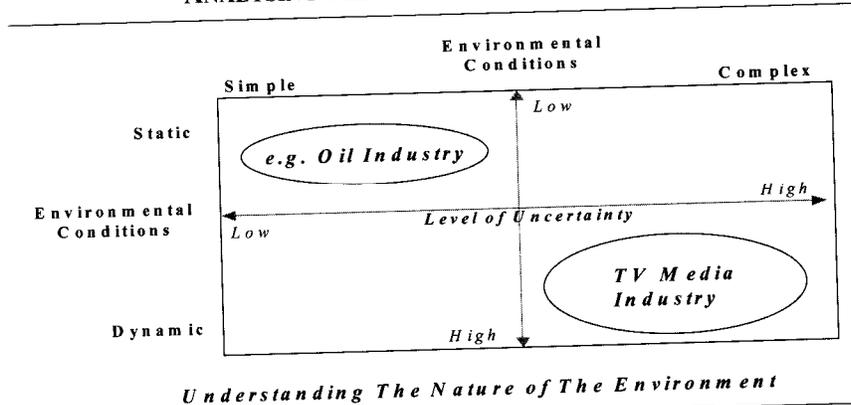
ANALYSING THE ENVIRONMENT

The purpose of this analysis is to assess the remote macro areas of the organisation (the word 'organisation' used in this section applies to organisations involved in or responsible for the development or set-up of TAM services). Environmental analysis is essentially an attempt to understand the strategic significance of developments around the organisation.

Understanding the Nature of the Environment

It would be sagacious if one begins by addressing the strategic management issue of coping with 'uncertainty': a) How uncertain is the environment?; b) What are the reasons for that uncertainty?; c) How should that uncertainty be dealt with?

Figure 2 suggests that environmental uncertainty increases as environmental conditions become more complex or dynamic. It will be noted that we have positioned the TV media industry as belonging in an environment which is both complex and dynamic, as opposed to the oil industry, for example, which for comparison purposes only is categorised as being in a simple and static environment. (See figure 2.)

Figure 2
ANALYSING THE TV MEDIA ENVIRONMENT

Adapted from Johnson and Scholes, 1993, p78

In simple/static conditions, an organization faces a relatively stable environment that is not undergoing significant changes, the technology is well established, and the competition and markets are entrenched. Changes that do occur are likely to be predictable, so it makes sense to analyse the environment on a historical basis.

In complex/dynamic conditions, organisations have to exhibit pro-activity rather than reactivity. Dynamic conditions require organisations to consider the environment of the future, not simply of the past. With the profusion of TV channels and with different delivery platforms and changing technologies, added with the complex environment of the country's social-cultural and political makeup, one can begin to understand and appreciate how complex and dynamic the nature of the environment really is.

As part of the environmental analysis, assessing the importance of external stakeholder expectations, in terms of the power/interest matrix (as described in the previous section 'New Measurement Techniques Introduced through Education, Not by Dictating the Market' as well as in figure 1) may prove very useful, hence repeating the exercise here is recommended.

Auditing Environmental Influences

PEST (Political, Economic, Socio-Cultural and Technological) analysis is a very useful technique to assess the environmental influences on the organisation and the industry in which it is operating in, through identification of long-term drivers of change and the differential impact of external influences, these impacts being either historical or in terms of likely future impacts.

First, let us begin by reminding ourselves that the notion of environment encapsulates very many influences. The difficulty is in understanding this diversity and its effects on the organisation's intended TAM service. The great danger or mistake organisations may make is to entirely rely on a listing analysis approach in attempting to solve the conundrum. We suggest a more active and pragmatic approach to this issue, and in this process devised what we have called a *harmonisation model* (see figure 3).

The purpose of this model essentially serves two key objectives:

1. enables pick-up of key environmental factors, many of which will be critical elements for the PEST analysis;

2. feeding back the key PEST analysis factors into the system to assist in harmonizing the activities of the organization with the environment in which it is operating.

Figure 3
HARMONISATION MODEL
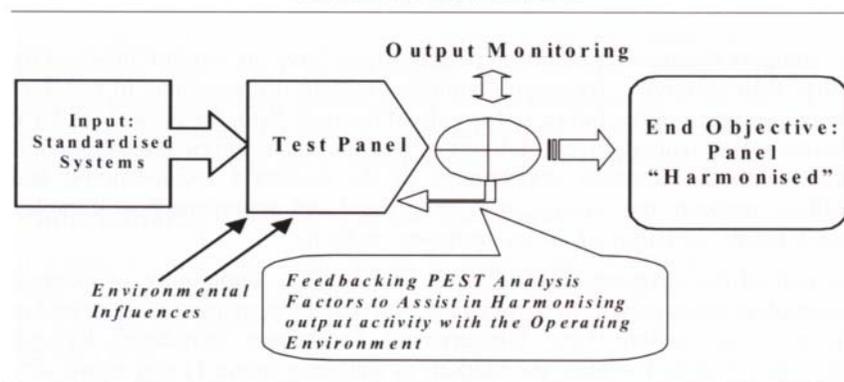
The key underpinning requirement for this model to have any real value or use is that it centrally relies on having a 'test panel' set-up. The test panel will basically he a much smaller version *(miniature replicate)* of the intended full TAM panel. In figure 3. the lest panel is shown to be input by what we have called *standardized systems;* these are the 'usual' hardware (peoplemetcrs), software (polling/data processing) or other related equipment and materials that are to be used in the set-up of the TAM service. Once this test panel is set- up and running, and being exposed to the *operating environment,* there will then be an important need to closely monitor the output activities of this panel. Some of the key activities that may need to be closely monitored from the test panel include:

❍ polling systems efficiency;
❍ data capturing (peoplemeters) systems behaviour and performance;
❍ respondent compliance and behaviour;
❍ viewing data analysis.

Subjecting the panel to this kind of inquisition may yield key environmentally dependent factors. These and other environmentally dependent factors, which may allect the operating of the TAM service, can be termed or called the PEST analysis factors.

It will be critical to assess these factors in terms of being either *positive* or *negative*. We are interested in the identified *negative/actors*. These negative factors will then have to be investigated and worked upon in terms of modification, improvements, or just being more aware or diligent on the part of the service provider. After this has been done, these factors will need to be Fed back into the test panel for re-assessment. This is a kind of 'iterative' process to achieve a satisfactory level of harmonization.

Once an acceptable level of harmonization has been established, progressing to the set-up of the full panel can then be done with more efficiency, assurance and belief that the intended service will at least meet the needs and expectations of the industry it intends serving. We used this model to a good practical effect in Pakistan- Some of the actual PEST analysis factors pertaining to the country and generated from the model are briefly discussed as follows (see also figure 4).

Political Environment

The political environment can affect the organisation at a strategic level by creating opportunities and threats. In Pakistan, governmental controls on TV media,

historically and recently, have been tight. Presently there is a level of political instability (some may argue stability) in the country because of an interim military controlled government. The ramification of this close relationship has resulted in Hie nation's TV broadcasting environment to be entrenched in state of flux, which has obviously not helped the media research industry at large.

Figure 4
PEST ANALYSIS
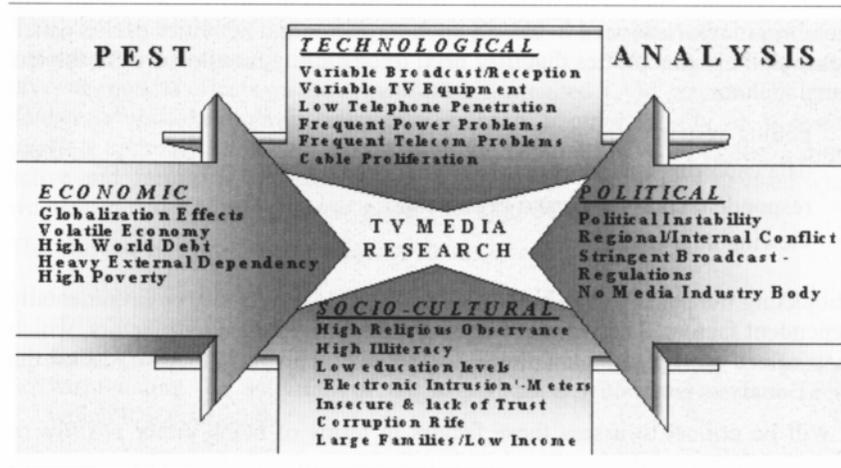
The industry has also not been helped by current regional disturbances. One notable and recent effect of this resulted in the government banning all reception of Indian channels throughout the country. This caused significant problems to broadcasters and media research companies alike. For us, lessons had to be learnt and operational contingencies developed for such eventualities. For astute researchers, closely tracking political moods is now a mandatory exercise.

On a separate but still on a political theme concerns appropriate industry consultation, At present there is no official TV media research industry consultation body. For developing countries such as Pakistan, where the media industry may be considered as being volatile, such a unifying body representing ail key stakeholders may prove to be beneficial in promoting and establishing accountability, equitability and standards in the market place.

Economic Environment

Economic forces affect most organisations on certain comparable lines. Hence further detailed differentiation is really not required. Some common influences faced

by organisations on their various exchange processes, for example, the price of major resources, both physical and human; the nature of demand and the perceptions and confidence of the business community and of existing and potential customers; are all influenced by the economic environment. Some of the specific key economic factors faced by the nation, and in turn affecting the industry are the following:

- ❍ high levels of poverty;
- ❍ high world debt;
- ❍ heavy external dependency;
- ❍ volatile economy.

Socio-cultural Environment

Generally, the pace of change in the social environment, which affects such factors as population size and structure, social values and expectations, is slow but inexorable. The case is similar for developing countries, but a few 'tads' less slow.

Pakistan's population is predominantly (over 90%) Moslem, the vast majority following their faith to a high observance. The male gender seems to clearly have a more dominant role in the society, with the women taking the back- stage. This factor became quite evident when we were recruiting and installing equipment in the homes. Although women recruiters were employed, and accompanied installations wherever necessary, still the women when alone seemed to shy away when it came to answering questions or deciding on matters. We subsequently and frequently made appointments when there was a male member also present.

The high illiteracy and low education levels also proved problematic. Whilst trialing our panel member documentation on the test panel we had to make frequent modifications to ensure a wider range of understanding existed amongst the diverse respondents.

Insecurity and a general lack of trust also prevails in the society. This is not helped when the electronic intrusion of the peoplemeter is installed in people's homes. The feeling of Big Brother watching you is not uncommon, and many homes will not entertain the idea, but good communication and some persistent but gentle honest persuasion can still work wonders.

Televisions are one of the most prized and guarded possessions in most homes here. Once the people learned that we had to connect our equipment to their television,

serious reservations were raised by many. Fortunately we intended using a non-invasive type of peoplemeter, which eased concerns considerably.

We also observed a strange viewing phenomenon, or perhaps more correctly 'non-viewing phenomenon', from a noticeable number of homes on our test panel. Particularly in the months of November and December (winter period) we noticed we were unable to collect (poll) data from some homes. After some investigation, what transpired was that marriages were taking place in these homes (time of year), and it was usual on such occasions to have relatives to stay over for up -to a week in many cases. Because of space problems, the TV was 'sacrificed' (disconnected and stored away) to release a room for guests. Although this was genuine non-viewing, and therefore not a research problem, we did, however, stress the point that they should let us know after the marriage was over so we could ensure everything was reconnected properly.

Technological Environment

Pakistan's current technological environment is proving to be very challenging. This was clearly evident from the number of significant factors that we found from our test panel. Following is a brief list of the main factors encountered from our test panel and our responses in dealing with them:

❍ Improved and tightened our meter installation techniques to counter the generally poor and variable reception quality of TV signals (off-air, cable and satellite) being received by the homes.
❍ Continually striving to improve detection methods and techniques to counter the proliferation of cable systems that is taking place in cities such as Karachi. A few years ago, cable penetration was non-existent, today it is currently running at over 50%.
❍ Improved the power supply system in the peoplemeter. This was done due to experiencing frequent and excessive electricity supply voltage fluctuations (poor power regulation).
❍ Improved the power back-ups to critical systems. This was done due to experiencing frequent and prolonged power supply shutdowns.
❍ Improved our polling system and software after experiencing variable quality of local telephone exchange systems and also because of the variable and poor quality of telephone lines and wiring in the homes.

THE ISSUE OF TRUST AND PROVIDING THIRD PARTY RATINGS

Some analysts believe that the absence of trust in public affairs is the most distinguishing element that separates an underdeveloped economy from a developed one. If one was to go by this analysis it is no surprise that most Pakistanis do not repose trust in public institutions.

Public opinion polls by Galiup Pakistan show that there is low level of trust in the executive, judicial and legislative arms of the government. It is also low in the government controlled electronic media as well as in the independent newspapers. The lowest level of trust is in politicians, political parties and the police. Private business does not evoke much trust either.

There is a common unfortunate feeling that fairness and honesty is absent from society. Thus it is not uncommon for conspiracy theories to prosper and rumours to abound about ill-gotten wealth, hidden motives and under the table deals. There is a general tendency to distrust the news in the official media as well as the independent press.

In this prevalent atmosphere of distrust it is hard for most people to believe that a professional organization would carry out unbiased third party evaluation. There is a lurking suspicion that ratings would be purposefully biased to hurt or help interested parties. The general argument runs, "If ratings can influence big decisions, why would the ratings body not misuse its influence by seeking benefits of one or another kind"? Those who are more charitable believe that professionals might try to play the game more astutely by tampering with samples, weighting schemes, question wordings and so on.

It is often observed that when people distrust objective methods, their confidence in their own judgement and observation is unduly heightened in the same proportion. Personal observation becomes the reference point to judge "correct" research from the "false", and such judgements are held with great emotion and self-righteousness.

Secondly, third party ratings are a phenomenon that is the hallmark of a vibrant civil society in which the state and non-state institutions are both strong and confident to subject themselves to independent scrutiny. A tradition of strong civil society and experience with internal self-governance provides the necessary fertile ground for third party evaluation. Unfortunately both are weak in a country such as Pakistan.

Thirdly, there are sad past experiences with experiments in self-governance. These failures, whether of parliaments, private associations or cooperative banks, are publicised beyond their merit to further aggravate the lack of confidence in independent self-governing institutions.

Given this prevailing atmosphere it requires outstanding ability and integrity to inspire confidence in third party evaluation. Here are some basics which we have learnt from experience, on how to anticipate the problem and try to pre- empt it by appealing to the following:

❍ build in systemic checks;
❍ appeal to credentials;
❍ appeal to proven track record;
❍ qconstant vigilance against rumours and conspiracy theories
❍ close interaction with competing interested parties to address their concerns before they become hardened into beliefs.

Let us explain briefly the steps that we undertook to achieve the above objectives. Some of these were taken only after the problem hit us in the face and we bruised ourselves before learning our lesson.

1.   *Build in systemic checks*. It is important to develop a set of highly visible and credible systemic checks about the authenticity and objectivity of the ratings data. We have discovered that high quality data and meticulous professionalism is not a sufficient check against unmerited objections by those who for one or another reason are either dissatisfied with the service or wish to discredit it for other motives. Thus we have now chosen to appoint a third party auditing system. A leading international professional firm of auditors is responsible for carrying out an annual quality assurance exercise. It looks into the compliance status on all aspects of the ratings operation. We will also soon have an independent 'ombudsman' whose job would be to investigate any serious complaint about the possibility of bias in the service.

2.   *Appeal to credentials.* Television ratings are a high profile activity. They may not constitute a large business in monetary terms but they come under discussion and debate at strategic levels in the leading media of the country. Thus it becomes necessary that the ratings service should have one or more comparable persons of national standing that could interact and engage in debate. In societies where individuals overshadow institutions, it is difficult to defend and create confidence in the validity of ratings without personal credentials and

reputation of its leadership in terms of professional standing and integrity. In Pakistan our current television audience measurement service has enjoyed this advantage because of our long-standing roots in the academia and professional circles.

3. *Appeal to proven track record.* Television ratings service influences major financial decisions. They tend to alter well-ingrained methods of allocating media budgets. Thus when an audience research agency makes its initial interventions in the media allocation process, many eyebrows rise. The technical findings of the researcher are challenged, by referring to the experience of "old hands". It is here that the comparable standing and proven track record of the research agency can turn to be a 'counterweight'. The proven track record of the research agency in 'media research' on the one hand and 'third party evaluation' on the other is particularly helpful. When faced with a challenge from experienced hands, you should provide historical data on the evolution of various media vehicles and channels. These are known and familiar to the challengers, through their own first hand experience. Thus you begin to connect with them and the relationship becomes more meaningful. Similarly the assurance that your agency has successfully provided 'third party evaluation' on other issues to other clients is a reassurance to them that by relying on your ratings they are not venturing into an unknown and untested hazardous terrain.

4. *Constant vigilance against rumours and conspiracy theories.* It is our experience that frivolous slander is not uncommon in the ratings business. The media industry has its due share among the 'chattering class' that loves to pick on others, shock them with their latest discovery and 'inside knowledge' or sometimes be a more blatant cynical carrier of 'character assassination' for interested motives. They would pick up an odd figure from the ratings data with a cell size of two or three respondents and shock their glamorous audience by their ability to spot such fallacious practices of the researchers, followed soon in hushed tones by insinuations about the motives that might lie behind the evil designs of the researcher. After we were bruised by such assaults a few times we decided to go public on the issue. We came to the conclusion that transparent public debate would be the best check against back-room gossip. Thus we initiated our response to whatever piece of gossip we picked up from the party circuit by explaining our view in the newspapers on those issues. It later triggered us to start our own brief monthly newsletter that began to serve as a vehicle for our point of view. While its first issue was in print, we came to realize that an online version would be equally or even more effective for our target audience. That was the beginning of our 'Cyberletter' released on a

monthly basis. It has served well to respond and even pre-empt some of the mischief of the gossip circles. Our sincere advice to the community of audience researchers is to guard yourself against unscrupulous gossip circles. They will try to hurt you at home and abroad through the time tested psychological war tool of 'insinuation'.

5. *Close interaction with the community of media researchers.* Aside from protecting yourself against the mischief of interested parties, it is important to actively participate in the professional forums of media researchers. If none exists, one might attempt to create it. This, in our view, is again a check against circulation of false information. Moreover it can be a suitable place for exchange of information, discussion and debate. In Pakistan we initiated for this purpose a media research get-together which meets periodically, bringing together around twenty persons from advertising agencies, media planners and media professionals in addition to the research agency people. Together they have formed a lively professional group.

SUMMARY

This paper concludes that despite a relatively small current TV advertising market, there are strong pressures and reasons to develop a modem TV meter- based audience measurement system in Pakistan.

The paper relates this anomaly to the existence of islands of modernity and globalisation amidst a vast and populous periphery of business operations that run on traditional management culture. The periphery, however, is not geographically focused; instead it runs alongside the modem sector throughout a country comprising of over 400 cities, 45,000 villages and 140 million people.

A globally mobile management class, working for transnational corporations, experiences the tensions of working in a dual economy. The paper listed seven features of 'duality' in the Pakistani economy and explained how the successful introduction of a modem TV audience measurement system is a creative outcome resulting from that tension.

The paper explained the difficulties of introducing new and modem measurement technology into the challenging environment of a developing and complex country. Some of the issues were political, physical and sociotechnological, as well as the relative absence of a civil society in the modem sector of the economy creating sociological conditions in which trust is in short supply and suspicion abounds.

The paper attempted to show (and to a large extent proved) that these issues could be realistically addressed and overcome by the application of practical methodologies:

- *educating the stakeholders through effective marketing* - the importance of tactfully marketing new measurement techniques and technology into the market place;
- *harmonisation of the measurement panel through testing* - the importance of exhibiting pro-activity, creativity and at the same time being pragmatic in approach, so as to help identify and overcome the inevitable challenges in the development of peoplemeter-based TAM service in Pakistan;
- *creating acceptability of the service through equitability and accreditation* - attempting to establish equitability and accreditation by the application of five key objectives.

These lessons which Gallup Pakistan, with the support of Taylor Nelson Sofres, learnt after being bruised a few times, are now passed on to those who might venture to enter similar grounds - good luck!

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