



Business Related Information Aired in Radio & Television in Sri Lanka

For

Enterprise for Pro-poor Growth Project

International Labour Organization

Final Report

Conducted by



The Nielsen Company Lanka (Pvt) Ltd
98 D.S. Senanayaka Mavatha, Colombo 8

Telephone +94 2 688446-8

Facsimile +94 2 688449

May 2009

Table of Contents

	Page
Acknowledgements	ii
List of Tables and Figures	iii
Acronyms	iv
Executive Summary	v
1 INTRODUCTION	1
1.1 Project Background	1
1.2 Objectives	2
1.3 Methodology	3
2 FINDINGS	5
2.1 Business Related Information (BI) Aired in Radio	5
2.1.1 General BI Aired on Radio	5
2.1.2 General BI Aired on Radio by Type of Information	6
2.1.3 General BI Aired on Radio by Language and Channel	8
2.1.4 Small & Medium Enterprises (SME) BI Aired on Radio by Language & Channel	10
2.1.5 General BI Programs on Radio by Format of the Program	11
2.1.6 SME BI Programs on Radio by Format of the Program	11
2.1.7 General BI Programs on Radio by Time Sessions	12
2.1.8 SME BI Programs on Radio by Time Sessions	12
2.2 Business Related Information (BI) Aired in TV	13
2.2.1 General BI Aired on TV	13
2.2.2 General BI Aired on TV by Type of Information	14
2.2.3 General BI Aired on TV by Language and Channel	15
2.2.4 SME BI Aired on TV by Language and Channel	16
2.2.5 General BI Programs on TV by Format of the Program	17
2.2.6 SME BI Programs on TV by Format of the Program	17
2.2.7 General BI Programs on TV by Time Sessions	18
2.2.8 SME BI Programs on TV by Time Sessions	18
3 REASONS FOR THE BI AIRTIME DECLINE IN RADIO AND TV	19
3.1 BI Airtime Decline : Further Investigations	19
3.2 Review the Enter Growth Progress Reports & Interviews with Channels	20
3.3 Annual Airtime for Programmes in 2006 and 2008 in TV and Radio	24
3.4 Airtime & Income Generation in TV & Radio in Three Weeks	25
3.5 Airtime Allocated & Income for Business Programmes	26
4 Summary & Conclusion	28

Acknowledgements

This report has been prepared by The Nielsen Company Lanka (Pvt.) Ltd. The Research team was led by Jinendra Kothalawala (Director of Research), with the assistance of Therica Miyanadeniya (Associate Director) and Vishuddhi Atapattu (Senior Executive). The report was undertaken on behalf of the Enter Growth project of International Labour Organization.

We would like to appreciate the support given by the Nielsen Media monitoring unit supervised by Jagath Pathirana and the team as well as the analysis team for their technical support to complete the study successfully.

We gratefully acknowledge the advice, guidance and comments provided at various stages of this study by Gamunu Wijesena (Project Manager), Roel Hakemulder (Advisor) and other staff members of Enterprise for Pro-poor Growth Project.

We would also like to acknowledge the help extended to us from team members of the media houses in Shakthi FM, Derana TV for giving us their time and corporation to understand why the media program component of the Enter Growth project collapsed rather than taking off during the project implementation.

List of Tables

Table 1	General BI Aired on Radio
Table 2	General BI Aired on Radio by Type of Information
Table 3	General BI Aired on Radio by Language and Channel
Table 4	SME BI Aired on Radio by Language and Channel
Table 5	General BI Programs on Radio by Format of the Program
Table 6	SME BI Programs on Radio by Format of the Program
Table 7	General BI Programs on Radio by Time Sessions
Table 8	SME BI Programs on Radio by Time Sessions
Table 9	General BI Aired on TV
Table 10	General BI Aired on TV by Type of Information
Table 11	General BI Aired on TV by Language and Channel
Table 12	SME BI Aired on TV by Language and Channel
Table 13	General BI Programs on TV by Format of the Program
Table 14	SME BI Programs on TV by Format of the Program
Table 15	General BI Programs on TV by Time Sessions
Table 16	SME BI Programs on TV by Time Sessions
Table 17	Annual Airtime for Programmes in 2006 and 2008 in TV and Radio
Table 18	Airtime & Income Generation in TV and Radio in Three Weeks
Table 19	Airtime Allocated & Income for Business Programmes

List of Figures

Figure 1	No. of Air Time seconds by Business Information Type in Radio
Figure 2	Relative Contribution of Air Time for BI Type in Radio
Figure 3	No. of Air Time seconds by Business Information Type in TV
Figure 4	Why Enter Growth Media Component Fail/Did Not Take Off: Conceptual Framework

Acronyms

BI	-	Business Related Information
CSR	-	Corporate Social Responsibility
Enter-Growth	-	Enterprise for Pro-poor Growth
GRP	-	Gross Rated Point
ILO	-	International Labour Organisation
SME	-	Small and Medium Enterprises
TOR	-	Terms of Reference
TV	-	Television

Executive Summary

The Enterprise for Pro-poor Growth (Enter-Growth) project, implemented by the International Labour Organization (ILO), is working to promote the growth and development of small and medium enterprises (SMEs) in Sri Lanka. The project started in 2005 in North Western and North Central provinces. There were various key components in this project and was focused at local level (districts & provinces) and focus of some components are at national level. Development of radio and television programmes that focus on the SME sector in Sri Lanka was one of such national component in the project, though this was not a major component in the entire project.

Preliminary analysis of the media industry in Sri Lanka was undertaken by the project and has highlighted that the business information news and programmes are dominated by corporate, large businesses and economic news, and that the issues and news relevant to SMEs are often neglected. To prepare for addressing this and to facilitate enterprises for pro-poor growth, the project contracted The Nielsen Company Lanka (Pvt) Ltd to monitor the business information of radio and TV stations in Sri Lanka for over a period of three weeks, from 1st to 21st January 2006. Findings revealed that only 0.77% of total airtime was allocated for business information in radio and 6.2% of total airtime is allocated for business information in Television. This established a baseline on the total airtime allocated for the business information on the TV and radio stations in 2006.

After that bench mark study Enter-Growth project has supported the development and launch of radio and television programmes that focus on the SME sector in Sri Lanka and the inclusion of more news and information relevant to the SME sector in other TV & Radio programmes. The Enter Growth involved in many interventions including presenting research findings, training journalists, on-the-job guidance/training and advice to programme makers and training by international consultant etc. in order to assist SME sector by providing Business Information to grow their enterprises through Radio and TV programs.

Now the project is nearing to its end and wishes to assess the impact of the project involvement in terms of change in coverage of SME related information in TV and radio, using the same definitions and methodology. Hence the objectives of this study were to quantify the amount of airtime devoted to business information on Radio and TV and to compare the findings with 2006 baseline study findings which use the same definitions and methodology to assess the impact of the Enter-Growth project involvement in terms of change in coverage of SME related issues in TV and radio.

The findings of the 2006 & 2009 media monitoring shows that there is a drop in both the Radio and TV airtime dedicated for the business related programs in respective periods.

Radio air time dropped by one third (35%) at overall level. However the relative composition by type of business information in the radio were more or less remains the same eg, small (11% to 16%), medium to large (1%), international & corporate (13% to 17%), economic (46% to 59%) etc. On the other hand **TV air time** also dropped drastically by three quarter (77%) at overall level. However the relative composition in the TV air time shows that small business information air time increased in TV from 8% to 25% in respective two periods and this is a good result which targeted from the media component of the project. However it is very difficult to conclude that this positive change was fully attributed by the project interventions.

When analysed **SME BI Radio airtime** by **language and channel** it has dropped by half (51%) for all languages in general. In Sinhala language it has almost halved (51%) and Lakhanda air time had affected largely to this drastic drop. However, when analysed by the relative composition of the air time by language, it has not changed and contribution of Sinhala language is 84%, while air time in English and Tamil language contribute only less than 10%. On the other hand air time in **SME BI in TV** for all languages has dropped (59%). In Sinhala language, Rupavahini has increased the airtime allocated for SME BI programs by 85% while TNL dropped drastically by 99%. In English channels ETV and TNL have dropped their airtimes allocated for the BI on SMEs. In the Tamil language channels there have not been any BI for SMEs when compare with 2006.

When analysed the **SME BI in radio** by **Format of the program**, radio airtime of regular business programmes for SMEs has dropped only by one tenth (9%). The relative contribution in regular business programmes have almost doubled in 2009 when compared with 2006 (24% to 45%). This analysis reveals that the airtime for SME BI have been maintained in the regular business programmes. On the other hand airtime of **SME BI in TV** has dropped for both regular business programs and news bulletins. Regular business programs contribute only 10% for the general business information and for the SME it contribute almost 90% of the air time and hence it can be concluded that SME BI are more in regular TV programs than news bulletins. This is a good result which targeted from the media component of the project. However it is very difficult to conclude that this positive change was fully attributed by the project interventions.

When analysed **SME BI airtime** in radio by **Time sessions** it has dropped for all the time sessions from morning to night. However, the relative contribution remains almost same in both periods. On the other hand airtime of **SME BI TV** has dropped for most time sessions except the morning 6am to 9am session. There is a significant change in the relative contribution of the Morning 1– 6 am to 9am, air time has increased from 19% to 56% and in Late night – 9 pm to 12 midnight has dropped from 29% to 6%.

Why Enter Growth Media Component Fail/Did Not Take Off? Media intervention was a small light touch approach of the entire project. Based on demand assessment survey, project found that there is a demand for the SME related BI among existing and potential entrepreneurs. Project focussed the technical skills among journalists, programmers, editors etc as the key issues faced by the media houses and interventions were primarily focussed on the above technical side. Though technical skills were improved, media houses could not increase the SME programs and continue air time allocations and marketing team face difficulty on finding sponsors and advertisers etc. If management and marketing team of the channels were equipped in this context the result of this project would have been more effective. Interviews with the stations revealed that if project has addressed the other key issues they faced when finding sponsors and advertisers in addition to the technical skill gap, this project component would have been more successful. The main challenge the project faced was the entertainment strategy followed by the channels, sponsors and advertisers.

As mentioned in the progress reports output section 4.4, Enter Growth project media interventions have targeted all the TV stations. However, follow-up meetings were conducted with stations **who were interested** on small business programmes and as a result the interactions were limited to Derana, ITN, Rupavahini - Channels Eye, TNL as TV stations and Vanguard as program developer. In Radio Shakthi FM (Tamil) was the only interested station. Though Max TV & Max Radio (Sinhala) were interested they were newly launched channels. Only Rupavahini - Channel Eye had higher reach and many other TV & Radio channels had small reach. In addition to these situations; in general there is a high turnover among media professionals among agencies. Even channel ownership/management is involved in making air time allocation decisions etc. These contextual factors of the media industry may have affected and limited the results expected from the media interventions. If project had taken the above context in to consideration and encouraged the channels by not limiting to continue with only the once who expressed interest, project would have achieved better results.

Due to various changes in the station management of the media houses over a period of time, the participants of the training programme have not been able to implement the business related programmes. Interviews with the stations revealed that if project has addressed the other key issues they faced when finding sponsors and advertisers in addition to the technical skills gap, this project component would have been more successful. The main challenge the project faced was the entertainment strategy followed by the channels, sponsors and advertisers.

The media monitoring team experiences reveal that, due to the Northern Province civil conflict between LTTE and the Government, channels have allocated significant time for war reporting in early January and it may have contributed to less attention for business information. In addition to that locally, the Media industry reports such as attacks to MBC Network, assassination of Mr. Lasantha Wickramathunga and Provincial elections in North Western and Central Provinces have also contributed to this situation. International news has also been focused towards the events of new American President that has contributed to this while financial and economic crisis information has also played a role to some extent.

1.0 Introduction

1.1 Project Background

The Enterprise for Pro-poor Growth (Enter-Growth) project, implemented by the International Labour Organization (ILO), is working to promote the growth and development of small and medium enterprises (SMEs). As part of the agenda, The Enter-Growth project supported the development of radio and television programmes that focus on the SME sector in Sri Lanka.

Preliminary analysis of the media industry in Sri Lanka was undertaken by the Enter-Growth Project and it has highlighted that the business information news and programmes are dominated by corporate, large businesses and economic news. The issues and news relevant to SMEs are often neglected. This indicates that the Sri Lankan media is yet to recognize the potential for business programmes that target the vast majority of businesses in the SME sector.

In preparation for addressing this and facilitating enterprises for pro-poor growth, the Enter-Growth contracted The Nielsen Company Lanka (Pvt) Ltd to monitor the business information of radio and TV stations in Sri Lanka over a period of three weeks, from 1st to 21st January 2006.

The Nielsen Company conducted the study and the findings revealed that only 0.77% of total airtime is allocated for business information on radio and 6.2% of total airtime is allocated for business information on Television. This established a baseline/bench mark on the total airtime allocated for business information broadcasted in TV and radio stations in 2006.

Following the benchmark or baseline study, the Enter-Growth project supported the development and launch of radio and television programmes that focus on the SME sector in Sri Lanka and the inclusion of more news and information relevant to the SME sector in other TV & Radio programmes. This work was based on experience gained in other countries where the media has been seen to provide businesses with:

- A critical source of up-to-date business information and news
- A platform to discuss and debate business issues
- A voice to influence policy and legislation

The Enter Growth was involved in the following activities in order to assist SME sector by facilitating stations for providing BI in Radio and TV in Sri Lanka:

- A workshop to present the findings of the first report which covered the air time allocated for media & the interest and demand for business programs among the target audience
- Many meetings and discussions with the management of channels as well as marketing departments
- Training programme for radio and TV journalists
- On-the-job guidance and advice for programme makers
- Second training programme with an international consultant
- A seminar on microfinance
- A microfinance field visit
- Development of a guide on small business for journalists

The Enter Growth project is now nearing its end, and wishes to assess the impact of the project involvement in terms of change in coverage of SME related information in TV and radio, using the same definitions and methodology.

1.2 Objectives

The specific objectives of the study are as follows:

- To identify all business oriented radio and TV programmes that currently exist in Sri Lanka.
- To quantify the amount of airtime devoted to general business and specifically to small enterprise
- To compare the findings with those of 3 years ago

1.3 Methodology

A Media monitoring exercise was implemented to determine the coverage of business related issues and quantification of air time allocated for the Business related programmes.

Required information was gathered during 1st to 21st January 2009 by continuous monitoring of all relevant radio and Television channels. A brief description of this process is given below:

- *Nielsen MediaWatch*[®] covers 50 publications, 12 TV and 20 Radio channels.
- All Radio monitoring was done electronically within 18 hours (6.00 am to 12.00 midnight)
- All TV monitoring was done electronically, through 24 hour recording, play back and computerizing, which ensures no data loss and minimum human error. For this exercise 18 hours (6.00 am to 12.00 midnight) were covered.
- Recording, playback and computerizing to ensure that there are no data loss and human errors are minimal.

Key terms and their definitions for the purpose of the airtime analysis of this study are as follows;

Business Information (BI): Includes all the information of any duration and regular or one off information that focuses specific feature or segment on issues around businesses. Advertisements are not included but sponsored programmes are included.

Business Programming (BI programmes): Includes all programming of any duration, either regular or one offs that focuses at least half of its content, or a specific feature or a segment on issues which cover business information.

Small Businesses: Spans informal, part-time and home-based businesses, single person businesses, family businesses and those employing up to a maximum of 15 people. This also includes agricultural businesses (farmers).

Medium to large businesses: Covers businesses that will have more than 15 employees but, for research purposes, does not include large conglomerates, government enterprises, large public companies and international corporations.

International and corporate businesses: Covers all large conglomerates, government enterprises, large public companies and international corporations. Programmes that cover stock market issues would be deemed to be focused on international and corporate businesses.

Economic programming: Programming that focuses on wider economic issues and trends, as distinct from those of specific business or business sectors, at national, regional or international levels.

Other Business Information: Business Institution Information (eg. SLIM etc) and information on Development Projects (infrastructure: transport, fishing, southern deployment project, Tsunami etc) are considered as other business related information.

2.0 Findings

2.1 Business Related Information (BI) Aired in Radio

This section presents, discusses and compares the airtime dedicated to Business Information on radio in 2006 and 2009.

2.1.1 General BI Aired on Radio

The following table presents the calculation method and discuss the comparison of total airtime dedicated to BI on radio in 2006 and 2009.

Table 1: General BI Aired on Radio

Calculation Items	2006	2009	Difference
a. Number of Radio channels monitored	17	20	3
b. No. of hours monitored in each of the above channel	18	18	-
c. Total Radio Airtime hours Per Day (a×b)	306	360	54
d. Number of Radio Airtime in Seconds per day in all 17 channels for 18 hours (c×60×60)	1,101,600	1,296,000	194,400
e. Actual Radio Airtime Allocation for 21 days	179,277	116,554	-62,723
f. Number of days monitored	21	21	0
g. Average number of radio airtime seconds per day	8,537	5,550	-2,987
h. Average Number of radio airtime minutes per day	142	92	50
i. Percentage of the Radio Airtime allocated per day for business programs	0.77%	0.43%	0.34%
j. BI Air Time Changed in Percentage			35%

The number of radio channels have increased from 17 in 2006 to 20 in 2009 and as a result the total number of radio airtime in Seconds per day in all 20 channels for 18 hours increased by 194,400 seconds per day.

The actual average number of radio airtime in terms of seconds for 21 days has dropped from 179,277 to 116,554 (dropped by 62,723) and in terms of percentage, it has dropped from 0.77% to 0.43 % (dropped by 0.34%) between 2006 and 2009. This is more than one third (35%) drop in radio airtimes. A further analysis of the above changes are discussed in sections 2.1.2 to 2.1.8 in terms of which type of BI contributed to this change, which language and channels, format of the program, air time etc for general business information and SME specific business information.

2.1.2 General BI Aired on Radio by Type of Information

The following table presents the changes in airtime for the two time periods focussing on different types of BI in terms of small businesses, medium to large businesses, international and corporate businesses on radio.

Table 2: General BI Aired on Radio by Type of Information

Business information type (a)	No of seconds (b)		Changes in 2006 vs. 2009 (c)		Relative Contribution % (d)	
	2006 Jan 1 st – 21 st	2009 Jan 1 st to 21 st	No of seconds	%	2006	2009
Small Business	27,806	13,268	-14,538	-52%	16%	11%
Medium to Large Business	2,139	1,332	-807	-38%	1%	1%
International & Corporate Business	22,504	20,361	-2,143	-10%	13%	17%
Economic Programmes	83,303	69,275	-14,028	-17%	46%	59%
Other Business Information	43,525	12,318	-31,157	-72%	24%	11%
Total	179,277	116,554	-62,673	-35%	100%	100%

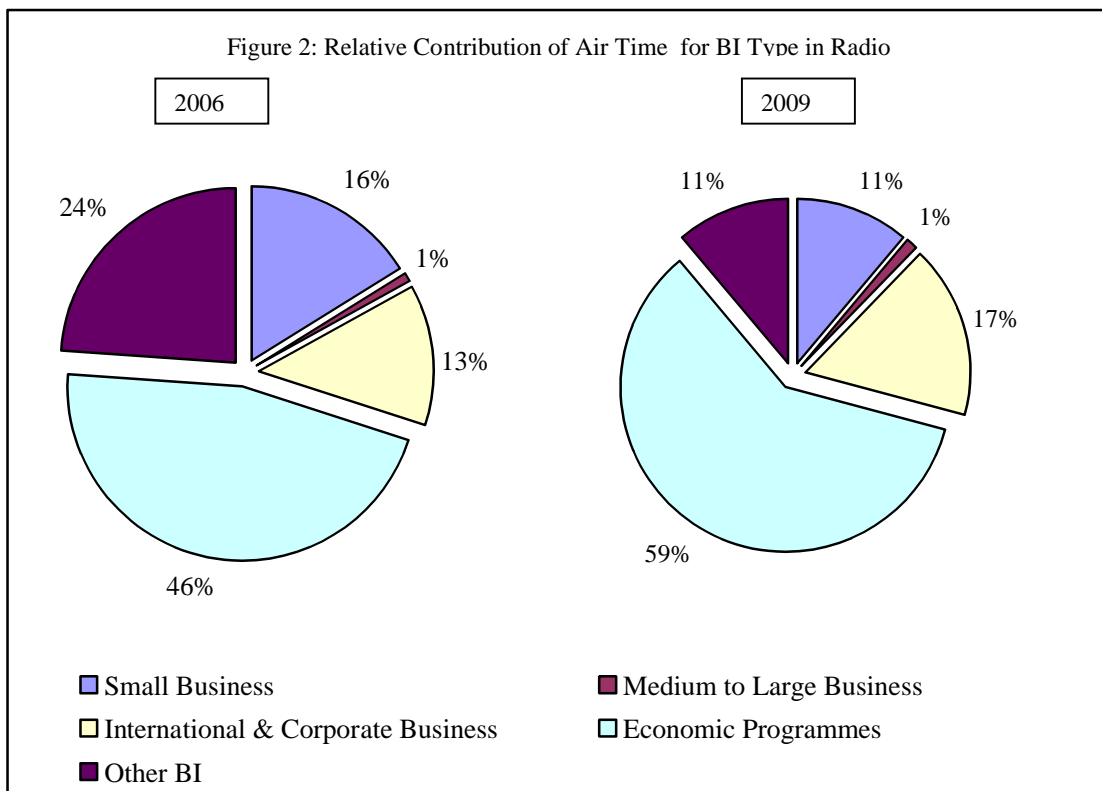
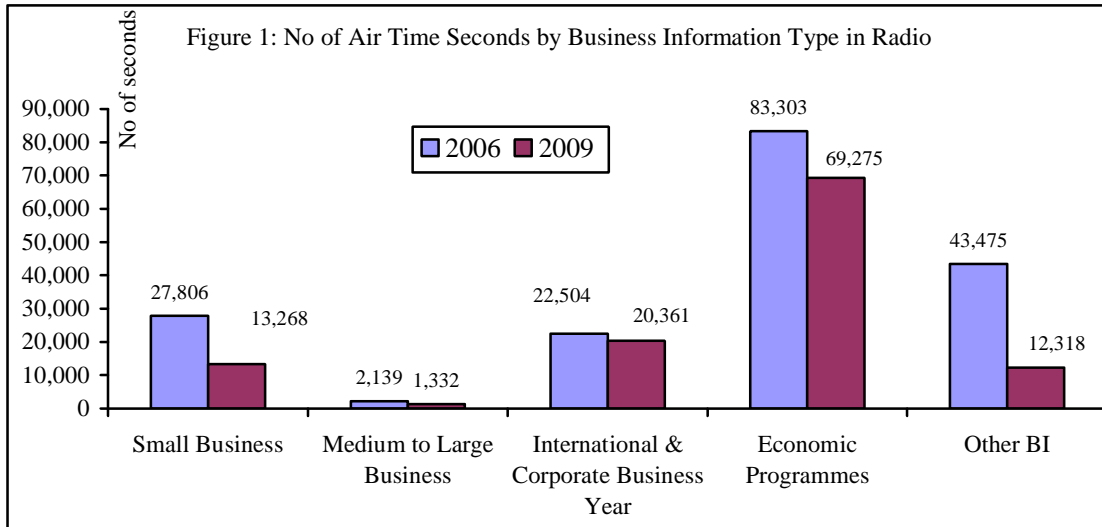
Note: Data presentation format: All the data tables in section two have been designed in a similar format and the way it presented is as follows.

- Column **a** presents the data categories (eg Small, Medium to Large etc.)
- Column **b** presents the no. of seconds in 2006 Jan 1st to 21st and 2009 Jan 1st to 21st. Eg. In 2006 Jan 1st to 21st time period, 27,806 seconds of BI were aired in small business types
- Column **c** presents the air time changes in two respective periods in two different ways.
 - o absolute terms (13,268-27,806) = -14,538
 - o percentage terms(-14,538/27,806)*100= -52%
- Relative contribution (column **d**) is calculated as (27,806/179,277) * 100= 16%

When analysed by **type of business information** as in table 2 and figure 1, the number of radio airtime seconds have dropped in all categories when compared with the 2006 situation. The airtime decrease is 35% at the total level in radio, while for small businesses the decrease is almost by half (52%), and more than one third (38%) for medium to large businesses.

However, the decrease in international and corporate business information and economic issues are comparatively less and is only 10% and 17% respectively.

When the *relative composition* of the airtime for different BI types was analysed as in table 2 & Figure 2, there was no change and only a slight increase towards economic programs from 46% to 59% was observed. The recent global financial and economic crisis situation may have created this change in radio channels.



2.1.3 General BI Aired on Radio by Language and Channel

Table 3: General BI Aired on Radio by Language and Channel

	No of seconds		Changes in 2006 vs. 2009	Relative Contribution %	
	2006	2009		2006	2009
Sinhala Channels					
Asura		898	-	-	1%
City	18,280	8,249	-55%	10%	7%
Hiru	5,349	3,852	-28%	3%	3%
Lakhanda	50,636	4,412	-91%	28%	4%
Neth	-	1,516	-	-	1%
Raja	3,765	-	-	2%	-
Ran	-	3,270	-	-	3%
Sha	9,408		-	5%	-
Shree	955	1,790	87%	1%	2%
Sirasa	11,380	6,785	-40%	6%	6%
Siyatha	-	5,364	-	-	5%
SLBC-Com	-	12,948	-	-	11%
Total	99,773	49,084	-51%	56%	42%
English Channels					
E FM	1,249	9,703	677%	1%	8%
Gold	15,743	5,865	-63%	9%	5%
Lite	14,314	9,920	-31%	8%	9%
Real	-	10,563	-	-	9%
SLBC-English	1,335	5,060	279%	1%	4%
Sun	15,735	-	-	9%	-
TNL	5,487	787	-86%	3%	1%
Yes FM	5,828	9,102	56%	3%	8%
Total	59,691	51,000	-15%	33%	44%
Tamil Channels					
Shakthi FM	6,019	7,011	16%	3%	6%
SLBC-Tamil	10,478	5,575	-47%	6%	5%
Sooriyan	3,316	3,884	17%	2%	3%
Total	19,813	16,470	-17%	11%	14%
All Languages	179,277	116,554	-35%	100%	100%

When analysed by **language and channel** as in table 3, the number of seconds in radio airtime has dropped for all languages as compared to the situation in 2006. However, when the *relative composition* of the airtime by language was analysed, there was no significant change and only a slight increase is seen in the English Channels, from 33% to 44% and slight decrease in Sinhala channels, from 56% to 42%.

The airtime decrease is 35% at the total level in radio. English and Tamil have decreased by 15% and 17% respectively, but for the Sinhala language, it has almost halved (51%) which is the biggest change.

In Sinhala channels, especially Lakhanda, shows a drop in its air time by 91% during the monitoring period, which is the main reason and the explanation for the 75% of the variance for air time drop of 62,723 seconds in radio. Relative contribution of Lakhanda was 28% in 2006 and dropped drastically to 4% in 2009, this had contributed largely for the total air time drop.

Findings of the English channels are interesting and SLBC English, Yes FM & E FM have increased the airtime. Discontinuing the Sun channel has contributed toward the drop in the total airtime, whereas if it had continued the air time allocated in English channels would have been the same or increased.

Findings among the Tamil channels are also interesting. Airtimes have increased in Shakthi FM to a certain extent and marginally in Sooriyan.

Up to now, the analysis only considered the general BI, which includes the small businesses, medium to large businesses, international and corporate businesses and other BI on radio. From this point onwards, in all the other sections, a special analysis will be presented focusing only on the small businesses and medium to large businesses, named as the SME specific businesses information. Since Enter Growth project is focusing only on the SME sector in the media component, this analysis is very important.

2.1.4 SME BI Aired on Radio by Language and Channel

Table 4: SME BI Aired on Radio by Language and Channel

	No of seconds		Changes in 2006 vs. 2009	Relative Contribution %	
	2006	2009		2006	2009
Sinhala Channels					
Asura	-	29	-	-	0%
City	3,472	3,647	5%	12%	25%
Hiru	1,888	419	-78%	6%	3%
Lakhanda	13,782	586	-96%	46%	4%
Neth	-	170	-	-	1%
Raja	945		-	3%	
Ran	-	422	-	-	3%
Sha	1,915		-	6%	-
Shree	458	660	44%	2%	5%
Sirasa	2,588	1,819	-30%	9%	12%
Siyatha	-	964	-	-	7%
SLBC-Com	-	3,533	-	-	24%
Total	25,048	12,249	-51%	84%	84%
English Channels					
E FM	140	273	95%	-	0%
Gold	1,094	108	-90%	4%	1%
Lite	80	213	166%	0%	1%
Real	-	417	-	-	3%
SLBC-English	200	270	35%	1%	2%
Sun	480	-	-	2%	-
Yes FM	-	83	-	-	1%
Total	1,994	1,364	-32%	7%	9%
Tamil Channels					
Shakthi FM	1,159	335	-71%	4%	2%
SLBC-Tamil	823	468	-43%	3%	3%
Sooriyan	921	184	-80%	3%	1%
Total	2,903	987	-66%	10%	7%
All Languages	29,945	14,600	-51%	100%	100%

When examined by **language and channel** for SME BI as in table 4, the number of seconds in radio airtime has dropped by half (51%) in all languages.

Total airtime of SME BI has dropped in Sinhala radio channels (51%). There is a major drop in the BI airtime in Lakhanda (96%) which had contributed to a drastic drop in the total airtime for SME BI in the Sinhala channels.

The drop in Tamil language airtime is 66% and in English language it is 32%. However, when the *relative composition* of the airtime by language was analysed, there was no change and the contribution of Sinhala language is 84%, while airtime in English and Tamil language contribute is only less than 10%.

2.1.5 General BI Programs on Radio by Format of the Program

Table 5: General BI Programs on Radio by Format of the Program

	Number of seconds		% Change	Relative Contribution %	
	2006	2009		2006	2009
Regular business programmes	22,593	9,960	-32%	13%	9%
News bulletins	156,684	105,564	-56%	87%	91%
Total	179,277	116,554	-35%	100%	100%

When analysed by **Format of the program** as in table 5, the number of seconds of radio airtime has dropped in both Regular business programmes and News bulletins, however the relative contribution remains the same in both the periods.

2.1.6 SME BI Programs on Radio by Format of the Program

Table 6: SME BI Programs on Radio by Format of the Program

	Number of seconds		% Change	Relative Contribution %	
	2006	2009		2006	2009
Regular business programmes	7,160	6,540	-9%	24%	45%
News bulletins	22,785	8,060	-65%	76%	55%
Total	29,945	14,600	-51%	100%	100%

When analysed by **Format of the program** for BI programs for SMEs as in table 6, the total airtime allocation has dropped (51%).

The radio airtime of regular business programmes for SMEs has dropped by only 9% for SMEs related BI programmes. The relative contribution in regular business programmes have almost doubled in 2009 when compared with 2006 (24% to 45%). This analysis reveals that the relative contribution of the airtime for SME BI have been maintained by the regular business programmes.

2.1.7 General BI Programs on Radio by Time Sessions

Table 7: General BI Programs on Radio by Time Sessions

	Number of seconds		% Change	Relative Contribution %	
	2006	2009		2006	2009
Morning 1– 6 am to 9am	43449	21433	-51%	24%	18%
Morning 2– 9 am to 12noon	16932	13710	-19%	9%	12%
Afternoon – 12 noon to 6pm	59033	40187	-32%	33%	34%
Evening – 6 pm to 9pm	49757	35388	-29%	28%	30%
Late night – 9 pm to 12 midnight	10106	5836	-42%	6%	5%
Total	179,277	116,554	-35%	100%	100%

When investigated by **Time sessions** as in table 7, the number of seconds of radio airtime has dropped in all of the time sessions. However, the relative contribution remains almost the same in both periods.

2.1.8 SME BI Programs on Radio by Time Sessions

Table 8: SME BI Programs on Radio by Time Sessions

	Number of seconds		% Change	Relative Contribution %	
	2006	2009		2006	2009
Morning 1– 6 am to 9am	11,023	4,763	-57%	37%	33%
Morning 2– 9 am to 12noon	1,395	1,117	-20%	5%	8%
Afternoon – 12 noon to 6pm	6,846	2,699	-61%	23%	18%
Evening – 6 pm to 9pm	8,923	5,428	-39%	30%	37%
Late night – 9 pm to 12 midnight	1,758	593	-66%	6%	4%
Total	29,945	14,600	-51%	100%	100%

When analysed by the Time session of the SME BI programmes airtime, the number of seconds of radio airtime has dropped for all the time sessions. However, the relative contribution remains almost the same in both periods.

2.2 Business Related Information (BI) Aired in TV

This section presents, and discuss the comparison of airtime dedicated to Business Information on TV in 2006 and 2009.

2.2.1 General BI Aired on TV

The following table present the calculation method and discusses the comparison of total airtime dedicated to BI programmes on TV in 2006 and 2009.

Table 9: General BI Aired on TV

Calculation Items		2006	2009	Difference
a.	Number of TV channels monitored	11	12	1
b.	Number of hours monitored in each of the above TV channel	18	18	-
c.	Total TV Airtime hours Per Day (a×b)	198	216	18
d.	Number of Radio Airtime in Seconds per day in all 17 channels for 18 hours (c×60×60)	712,800	777,600	64,800
e.	Actual TV Airtime Allocation for 21 days	927,062	211,283	-715,779
f.	Number of days monitored	21	21	0
g.	Average number of TV airtime seconds per day	44,146	10,061	34,085
h.	Average Number of TV airtime minutes per day	736	168	-568
i.	Percentage of the TV Airtime allocated per day for business programs	6.2%	1.3%	-4.9%
j.	BI Air Time Changed in Percentage			-77%

The numbers of TV channels has increased from 11 to 12 in 2009 and as a result the total number of TV Airtime in Seconds per day in all channels for 18 hours increased by 64,800 seconds per day.

The actual average number of TV airtime in terms of seconds in 21 days dropped from 927,062 to 211,283 (dropped by 715,779) and in terms of percentage it has dropped from 6.2% to 1.3% (dropped by 4.9%) in the respective periods. Hence air time has dropped by there quarter (77%) in the TV.

A further analysis of the above changes are discussed in the sections 2.2.2 to 2.2.8 in terms of which type of business information contributed to this change, which language and channels,

format of the program, air time etc for general business information and SME specific business information.

2.2.2 General BI Aired on TV by Type of Information

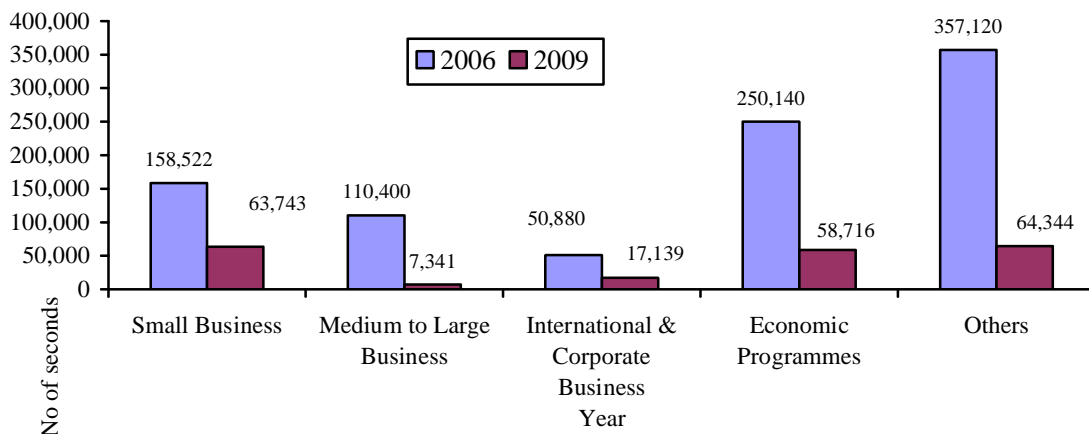
The following table present the last three years changes in airtime focused on different types of BI in terms of small businesses, medium to large businesses, international and corporate business on TV.

Table 10: General BI Aired on TV by Type of Information

Business information type	No of seconds		Changes in 2006 vs. 2009		Relative Contribution %	
	2006	2009	No of seconds	%	2006	2009
Small Business	77,580	52,874	-24,706	-32%	8%	25%
Medium to Large Business	91,560	16,307	-75,253	-82%	10%	8%
International & Corporate Business	287,040	66,058	-220,982	-77%	31%	31%
Economic Programmes	332,042	68,765	-263,277	-79%	36%	33%
Others	138,840	7,279	-131,561	-95%	15%	3%
Total	927,062	211,283	-715,779	-77%	100%	100%

When analysed by **type of business information**, airtime has decreased from 77% at the total level. As shown in table 10 and figure 3, the number of seconds of TV airtime has dropped in all categories when compared with 2006. Despite a drastic drop in total airtime for Small businesses the relative composition has increased during the respective periods (8% to 25%).

Figure 3: No of Air Time Seconds by Business Information Type in TV



2.2.3 General BI Aired on TV by Language and Channel

Table 11: General BI Aired on TV by Language and Channel

	No of seconds		Changes in 2006 vs. 2009	Relative Contribution %	
	2006	2009		2006	2009
Sinhala Language					
Derana	18,720	2,387	-87%	2%	1%
ITN	17,160	9,332	-46%	2%	4%
MAX	.	4,300			2%
Rupavahini	58,140	53,724	-8%	6%	25%
Sirasa	10,320	4,595	-55%	1%	2%
Swarnavahini	2,940	1,340	-54%	0%	1%
TNL	119,760	8,410	-93%	13%	4%
Total	227,040	84,088	-63%	24%	40%
English Language					
ART TV	245,700	63,284	-74%	26%	30%
Channel Eye	3,240	450	-86%	0%	0%
ETV	326,100	39,083	-88%	35%	18%
ITN	13,020	3,482	-73%	1%	2%
MTV	2,640	15,476	486%	0%	7%
TNL	104,100	3,440	-97%	11%	2%
Total	694,800	125,215	-82%	75%	59%
Tamil Language					
Channel Eye	2,460	510	-79%	0.3%	0.2%
ITN	1,560			0.2%	
Shakthi TV	1,202	1,470	22%	0.1%	0.7%
Total	5,222	1,980	-62%	1%	1%
All Languages	927,062	211,283	-77%	100%	100%

Note: One channels may have more than one language programs. Eg ITN has programs in all three languages.

When analysed by **language and channel** as in the table 11, the number of seconds of TV airtime has dropped drastically (77%) in all languages as compared to 2006.

English language contributes to 75% of the airtime in 2006, but it has dropped by 82% which is the main reason for the drop in total airtime. Airtimes have significantly dropped in ETV and TNL. MTV shows an increase in airtime such as on business information. When analysed program wise in each of the channels, on ETV, programs such as LBR & Lanka Business Online, on ART TV, The State of Business & Biz Roundup and in TNL, Lanka Business Report & Lanka Viyaparika Puwath programs have dropped airtime drastically.

Sinhala language findings are interesting in that airtime has dropped in TNL, which has contributed to the total Sinhala airtime drop, but Rupavahini has almost maintained the previous airtime levels. Tamil BI airtime is very low compared with English and Sinhala airtimes.

Up to now, the analysis considered only the general business information, which included the small businesses, medium to large businesses, international and corporate businesses and other business information on TV.

From this point on wards, in all the other sections a special analysis will be presented focusing only on the small businesses and medium to large businesses, named as the SME specific businesses information. Since Enter Growth project is focusing only on the SME sector in the media component, this analysis is very important.

2.2.4 SME BI Aired on TV by Language and Channel

Table 12: SME BI Aired on TV by Language and Channel

	No of seconds		Changes in 2006 vs. 2009	Relative Contribution %	
	2006	2009		2006	2009
Sinhala Language					
Derana	4,500	670	-85%	2.7%	1.0%
ITN	13,500	3,268	-76%	8.0%	4.7%
MAX	-	720	-	-	1.0%
Rupavahini	26,160	48,493	85%	15.5%	70.1%
Sirasa	4,140	970	-77%	2.4%	1.4%
Swarnavahini	60	725	1108%	0.0%	1.0%
TNL	38,400	360	-99%	22.7%	0.5%
Total	86,760	55,206	-36%	51.3%	79.8%
English Language					
ART TV	36,900	10,655	-71%	21.8%	15.4%
Channel Eye	2,220	-	-	1.3%	-
ETV	36,000	2,760	-92%	21.3%	4.0%
ITN	240	440	83%	0.1%	0.6%
MTV	300	-	-	0.2%	-
TNL	4,800	120	-98%	2.8%	0.2%
Total	80,460	13,975	-83%	47.6%	20.2%
Tamil Language					
Channel Eye	960	-	-	0.6%	-
ITN	180	-	-	0.1%	-
Shakthi TV	780	-	-	0.5%	-
Total	1,920	-	-	1.1%	-
All Languages	169,140	69,181	-59%	100%	100%

When analysed by **language and channel** for the airtime of SME BI on TV, the total number of seconds have dropped (59%).

Interestingly in Rupavahini, there is an increase in the relative contribution of the airtime allocated for SME BI programs. On the other hand on TNL, the Sinhala language BI have dropped airtime drastically (99%).

There has not been any BI for SMEs in 2009 in the Tamil language channels. In the English channels also, ETV and TNL have dropped their airtimes allocated for the BI on SMEs.

2.2.5 General BI Programs on TV by Format of the Program

Table 13: General BI Programs on TV by Format of the Program

	Number of seconds		% Change	Relative Contribution %	
	2006	2009		2006	2009
Regular business programmes	837,782	186,113	-78%	90%	88%
News bulletins	89,280	25,170	-72%	10%	12%
Total	927,062	211,283	-77%	100%	100%

When analysed by **Format of the program** as in the table 13, the number of the seconds in TV airtimes have dropped in both Regular business programmes and News bulletins, however the relative contribution remains the same in both periods.

2.2.6 SME BI Programs on TV by Format of the Program

Table 14: SME BI Programs on TV by Format of the Program

	Number of seconds		% Change	Relative Contribution %	
	2006	2009		2006	2009
Regular business programmes	154,500	66,966	-57%	91%	97%
News bulletins	14,640	2,215	-85%	9%	3%
Total	169,140	69,181	-59%	100%	100%

When analysed by the **format of the program** as in table 14, the number of seconds allocated for BI programmes in TV airtime has dropped for both regular business programs and news bulletins for SME BI.

Regular business programs of SME BI contribute almost 90% of the air time, hence it can be concluded that SME BI are present in regular TV programs than the news bulletins in TV.

2.2.7 General BI Programs on TV by Time Sessions

Table 15: General BI Programs on TV by Time Sessions

	Number of seconds		% Change	Relative Contribution %	
	2006	2009		2006	2009
Morning 1– 6 am to 9am	158,522	63,743	-60%	17%	30%
Morning 2– 9 am to 12noon	110,400	7,341	-93%	12%	3%
Afternoon – 12 noon to 6pm	50,880	17,139	-66%	5%	8%
Evening – 6 pm to 9pm	250,140	58,716	-77%	27%	28%
Late night – 9 pm to 12 midnight	357,120	64,344	-82%	39%	30%
Total	927,062	211,283	-77%	100%	100%

When investigated by **Time sessions** as in table 15, the number of seconds in TV airtime has dropped in all of the time sessions. However, the relative contribution remains the same except early morning sessions in both periods.

2.2.8 SME BI Programs on TV by Time Sessions

Table 16: SME BI Programs on TV by Time Sessions

	Number of seconds		% Change	Relative Contribution %	
	2006	2009		2006	2009
Morning 1– 6 am to 9am	32,940	38,413	17%	19%	56%
Morning 2– 9 am to 12noon	21,780	240	-99%	13%	0%
Afternoon – 12 noon to 6pm	12,900	7,193	-44%	8%	10%
Evening – 6 pm to 9pm	53,220	18,925	-64%	31%	27%
Late night – 9 pm to 12 midnight	48,300	4,410	-91%	29%	6%
Total	169,140	69,181	-59%	100%	100%

When analyzed by **time sessions** as in table 16, the number of seconds for TV airtime has dropped for the SME BI except the morning 6am to 9am session. There is a significant change in the relative contribution in the Morning 1– 6 am to 9am. Airtime has increased from 19% to 56% while late night – 9 pm to 12 midnight has dropped from 29% to 6%.

3.0 Reasons for the BI Airtime Decline in Radio and TV

3.1 BI Airtime Decline: Further Investigations

The Nielsen Company Lanka (Pvt) Ltd carried out monitoring of the business information programmes (BI) in radio and TV stations of Sri Lanka for over a period of three weeks, from 1st to 21st January 2006. The findings revealed that only 0.77% of total airtime was allocated for business information on radio and 6.2% of the total airtime was allocated for business information on Television. Media monitoring was carried out from January 1st to 21st 2009 and the findings revealed that the total airtime allocated for business information on radio has dropped to 0.43% and on TV it has dropped to 1.3%. Given this context, ILO has requested Nielsen to investigate this further as an additional component of the existing study.

The main objective of this additional component was to investigate the causes of not continuing initially started SME's targeted business information programs in the selected TV & Radio channels which interact with the Enter Growth project. This will attempt to answer why the media program component of the Enter Growth project collapsed rather than taking off during the project implementation.

Methodology followed for the additional component was; reviewing project progress reports and interviews with TV & Radio channels and analysing Airtime allocation in 2006 vs. 2009 for three weeks as well as 2006 & 2008 annual airtime in detail.

Three channels namely Shakthi FM, Derana TV & TNL TV were selected where Enter Growth has interacted while carrying out the project activities. The above channels have interacted with the project during the last three years but showed a decline in the airtime allocated for business information when compared with 2006 airtime allocation. Hence these three channels were selected for further investigations.

Channel	Drop in Airtime Business Information (%)
1. TNL TV	99%
2. Derana TV	85%
3. Shakthi FM	71%

The senior officers of the channels and officers in three channels who have participated in trainings conducted by the Enter Growth project were interviewed including Officials/persons interacted with Project .

However due to organizational management and staff changes, some of the initial participants and officials who interacted with the project were not available for the interview and present senior managers and participants were interviewed in the selected channels instead.

3.2 Review of the Enter Growth Progress Reports & Interviews with Channels

Sections 4.4 in the six progress reports of the Enter Growth project have been reviewed and the progress of the media component during the project implementation was traced by these reports. The following are some key activities included in the media component in all six progress reports;

During this planning stage of the project (**First Progress Report: June 2005 to November 2005**) an international trainer/consultant was brought and assessment was carried out to find out the media environment in Sri Lanka. His conclusions were that the project should:

- Support the establishment of radio as well as TV programmes.
- Work with commercial stations, which will provide a better platform for debate.
- Attempt to work with a local partner organization, for greater local ownership.
- Support the Sri Lanka Press Institute to develop a short, mid-career course in radio and TV business programme production.
- Carry out preparatory research to be better able to make a case for small enterprise programmes.

The findings of this assessment gave the project a direction to carry out the activities for the media component for which consultants were recruited.

An audience research was carried out by the project sponsorship (**Second Progress Report: November 2005 to July 2006**). It was found that there is a strong demand for the small business radio and television programmes. Media monitoring shows that in Radio and TV that the business coverage is low and coverage of small businesses is minimal.

The project carried out the following activities in this quarter;

- The project presented the findings in a workshop to the media representatives and advertising agencies.
- The meetings with individual stations were held and six interested stations participated in the project.
- Collaboration with Sri Lanka College of Journalism (under the SL press institute) – Conducted a mid carrier course for business journalists and programming staff.
- 16 journalists were trained and exposed to a wide range of programme formats and techniques
- Session on small businesses held for the College's regular course students

After July 2006, the progress of the media component is clearly presented in the 3rd, 4th and 5th progress reports. Those reports discuss the existing business programs and focus on the small business segments. Project interactions with three selected channels are as follows.

Derana TV

- During January 2007 to July 2007, Derana TV recruited the main project's contact at Max TV who participated for Enter Growth Media training program for Derana TV as the Manager of News Programmes. Under new managers' guidance, Derana channel started covering small businesses related stories on its main news programme.
- During July 2007 to January 2008, Derana TV was broadcasting several business news programmes. The new manager programmes have started including small enterprise related stories. It included significant coverage of small businesses.
- In addition to these programmes, Derana started a weekly half-an-hour business programme, 'Vanija Vitti', which includes significant coverage of small enterprises and case studies of successful small business persons.
- Derana TV was identified as a key player for the Enter Growth project to offer the greatest scope for a programme dedicated to small businesses. In consultation with the project's international media consultant, Enter-Growth considered to support on expanding temporarily its production capacity to enable the station to produce such programmes and find sponsors. But the progress is not discussed in the progress reports.

Derana management and participants of the training programme appreciated the project interventions and stated that the trainings were of benefit for their staff to design and develop business related programs. However, due to competition in the market, allocating more time for SME related businesses is challengeable, though SME related programs can contribute to the business audience and growth of the country. Since SME related program cost and time involvement is high compared with other programs (eg chart show etc.), it is very difficult to find sponsors for such programmes and since low cost program options are available among the other competitors and therefore, attracting sponsors to this kind of programs is very challengeable.

Shakthi FM

- During July 2006 to January 2007, Shakthi FM a Tamil language radio channel was broadcasting 'Velichathai Theadi' – 'Search for Light' launched a weekly 90 minute Tamil language radio programme as a result of the project. This incorporates about 20 – 25 minutes of small business content in the programme. But Shakthi FM discontinued its small business programmes in April 2007 due to an absence of the country Programme Manager and resource person's refusal to appear on the broadcasts because of fears of abduction.
- The station was re-launched and the new Programme Manager has expressed interest in broadcasting segments on small enterprises, but Shakthi's new emphasis on entertainment was the key challenge to allocate the air time for SME related information.

Since the station was re-launched, the current senior operational staffs is new and they are not able to respond to Enter-Growth project specific interventions. Some of the participants in these trainings could not remember the content and details of the program. However, some of them were very enthusiastic about the media training concept and appreciated if they can participate for similar trainings in the future which would be very helpful to them.

TNL TV

- TNL TV channel introduced business segments into an existing weekly programme 'Rhythm of Life,' in Sinhala. This program contains interviews of business persons, but most are sponsored by those interviewed.
- TNL also broadcasted a weekly half-an-hour programme in Sinhala promoting

microfinance and micro-enterprises sponsored by Ceylinco Grameen, a microfinance service provider. This was not facilitated by Enter-Growth. During January 2008 to August 2008, Ceylinco TV, which broadcasts its advertorials for the company's microfinance bank on TNL, appears to be interested in giving more substance to its programmes but it was not continued.

- TNL also considered to launch a half-an-hour programme devoted to small businesses but it had failed due to financial constraints and understaffing. Report further states that it is unlikely to happen soon.

Senior management is not reachable to make an appointment for the interview and therefore it was not possible to get any project feedback. A detailed introduction letter on the project and interventions were submitted before making an appointment, but it was refused and after that another project specific interaction with TNL was submitted. But making an appointment was not feasible.

3.3 Airtime for Programmes in 2006 and 2008 on TV and Radio

Section 2 of this report analyses the results of air time allocated for business information for three weeks (Jan 1st to 21st). This section analyses the 2006 and 2008 annual air time allocated for all programs including business programs. It covers annual data from January 1st to December 31st.

When analysing the airtime for 26 different programme categories, the total airtime has been taken into consideration and it includes the airtime for the advertisements aired in between the programmes and not the exact time allocated for the programme. Therefore, there is a difference between the airtime allocated for programme categories in this section and the airtime monitoring exercise carried out in the previous sections to measure the business information.

Table 17: Annual Airtime for Programmes in 2006 and 2008 in TV and Radio

Programme Categories	TV		Radio		% Change in TV	% Change in Radio
	2006 Jan 1 st – Dec 31 st	2008 Jan 1 st – Dec 31 st	2006 Jan 1 st Dec 31	2008 Jan 1 st Dec 31		
1. Arts And Culture	0.24%	0.38%	0.36%	0.02%	0.14%	-0.34%
2. Beauty/Fashion	0.32%	0.53%	0.01%	0.00%	0.21%	-0.01%
3. Business Program	2.60%	2.21%	0.03%	0.03%	-0.40%	0.00%
4. Children Programs/Cartoons	4.81%	5.94%	0.39%	0.14%	1.13%	-0.26%
5. Comedy	0.96%	1.11%	0.53%	0.03%	0.15%	-0.50%
6. Current Affairs	1.76%	4.20%	0.56%	0.08%	2.44%	-0.49%
7. Documentaries	0.63%	0.28%	0.01%	0.00%	-0.36%	-0.01%
8. Drama/Soap	7.14%	7.46%	3.10%	0.66%	0.32%	-2.44%
9. Educational/Social Program	1.48%	1.60%	0.13%	0.04%	0.12%	-0.09%
10. Film Based Program	0.92%	1.05%	0.79%	1.04%	0.12%	0.25%
11. Game Show	0.59%	0.80%	0.59%	0.05%	0.21%	-0.54%
12. Health/Fitness	0.20%	1.55%	0.16%	0.06%	1.35%	-0.10%
13. Movies	9.67%	6.66%	0.08%	0.00%	-3.00%	-0.08%
14. Music/Dance Program	9.83%	13.61%	66.86%	66.07%	3.78%	-0.79%
15. Nature/Wild Life/Environment	1.08%	0.54%	0.08%	0.05%	-0.53%	-0.03%
16. News	21.31%	15.08%	9.97%	9.02%	-6.23%	-0.95%
17. Other Programs	15.71%	16.64%	7.58%	14.65%	0.93%	7.07%
18. Other Serials	2.51%	1.61%	0.00%	0.00%	-0.90%	0.00%
19. Plays/Ballets	0.02%	0.00%	0.00%	0.01%	-0.02%	0.01%
20. Political Talk Show / Prg	0.63%	0.71%	0.13%	0.49%	0.08%	0.36%
21. Quiz Program	0.05%	0.11%	0.02%	0.00%	0.06%	-0.02%
22. Religious Program	2.71%	4.79%	1.45%	0.35%	2.07%	-1.10%
23. Science/Technology	0.14%	0.35%	0.06%	0.02%	0.20%	-0.04%
24. Sports	5.26%	3.32%	0.57%	0.80%	-1.95%	0.22%
25. Talk/Chat Show	6.94%	7.41%	6.43%	5.58%	0.48%	-0.85%
26. Women's Program (Assorted)	2.48%	2.07%	0.08%	0.81%	-0.41%	0.73%
Total	100%	100%	100%	100%		

When analysed by change (%) in the annual airtime allocated in 12 TV channels and 20 radio channels in 2006 and 2008, news air time has been dropped from 21% -15% and music/dance has increased from 9%-13%.

3.4 Airtime & Income Generation in TV& and Radio in Three Weeks

Table 18: Airtime & Income Generation in TV& and Radio in three weeks

Programme Categories	Air Time				Income		Radio	
	TV		Radio		TV		Radio	
	2006 Jan 1- 21 st	2009 Jan 1- 21 st	2006 Jan 1- 21 st	2009 Jan 1-21 st	2006 Jan 1- 21 st	2009 Jan 1- 21 st	2006 Jan 1- 21 st	2009 Jan 1- 21 st
1. Arts And Culture	0.23%	0.11%	0.00%	0.07%	0.09%	0.06%	0.00%	0.08%
2. Beauty/Fashion	0.20%	0.40%	0.00%	0.00%	0.10%	0.33%	0.00%	0.00%
3. Business Program	2.55%	1.77%	0.02%	0.00%	4.32%	1.32%	0.00%	0.00%
4. Children Programs/Cartoons	5.43%	5.91%	0.10%	0.32%	2.89%	2.65%	0.02%	0.33%
5. Comedy	1.02%	0.97%	0.01%	0.93%	0.66%	1.13%	0.01%	1.50%
6. Current Affairs	1.33%	5.53%	0.08%	0.31%	0.72%	1.36%	0.01%	0.75%
7. Documentaries	0.73%	0.27%	0.00%	0.00%	0.37%	0.09%	0.00%	0.00%
8. Drama/Soap	6.43%	7.43%	0.42%	3.19%	24.72%	30.01%	2.42%	5.31%
9. Educational/Social Program	1.48%	1.07%	0.01%	0.01%	0.40%	0.34%	0.00%	0.01%
10. Film Based Program	0.94%	0.55%	1.12%	0.47%	0.19%	0.37%	0.64%	0.33%
11. Game Show	0.69%	0.80%	0.01%	0.58%	0.81%	1.65%	0.00%	1.33%
12. Health/Fitness	0.17%	1.40%	0.08%	0.13%	0.29%	0.27%	0.00%	0.07%
13. Movies	10.18%	6.75%	0.00%	0.06%	6.72%	5.22%	0.00%	0.07%
14. Music/Dance Program	9.99%	13.79%	68.36%	67.60 %	4.78%	15.34%	68.56%	66.08%
15. Nature/Wild Life/Environment	1.24%	0.68%	0.02%	0.07%	0.78%	0.39%	0.00%	0.21%
16. News	21.10%	16.57%	8.59%	9.06%	31.92%	17.69%	9.30%	11.32%
17. Other Programs	15.72%	16.97%	13.62%	8.81%	4.18%	7.56%	12.47%	4.00%
18. Other Serials	2.85%	1.25%	0.00%	0.00%	3.43%	1.63%	0.00%	0.00%
19. Plays/Ballets	0.00%	0.04%	0.01%	0.00%	0.00%	0.01%	0.00%	0.00%
20. Political Talk Show / Programme	1.29%	0.61%	0.32%	0.32%	0.77%	0.34%	0.05%	0.38%
21. Quiz Program	0.00%	0.19%	0.00%	0.02%	0.00%	0.14%	0.00%	0.01%
22. Religious Program	2.49%	4.65%	0.55%	1.85%	0.22%	0.28%	0.38%	1.24%
23. Science/Technology	0.11%	0.26%	0.02%	0.04%	0.16%	0.09%	0.01%	0.00%
24. Sports	3.89%	2.36%	0.50%	0.34%	4.25%	6.20%	0.48%	0.24%
25. Talk/Chat Show	7.68%	7.29%	5.24%	5.79%	4.10%	3.32%	4.18%	6.75%
26. Women's Program (Assorted)	2.23%	2.37%	0.89%	0.01%	3.13%	2.21%	1.47%	0.00%
Total	100%	100%	100%	100%	100%	100%	100%	100%

As presented in table 18 & 19, there is no major difference between three weeks media monitoring & annual airtime allocations (eg in annual 9.83% air time for the music/dance programs while in three weeks it is 9.99%) .

When analysed, the airtime of the programme categories and income generation as in table 18 for TV & Radio in 2006 and 2009 reference periods, the airtime of the business programmes and income have dropped. Drama/Soap is only taking around 7% of the airtime but generate 25-30% revenue. This may be an area where focus on entertainment brings in more revenue, and any channel will look at it as a business module since they are in a very competitive market.

3.5 Airtime Allocated & Income for Business Programmes

From this point onwards only the three selected channels that interacted with Enter Growth project will be analysed in terms of the air time allocation and revenue generation from the BI.

Table 19: Airtime Allocated & Income for Business Programmes in 3 Channels (%)

Business Programme Name	Air Time		Income	
	2006 Jan 1 st to Jan 21 st	2009 Jan 1 st to Jan 21 st	2006 Jan 1 st to Jan 21 st	2009 Jan 1 st to Jan 21 st
TNL TV				
Avadivanu Sri Lanka	1.38%	0.00%	0.06%	0.00%
Benchmark	1.58%	2.13%	0.44%	1.79%
Benchmark -Rep	1.60%	2.13%	0.43%	0.40%
ERA	2.45%	0.00%	0.45%	0.00%
Lanka Business Report	1.86%	0.00%	1.41%	0.00%
Lanka Vyaparika Puvath	2.35%	0.00%	2.42%	0.00%
Lanka Vyaparika Puvath-Rep	1.16%	0.00%	0.60%	0.00%
Motor Cross	1.80%	0.00%	0.58%	0.00%
Mhunata Muhuna	0.50%	0.37%	0.11%	0.06%
Mhunata Muhuna -Rep	1.18%	0.57%	0.28%	0.06%
Ran Piyavara	1.60%	0.00%	0.16%	0.00%
Seylan Tele Velandasela	1.47%	1.88%	0.54%	0.28%
TNL English News	4.18%	5.71%	20.47%	5.08%
TNL Sinhala News	10.98%	13.62%	43.34%	11.23%
Viwaranikawa	2.04%	0.00%	1.69%	0.00%
Programmes on Ceylinco	0.00%	1.60%		
Derana				
Ada Derana	12.56%	13.73%	11.12%	58.77%
Ada Derana-Rep	23.69%	0.00%	1.89%	0.00%
Vanija Viththi	0.72%	2.11%	0.05%	2.48%
Madhyana Puwath	0.00%	7.93%	0.00%	16.64%
Shakthi FM				
Main News	21.19%	34.73%	8.61%	0.06%
News Headline	5.70%	13.48%	5.36%	3.15%
Total	100%	100%	100%	100%

TNL had allocated 10% of the airtime for the BI, and had generated 43% of the income from the BI segments in 2006, but both airtime and income dropped in 2009. Derana allocated only 13% of airtime and generated 58% income in the BI segments. This may be a good marketing strategy for Derana.

In addition to the above three channels, all the other TV channels BI programs are as follows during 2009

TV Channels	Business Information Programme
Art TV	Biz Roundup, State Of Business 10 To 10, The State Of Business
Etv	LBO Tv, LBR
MTV	Biz 1st Infocus
Rupavahini	Nugasewana

In the Radio, almost all the stations have BI on news. Deewara Navodaya and Govi Gedara Adaharaya broadcasted on the SLBC Commercial service are the next top programmes which are having more airtime.

4.0 Summary and Conclusion

The findings of the media monitoring shows that there is a drop in both Radio and TV airtime allocated for the general business information (BI) as well as SME BI between the two respective periods in 2006 and 2009.

Radio Air Time

The actual number of **radio airtime** in terms of seconds for 21 days have dropped from 0.77% to 0.43% in the respective periods. This is more than one third (35%) drop in radio airtimes. This drop was analysed in detail by using four different criteria eg, type, language and channel, format and time session.

When radio airtime by **type of business information** was analysed for this change, it was found that irrespective of small, medium to large, international and corporate and economic business information, air time has dropped but the drop in international and cooperate issues are only around one tenth. Interestingly the relative composition of the airtime for the above categories has not changed and there is only a slight increase towards economic programs from 46% to 59%.

When general BI radio airtime by **language and channel** was analysed, it was seen that this has dropped by one third (35%) in all channels and languages. English and Tamil has decreased only by over one tenth (15% -17%), but Sinhala dropped drastically by half (51%). Air time drop in Lakhanda is the main reason which explains 75% of the variance and drop by 62,723 seconds in Radio. Among English channels, SLBC English, Yes FM & E FM has increased the airtimes for BI and discontinuing Sun channel has also contributed in the drop in total airtime. Tamil channel findings shows that airtimes have increased in Shakthi FM to a certain extent while in Sooriyan it has increased marginally.

When the SME BI airtime was examined, this had dropped by half (51%). Airtime of SME BI programmes in Sinhala radio channels have dropped by half (51%) and Lakhanda had contributed largely to this drastic drop. However, when analysed by the relative composition of the airtime by language, it has not changed and contribution of Sinhala language is 84%, while airtime in English and Tamil language contribute was only less than 10%.

When the general BI in radio by **Format of the program** was analysed, airtime of both the News bulletins and Regular business programmes has dropped by one-third (35%) but the majority (90%) of the airtime comes from news bulletins in both periods.

When the SME BI in radio by Format of the program was analysed, radio airtime of regular business programmes for SMEs has dropped only by one-tenth (9%). The relative contribution in regular business programmes have almost doubled in 2009 when compared with 2006 (24% to 45%). This is a good result which targeted from the media component of the project. However it is very difficult to conclude that this positive change was fully attributed by the project interventions.

When investigating the general BI in radio airtime by **Time sessions**, it has dropped in all of the time sessions from morning to night for BI in both periods. However, the relative contribution remains almost the same in both periods.

When SME BI airtime in radio by Time sessions was analysed, it has dropped for all the time sessions. However, the relative contribution remains almost the same in both periods.

TV Air Time

TV airtime in terms of percentage has dropped drastically from 6.2% to 1.3% (dropped by 77%) in respective periods. The drop in TV is higher than the airtime drop in radio (35% vs. 77%).

When the general BI airtime in TV by **type of business information** was analysed for this change, it was found that all types of BI airtime in TV has dropped. However, with the drastic drop of total airtime, relative composition of small businesses has increased during the respective periods (from 8-25%). *This is a good result which targeted from the media component of the project. However it is very difficult to conclude that this positive change was fully attributed by the project interventions.*

When the general BI airtime in TV by **language and Channel** was analysed, it has dropped in all languages. English language contributes to 75% of the airtime in 2006, and it has dropped drastically by 82% and this is the main reason for the total airtime drop. ART, ETV and TNL airtime have significantly dropped. MTV has increased their airtimes on BI. In Sinhala language channels, the airtime drop in ITN has largely contributed to the total Sinhala airtime drop, but Rupavahini maintains the previous airtime levels. Tamil BI is very low compared with English and Sinhala BI airtimes.

*When SME BI airtime in TV by **language and Channel** was analysed, it was found to have dropped by 59%. In the Sinhala language, Rupavahini has increased the airtime allocated for SME BI by 85% while TNL dropped drastically by 99%. In English channels, ETV and TNL have dropped their airtime allocated for the BI on SMEs. In the Tamil language channels, there have not been any BI. It can be concluded that there is a language wise imbalance as well.*

When general BI airtime in TV by **Format of the program** was analysed, the airtime have dropped in both News bulletins and Regular business programmes, but relative composition remains the same, the majority (90%) of the airtime comes from news bulletins in both periods.

*When the SME BI airtime in TV by the **format of the program** was analysed, it has dropped for both regular business programs and news bulletins. Regular business programs contribute only 10% to the general business information and for the SME it contributes almost 90% of the air time and hence it can be concluded that SME BI are contributing more.*

When analysing the TV airtime by **Time sessions**, the number of TV airtime have dropped in all of the time sessions. However the relative contribution remains the same in both periods.

When analysing the SME BI airtime in TV by time sessions, it has dropped for most time sessions except the morning 6am to 9am session. There is a significant change in the relative contribution in the Morning 1– 6 am to 9am, airtime has increased from 19% to 56% and in the late night, 9 pm to 12 midnight, has dropped from 29% to 6%.

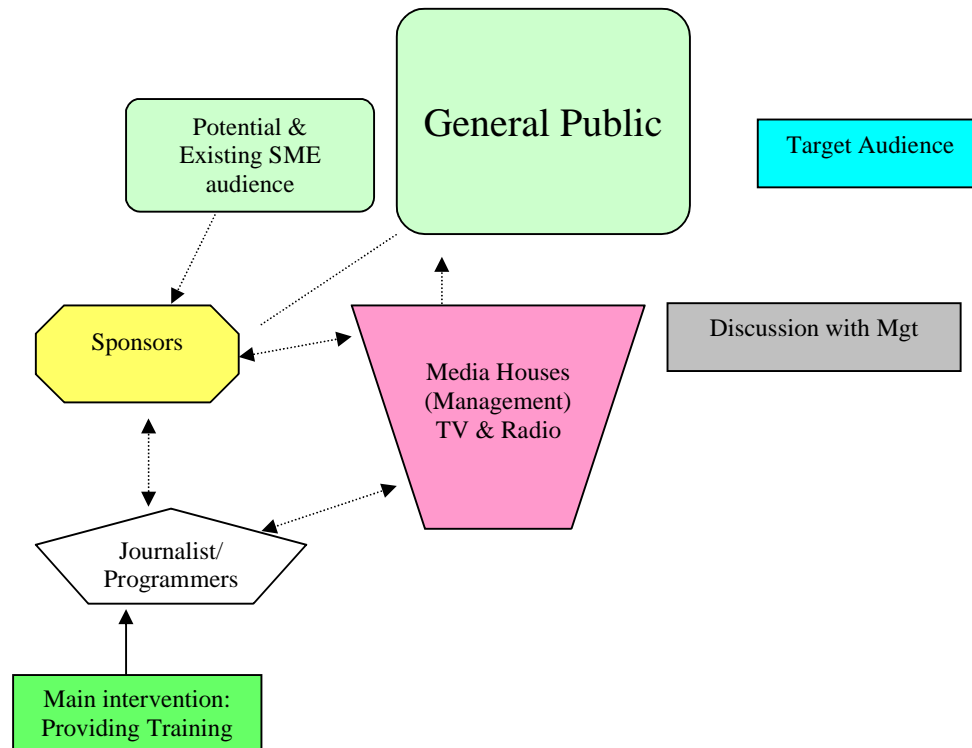
Why Enter Growth Media Component Fail/Did Not Take Off

Analysis of the annual (Jan 1st to Dec 31st) media monitoring data two periods (2006 to 2008) and interviews with three channels contributed to understand further about the drop in the airtime allocated for the business programmes.

When analysing the airtime of the programme categories and income generation in TV & Radio, in 2006 and 2009 reference periods, the airtime of the business programmes and income have dropped. Drama/Soaps are only taking around 7% of the airtime but generate 25-30% revenue. This may be an area where it shows entertainment focus is giving more revenue and any channel will look at it as a business module since they are playing in a very competitive profit oriented market.

When analysing the airtime allocation and revenue generation from the BI of the three selected channels who interacted with the Enter Growth project, it was revealed that TNL had allocated 10% of the air time for the BI and have generated 43% of the income from the BI segments in 2006, but both airtime and income dropped in 2009. Derana allocated only 13% of air time for BI and generated 58% income.

Figure 4: Why Enter Growth Media Component Fail/Did Not Take Off: Conceptual Framework



Why Enter Growth Media Component Fail/Did Not Take Off can be explained conceptually from figure 4. The media air time monitoring study estimate the supply in 2006 as 6.2% in TV and 0.77% in Radio for BI. Interest, preference and demand for the BI among target audience is also measured by interviewing existing and potential SME target audience which showed that they had a good interest.

There are many factors in the final supply equation of the TV & Radio air time for BI. Project interventions were mainly focused on the programmers, cameramen, news editors etc and more focused on technical side interventions, but less attention and follow-up on facilitating the channel management & marketing team for allocating the airtime and getting sponsors and advertisements for BI programs etc.

However, BI airtime is for a specific target audience and there is only a limited viewer-ship and listener-ship rating and sponsors and advertisers bargain based on their Gross Rated Point (GRP) for the advertisement. But the media houses were not able to play this role by giving only the training to technical staff, discussion with management and marketing team.

As mentioned in the progress reports output section 4.4, Enter Growth project media interventions have targeted all the TV stations. However, follow-up meetings were conducted with stations **who were interested** on small business programmes and as a result the interactions were limited to Derana, ITN, Rupavahini - Channels Eye, TNL as TV stations and Vanguard as program developer. In Radio Shakthi FM (Tamil) was the only interested station. Though Max TV & Max Radio (Sinhala) were interested they were newly launched channels. Only Rupavahini - Channel Eye had higher reach and many other TV & Radio channels had small reach. In addition to these situations; in general there is a high turnover among media professionals among agencies. Even channel ownership/management is involved in making air time allocation decisions etc. These contextual factors of the media industry may have affected and limited the results expected from the media interventions. If project had taken the above context in to consideration and encouraged the channels by not limiting to continue with only the once who expressed interest, project would have achieved better results.

Interacting only with one selected official for implementation was another weakness identified, because when that person leaves the organization the continuation of the programme was at jeopardy.

Interviews with the stations revealed that if project has addressed the other key issues they faced when finding sponsors and advertisers in addition to the technical skills gap, this project component would have been more successful. The main challenge the project faced was the entertainment strategy followed by the channels, sponsors and advertisers. Reason for having more entertainment programs in most of the channels were based on targeting higher viewer-ship and listener-ship to finally achieve higher GRP for their channel and programs. For that media stations have to target the general audience and not the specific groups like housewives, young or business audience to get higher viewer/listener ship. Hence reality shows like Super star, Dream star, Sri Lankan life, Little star, Comedy star etc. have been started and they are more contributing than business information programs etc. to the media houses to get higher readership and viewership.

Due to various changes in the management of the media houses over a period of time, the participants of the training programme have not been able to implement the business related

programmes. Since only few channels have been selected for interaction there were limited options available for achieving the objective of the media component.

The media monitoring team experiences reveal that, due to the Northern Province civil conflict between LTTE and the Government, channels have allocated significant time for war reporting in early January and it may have contributed to less attention for business information. In addition to that locally, the Media industry reports such as attacks to MBC Network, assassination of Mr. Lasantha Wickramathunga and Provincial elections in North Western and Central Provinces have also contributed to this situation. International news has also been focused towards the events of new American President that has contributed to this while financial and economic crisis information has also played a role to some extent.