

## Media in Promoting Small Business in Sri Lanka



### The Enterprise for Pro-poor Growth - Enter-Growth project



### International Labour Organization



### Final Report



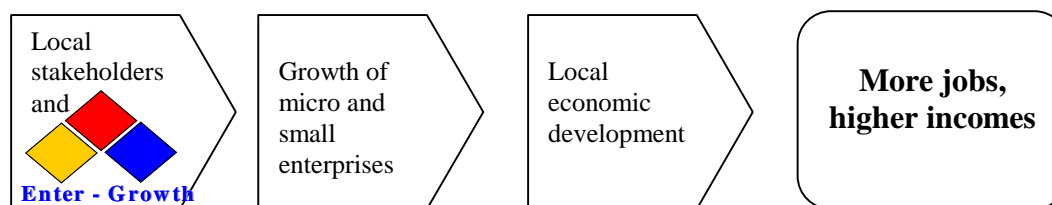
February 2006

## About Enter-Growth

Enterprise for Pro-poor Growth, or Enter-Growth for short, is a project of the International Labour Organisation (ILO), the Swedish International Development Agency (SIDA), and the Ministry of Investment and Enterprise Development. Its goal is to contribute to pro-poor economic growth and quality employment for women and men, through an integrated programme for development of micro and small enterprises. The project design is based on extensive consultations with provincial and district stakeholders from the Government, the private sector – micro and small enterprises in particular -, and NGOs. It seeks to address issues that relate to:

- The market access of micro and small enterprises;
- The policy and regulatory environment for micro and small enterprise growth;
- Enterprise culture – the way enterprise is perceived and valued in society.

The project's most basic assumption is that none of the constraints in these areas can be addressed without dialogue with and between the stakeholders in the districts, and that they need to take the lead in finding and implementing solutions. Enter-Growth's role is that of a facilitator in this process. After a first project concept in 2003, and a final document in 2004, the project started in June 2005, for a period of 3 years. It has a head office in Colombo, and offices in each of the four Districts covered.



Activities of Enter-Growth are based on four central strategies: Facilitating a dialogue between small businesses and parties affect their development; Increasing access to markets by providing information, skills, exposure, business networks and linkages to large buyers; Improving the policy and regulatory environment; and by Promoting enterprise culture.

### **Strategy 1: Facilitating dialogue**

Enter-Growth bases its work on dialogue and consultation between and with those who affect the development of the micro and small enterprise (MSE) sector: National level Ministries, Provincial and District Governments, private sector organizations and NGOs. In each of the four Districts it operates, it supports Micro and Small Enterprise Forums that bring together representatives of these sectors.

### **Strategy 2: Increasing access to markets**

Micro and small enterprises have little access to larger markets because of a lack of information, skills, exposure, business networks and linkages to large buyers. Enter-Growth works to strengthen the supply of business development services that address these constraints. The demand for such services is identified through LOCAs, and by stimulating demand through providing more information on business development and promoting them. The final result will be better market access, so higher incomes and more jobs.

### **Strategy 3: Improving the policy and regulatory environment**

Policies, regulations and rules at the local level often do not make starting or growing a small enterprise easy, even though the Government is in favour of private sector development. Enter-Growth provides officials with information and training so they can serve MSEs more effectively. It also provides assistance to revise rules and regulations that are set at the local level, to make them more conducive to the MSE sector. A stronger voice for MSEs means a better informed Government, which will set policies and regulations to promote the growth of local incomes and jobs.

### **Strategy 4: Promoting enterprise culture**

In Sri Lanka's poorer, more rural areas, having a small enterprise is often seen as an option of last resort rather than a valuable occupation or a commendable undertaking. This limits the growth of enterprise, as few people start a business and those that do are not motivated enough. Enter-Growth works to have more rural people, including women and youth, consider business as an accepted and valued option. It is introducing business awareness training ("Know About Business") in vocational schools and planning a campaign that will make use of theatre and mass media. This will target those who could decide to start a small enterprise as well as those who affect such decisions, such as teachers and officials.

## **Foreword**

This report presents the findings of a comprehensive research exercise carried out to fulfil information needs for a proposed media based SME development activity under the Enterprise for Pro-poor Growth (Enter-Growth) project in Sri Lanka. Enter-Growth, an enterprise development project implemented by the International Labour Organization (ILO), is working to promote the growth and development of small and medium enterprises (SMEs). Specifically, the media project will launch radio and television programmes that focus on the SME sector in Sri Lanka.

The report is compiled by ACNielsen Sri Lanka for the International Labour Organization.

## Table of Contents

Executive Summary.....	1
1. Introduction.....	4
1.1 Objectives.....	5
1.2 Methodology.....	6
1.2.1 Media Monitoring.....	6
1.2.2 The survey.....	6
1.2.3 Further exploration with Group Discussions.....	7
2. Findings.....	8
2.1 Findings of the Survey.....	9
2.1.1 Media habits and opinions (radio and Television).....	9
2.1.2 Current sources of business information and perceived role of electronic media.....	19
2.1.3 Interest in proposed programmes and media preference.....	22
2.1.4 Potential for use of telephone and mobile phone in business.....	29
2.2 Findings of the Media Monitoring Exercise – A summary.....	34
2.2.1 Radio.....	34
2.2.2 TV.....	36
2.3 Findings of the Focus Group Discussions.....	41
2.3.1 Television.....	41
2.3.2 Radio.....	48
2.3.3 Reactions to programs based on Small and Medium scale business.....	49
2.3.4 Opinions on Programme Scheduling.....	54
3. Discussion of Findings.....	55
4. Recommendations.....	60
Appendices.....	
Appendix 1: Conceptual framework.....	
Appendix 2: Survey Questionnaire.....	
Appendix 3: Acceptance Levels of Proposed Media Programmes – TV and Radio.....	
Appendix 4: Preferred Length of Proposed Media Programmes.....	
Appendix 5: Descriptive programme schedule for Radio.....	
Appendix 6: Descriptive programme schedule for TV.....	

## List of Tables

Table 1: Television viewership - Total level.....	9
Table 2: Television viewership - segment analysis.....	9
Table 3: Frequency of Watching Television - Total Level.....	10
Table 4: Frequency of Watching Television - Segment Analysis.....	10
Table 5: Popular Times of Watching - Total Level.....	11
Table 6: Popular Times of Watching - Segment Analysis.....	11
Table 7: Favourite TV channels - Total Level.....	12
Table 8: Favourite TV channels - Segment Analysis.....	13
Table 9: Radio Listnership - Total Level.....	14
Table 10: Radio Listnership - Segment Analysis.....	14
Table 11: Frequency of listening to the Radio - Total Level.....	15
Table 12: Frequency of listening to the Radio - Segment Analysis.....	15
Table 13: Popular Times to Listen to the Radio - Total Level.....	16
Table 14: Popular Times to Listen to the Radio - Segment Analysis.....	16
Table 15: Popular Radio Channels - Total Level.....	17
Table 16: Popular Radio Channels - Segment Analysis.....	18
Table 17: Perceptions of Business Topic Coverage on TV.....	19
Table 18: Perceptions of Business Topic Coverage on Radio.....	19
Table 19: Usage Levels of Sources for Different Information Needs.....	20
Table 20: Use of Busniness Information Sources - Media Vs Non-media.....	21
Table 21: Acceptance levels of Proposed Media Programmes - at Total Level - TV and Radio.....	22
Table 22: Preference Levels of TV against Radio - Total Level.....	23
Table 23: Preference Levels of TV against Radio - Segment Analysis.....	23
Table 24: Reasons to Prefer TV over Radio - Total Level.....	24
Table 25: Reasons to Prefer TV over Radio - Segment Analysis.....	24
Table 26: Information Topics of Interest – Total Level.....	25
Table 27: Information Topics of Interest - Segment Analysis.....	26
Table 28: Preferred Time Slots - TV.....	27
Table 29: Preferred Time Slots - Radio.....	27
Table 30: Preferred Length of the Programme - Total Level.....	28
Table 31: Availability Levels of Phone Facility – Segment Analysis and Total Level.....	29
Table 32: Awareness Level on SMS - Total Level.....	30

Table 33: Awareness Level on SMS - Segment Analysis.....	30
Table 34: Availability of SMS Facility - Total Level.....	30
Table 35: Availability of SMS Facility - Segment Analysis.....	30
Table 36: Use of SMS Service - Total Level .....	31
Table 37: Use of SMS Service - Segment Analysis.....	31
Table 38: Interest Levels on Receiving Business Information by SMS - Total Level.....	32
Table 39: Interest Levels on Receiving Business Information by SMS - Segment Analysis.....	32
Table 40: Willingness to Pay for SMS Information - Total Level .....	33
Table 41: Willingness to Pay for SMS Service - Segment Analysis.....	33
Table 42: Willingness to Buy a Phone to Receive SMS Information - Total Level.....	33
Table 43: Willingness to Buy a Phone to Receive SMS Information - Segment Analysis .....	33

## Acronyms

CWE	-	Chief Wage Earner
DS	-	Divisional Secretariat
Enter-Growth	-	Enterprise for Pro-poor Growth
FGD	-	Focus Group Discussions
GN	-	Grama Niladari (Government Officer in Charge of Village/Town)
GoSL	-	Government of Sri Lanka
HH	-	House Hold
ILO	-	International Labour Organisation
MSE	-	Micro and Small Enterprise
MSME	-	Micro, Small, and Medium Enterprises
NGO	-	Non Governmental Organisation
SEC	-	Social Economic Class
SIDA	-	Swedish International Development Agency
SME	-	Small and Medium Enterprises
TOR	-	Terms of Reference

## **Executive Summary**

Small and Medium Enterprises (SMEs) sector is a critical component in the economy of Sri Lanka. Majority of the private sector enterprises in the country fall into this category. Despite the acknowledgement of its importance, the small business sector has not shown strong growth over the years. Rather, it looks as if the sector has settled to become a cluster of fragile and stagnant enterprises. Insufficient information has been pointed out as one of the key reason for lack of development among small businesses. The Enter-Growth project of the ILO strives to change this situation through the activation of four key strategies: Facilitating a dialogue between small businesses and parties that affect their development; Increasing access to markets by providing information, skills, exposure, business networks and linkages to large buyers; Improving the policy and regulatory environment; and by Promoting enterprise culture. The underlying concept of the project activities is involving business operators and stakeholders towards developing small businesses to strengthen the local economy, thus creating higher employment and income opportunities. In this regard ILO has taken an initiative through the Enter-Growth project to support small business owners through a series of TV and radio programmes to provide:

- Up-to-date business information and news
- A platform to discuss and debate business issues
- A voice to influence policy and legislation

### **Objective**

This research exercise is an effort to: understand the extent to which there would be an audience in Sri Lanka for the proposed programmes; understand general media habits of the target audience; and to quantify air time currently devoted to business related programmes on TV and radio.

### **Brief methodology**

The research process consisted of three components. The first component involved a media monitoring exercise to determine the coverage, and to quantify airtime allocated business programmes on Radio and TV,. This was achieved through continuous monitoring of all relevant radio and Television channels from 1st to 21st January 2006. The second component involved a survey of 500 eligible respondents in Colombo, Kandy, and

Kurunegala districts. The sample included urban as well as the rural sector, women business owners, and business owners from both upper and lower socio-economic groups. Field work took place from 06<sup>th</sup> January to 17<sup>th</sup> January 2006. The third component involved focus group discussions comprising potential listeners (24 listeners) of proposed business programmes to obtain qualitative information. The purpose of this exercise was to shed light on unclear areas and further explain issues uncovered.

## **Recommendations**

### **1. Media types to be used (radio/TV): Reasons for popularity of Television programmes**

Current and Potential entrepreneurs prefer TV against radio, the direct reason for preference being the visual character of TV. Further TV creates a face-to-face feeling among the audience increasing believability, and also keeps them focused on the programme.

### **2. Type of Programme: Discussion Forums with Celebrity Entrepreneurs/Panels**

Small business owners have stressed the importance of real life examples and guidance using local business people who had started small and have “gone up the ladder”. The programmes should also provide the audience the opportunity to interact with the experts participating in the discussion. This part of the programme would be more like a “Business Clinic”.

### **3. Delivery of the Programme: One Programme for all except in Tamil speaking areas**

Despite some marginal variations the trends were consistent across all the segments considered. Therefore, a single programme can focus on the total audience. The programme however should be made flexible enough to accommodate Tamil speaking business people as well.

### **4. Media channels to be used: Rupavahini or Sirasa**

Rupavahini has high coverage across the country, and is watched alike by both urban and rural sectors. It is also perceived as a channel that telecasts meaningful programmes rather than only light entertainment. On the other hand, Sirasa TV is perceived as a channel that has taken the initiative to help people. However, coverage should be verified prior to making this decision.

### **5. Time and day to air these programmes: Sunday - Morning 7 -9 am OR Evening 8 to 10 pm**

There was no clear convergence on particular day and time. However, the weekend, particularly Sunday has been highlighted as a relatively free day.

In terms of time, again there was no strong convergence, yet morning 7-9 am and evening 8-10 pm seemed to have been preferred by more respondents. Given that 8-10 pm peak times are booked for tele-dramas and news, it may not be practical to squeeze in a Business Programme. Having a programme starting at 10pm, and a repeat telecast in the morning at 7 pm would be the better option.

**6. Length of such programmes: 1 hour**

Although the preference of a high proportion (50%) is 30minutes, this perhaps may not be adequate for a programme with an interactive discussion panel plus information clips. On the other hand all put together, the proportion preferring a programme running for more than 30 minutes is also 50%.

**7. Topics to be covered – Broad Content Guidelines**

There was a fair demand for all the topics: Information on new technologies/machinery, Information on markets, Information on services for the business (financial/non-financial), Imparting knowledge and experience from successful business people, Information on business opportunities, Questions and answers to business issues and problems, Information on new equipment, Tips and business advice from ‘experts’, and a Platform to discuss and air business problems and issues

**8. Potential of SMS as a source of business information: Needs further understanding**

An instant glance at the findings indicates that this is an option with a lot of potential. Majority owns mobiles with SMS facility and there is a high willingness to receive business information even at a reasonable cost. However, the fact that currently not many use this facility, creates a doubt as to whether despite high expressed liking, there would be sufficient commitment at implementation level, for this type of project to be sustained. Thus, further studies may need be done on current usage and what particular types of information can be effectively communicated via SMS. How advance is Sinhalese/Tamil medium SMS, is another question to be answered prior to rolling out this type of a project.

## 1. Introduction

Small and Medium Enterprises (SMEs) sector is a critical component in the economy of Sri Lanka. Majority of the private sector enterprises in Sri Lanka fall into this category, as in many other developing countries. Thus, the small business sector has emerged to be a key livelihood provider to both urban and rural sectors. The role of small business sector in employment generation and poverty control has been strongly recognized. According to the Investment Climate Report published by The World Bank and the Asian Development Bank, 13% of rural families depend on the non-farming sector as an important source of income and livelihood.

Despite the acknowledgement of its importance, the small business sector has not shown strong growth over the years. Rather, it looks as if the sector has settled to become a cluster of fragile and stagnant enterprises. Such a condition could easily spell disaster to a country like Sri Lanka. There are many reasons identified for this state of affairs. These vary from social concerns to lack of proper infrastructure facilities. Whilst most discussions on issues facing the SME sector has been focused on access to credit and education, lack of correct business information has not received much attention. At the same time the enabling environment for small businesses has moved in a positive direction providing comparatively better facilities to the business owners. This indicates that perhaps the business community is not capitalizing on market opportunities, not making use of facilities available, and also do not know how to get out of a problem. Thus it is important to ask the question - Do they know? Therefore, access to information could well prove to be the key to overcoming the tangible impediments that hinder business growth.

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 a part of the agenda, The Enter-Growth project is planning to support the development and launch of radio and television programmes that focus on the SME sector in Sri Lanka. This work is based on experience 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

Preliminary analysis of the media industry in Sri Lanka undertaken by the Enter-Growth Project has highlighted that business news and programmes are dominated by corporate, large business and economic news, and that the issues and news relevant to SMEs is 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. However in other countries, business programmes have been developed by commercial broadcasters who have recognized the potential of SME programmes to attract significant audiences and advertisers that are interested in penetrating the huge market the SME sector offers.

Thus, the purpose of this research assignment was to establish the extent to which there would be an audience for this type of programme in Sri Lanka among existing and potential entrepreneurs, and to establish the coverage of business related news on electronic media. Specific objectives of the study are given below.

### **1.1 Objectives**

1. To complement existing available data to understand the radio and TV usage patterns among the target audience of existing and potential small business owners and managers.
2. To develop a preliminary understanding of the interest and demand for business programmes among the target audience.
3. To identify all business oriented radio and TV programmes that currently exist in Sri Lanka and to quantify the amount of airtime devoted to general business and specifically to small enterprises.

The conceptual frame work diagram in Appendix 1 depicts how the goals of the Growth project are linked to the research objectives, and post survey actions.

## 1.2 Methodology

The research process consisted of three components. It started with the media monitoring exercise to determine the coverage of business related issues and quantification of air time allocated, which is objective 3. The preparatory work of the main survey happened simultaneously. This survey among 500 eligible respondents covered objectives 1 and 2. Qualitative information was sort through group discussions with potential listeners of proposed business programmes following the survey to shed light on unclear areas and further explaining of issues unearthed.

### 1.2.1 Media Monitoring

Required information was gathered during January 1st to 21st. 2006 by continues monitoring of all relevant radio and Television channels. Brief description of this process is given below:

- *ACN MediaWatch*<sup>®</sup> covers 50 publications, all 10 TV channels and 18 Radio channels.
- All TV monitoring was done electronically, through 24 hour recording, play back and computerizing, which ensures no data loss and minimum human error.
- All Radio monitoring was done electronically within the 18 hours ( 6.00am to 12.00 midnight)
- Recording, playback and computerizing ensure that there's no data loss with minimal human errors.

### 1.2.2 The survey

This component of the research assignment was implemented through a structured questionnaire based on the draft questionnaire provided by the ILO. The English version of the questionnaire is given in Appendix 2. The finalized questionnaire was translated into Sinhalese and piloted among 15 eligible respondents prior to start of field work. The survey was conducted among 500 existing and potential SME owners in districts of Colombo (Western including capital city), Kurunegala (North Western), and Kandy (Central). This included urban as well as the rural sector, women business owners, and business owners from both upper and lower socio-economic groups. Sample composition is given in the table below.

	Urban	Rural	Total	Male: Female	Upper & Middle Vs Lower SEC
Colombo	200	-	200	120:80	140:60
Kurunegala	75	75	150	90:60	105:45
Kandy	75	75	150	90:60	105:45
<b>Total</b>	<b>350</b>	<b>150</b>	500	<b>300:200</b>	<b>350:150</b>

Field work took place from the 09<sup>th</sup> January to the 16<sup>th</sup> January 2006. The number of field staff employed for the data collection was 24. The questionnaire took around 30 minutes to complete. A pre-defined percentage of the completed questionnaires were checked: 10% accompanied and 30% back checked within less than a week. The research team including the team leader checked the initial questionnaire as an additional precaution.

The field staff followed a predefined process to identify eligible respondents. The initial step was to visit the Divisional Secretariat (DS) office and refer to information about SMEs in “Sampath Pathikada”, a document which the DS office updates annually. This gives the number of small and medium enterprises and the possible breakdown of the industries/sectors. The second step was meeting the GN Officer<sup>1</sup> (“Grama Niladari”) to identify where small businesses are operating in the village or town. For the purpose of selecting potential businesses owner, field staff collected information from Government sources such as “Samurdhi” Banks, Business Chambers, Trade Associations, Commercial Banks and Village Civil Society leaders.

### **1.2.3 Further exploration with Group Discussions**

The Focus Group Discussions were conducted among potential listeners of proposed business programmes after the completion of the main survey, mainly in order to explore issues raised in the questionnaire in more detail. These were also designed to check on inconsistency or unexpected results from the survey. Three FGDs were conducted in each of the survey districts. The FGDs were done only among potential listeners of business radio programmes. Care was taken to represent a cross section in terms of gender and social economic class and Nature of Employment.

The three focus groups consisted of participants belonging to a wide variety of sectors. Dressmaking, coir products manufacturing, animal husbandry, mushroom farming, manufacturing and packing of spices, restaurants, manufacturing of timber products (furniture, pantry cupboards), repairing of mobile phones, repairing of air conditioners, video renting, hairdressing, flower and bridal decorating and running of communication centres just to name a few.

---

<sup>1</sup> GN Division (Grama Niladari) is the lowest administrative unit in Sri Lanka. A GN officer is typically in charge of a village or a section of a larger township.

## **2. Findings**

### **2.1 Findings of the Survey**

**2.1.1 Media habits and opinions**

**2.1.2 Perceptions on coverage and sources of business information**

**2.1.3 Interest in proposed programmes and media preference**

**2.1.4 Potential for use of phone mobile phone in business**

### **2.2 Findings of the Media Monitoring Exercise**

### **2.3 Findings of the Focus Group Discussions**

## 2.1 Findings of the Survey

### 2.1.1 Media habits and opinions (radio and Television)

#### Television

##### Usage Patterns

**Table 1: Television viewer ship - Total level**

	Total Level
Total Base	514
Yes	97%
No	3%
Total	100%

Almost all business owners and intending business owners watch television. This shows the strength of this media in terms of its potential to reach such an audience. This trend is consistent among the range of segments considered as depicted in Table 2 below.

**Table 2: Television viewer ship - segment analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
<i>Base</i>	360	154	182	178	241	111	162	349	165	315	199	77	194	89
Yes	97%	97%	97%	98%	98%	98%	96%	97%	97%	97%	96%	97%	97%	98%
No	3%	3%	3%	2%	2%	2%	4%	3%	3%	3%	4%	3%	3%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.15: Do you watch TV?*

**Table 3: Frequency of Watching Television - Total Level**

	Total Level
Base	499
Every day	86%
4-6 days a week	5%
2-3 days a week	7%
Once a week	1%
Only occasionally	1%
Total	100%

A vast majority of nearly 90% watch television everyday. This trend is highly consistent across all sub groups considered.

**Table 4: Frequency of Watching Television - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
<i>Base</i>	350	149	176	174	235	109	155	339	160	307	192	75	188	87
Every day	85%	89%	88%	83%	87%	87%	85%	86%	88%	86%	86%	88%	84%	85%
4-6 days a week	5%	4%	4%	6%	4%	5%	6%	4%	7%	4%	6%	4%	5%	6%
2-3 days a week	8%	5%	7%	9%	7%	7%	7%	9%	4%	8%	6%	8%	8%	8%
Once a week	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	2%	0%	2%	1%
Only occasionally	1%	1%	0%	1%	1%	1%	1%	1%	0%	1%	1%	0%	1%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.16: If 'yes' how often do you watch TV?*

**Table 5: Popular Times of Watching - Total Level**

	Total Level
Base	499
7am - 9am	12%
9am to 12 noon	6%
12 noon to 4pm	7%
4pm - 6 pm	5%
6pm - 8pm	32%
8pm - 10pm	86%
Other times	12%

Findings show that Television clearly is an evening affair for majority of respondents. Viewer ship (86%) is highest between 8 to 10 pm, and the popularity of this time slot is consistent across all segments including: business types, gender, socio-economic classes, area of dwelling. The high convergence on 8-10pm slot is most likely due to telecasting of news and tele-dramas. Second most popular time slot is from 6 to 8 in the evening (32%).

In general, morning hours do not seem to be very popular. The mostly watched hours in the morning are 7 – 9am (12%). Television viewing in the morning is slightly higher for the urban sector compared with the rural sector. Potential business owners also show a higher likelihood to watch television in the morning hours. More women (24%) watch TV than men (14%) when the total morning session from 7am to midday is considered.

**Table 6: Popular Times of Watching - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
<i>Base</i>	350	149	176	174	235	109	155	339	160	307	192	75	188	87
7am - 9am	9%	19%	6%	12%	11%	14%	12%	16%	4%	11%	13%	8%	10%	8%
9am to 12n	6%	7%	5%	6%	8%	2%	6%	6%	8%	3%	11%	5%	5%	7%
12n to 4pm	7%	5%	9%	6%	6%	8%	6%	8%	4%	5%	10%	7%	9%	6%
4pm - 6 pm	4%	7%	5%	3%	3%	5%	8%	4%	6%	3%	7%	5%	3%	5%
6pm - 8pm	27%	42%	32%	23%	30%	31%	35%	33%	29%	26%	41%	36%	21%	33%
8pm -10pm	85%	89%	86%	85%	86%	89%	85%	88%	84%	87%	85%	83%	86%	86%
Other	13%	12%	10%	16%	10%	17%	12%	14%	8%	16%	6%	12%	16%	6%

*Q.17: When do you mostly watch TV?*

**Channel Preference****Table 7: Favourite TV channels - Total Level**

	<b>Total Level</b>
Base	499
Rupavahini	74%
Sirasa Tv	61%
Swarnavahini	57%
ITN	37%
Shakthi TV	9%
Eye	8%
MTV	8%
TNL	5%
Derana	1%
ETV	1%
Cable TV	1%
TV Lanka	0%
Art TV	0%

*Q.18.b: Which are your 3 favorite TV channels?*

Rupavahini tops the preference lists, followed by privately owned stations Sirasa, and Swarnavahini. ITN the other state channel with wide coverage, comes fourth.

**Table 8: Favourite TV channels - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
<i>Base</i>	350	149	176	174	235	109	155	339	160	307	192	75	188	87
Rupavahini	73%	74%	77%	69%	71%	72%	79%	69%	83%	70%	80%	81%	67%	79%
Sirasa Tv	60%	63%	60%	60%	62%	67%	55%	63%	57%	61%	62%	59%	59%	66%
Swarnawahini	56%	59%	58%	55%	57%	56%	57%	59%	53%	57%	57%	57%	56%	55%
ITN	38%	37%	40%	35%	35%	36%	42%	36%	41%	36%	39%	37%	40%	33%
Shakthi TV	9%	7%	8%	11%	7%	13%	8%	12%	3%	11%	6%	4%	13%	7%
Eye	7%	10%	6%	9%	8%	8%	8%	7%	11%	9%	7%	5%	8%	8%
MTV	9%	5%	6%	12%	10%	9%	4%	10%	3%	9%	5%	8%	10%	7%
Derana	1%	1%	2%	1%	0%	4%	1%	2%	0%	1%	1%	0%	2%	0%
ETV	2%	0%	1%	3%	2%	0%	1%	1%	1%	2%	1%	4%	2%	0%
TNL	4%	5%	5%	4%	5%	3%	5%	4%	5%	4%	6%	5%	4%	3%
Cable TV	1%	1%	1%	2%	1%	2%	1%	1%	0%	1%	1%	1%	1%	1%
TV Lanka	0%	1%	1%	0%	0%	0%	1%	1%	0%	0%	1%	0%	1%	0%
Art TV	1%	0%	1%	0%	1%	0%	0%	1%	0%	1%	0%	1%	0%	1%

*Q.18.b: Which are your 3 favorite TV channels?*

Whilst in general, trends are consistent across the segments, the following minor variations can be noted. Rupavahini shows marginally higher popularity among rural and less affluent respondents. Sirasa is slightly more popular among C socio-economic class households and less among D and E. Swarnawahini on the other hand has quite consistent appeal among all sub sectors considered.

## **Radio**

### **Usage Patterns**

**Table 9: Radio Listnership - Total Level**

	<b>Total Level</b>
Total Base	514
Yes	78%
No	22%
Total	100%

Just over 75% of the respondents listen to the radio. This trend is consistent with marginal differences among the sub groups considered below.

**Table 10: Radio Listnership - Segment Analysis**

	<b>Status</b>		<b>Size</b>		<b>SEC</b>			<b>Dwelling Area</b>		<b>Gender</b>		<b>Sector</b>		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
<i>Base</i>	360	154	182	178	241	111	162	349	165	315	199	77	194	89
Yes	79%	74%	79%	80%	79%	84%	72%	79%	76%	79%	75%	77%	78%	85%
No	21%	26%	21%	20%	21%	16%	28%	21%	24%	21%	25%	23%	22%	15%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.21: Do you listen to radio?*

**Table 11: Frequency of listening to the Radio - Total Level**

	Total Level
Base	400
Every day	81%
4-6 days a week	4%
2-3 days a week	10%
Once a week	1%
Only occasionally	4%
Total	100%

Approximately 80% of those who listen to radio tune in everyday. This trend is consistent with marginal differences among the sub groups considered below.

**Table 12: Frequency of listening to the Radio - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
<i>Base</i>	286	114	144	142	190	93	117	275	125	250	150	59	151	76
Every day	80%	83%	81%	78%	78%	85%	81%	83%	77%	82%	79%	80%	78%	83%
4-6 days a week	3%	6%	4%	2%	4%	4%	3%	3%	6%	3%	5%	3%	3%	3%
2-3 days a week	11%	7%	11%	11%	11%	6%	11%	8%	14%	8%	13%	14%	12%	8%
Once a week	1%	2%	1%	1%	2%	1%	1%	1%	2%	1%	2%	2%	1%	1%
Only occasionally	5%	2%	3%	7%	5%	3%	3%	5%	2%	6%	1%	2%	6%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.22: If 'yes' how often do you listen to the radio?*

**Table 13: Popular Times to Listen to the Radio - Total Level**

	Total Level
Base	400
7am – 9am	53%
9am to 12 noon	30%
12 noon to 4pm	28%
4pm – 6 pm	17%
6pm – 8pm	17%
8pm – 10pm	12%
Other times	19%
On the bus	9%

The times they listen to the radio is divided across the day. However, just above 50% claim that 7-9 in the morning is the time they tune in mostly. For a third of the respondents it is from 9 in the morning to 12 noon. In contrast to television viewing habits, fewer people listen to the radio in the evening and night. Clearly this time is reserved for watching TV.

**Table 14: Popular Times to Listen to the Radio - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
<i>Base</i>	286	114	144	142	190	93	117	275	125	250	150	59	151	76
7am - 9am	47%	69%	58%	36%	48%	59%	57%	50%	60%	46%	66%	54%	44%	47%
9am to 12n	31%	27%	31%	32%	30%	39%	23%	32%	25%	30%	31%	22%	34%	33%
12n to 4pm	28%	27%	26%	29%	23%	42%	24%	28%	26%	28%	27%	29%	26%	29%
4pm - 6 pm	19%	13%	24%	13%	16%	19%	16%	19%	13%	17%	17%	19%	19%	18%
6pm - 8pm	17%	14%	22%	13%	16%	13%	21%	18%	13%	16%	18%	15%	17%	20%
8pm -10pm	13%	10%	12%	15%	12%	9%	15%	13%	10%	14%	9%	10%	14%	14%
Other	16%	25%	15%	18%	18%	13%	24%	21%	13%	20%	17%	15%	20%	11%
On the bus	9%	7%	4%	15%	12%	9%	4%	11%	5%	12%	3%	8%	8%	13%

*Q.23: When do you mostly listen to radio?*

The trends are highly consistent across the segments for all time slots except 7 to 9 in the morning. Findings indicate that potential business owners compared to current business owners; small scale business owners compared to medium scale tune in to the radio during this time. In terms of the Socio Economic groups, nearly 10% more of Socio-Economic Class C and DE categories listen to the radio between 7 and 9 in the morning compared to the AB segment. The rural sector too shows higher listener ship (10% more) compared to the urban sector during this early morning slot.. There is a clear difference between male and female groups too in this regard, where 20% more women compared to men, listen to the radio between 7 and 9 in the morning.

**Channel Preference****Table 15: Popular Radio Channels - Total Level**

	<b>Total Level</b>
Base	400
Sri FM	83%
Sha FM	82%
Hiru FM	81%
Lakhada	73%
Raja FM	70%
Sirasa FM	59%
Swadeshya	41%
Shakthi FM	34%
Pavana	31%
City FM	29%
Asura FM	27%
Isira Radio	21%
Sooriyan FM	21%
Yes FM	13%
Sun FM	13%
RNN	12%
Gold FM	10%
TNL Radio	10%
E FM	6%
Classic FM	5%
TNL lite	4%
SLBC	2%
Neth FM	1%
Y FM	1%

Sri, Sha, and Hiru share the top position (80% approx) in the preference lists, followed by Lakhanda (73%) and Raja (70%). This preference order is consistent across all subgroups with marginal differences, as depicted in the Table below.

*Q.24.b: What are your 3 favourite radio stations?*

**Table 16: Popular Radio Channels - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
<i>Base</i>	286	114	144	142	190	93	117	275	125	250	150	59	151	76
Sri FM	83%	83%	84%	82%	83%	85%	82%	84%	81%	83%	83%	83%	79%	89%
Sha FM	81%	84%	82%	80%	82%	85%	79%	82%	82%	83%	81%	88%	79%	79%
Hiru FM	81%	82%	81%	80%	77%	90%	80%	82%	78%	78%	85%	81%	79%	83%
Lakhada	74%	72%	74%	73%	72%	75%	74%	75%	69%	73%	74%	78%	74%	71%
Raja FM	71%	68%	72%	70%	69%	77%	66%	71%	70%	71%	69%	69%	73%	68%
Sirasa FM	61%	55%	58%	64%	60%	53%	63%	53%	72%	60%	59%	64%	58%	64%
Swadeshya	41%	40%	42%	40%	35%	53%	40%	44%	34%	43%	37%	47%	42%	33%
Shakthi FM	34%	35%	26%	41%	31%	44%	32%	41%	18%	37%	29%	44%	33%	26%
Pavana	31%	29%	29%	34%	33%	34%	25%	34%	24%	32%	29%	44%	26%	32%
City FM	29%	28%	28%	31%	26%	33%	30%	30%	26%	30%	27%	39%	27%	26%
Asura FM	26%	28%	25%	27%	25%	33%	24%	31%	18%	26%	27%	29%	26%	24%
Isira Radio	20%	22%	17%	24%	19%	27%	18%	22%	18%	22%	19%	31%	18%	17%
Sooriyan FM	22%	18%	17%	27%	19%	26%	20%	27%	8%	25%	13%	22%	27%	12%
Yes FM	12%	13%	9%	15%	12%	17%	10%	16%	6%	13%	11%	14%	13%	9%
Sun FM	13%	11%	7%	19%	14%	16%	8%	16%	4%	14%	11%	15%	13%	11%
RNN	13%	8%	10%	16%	9%	17%	11%	15%	4%	11%	13%	14%	16%	7%
Gold FM	10%	10%	5%	15%	7%	17%	9%	13%	3%	11%	8%	8%	13%	7%
TNL Radio	10%	11%	9%	11%	9%	13%	10%	12%	6%	11%	9%	14%	10%	8%
E FM	8%	3%	3%	12%	5%	10%	5%	9%	1%	6%	6%	8%	9%	5%
Classic FM	6%	4%	1%	11%	4%	9%	4%	7%	2%	6%	4%	5%	7%	5%
TNL lite	4%	4%	0%	8%	2%	8%	6%	6%	0%	4%	4%	3%	6%	1%
SLBC	2%	2%	2%	2%	2%	3%	2%	2%	2%	2%	3%	2%	1%	4%
Neth FM	1%	1%	1%	1%	1%	1%	1%	1%	0%	1%	1%	0%	2%	0%
Y FM	2%	0%	3%	1%	2%	1%	0%	1%	1%	2%	0%	0%	1%	4%

*Q.24.b: What are your 3 favorite radio stations?*

## 2.1.2 Current sources of business information and perceived role of electronic media

### Perception of coverage of Business topics on Television

**Table 17: Perceptions of Business Topic Coverage on TV**

	<b>Too much</b>	<b>Average</b>	<b>Too little</b>	<b>None</b>
Income generation and Small Business	1%	22%	72%	5%
Large business management	10%	26%	57%	7%
Politics	33%	51%	9%	7%
Films and Dramas	70%	26%	3%	1%
Health	1%	30%	65%	4%
Agriculture	1%	31%	65%	3%
Comedies	22%	46%	28%	4%
Religious topics	3%	46%	49%	2%
Sports	15%	62%	20%	3%
Music	55%	39%	4%	1%

*Q.19: Do you think that there is too much or too little time allocated for the following programs on Sri Lankan TV channels?*

Majority (72%) feels that not enough time is allocated for business programmes on TV. Entertainment, particularly films and dramas; and politics they feel are topics that too much time is allocated for.

**Table 18: Perceptions of Business Topic Coverage on Radio**

	<b>Too much</b>	<b>Average</b>	<b>Too little</b>	<b>None</b>
Income generation and Small Business	2%	20%	71%	7%
Large business management	8%	23%	59%	10%
Politics	18%	43%	26%	15%
Health	2%	28%	64%	7%
Agriculture	1%	28%	65%	7%
Comedies	17%	49%	28%	7%
Religious topics	4%	45%	49%	3%
Sports	11%	65%	21%	3%
Music	71%	24%	2%	3%

*Q.25: Do you think that there is too much or too little time allocated for the following programs on Sri Lankan Radio Channels?*

Feeling of the Majority (71%) is that not enough time is allocated for business programmes on radio as well. Music in their opinion takes too much of radio airtime.

**Current sources of business information****Table 19: Usage Levels of Sources for Different Information Needs**

	No Source	TV	Radio	Newspapers/Magazines	Family	Business friends/associates	Associations/Chambers	Government officials	Private companies	NGOs and projects	Other
Information on markets	13%	31%	11%	27%	12%	31%	9%	3%	6%	2%	2%
Information on business opportunities	12%	22%	9%	26%	13%	35%	11%	5%	5%	3%	1%
Information on services for your business (financial/non-financial)	17%	12%	7%	15%	11%	26%	15%	19%	9%	5%	2%
Information on new technologies	19%	35%	11%	28%	4%	18%	12%	4%	10%	2%	1%
Information on new equipment	18%	33%	10%	27%	4%	20%	12%	4%	10%	2%	1%
Information on new laws and business legislation	28%	13%	6%	14%	4%	11%	13%	32%	3%	4%	1%
Business tips and advice	17%	22%	11%	19%	9%	27%	12%	12%	7%	3%	2%
Information on starting up a new business	18%	19%	7%	16%	15%	32%	9%	11%	6%	4%	3%

*Q.33: How do you get the following information currently?*

Considerable proportions of small business owners seem to rely on friends and associates to obtain information on markets, business opportunities, starting up new businesses, advice, and business support services. News papers also have been a source to obtain get information on above. Television seems to be playing a key role in giving information on new technologies, new equipment, and business advice. However, it is clear, as shown in the table below that business owners show an overwhelming reliance on known associates for information.

**Table 20: Use of Business Information Sources - Media Vs Non-media**

	Electronic Media		Other and Non-media
	TV	Radio	
Information on markets	31%	11%	93%
Information on business opportunities	22%	9%	98%
Information on services for your business (financial/non-financial)	12%	7%	103%
Information on new technologies	35%	11%	78%
Information on new equipment	33%	10%	80%
Information on new laws and business legislation	13%	6%	81%
Business tips and advice	22%	11%	90%
Information on starting up a new business	19%	7%	96%

*Q.33: How do you get the following information currently?*

### 2.1.3 Interest in proposed programmes and media preference

#### Response on Business Television and Radio programme

There is an overwhelming response to the key concepts of the proposed media programmes. The figures hint that TV would be the preferred media especially when it comes to providing a platform to discuss business issues, and influencing policy legislations. These trends are consistent across all sub groups considered, as depicted in Tables in Appendix 3 in page xxiii.

**Table 21: Acceptance levels of Proposed Media Programmes - at Total Level - TV and Radio**

	TV		Radio	
	Yes	No	Yes	No
Base	500	14	459	55
Provide business information, tips and advice	97%	3%	89%	11%
Provide opportunities to learn from other business people	98%	2%	89%	11%
Provide a platform to discuss business issues and influence government on business policy	98%	2%	83%	17%

*Q.26: Would you be interested in such a **Radio** programme? A programme that...?*

*Q.27: Would you be interested in such a **TV** programme? A programme that...?*

**Preferred Media for proposed Programmes**

**Table 22: Preference Levels of TV against Radio - Total Level**

	Total Level
Total Base	514
TV	81%
Radio	13%
Any media	6%
Total	100%

Television is the preferred media for the proposed programmes for the vast majority, exceeding 80%. This preference is consistent across all sub groups with marginal differences.

**Table 23: Preference Levels of TV against Radio - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
Base	360	154	182	178	241	111	162	349	165	315	199	77	194	89
Radio	12%	15%	14%	10%	12%	14%	14%	13%	12%	12%	14%	5%	15%	10%
TV	80%	83%	82%	79%	81%	80%	81%	79%	85%	81%	82%	87%	76%	83%
Any	8%	2%	4%	12%	7%	6%	5%	7%	3%	7%	5%	8%	8%	7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.28: Would you prefer this programme on radio or TV?*

**Table 24: Reasons to Prefer TV over Radio - Total Level**

	Total Level
Base	514
TV is visual / has pictures	58%
I watch TV more convenient	11%
I watch TV more often	11%
I listen to radio more often	6%
Listen to radio more convenient	4%
Other reasons	10%
Total	100%

Visual characteristic is the main reason (58%) to prefer TV over the radio. Convenience of the Television and tendency to watch TV more than listening to radio also have been mentioned (11% each) as reason for preference of TV by some respondents. This trend is highly consistent across the segments considered, as depicted in Table 25 below.

**Table 25: Reasons to Prefer TV over Radio - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
Base	360	154	182	178	241	111	162	349	165	315	199	77	194	89
TV is visual	56%	64%	62%	51%	53%	63%	64%	54%	67%	59%	57%	70%	45%	67%
I listen to radio more often	6%	6%	8%	5%	5%	10%	5%	7%	5%	6%	7%	1%	9%	4%
TV is more convenient	14%	6%	10%	17%	16%	7%	7%	12%	10%	11%	12%	9%	16%	11%
I watch TV more often	11%	13%	10%	11%	12%	10%	10%	13%	8%	10%	14%	8%	14%	4%
Radio is more convenient	5%	3%	5%	4%	6%	4%	2%	5%	4%	5%	3%	3%	5%	6%
Other reasons	8%	8%	5%	12%	8%	6%	11%	9%	6%	9%	8%	9%	9%	7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q29: Why do you prefer TV/Radio for this programme?*

### Information areas business owners are interested in

There is a demand for all types of topics and information from such programmes. This is positive as it shows the business owners are keen on receiving information.

**Table 26: Information Topics of Interest – Total Level**

	<b>Total Level</b>
Total Base	514
Information on new technologies/machinery	42%
Information on markets	38%
Information on services for your business (financial/non-financial)	38%
Imparting knowledge and experience from successful business people	37%
Information on business opportunities	36%
Question and answers to business issues and problems	32%
Information on new equipment	30%
Tips and business advice from ‘experts’	30%
Platforms to discuss and air business problems and issues	21%
Other (Information about marketing field, Good concepts about business)	1%

*Q.30: What would you want a business radio or TV programme to provide?*

Importance of these topics however seems to vary across some of the segments considered as depicted in Table 27 below. It is clear that whilst potential entrepreneurs have higher interest in new business opportunities and examples of successful entrepreneurs, current business owners have higher interest in expert advice on running businesses. Urban and Rural sectors seem to be different in terms of demand for information markets, and need of a platform to air business issues. The manufacturing sector apparently is keen on equipment and machinery, and also on expert advice

**Table 27: Information Topics of Interest - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
Information on new technologies/machinery	43%	41%	38%	47%	42%	47%	40%	44%	39%	44%	39%	60%	31%	54%
Information on markets	38%	40%	36%	39%	39%	46%	32%	42%	30%	40%	36%	38%	39%	35%
Information on services for your business (financial/other)	39%	36%	40%	38%	38%	45%	33%	38%	37%	39%	36%	32%	44%	33%
Imparting knowledge and experience from successful business people	34%	42%	35%	34%	33%	41%	39%	41%	28%	35%	40%	26%	42%	26%
Information on business opportunities	32%	45%	34%	30%	33%	41%	37%	39%	30%	37%	34%	35%	31%	31%
Question and answers to business issues and problems	32%	31%	35%	30%	34%	32%	29%	38%	19%	32%	32%	22%	41%	22%
Information on new equipment	29%	34%	26%	31%	30%	30%	31%	32%	28%	32%	27%	40%	20%	38%
Tips and business advice from 'experts'	33%	24%	30%	36%	31%	37%	25%	28%	35%	34%	24%	42%	29%	35%
Platforms to discuss and air business problems and issues	20%	22%	13%	28%	23%	21%	17%	27%	8%	22%	20%	17%	25%	12%
Information about marketing field	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Programs generate good concepts about business	0%	1%	0%	1%	1%	0%	0%	0%	1%	1%	0%	0%	1%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.30: What would you want a business radio or TV programme to provide?*

**Preferred slots for programmes – TV and Radio**

**Table 28: Preferred Time Slots - TV**

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7am - 9am	28%	26%	26%	26%	27%	25%	26%
9am to 12 noon	20%	21%	20%	20%	20%	21%	21%
12 noon to 4pm	10%	10%	10%	10%	10%	9%	9%
4pm – 6 pm	5%	5%	5%	6%	5%	7%	8%
6pm – 8pm	14%	13%	14%	13%	14%	13%	14%
8pm – 10pm	21%	21%	21%	21%	21%	22%	23%
Other times	8%	8%	9%	9%	8%	8%	8%

Morning hours from 7 a.m. to 9 a.m. across the week seems to be the possible time slots on TV. There is a close preference between morning 9 a.m. -12 noon and late night 8 p.m. – 10 p.m. slots. However, this is not conclusive, given that there is no high majority for both. Radio however, converges on to late night slot of 8 p.m.-10 p.m.

*Q.31b: What day and time would you prefer a business radio programme to air?*

**Table 29: Preferred Time Slots - Radio**

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7am - 9am	3%	3%	3%	3%	3%	3%	4%
9am to 12 noon	5%	4%	5%	4%	5%	6%	7%
12 noon to 4pm	2%	2%	2%	2%	2%	3%	3%
4pm – 6 pm	2%	2%	2%	2%	2%	3%	4%
6pm – 8pm	13%	13%	13%	13%	13%	13%	14%
8pm – 10pm	69%	69%	68%	69%	68%	67%	65%
Other times	8%	8%	9%	8%	9%	9%	9%

*Q.31a: What day and time would you prefer a business TV programme to air?*

**Preferred Length of programmes – TV and Radio**

Highest proportion, around 50%, prefers the programme –whether it is on TV or Radio - to be 30 minutes in length. However, around a third of the sample prefers to have a one hour programme. All sub groups considered show similar trends with marginal differences as depicted in Tables in Appendix 4 in page xxv.

**Table 30: Preferred Length of the Programme - Total Level**

<b>Total Level</b>	<b>TV</b>	<b>Radio</b>
Base	508	470
30 minutes	50%	47%
30 – 45 minutes	16%	19%
1 hour	30%	28%
More than one hour	4%	3%
Other	1%	3%
Total	100%	100%

*Q.32a: How long should such a TV programme be?*

*Q.32b: How long should such a radio programme be?*

## 2.1.4 Potential for use of telephone and mobile phone in business

### Availability of phone facility

**Table 31: Availability Levels of Phone Facility – Segment Analysis and Total Level**

	Status		Size		SEC			Dwelling Area		Sector			Total
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Manu	Trade	Other	
Base	360	154	182	178	241	111	162	349	165	77	194	89	514
Yes	78%	50%	65%	91%	81%	76%	49%	79%	49%	78%	77%	81%	70%
No	22%	50%	35%	9%	19%	24%	51%	21%	51%	22%	23%	19%	30%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q34: Does your household own a phone?*

At total level, 70% of the respondents have a phone connection in the household. Substantial differences can be noted across the different subgroups considered. Whilst 78% of the existing business owners have phones, only 50% of those who intend to start businesses had phones. Whilst a very high 91% of medium scale business owners have a phone facility, 65% of small business owners have a phone. As one would expect, most A, B, and C socio economic group respondents (80% approx) have a phone, where as only 50% of the DE has group the facility. A similar gap can be seen between urban (79%) and rural (49%). Across business sectors however there is no difference in phone ownership.

## Awareness and Availability of SMS

**Table 32: Awareness Level on SMS - Total Level**

	Total Level
Base	358
Yes	89%
No	11%
Total	100%

A very high majority (89%) is aware of the SMS facility offered through mobile phones, and some landline companies. This is consistent across all sub groups considered in the analysis with minor variations.

**Table 33: Awareness Level on SMS - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
Base	281	77	119	162	195	84	79	277	81	248	110	60	149	72
Yes	89%	87%	85%	92%	89%	92%	85%	89%	86%	90%	85%	83%	91%	89%
No	11%	13%	15%	8%	11%	8%	15%	11%	14%	10%	15%	17%	9%	11%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.35: Do you know about SMS? That is a way of sending text messages through telephone*

**Table 34: Availability of SMS Facility - Total Level**

	Total Level
Base	317
Yes	68%
No	32%
Total	100%

Nearly 70% of phone owners who are aware of the SMS facility claim that they can use SMS on their phones. This is consistent across all sub groups analysed except one. Findings indicate that women (58%) have less access to SMS facility compared to men (72%).

**Table 35: Availability of SMS Facility - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
Base	250	67	101	149	173	77	67	247	70	224	93	50	136	64
Yes	68%	67%	67%	69%	73%	61%	64%	67%	71%	72%	58%	64%	66%	77%
No	32%	33%	33%	31%	27%	39%	36%	33%	29%	28%	42%	36%	34%	23%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.36: Is it possible to send SMS with your phone?*

**Table 36: Use of SMS Service - Total Level**

	Total Level
Base	216
Yes	51%
No	49%
Total	100%

Despite 70% of phone owners being aware of the SMS facility, and also knowing that they can use this facility on their phones, only half of them (51%) seem to use SMS for business purposes. It is interesting to note that women who have access to SMS do use it slightly more than men do for business purposes.

**Table 37: Use of SMS Service - Segment Analysis**

	Size		SEC			Dwelling Area		Gender		Sector		
	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
Base	68	103	126	47	43	166	50	162	54	32	90	49
Yes	50%	49%	49%	47%	63%	52%	50%	49%	57%	38%	54%	47%
No	50%	51%	51%	53%	37%	48%	50%	51%	43%	63%	46%	53%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.37: Do you use the phone to send or receive SMS or text messages for business purposes?*

**Table 38: Interest Levels on Receiving Business Information by SMS - Total Level**

	Total Level
Base	216
Yes	70%
No	30%
Total	100%

A high majority of 70% out of the phone owners who are aware of the SMS facility, and also know that they can use this facility on their phones, are interested in receiving business information through SMS. Whilst this is the overall picture, there seem to be substantial variations across the sub groups considered in the analysis.

Interestingly, more of potential (82%) compared to 67% existing business owners are interested in the service. Small business owners (75%) have shown higher interest compared to medium size business owners (62%). Less affluent socio economic group DE (79%) has shown higher interest than C (72%), and the more affluent AB (67%). Rural sector business owners and potential owners (82%) have shown higher interest in receiving business information through SMS compared to their urban counterparts (67%). Consistent with current use of SMS for business purposes, women (80%) have shown higher interest in SMS based business information service than men (67%). Trade (72%) and Other Service (67%) sectors show greater interest in this service compared to Manufacturing/Agriculture (53%)

**Table 39: Interest Levels on Receiving Business Information by SMS - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
Base	171	45	68	103	126	47	43	166	50	162	54	32	90	49
Yes	67%	82%	75%	62%	67%	72%	79%	67%	82%	67%	80%	53%	72%	67%
No	33%	18%	25%	38%	33%	28%	21%	33%	18%	33%	20%	47%	28%	33%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.38: Would you be interested to receive text messages with information useful for your business?*

**Table 40: Willingness to Pay for SMS Information - Total Level**

	Total Level
Base	152
Yes	99%
No	1%
Total	100%

Paying for a useful service seems very much the norm for those who found SMS based business information services as helpful. There is absolute willingness to pay a fair fee

**Table 41: Willingness to Pay for SMS Service - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
Base	115	37	51	64	84	34	34	111	41	109	43	17	65	33
Yes	99%	97%	98%	100%	98%	100%	100%	98%	100%	98%	100%	100%	100%	97%
No	1%	3%	2%	0%	2%	0%	0%	2%	0%	2%		0%	0%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.39: Would you be willing to pay a small charge for such a service?*

**Table 42: Willingness to Buy a Phone to Receive SMS Information - Total Level**

	Total Level
Total Base	101
Yes	69%
No	31%
Total	100%

An encouraging majority of nearly 70% across all sectors have expressed interest in purchasing a phone with SMS facility, to receive information useful for business purposes. .

**Table 43: Willingness to Buy a Phone to Receive SMS Information - Segment Analysis**

	Status		Size		SEC			Dwelling Area		Gender		Sector		
	Exist	Poten	Small	Med	AB	C	DE	Urban	Rural	Male	Female	Manu	Trade	Other
Base	79	22	33	46	47	30	24	81	20	62	39	18	46	15
Yes	69%	69%	66%	72%	75%	74%	57%	72%	62%	72%	64%	68%	68%	72%
No	31%	31%	34%	28%	25%	26%	43%	28%	38%	28%	36%	32%	32%	28%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Q.40: Would you consider buying a phone if you could receive information useful for your business?*

## 2.2 Findings of the Media Monitoring Exercise – A summary

### 2.2.1 Radio

#### Proportion of airtime devoted to business programmes

Total Radio Air time/Day	Sum of total airtime across all channels per day	Proportion allocated to business issues (all sectors, all levels)
Number hours/ station = 18 Number of radio stations = 17		
17*18*3600 seconds per Day	Sum of all/ number of Days (monitored) = X	$(X/306)*100$
1, 101, 600 seconds per day	$179277 / 21 = 8537$ seconds per day	<b>1%</b>

#### **Proportion of this airtime that is focused on small business, medium to large business, international and corporate business and economic issues**

	Small	Medium	Large
<b>Seconds</b>	27806	2139	22504
<b>Relative proportion</b>	53%	4%	43%

A robust analysis of this is not possible due to the ad-hoc nature of airing business related information. Given below is indicative information from where it was possible to trace what sector/size of business.

**Number of business programmes - Includes news bulleting that contained business information**

		%	Number of seconds
<b>Total business related airings</b>		100%	179277
<b>Regular business programmes</b>		15%	26261
<b>News bulletins</b>		85%	153016
By Channel/Language			
<b>Sinhalese Total</b>		56%	<b>99773</b>
	City	10%	18280
	Hiru	3%	5349
	Lakhanda	28%	50636
	Raja	2%	3765
	Sha	5%	9408
	Shree	1%	955
	Sirasa	6%	11380
<b>English Total</b>		33%	<b>59691</b>
	YES	3%	5828
	Sun	9%	15735
	Gold	9%	15743
	Lite	8%	14314
	SLBC	1%	1335
	E	1%	1249
	TNL Radio	3%	5487
<b>Tamil Total</b>		11%	<b>19813</b>
	SLBC Tmil	6%	10478
	Shakthi	3%	6019
	Sooriyan	2%	3316
<b>By session</b>			
	Morning 1- 6am to 9am	29%	42764
	Morning 2- 9am to 12noon	10%	15269
	Afternoon - 12noon to 6pm	31%	46955
	Evening - 6pm to 9pm	26%	38525
	Late night - 9pm to 12midnight	4%	5607

Only 1% of radio airtime (all channels taken from 6am until 12 midnight) is allocated for business related information per day.

When this 1% was further probed, figures show that regular business programmes account for a mere 15% of the total business information airtime on Radio. The rest is news bulletins in the form of business news or main headlines. Majority of the programmes are in Sinhalese (56%), and 33% in English. There is very little time given for business information in the Tamil language.

Morning from 6 to 9 a.m., afternoon from 12 noon to 6 p.m., and 6 to 9pm are the sessions where most airtime is given.

**Descriptive information**

News bulletins are the main type of programmes that included business news. This could either be a business news section in the main news telecast, or a main headline news article depending on the national importance of the topic. Lak Sathosa (Sinhala programme) on City FM, and Business Focus on TNL lite are the only identified short business focused programmes that were independent of news. The topics covered were mostly on prices, currency, foreign investments, and new developments in industries and major companies. In short this information was mainly to do with the macro environment than specific issues and concerns of small business operators. Please find attached as appendix 5, the descriptive programme schedules for the 1<sup>st</sup>, 11<sup>th</sup> and 21<sup>st</sup> of January which were randomly selected as a representative sample. However, if need be the full schedules for the whole period can be availed on request.

**2.2.2 TV**

**Proportion of airtime devoted to business programming**

<b>Total TV Air time/Day</b>	<b>Sum of total airtime across all channels per day</b>	<b>Proportion allocated to business issues (all sectors, all levels)</b>
Number hours/ station = 18		
Number of TV stations = 11		
11*18*3600 seconds per Day	Sum of all/number of Days (monitored) = Y	(Y/198)*100
712800	927062/21 = 44146	<b>6.2%</b>

**Proportion of this airtime that is focused on small business, medium to large business, international and corporate business and economic issues**

	<b>Small</b>	<b>Medium</b>	<b>Large</b>
<b>Seconds</b>	77580	91560	287040
<b>Relative proportion</b>	17%	20%	63%

A robust analysis of this is not possible due to the ad-hoc nature of airing of business related information. Given below is indicative information from where it was possible to trace what sector/size of business.

**Number of business programmes - Includes news bulleting that contained business information**

			<b>Number of Seconds</b>
Total business related airings		100%	927062
Regular business programmes		90%	836520
News bulletins		10%	90542
<b>By Channel</b>			
	Derana	2%	18720
	Sirasa	1%	10320
	Swarnawahini	0%	2940
	ART tv	27%	245700
	Etv	35%	326100
	MTV	0%	2640
	Shakthi	0%	1202
	Eye	1%	5700
	ITN	3%	31740
	Rupawahini	6%	58140
	TNL	24%	223860
<b>By session</b>			
	Morning 1– 6am to 9am	15%	125822
	Morning 2– 9am to 12noon	13%	109140
	Afternoon – 12noon to 6pm	2%	16080
	Evening – 6pm to 9pm	29%	246600
	Late night – 9pm to 12midnight	41%	350820
<b>By Language</b>			
	Sinhalese	24%	227460
	English	75%	695580
	Tamil	1%	5220

Proportion of time allocated for business information and news on Sri Lankan television is 6.2% of the total airtime (all channels taken from 6am until 12 midnight).

When this 6.2% was further probed, figures show that regular business programmes account for a healthy 90% of the total business information airtime on TV. This is clear from the type of programmes television channels have: mostly 30 minutes programmes dedicated to business. The rest 10% is news bulletins in the form of business news or main headlines.

Majority of the programmes (75%) are presented in English. Sinhalese takes 24% and Tamil a mere 1%. Thus, the current business information programmes telecasted on TV seem to cater to a smaller niche of large business owners, given that the majority of small and medium entrepreneurs are mainly non-English speaking. This shows a bias toward large scale businesses. Most airtime is given in the night from 9 p.m. to midnight (41%), followed by 6 p.m. to 9 p.m. (29%).

## **Descriptive information**

Television programmes are mostly 30 minutes in length and fully dedicated to business news and issues. State of Business and BIZ Roundup on Art TV; Lanka Business Report, LBO TV, and The Money Report on ETV; Rupees and Sense on ITN; and Benchmark on TNL are the main English language business programmes. Vanija Viththi on Derana; Viyaparika Viththi on Rupavahini; Viyaparika Vivaranikawa are some of the main Sinhala programmes. These programmes mainly discuss stock market news, foreign investments, policies and regulations, and new developments among bigger companies. The SME related programmes with the largest time duration, with top 10 programmes and descriptive information is as follows. Please find attached as appendix 6, the descriptive programme schedules for the 1<sup>st</sup>, 11<sup>th</sup> and 21<sup>st</sup> of January which were randomly selected as a representative sample. However, if need be the full schedules for the whole period can be availed on request.

### **Top 10 SME related TV programmes (01.01.2006 to 21.01.2006)**

#### **1. Lanka Business Report**

Lanka Business Report is a 30 minute weekly business programme on ETV and Co-sponsored by SLT and Alliance Insurance. This is completely an English language program with all programs mainly aimed at medium and large business enterprises, as well as broad economic aspects. Information is presented in the form of 'news' presentations and often carries a lot of interviews with business leaders and analysts to support the news item. Since this is a weekly program, most of the programs are not based on day to day business events; instead it rather talks on broader business and economic topics.

## **2. Shanida Ayubowan.**

Shanida Aubowan is a Sinhala language 3 hr live program on Rupavahini, telecasted every Saturday morning, and is more of a documentary program. Within the three hours, there are programs of different subjects i.e. art and culture, literature, business, education etc. each segment given a 20-30 minutes time allocation. The business segment is typically based on a particular incident that happened or is currently happening during the week, and often carries live interviews with experts or top ranking officials of the company or economy concerned. This has more emphasis on medium scale businesses.

## **3. Rupees and Sense**

This is a 30 minute English business weekly program on ITN sponsored by the Bank of Ceylon. It generally discusses current business issues and carries interviews with industry experts.

## **4. Seylan Tele Welandasela**

This is a weekly business awareness program on TNL sponsored by Seylan Bank. It always focuses on small and medium scale urban and rural entrepreneurs. The most common feature of this program is that an interviewer goes even to remote villages and houses, interviewing SME entrepreneurs. It also gives guidance by a banker as to how to deal with banks in order to get assistance for SME entrepreneurs.

## **5. Pahan Dora**

This is a live program which is aired once a day on ITN. It is a 3 hour program within which are 30 min programme segments each. Various topics are discussed with business being one of them. A main feature of this program is that per a day, it focuses on one industry where a specialist of the industry is interviewed.

## **6. Govibimata Arunalu**

This is a documentary comprising a business weekly program on Rupavahini. Main focus is on agriculture and farmers with the main contributor to this program being the Agriculture Ministry. Concentrates an interviews and advisory type of programs to farmers on various aspects of the agriculture industry.

## **7. Manusath Uyana**

This is a regular live program on Rupavahini and is not dedicated to business. It often talks about current topics, and based on the topic, an expert on the subject speaks or is interviewed.

## **8. Nugasevana (Two programmes)**

This is a daily live Sinhala program on weekdays on Rupavahini, which often focuses on women. The three hour program has many sub programs ie: cookery, home based business, art and culture, baby care etc. The business segment focuses on small and medium business, awareness on bank loan facilities, different types of business that can be started etc. Discussion with an expert is a normal feature of this program segment.

## **9. Arthika Punarjeewana Sangamaya**

This is a weekly 30 minutes program on TNL, and often talks about eradication of poverty, small home businesses, etc. The program is more informative in nature in giving a lot of help , information and guidance to all the topics mentioned above. This is a Sinhala program designed for the lower and middle classes

## 2.3 Findings of the Focus Group Discussions

The qualitative component of the study consisted of three focus groups. Each group comprised of eight participants representing a cross section of the SME sector who were potential viewers / listeners of business related TV / radio programs.

### 2.3.1 Television

Free time available to relax in front of a TV was very much dependent on the type of business involved. However it appeared that women enjoyed more opportunity to watch Television compared to men, particularly during daytime. This was mainly due to most females having household based businesses or within close proximity to the house from business premises. Men on the other hand were mostly involved in businesses set up away from home. Thus for men, apart from the evening, early morning around 7am seem to be the only time to watch TV during weekdays. Free time during weekends again seems to depend on the type of business involved. However, Sundays were seen as relatively free days where more time was spent on watching Television.

#### Weekday TV Habits

- **Less opportunity to view (All)**
- **Starting the day -> Mind on impending Work (All)**  
“...I don't get to watch much TV during weekdays...it is mostly early in the morning around 7am before going to work and in the evening after returning home that I get to watch TV...” (male)
- **“Entertainment” while working -> Less involvement with program (Mostly Female)**  
“...I have my salon set up in my own house...so I can watch TV regularly especially if there is a program like Nugasevana or Suba Udasenak on, I make sure I don't miss it...”(female)
- **Stop gap -> In between work -> Break for mind (Mostly Female)**  
“...I have set up my flower shop in one section of my house...I have about ten people working in it...so as and when I feel like taking a break I come home and watch a bit of TV...”(female)
- **Relax in the evening -> Stress reliever -> Mostly entertainment (All)**  
“...we watch tele dramas...we can relax after work...”

### **Weekend and Holiday TV Habits**

- ***More time and opportunity to view (All)***

*“...I don’t work on Sundays, so end up watching the whole day...”*

*“...we start watching TV 1-2 hrs early on weekends...”*

*“...we can never predict what time we come home on weekdays...so even teledramas are difficult to follow on a regular basis...but on weekends we have more time in hand so there is more opportunity to watch and enjoy...”*

*“...Doramadalawa is shown on Mondays and Saturdays...but I prefer to watch it on weekends as I have more free time and can actually concentrate on the program more...”*

*“...Illakkaya is good program that is shown on Sundays...I encourage even my children to watch it...”*

Across the groups, participants enjoyed listening to radio early in the morning and while at work irrespective of whether they had the business set up in their own residence or not. Nevertheless, post returning home from work or closing of business for the day, watching Television was a much preferred option over listening to radio.

### **Radio habits**

- ***Start to the day***

*“...at 7:40am they play a program called ‘Vanakkam Thayagam’ on Shakti FM... I always listen to that on weekdays...” (Tamil)*

- ***Less distractive entertainment***

- ***Companionship***

*“...I keep the radio on in my shop...so during daytime I get to listen to it very often...”*

*“...during the day while I am working at home I have the radio on...otherwise it gets boring and I start feeling lazy...”*

### **Preferred TV Stations**

Across the groups Rupavahini, ITN, Sirasa, and Swarnavahini emerged as the most frequently watched TV channels. Further, it was interesting to note that Rupavahini and ITN were mostly preferred for their Informative programs. Likes and dislikes with regard to above channels are discussed below in detail.

### **Swarnavahini**

Clear reception, good variety and timing of programs were noted as the key likes of Swarnavahini. Further, the attention on spirituality and religion exhibited by Swarnavahini was also highly commended. This gives the station a more serious outlook and credibility. On the negative side, declining quality of tele-dramas was noted as a key dislike. It has also been criticized of being politically biased.

#### **Positives**

- ***Has a good mix and variety***  
“...there are cookery programs, political programs as well as religious programs...their mix is much better than Sirasa TV’s...”
- ***Appreciative of attention to all religions***  
“...as a Muslim I was proud to see that they start off their transmissions with prayers of all religions including mine...”  
“...on Poya days they have very good discussions on Buddhism...”

#### **Negatives**

- ***Political bias towards the opposition***  
“...especially during elections, they dedicated more of their airtime on opposition related activities and news items...”
- ***Unsuitable programs***  
“...we do not encourage our kids to watch too many Hindi movies...Swarnavahini of course show a Hindi or Tamil movie in the afternoon but it finishes just before the kids come home from school...so it is alright...”
- ***Declining quality of tele dramas***  
“...the teledramas like Ashavari, and Pooja are entertaining but not that meaningful...”

## **Sirasa TV**

In general, Sirasa TV is perceived as a good channel for entertainment and coverage of sports. The hourly telecasts of news were also seen as a positive of the channel. In addition, the fact that Sirasa TV has introduced a number of innovative programs and competitions creating opportunities for budding local talent was also perceived as a key like of the channel. Combination of these comments shows the strength of Sirasa channels in getting closer to the masses. According to the respondents Sirasa compared to Swarnawahini has less variety. However, this channel has created a niche in being highly interactive to the society.

The key negatives of Sirasa have been the lower quality of tele-dramas and too many tele-dramas being either Indian or locally done with high influence from Indian soaps. A new word seems to have emerged to define this phenomenon: "Indianization". These comments came out strongly by the participants from Kandy in particular. In addition, the programs were also perceived to be lacking in variety.

### **Positives**

- ***Public interactive programs***

*"...there are programs like Abanna Aasai Gayanna and Sirasa Super Star that provide good opportunities for young people to show the country their talents..."*

*"...programs such as Savanata Vadanak allows the public also to take part..."*

- ***Good entertainment channel***

*"...they have lots of musical programs, game shows and Hindi films shown on Sirasa TV..."*

- ***Reaching the masses***

*"...programs like Lunch Time TV actually focus on the lower middle class working people...I cannot remember any other program that catered to them...through programs like these they have been able to reach a segment which had been neglected for a long time..."*

- ***Hourly News telecast***

*"...Sirasa TV has "News @ 55" that is telecasted every hour...so when ever I hear some exciting news, I switch on to Sirasa to get it verified..."*

### **Negatives**

- ***Less variety vis-à-vis Swarnawahini***

*"...it is mostly musicals and teledramas that are shown...even the tele dramas are all very much alike..."*

- ***Low quality teledramas***

*"...the tele dramas are really low in quality and meaningless..."*

- ***Too many long serials (tele dramas)***

*"...the serials are too long and they are all very much similar*

*"...they show four dramas continuously after 8pm...that is too much..." "...we only get to watch TV from 8pm till about 10pm and during that time all what they show is tele dramas..."*

## ITN

Clear reception for many and high quality informative programs were the two key likes of ITN. According to the respondents, compared to the above privately owned stations, ITN has programmes that have meaningful content. A good variety of programmes including programmes for women also have been mentioned as positive opinions on ITN.

### Positives

- **Clear reception**  
*“...it can be viewed from almost any part of the country...”*
- **High quality Infotainment**  
*“...they have lots of discussions like Doramadalawa and also Women’s programs...”*
- **Meaningful programs**  
*“...there are some very interesting and meaningful programs like Doramadalawa where professors and experts from different fields come and discuss issues on society, psychology etc...”*

However, inconvenient timing of programs has been pointed out as a dislike. Time inconvenience apparently is caused either with telecasted time being simply not right or delaying and, worse cancellation of lined up programmes. In addition, poor quality of tele-dramas as it has been the case with Sirasa and Swarnawahini discussed above is seen as a key dislikes of the channel.

### Negatives

- **Inconvenient timing**  
*“...Doramadalawa starts very late and sometimes goes on till 12 midnight...even though the program is good we find it difficult to enjoy as it is very tiring to watch TV late in the night for so long ...”*
- **Poor quality of tele dramas**  
*“...there is only Kopi Kade to watch...there aren’t too many other teledramas to watch on ITN...”*

## **Rupavahini**

In general Rupavahini seem to have done better than other channels content and coverage. It has been appreciated for striking a good balance across the variety and presenting meaningful programmes. Good coverage across most parts of the country has also been a positive. Further, the children's' programs telecasted on Rupavahini were also highly commended. It is interesting to note that Rupavahini has been perceived as a channel that supports and encourages small business and self employment.

### **Positives**

- ***Island wide reception***  
“...Rupavahini and ITN can be watched from most parts of the country...”
- ***Good balance between entertainment and Informative programs***  
“...they do not show too many tele dramas like Sirasa and Swarnavahini...”  
“...they focus on meaningful and useful programs rather than packing their program line up with Hindi movies and tele dramas...”
- ***SME related programs***  
“...they show programs related to businesses and self employment...”  
“...once they showed how to start off a mushroom farm...being a mushroom farmer myself, I got a lot of tips from that show...”
- ***Exemplary***  
“...sometime ago there was nothing suitable for children to watch on TV...but that has changed now thanks to Rupavahini...now other channels are also copying this...”

On negatives of the channel, political bias and inconvenient timing of certain programmes have been the main issues raised.

### **Negatives**

- ***Political bias -> towards the ruling party***  
“...especially the news is very biased towards the ruling party...”
- ***Inconvenient timing***  
“...Nueasevana is shown only in the mornine...only those who stay at home or work from home gets a chance to see it...it would be better to show it at night”

### **Preferred TV programs**

Where favourite programs are concerned Rupavahini's Nugasevana, News and Ilakkaya, ITN's, Doramadala, Atapattama, Thulawa and Kopi Kade, Sirasa TV's Randepaya, Sirasa Super Star and Autovision and Swarnavahini's Mul Pituwa, News, Kinihira and Deshapalana Sathiya came up as the most favourite programmes. Over all it was perceived that preference was for informative programs rather than entertainment programs. Difficulty in following tele-dramas regularly due to hectic work schedule was quoted as one of the key factors for the above difference in preference.

#### **Preference**

- ***Informative programs***

- ***Educative programs***

- ***Infotainment programs***

*"...we especially like Swarnavahini news as it lasts for one full hour and therefore covers a range of news items..."*

*"...Mul Pituwa is a very important program because within a very short period we get to know what is happening in the country before we start the day..."*

- ***Non-serial (documentaries etc.) programs -> Less long-term involvement***

*"...we prefer documentary programs over tele dramas because tele dramas need to be followed on a regular basis and that is not easy for us with our work schedules..."*

### **Program Balance on TV**

Participants across the groups articulated that all channels dedicate too much of airtime on tele dramas. Further, there seem to be a need for programmes with more information than light entertainment. Also, the respondents pointed out the need for existing programs to be more conveniently timed were also requested.

- ***Imbalance -> too many tele dramas -> need for more informative programs***

*"...after coming home after work we want to watch something that is enjoyable and relaxing like songs or documentaries on nature...but all they have is tele dramas..."*

- ***Inconvenient timing***

*"...Nugasevana is shown only in the morning...only those who stay at home or work from home gets a chance to see it...if they can show a repeat program in the night it would be better..."*

*"...Doramadalawa starts very late and sometimes goes on till 12 midnight...even though the program is good we find it difficult to enjoy as it is very tiring to watch TV late in the night for so long ..."*

## 2.3.2 Radio

### Preference towards radio stations

In general radio is mainly perceived as a source of entertainment rather than information. Therefore the preference towards a channel largely depended on the type of music played.

In this context, Sirasa FM, Hiru FM, Shri FM, Sha FM and Y FM were noted as the most preferred channels. However, rather than being a loyal fan of one particular channel, a tendency to flirt among two or more of the above channels were also apparent.

- ***Light on going entertainment -> Channel surfing -> Less mind involvement -> Less loyalty to particular channel***  
"*...we expect mostly songs from radio...we mostly listen to it while at work or when just taking a break and relaxing at home...so if it is difficult to follow dramas etc...*"  
"*...we do not listen to one particular station...when there are ads going on one we tune to another channel...*"

However, Lakhanda and Sirasa FM were criticized for inundating listeners with advertisements which prevented them from continuously enjoying the music.

### Preference towards radio programs

Awareness of radio programs by name was low across groups. However, there was notable recall of music, game, and request shows on Sirasa TV and Hiru FM as favourites. Apart from such entertainment programmes, respondents claimed they listen to news and sports updates fairly frequently.

### 2.3.3 Reactions to programs based on Small and Medium scale business

#### Recall of business related programs

Recall of business programmes on TV is stronger than those on the radio which was extremely poor. Comments from respondents also indicate that they wanted certain programmes to continue for example 'Business Today'. Not only the programme content but featured business celebrities also seem to have had an impact on the programme delivery and thus recall.

- **Higher recall in TV than in Radio**
- **High recall of current TV programs + high recall of past TV programs -> Indicative of Interest and Involvement -> Shows a need**
  - "...once they showed a program on the milk industry...such programs are not there anymore..."*
  - "...There is a program calle 'Vyaparika Puvath' on Rupavahini...it gives an update on the share market and all...it is not that relevant to us..."*
  - "...Nugasevana shows some business related programs..."*
- **Recall of program higher than the Channel it was on**
  - "...Samurdhi had a program on small business but I cannot remember the channel it went on..."*
  - "...earlier there was a program called Business Today...I do not think that it is there any more..."*
- **Recall of programs featuring prominent businessmen**
  - "...there is a program sponsored by Ceylinco...Mr. Lalith Kothelawala comes on that show...they explain how a successful business is developed...programs like that are very encouraging as it takes away the fear of starting a business..."*
  - "...there was such a program on Rupavahini sponsored by Siddhalepa..."*

### **Nature of the Programme**

- Documentary Vs Tele drama

Respondents have pointed that they would prefer discussion or documentary type business information programmes as against drama type. In general tele dramas are not seen as a source of realistic information. Those are more likely to be perceived as ‘just a story’ that does not reflect the real challenges in setting up a business. Tele drama type programmes they say perhaps is better used to explain certain complex topics such as legal procedures, that could not be explained effectively through a discussion.

- ***Unrealistic***
- ***Not serious enough***
- ***Tele drama = entertainment -> less impact***  
*“...tele dramas are inspiring and encourage positive thinking but not to such an extent that we want to start a business because at the end of the day it is just a story...”*  
*“...a tele drama may be a better way to discuss the legal issues...it is easier to act out the consequences rather than explain it in words...”*

- Real life case studies – Live Discussions

Connecting the above, the preference is toward programmes that feature entrepreneurs who came up the hard way to whom small business owners can relate themselves. This seems to have the air of credibility that surrounds a real life case study. They also need the opportunity to interact with featured entrepreneurs to put across specific requests for advice.

- ***Use of relevant role models -> Can relate to + High credibility -> Inspirational***  
*“...the businessmen they invite for the show should be easy for us to relate to...not those high society businessmen...because we are more interested in their ideas and how they had overcome their obstacles...”*  
*“...we prefer someone who started small like. Hettigoda veda mahaththaya, owner of Sweet House, Owner of Uswatta or Kabawatta Tea...what we hear from them would be more believable...”*  
*“...we would prefer to watch something like that rather than a tele drama...”*
- ***Public Interactive programs***  
*“...it should be a documentary plus interview with a business specialist, where we can call and ask questions...”*

### **Content attributes of an SME related program**

- There is an overwhelming need for programmes that specifically focus on small businesses. Such specialized programmes are expected to provide techniques to grow the business and some training through media where there is no access to such services. They have also spelled out the need to know how to get to the end user directly which indicate access to markets is an issue that needs to be addressed in media programmes.

- ***Focus on SME and related issues***

*“...it is a very good idea as there are programs on large scale businesses but very few that focuses on us...”*

- ***Business development and expansion***

*“...even though currently we are running a small business it need not stay small forever...this type of programs can really help us develop our business and move forward...”*

- ***Financial Management***

*“...we need know how we can better earn from our investments...how to allocate funds on different business needs such as stock keeping...”*

- ***Management Issues***

- ***Planning and organisation***

*“...there are so many things that we do not know...unlike the big businessmen we do not have access to expensive training programs...so, I feel this is would be a very good idea...”*

*“...we have resources but often do not know how to get the best out of it...this type of a program can help us...”*

- ***Marketing and customer relations***

*“...through a program like this, we can find out how to deal with the end customer directly rather than through an intermediary...”*

- Another important characteristic would be discussing issues related to a variety of business segments

*“...every week they can talk about a different type of business...that way nobody is neglected...”*

- Information on starting a business

The respondents have expressed the need for a bundle of information related to setting up a business. It is desired to receive information on how initial impediments were tackled through entrepreneurs with real life experience. Specifically, information should include financing, access to markets, maximizing Return on Investment (ROI).

- **Information sharing -> Experience of others**

*“...a successful businessman can come and talk about his past experiences, how he first started how he developed etc...but getting the information and tips would be more important than the life story...”*

- **Financing aspects**

*“...we would like to know what loan and leasing facilities are available for us in banks and how we should approach them...”*

- **Pre planning and strategising**

*“...we want to know how we can get the best use of our investments...”*

- **Marketing**

*“...how to introduce our products into the market in such a way that will attract customers...”*

- **Legal issues**

*“...we need to know about the laws governing the registration process of a business, branding products, taxation etc...”*

- Information on Expansion and Diversification

There is also demand for information on business expansion and diversification. This could be in the form of vertical diversification where they could extend the product or service assortment in a specific field or branch into new ventures.

- **Maximising effort for more profit**

*“...I am paid only Rs.18/= for one litre of milk that I produce...but I put a lot of hard work into my business...so, I want to know how and from where I can fetch better prices for my products...”*

- **Expansion through diversification -> need to learn more skills**

*“...currently I only sell fresh milk as a product...I would like to know how I can diversify into new areas such as yoghurt or curd...”*

- Information on running a business

Those who are running their businesses have expressed the desire to have information on access to new suppliers especially for speciality products, new technology, business legislations, market information, and product standard requirements.

- **Knowledge on the market**

*“... tips on recognizing good customers would be very important...”*

- **Information on sources of raw materials**

*“...information on finding new and alternative suppliers*

*“...it is very difficult to get mushroom seeds...they can teach us how to farm it ourselves...”*

*“...places where I can find raw materials...especially in my case, as a florist, there are some seasons where certain flowers are very scarce...so I would like to know new places where I can get the flowers that I need or what can be used as substitutes...”*

- **Use of technology**

*“...they can share information on new technology and equipment used in different fields and how we can also get access to them...”*

- **Cost effective methods/minimising costs**

*“...they should share information on low cost methods used in various businesses...”*

- **Legal Issues**

*“...it is important to be aware of labour laws, so that we can ensure that there are no conflicts or strikes...”*

*“...contract law is also important since as a distributor of soft drinks, I have to sign agreements...so, I need to know the consequences and how I should react if either party fails to act according to the contract...”*

- **Quality standard requirements**

*“...now, people are getting more concerned about quality standards...we would also like to know how we can produce our products according to established standards of quality...”*

### 2.3.4 Opinions on Programme Scheduling

- Preferred media

Television was preferred over radio as it is a visual media and thus would be more descriptive and also believable. Also, given the need to have interactive and discussion based programmes as mentioned above television provides a better platform.

- Preferred Days and Timings: Weekend Vs Weekdays

As mentioned earlier the participants found that the weekends were less busy compared to weekdays. Therefore, weekends were the preferred option as against weekday to air the proposed business program. However, there seem to be a consensus on airing the programme on weekdays between 8pm and 10pm. It should also be noted that more than the date; it is time that respondents found to be critical if they are to have a chance of watching or listening to the programme.

- Timing

A program scheduled between 8pm and 10pm, with duration of around one to one and a half hours was seen as ideal.

- Preferred channel

ITN and Rupavahini were preferred over other channels in general. The main reasons for this preference were the image of these two channels as telecasters of programmes with informative content and wider coverage across the island.

### **3. Discussion of Findings**

#### **Media habits**

Almost all (97%) business owners and potential business owners watch television, and is a daily activity for most of them. Radio listener proportion is lower at 78%. Findings have shown how this trend is consistent for TV across all sub groups considered. Where as Radio tends to have a relatively higher preference in the rural sector and among less affluent categories. This is the first indication of the strength of the TV to reach an audience of this nature.

A unique characteristic however, with regard to television viewing is that it tends to be mainly an evening affair. Starting from 6pm, it peaks between 8 to 10 pm. The high convergence to the 8-10pm slot is most likely due to telecasting of news and tele-dramas during this time of the night. Therefore, directly concluding that this is the right time for a new programme may be risky as the time slot has already been booked by news and numerous tele-dramas. Besides, almost all households can expect to have a single TV set. Thus programmes aired during these peak hours should be the choice of the majority of the household, else depends on the person who has the highest influence on what to watch. Morning hours are less popular with around 12% opting to watch TV from 7-9am. It is clear however, that women tend to have more time to watch TV during the day time due to being home-based businesses as compared to men working out of home, as respondents in the group discussions have pointed out.

Radio listenership on the other hand tends to be more divided across the segments with highest during the morning hours from 7 to 9am. This is followed by mid-morning from 9 to 12 noon, and afternoon hours until 4pm. Popularity diminishes steadily into the late hours. This is not surprising given almost all watch TV in the evening until 10pm, in the night. With regard to radio, the question also remains whether tuning-in in the morning is merely to listen to music while getting ready for the day. The strength of the radio however, as findings from focus group discussions indicate, is that one could listen to radio whilst working.

In terms of TV channel preference, Rupavahini tops the list followed by privately owned stations Sirasa, and Swarnawahini. Rupavahini shows marginally higher popularity among rural and less affluent respondents. Sirasa and Swarnawahini on the other hand have quite consistent appeal among the sub segments considered. Rupavahini whilst liked for good coverage, and a variety of programmes with meaningful content, is criticised of being politically biased, and for lack of customer focus -or being rigid- on programme timing.

Coming number two, Sirasa TV is better known for its entertainment programmes, sports and news casts. It seems to play to the rhythm of the masses, and also use interactive programmes. The negatives of Sirasa as discussed in the Focus Group forums have been the lack of variety (stuck on entertainment), and lack of sense in the programmes. However, it should not be forgotten that the so called programmes lacking sense for some, are appreciated by millions of other viewers.

Swarnawahini has been commended for a good balance in programmes, and timings. The negatives for Swarnawahini is bias toward tele-dramas and movie entertainment. This however, may not be a significant draw back given that currently the television sector in Sri Lanka thrives on tele-dramas and movies.

Looking at the profiles of the top three; Rupavahini, Sirasa, Swarnawahini, it can be concluded that Rupavahini can carry more weight in terms of credibility and seriousness. Whilst Swarnawahini is comparable, Sirasa TV could lag behind in this quality. The strength of the latter however is its proximity to the masses and the belief that they support people through interactive programme activities. A practical concern may be however, the overall coverage of Sirasa and Swarnawahini. Even though the latter channels have expanded over the years, yet have less coverage compared to Rupavahini.

When it comes to radio, Sri, Sha, and Hiru share the top position (80% approx) in the preference lists, followed by Lakhanda (73%) and Raja (70%). This preference order is consistent across all subgroups apart from a few marginal differences. Most of these channels are liked for the selection of music played. Lakhanda however was praised for having a good variety of programmes.

### **Current sources of business information and perceived role of the media**

The media monitoring exercise has pointed out that airtime allocated to business information both on Radio and Television is extremely low. Radio being the lowest, allocates only 1% of the airtime per day for business information, while television channels are better at 6.2%. Thus Out of the 1% airtime allocated on radio, only 15% is regular business programmes. On the contrary, Television airtime for business is dominated by regular programmes (90%). This further confirms that TV is more established and organized in providing business information. However, figures indicate that most of the television business information is delivered in English medium, making it less appealing to mainly Sinhalese speaking rural business communities and small business owners. Due to the ad-hoc nature of the information – especially in news bulletins – calculating proportions of time allocated for different business sectors: small, medium, and large business has not been possible.

The feeling of the majority of small business owners and potential small business operators is that electronic media giants TV and radio both do not allocate sufficient air time for programmes that provide business information, particularly for programmes related to small business operation. Television is perceived to be driven by films and dramas, and the radio driven by music. This situation has lead business people to seek information through more informal sources such as friends and business associates. Whilst this is a good way of accessing information, it does not give the small scale entrepreneur the opportunities to look beyond the conventional window. Considerable proportions of small business owners seem to rely on friends and associates to obtain information on markets, business opportunities, starting up new businesses, advice, and business support services. News papers also have been sources to obtain information on the above. Television seems to be playing a key role in giving information on new technologies, new equipment, and business advice. It is through nation wide electronic media that the experiences of prominent entrepreneurs across the country can be shared. It is also the means to get the authorities to hear the voice of small business and to influence the policy regulators.

### **Interest in proposed programmes and media preference**

There is an overwhelming response to the key concepts of the proposed media programmes. All three concepts: providing up-to-date business information and news, providing a platform to discuss and debate business issues, and providing a voice to influence policy and legislation have been accepted as relevant by almost all respondents.

There is a demand for all topics including new machinery and technology, market information, and business support services from such a programme. Whilst this is a positive indication of business owners being keen on receiving information, it affirms the current short supply of information for business operations.

Television is the preferred media for the proposed programmes for the vast majority, exceeding 80%. This preference is consistent across all sub groups with marginal differences. The main reason they have indicated being the visuals make it more involving and believable. This, coupled with the popularity of TV as a media in general implies that TV could be the channel for this type of programme.

Morning hours from 7 to 9am across the week seems to be possible time slots on TV. There is close preference between 9-12am, and late night 8 – 10pm slots as well. However, this is not conclusive given that there is no high majority for any time slot. Radio on the other hand clearly converges on to the late night slot of 8-10pm. Therefore, careful attention must be paid to general television viewing habits in deciding what would be the better timing for the programme on television which is the preferred media.

The programme, whether it is on TV or Radio, is preferred by most (50%) to be 30 minutes in length. However, there is a fair demand (30%) for a one hour programme as well. This shows that the upper limit for the programme length is an hour and ideally should be half an hour. Whilst there is no conclusive evidence coming from the survey on the day of the week, focus groups have indicated that weekends could be a better choice.

### **Potential for use of telephone and mobile phone in business**

At the total level, 70% of the respondents had a phone connection of any form for the household. As cross analysis have revealed, phone usage is higher among existing business owners than potentials. Also, phone use is higher among medium scale more affluent business owners, compared to small business owners and the less affluent. This gap is reflected in the difference between urban and rural. Thus, phone usage generally remains a facility used by urban business owners who own comparatively larger scale businesses.

SMS facility was nothing new to the business community, and most phone owners are aware that they could use SMS on their phones. However, not many seem to be using this facility for business purposes. Perhaps this is a result of an overall orientation in the sector than these entrepreneurs lack of interest in using the facility. It is interesting to note that women who have access to SMS do use it more than men do for business purposes.

Encouraging findings are that a majority are interested in receiving business information through SMS on an overall level. However, findings show that potential compared to existing business owners, Small business owners compared to medium size business owners, less affluent socio economic groups (C, DE) compared to more affluent AB (67%), and Rural sector compared to urban counterparts has shown higher interest in an SMS based business information service. This can be generalized to say that upcoming entrepreneurs are slightly more interested on such a concept compared to those who are better established.

## 4. Recommendations

### 1. Media types to be used (radio/TV): Reasons for popularity of Television programmes

Small and medium entrepreneurs prefer TV against Radio, and the direct reason for preference being the visual character of TV. TV is perceived to be a better source of business information, and also is a more frequently used source compared to the radio. The reason being that TV could create face to face feeling among the audience and also increase believability as well as keep them focused on the programme.

### 2. Type of Programme: Discussions Forums with Celebrity Entrepreneurs/Panels

Small and medium entrepreneurs (potential and current) have stressed the importance of real life examples and guidance using local business people who started small and have climbed up the ladder. It would be important to note that these celebrity entrepreneurs need to be personalities that predominantly rural, small business people can relate to. The programmes should also provide the audience the opportunity to interact with the experts participating in the discussion. This part of the programme would be more like a “Business Clinic” where questions are asked and answered by the experts. ‘Auto Vision’ on Sirasa TV would be a good example of a successful interactive information programme.

### 3. Delivery of the Programme: One Programme for all – Flexible with Tamil

Despite some marginal variations the trends were consistent across all the segments considered. Therefore, a single programme can focus on the total audience. Whilst Sinhalese will be the preferred medium given the numbers, the programme should be made flexible enough to accommodate Tamil speaking business people as well. Subtitles and translation of questions and answers could be used for this.

### 4. Media channels to be used: Rupavahini or Sirasa

Rupavahini has high coverage across the country, and is watched alike by urban and rural sectors. It is also perceived as a channel that telecasts meaningful programmes rather than only light entertainment. On the other hand, Sirasa TV is perceived as a channel that has taken innovative initiatives to help communities and people. However, before finalizing a decision on this it is recommended to check the coverage of Sirasa TV carefully.

### **5. Time and day to air these programmes: Sunday - Morning 7 -9 OR Evening 8 to 10**

There was no clear convergence on a particular day or time. However weekend, particularly Sunday has been highlighted as a relatively free day. In terms of time, again there was no strong convergence, yet morning 7 a.m.-9 a.m. and evening 8 p.m.-10 p.m. seemed to have been preferred by more. Given that 8 p.m.-10 p.m. peak times are undoubtedly booked for tele-dramas and news, it does not sound highly practical to squeeze in a Business Programme. Having a programme starting at 10pm, and a repeat telecast in the morning at 7 a.m. would be the better option. The issue here is that repeat telecast means no interaction. However, this would at least provide the opportunity for those who cannot tune in at nights regularly to view the programme specific scheduling of the programme should be done in consultation with the channels and perhaps a media planner from the industry.

### **6. What would be the desired length of such programmes: 1 hour**

Although the preference of a high proportion (50%) is 30minutes, this perhaps may not be adequate for a programme with an interactive discussion panel plus information clips. On the other hand, all put together, the proportion preferring a programme running for more than 30 minutes is also 50%. Therefore, given the need for the programme to be effective a 1 hour programme may be the better option.

### **7. Topics to be covered – Broad Content Guidelines**

There is a fair demand for all the topics below. However, at the total, level this is the order of demand ranked, in terms of percentage who said they need information covering each topic.

- Information on new technologies/machinery
- Information on markets
- Information on services for your business (financial/non-financial)
- Imparting knowledge and experience from successful business people

- Information on business opportunities
- Questions and answers to business issues and problems
- Information on new equipment
- Tips and business advice from ‘experts’
- Platforms to discuss and air business problems and issues

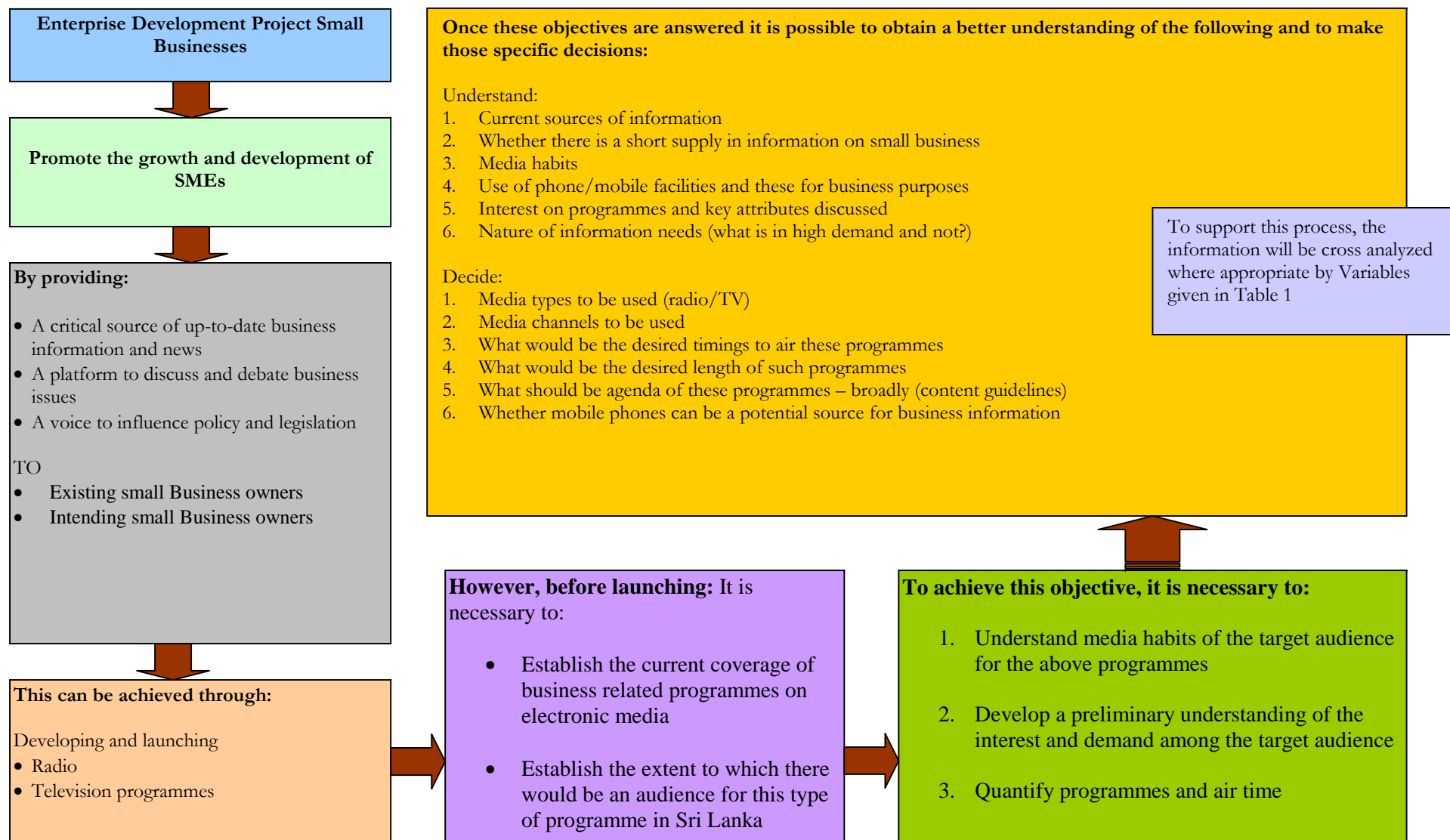
The exemptions as discussed in the previous chapter are Marketing and Business Concepts. This lack of spontaneous demand should not be interpreted as low significance. The ignorance on such topics may be a result of rather not understanding the importance of these in business development. Thus Enter-Growth programmes could look at practical ways of initially making people aware of these concepts, and then convincing them on the importance. This could be followed by educating them on how these concepts can be applied in their businesses.

#### **8. Potential of SMS as a source of business information: Needs further understanding and begin with promoting the concept**

An instant glance at the findings indicate this is an option with a lot of potential. Majority owns mobiles with SMS facility and there is a high willingness to receive business information even at a reasonable cost. However, it is clear that not many use this facility currently, creating a doubt whether despite high expressed liking whether there would be sufficient commitment at implementation level for this type of project to be sustained. Thus, further studies may need to be done on current usage and what particular types of information can be effectively communicated via SMS. This could be followed by creating higher awareness on practical benefits. How advanced is Sinhala/Tamil medium SMS is another question to be answered prior to rolling out this type of a project. As indicated in the previous discussions, very few SME operators would be comfortable in English medium services.

# Appendices

## Appendix 1: Conceptual framework



**Appendix 2 – Survey Questionnaire**

Questionnaire No  
Project Name

<b>GROWTH</b>			

**SMALL AND MEDIUM ENTERPRISES (SME) AUDIENCE RESEARCH**

**Conducted by**

**ACNielsen Lanka (PVT) LTD**  
**425, R. A. De mel Mawata, Colombo - 03**  
*January - 2006*

Sample Point No.	Province	District	U/R	MC/UC/PS	S.P. Number	HH. Number
<b>Office Use Only</b>						

**Respondents Report :**

Name with initial : .....	Province Name:.....			
Address : Number.....	District Name:.....			
Street/Lane/bylane: .....	Divisional Secretary Division Name:			
Village:..... Town:.....	1. Urban (MC/UC)    2. Rural (PS)			
Postal Code:..... Landmark of House: .....	MC/UC Name:.....			
Home Phone C.No..... PNo.....	PS Name:.....			
Office Phone C.No..... PNo.....				
Other important information depend on project eg.1. Field S.T. :1. Random    2. Booster 2. Gender    1. Male    2. Female    3. Age    1.    2.    3.    4.Others    SEC, USAGE				

**Field Investigators Report :**

Investigator's Name :	Code			
Date of Interview : Year: 2006 Month:.....Date:.....				
Time of Interview: Please use 24 hours system				
First Visit	From : .....	To : .....		
Second Visit	From : .....	To : .....		
I hereby certify that all information provided here is true and accurate and are being obtained from the respondent as instructed.				
..... Signature of interviewer				

**Field Supervisors Report :**

Method	Accompanied	Back checked	Scrutinized	Supervisor
--------	-------------	--------------	-------------	------------

Date Year/M/D	...../...../.....	...../...../.....	...../...../.....	Name :
Time (24 hrs)	From to	From to	From to	Code:

**Total Quality Management Report**

	Yes	Name/Code	Short Signature	Date(Year/M/D)
Field Scrutinized	1			...../...../.....
Cording	1			...../...../.....
Data Entry	1			...../...../.....
Cleaning	1			...../...../.....
Researchers	1			...../...../.....
Analysis	1			...../...../.....

**Detail Field Supervising Report**

Verification Areas		Results									
Name of the respondents		1	2	3	4	5	6	7	8	9	10
	1										
	2										
	3										
Age		1. Conducting the interviews according to instruction 2. Not selecting correct respondent 3. Did not select correct house 4. Slipping some questions during interviews 5. filling the Questions according to self imagination 6. No proper explanation to the respondent 7. leading the questions 8. Spontaneous response without showing Show cards 9. Respondent can't remember the interviews or interviewer * Not relevant ____									
1.											
2.											

Rejections and reasons	
TQM Status	

Study ID                    2006-06        (101-106)    Resp. No.                    \_\_\_\_\_        (107-110)  
 Interviewer No.            \_\_\_\_\_        (114-117)    Interview Length            \_\_\_\_\_        (118-119)  
 No. Of Queries            \_\_\_\_\_        (120-121)    Reference No.                \_\_\_\_\_        (122-125)

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Interviewer Name: \_\_\_\_\_

Recruited By: \_\_\_\_\_

Date of Interview: \_\_\_/\_\_\_/2006

Time Started/End: [     ] to [     ]

"I am from ACNielsen (Pvt.) Ltd. and we are currently carrying out a survey on radio listener ship and TV viewer ship among small and medium entrepreneurs like you in Sri Lanka. Could I spend 10 minutes with you to ask a few questions?"

**SCREENING QUESTIONS**

Q1     Are you involved in any small or medium enterprise, in the areas of small businesses, commercial farming other than paddy, or other income generating activity?

Yes .....  
 No .....

Code (126)	Route
1	Q3
2	Q2

Q2	Are you interested in <b>information or facts</b> about income generation and small businesses?	Code (127)	Route
	Yes .....	1	Q10
	No .....	2	CLOSE

**FOR EXISTING SME**

Q3	What is your involvement/interest in small and medium business and income generation?	Code (237)	Route
	Owner .....	1	
	Employee .....	2	

Q4	<b>Read the answers</b> What type of business are you involved in?	Code (238)	Route
	Agriculture .....	1	
	Manufacturing .....	2	
	Trading / retailing .....	3	
	Other Services .....	4	

Q5	How many employees are working in your business currently?	Code (238)	Route
	Less than 5 employees .....	1	
	5 - 50 employees .....	2	

More than 50 employees ..... 

3	
---	--

Q6 Of them, how many employees are working as temporary and permanent basis in your business?

(R1) Permanent .....			
(R2) Temporary .....			
(R3) Total .....			

Q7 What is the amount of capital invested in your business? That is money invested on Land, buildings, Machinery, Vehicles etc.

	Code (238)	Route
Less than 4Million .....	1	
4 - 20 Million .....	2	
More than 20 Million .....	3	

**Interviewer to note the following (Don't ask the question)**

Q8 What is the scale of business? ( Please assess the scale according to physical dimensions of the business and based on the other instructions given according to the answers for above questions.)

	Code (238)	Route
Small .....	1	
Medium .....	2	
Large .....	3	

Q9 How long is it since your business started its operations?

Code (238)	Route

Less than one year .....	1	
More than one year .....	2	

**FOR POTENTIAL SME**

Q10 You said that you intend to start a small or medium enterprise in future. How much are you planning to invest in this business as capital? That is the money intending to invest on Land, buildings, Machinery, Vehicles etc. **(INTERVIEWER: PLEASE CALCULATE THE TOTAL AND MARK BELOW)**

	Code (237)	Route
Less than 4Million .....	1	
4 - 20 Million .....	2	
More than 20 Million .....	3	

Q11 <b>Read the answers</b> What is the type of business that you are intending to start?	Code (238)	Route
Agriculture .....	1	
Manufacturing .....	2	
Trading / retailing .....	3	
Other Services .....	4	

Q12 Information channel about potential SME	Code (238)	Route
From Government information .....	1	
From "Samurdhi" Banks .....	2	
From Business chambers and Trade Associations .....	3	
From commercial Banks .....	4	
Other Sources (please specify) .....	5	

Q13 How long will it take to start your business?	Code (238)	Route
Less than one year .....	1	
More than one year .....	2	

**A) TELEVISION VIEWING HABITS**

Q14a Do your household members have access to watch Television?	Q14a	Q14b
---	------	------

Q14b Do your household members watch Television?		
	access to watch	watch
	Yes .....	1
No .....	2	2

Q15 Do you personally watch TV?	Code (129)	Route	
	Yes .....	1	Q16
	No .....	2	Q20

Q16 <b><u>If yes in (Q15)</u></b> If 'yes' how often do you watch TV?	Code (130)	Route	
	Every day (7days a week) .....	1	
	4-6 days a week .....	2	
	2-3 days a week .....	3	
	Once a week .....	4	
	Only occasionally .....	5	

Q17	When do you mostly watch TV? <i>(Tick up to 3 boxes)</i>	Code (131)	Route
	Early morning (7am - 9am) .....	1	
	Mid morning (9am to 12 noon) .....	2	
	Early Afternoon (12 noon to 4pm) .....	3	
	Late Afternoon (4pm - 6 pm) .....	4	
	Early evening (6pm - 8pm) .....	5	
	Late evening (8pm - 10pm).....	6	
	Other times .....	7	

Q18a Which TV channels have clear reception in your area?  
*(Multiple)*

Q18b Which are your 3 favourite TV channels?  
*(Tick up to 3 boxes)*

	Q18a <b>Coverage</b>	Q18b <b>Favourite</b>
	(132)	(134)
Art TV .....	01	01
Cable TV .....	02	02
Channel Eye .....	03	03
Derana .....	04	04
ETV .....	05	05
ITN .....	06	06
MTV .....	07	07

Rupavahini .....	08	08
Shakti TV .....	09	09
Sirasa TV .....	10	10
Swarnavahini .....	11	11
TNL TV .....	12	12
Others .....	13	13
None .....	14	14

Q19 **Show card**

Do you think that there is too much or too little time allocated for the following programs on Sri Lankan TV channels?

	Too much more	Much more	Ideal	Little	Too little	None
(R1) Politics .....	(136) 1	2	3	4	5	6
(R2) Films and Tele dramas .....	(137) 1	2	3	4	5	6
(R3) Health issues .....	(138) 1	2	3	4	5	6
(R4) Income generation and small business .....	(139) 1	2	3	4	5	6
(R5) Large business .....	(140) 1	2	3	4	5	6
(R6) Agriculture .....	(141) 1	2	3	4	5	6

	(142)					
(R7) Humorous/ comedies .....	1	2	3	4	5	6
	(143)					
(R8) Religion .....	1	2	3	4	5	6
	(144)					
(R9) Sports .....	1	2	3	4	5	6
	(145)					
(R10) Music .....	1	2	3	4	5	6

**B) RADIO LISTENING HABITS**

Q20a	Do your household members have access to listen to Radio?	Q20a	Q20b
Q20b	Do your household members listen to Radio?	access to listen	listen
Yes .....		1	1
No .....		2	2
Q21	Do you personally listen to radio?	Code (147)	Route
Yes .....		1	Q22
No .....		2	Q26
Q22	<b><u>If yes in (Q21)</u></b> If yes how often?	Code (148)	Route
Every day .....		1	

4-6 days a week .....	2	
2-3 days a week .....	3	
Once a week .....	4	
Only occasionally.....	5	

Q23	When do you mostly listen to radio? <i>(Tick up to 3 boxes)</i>	Code (149)	Route
	Early morning (7am - 9am) .....	1	
	Mid morning (9am to 12 noon) .....	2	
	Early Afternoon (12 noon to 4pm) .....	3	
	Late Afternoon (4pm - 6 pm) .....	4	
	Early evening (6pm - 8pm) .....	5	
	Late evening (8pm - 10pm) .....	6	
	Other times .....	7	
	While traveling in the car / bus .....	8	

Q24a Which radio stations are clearly receptive (can clearly listen to) in your area?  
*(Multiple)*

Q24b Which are your 3 favourite radio stations?  
*(Tick up to 3 boxes)*

	Q24a	Q24b
	Coverage	Favourite
	(150)	(152)
Asura FM.....	01	01
City FM.....	02	02

Classic FM.....	03	03
E FM .....	04	04
Gold FM.....	05	05
Hiru FM .....	06	06
Isira Radio.....	07	07
Lakhanda .....	08	08
Pavana .....	09	09
Raja FM.....	10	10
RNN .....	11	11
Sha FM.....	12	12
Shakti FM .....	13	13
Shree FM.....	14	14
Sooriyan .....	15	15
Sun FM.....	16	16
Swadesheeya.....	17	17
TNL Radio .....	18	18
TNL Lite.....	19	19
Yes FM.....	20	20
Others .....	21	21
None .....	22	22

Q25 **Show card**

Do you think that there is too much or too little time allocated for the following programs on Sri

Lankan Radio Channels?

	Too much more	Much more	Ideal	Little	Too little	None
(R1) Politics .....	(154) 1	2	3	4	5	6
(R2) Music .....	(155) 1	2	3	4	5	6
(R3) Health issues .....	(156) 1	2	3	4	5	6
(R4) Income generation and small business ..	(157) 1	2	3	4	5	6
(R5) Large business .....	(158) 1	2	3	4	5	6
(R6) Agriculture .....	(159) 1	2	3	4	5	6
(R7) Humorous/ comedies .....	(160) 1	2	3	4	5	6
(R8) Religion .....	(161) 1	2	3	4	5	6
(R9) Sports .....	(162) 1	2	3	4	5	6

**C) INTEREST IN SMALL AND MEDIUM BUSINESS RADIO AND TV PROGRAMMES**

Q26 **Explain the concept of a small & medium business radio or TV programme (Rotate the statements)**

We are interested in supporting radio and TV stations to establish programmes that focus on income

generation and small & medium business issues. These programmes would:

- provide business information, tips and advice.
- provide opportunities to learn from other business people
- provide a platform to discuss business issues and influence government on business policy.

Would you be interested in such a Radio programme that provide?

	Yes	No
(R1) <i>business information, tips and advice</i>	1	2
(R2) <i>opportunities to learn from other business people</i>	1	2
(R3) <i>platform to discuss business issues and influence government on business policy</i>	1	2

Would you be interested in such a TV programme that provide?

Q27

	Yes	No
(R1) <i>business information, tips and advice</i>	1	2
(R2) <i>opportunities to learn from other business people</i>	1	2
(R3) <i>platform to discuss business issues and influence government on business policy</i>	1	2

Q28 Would you prefer this programme on radio or TV?

	Code (170)	Route
Radio .....	1	
TV .....	2	
Prefer in any medium .....	3	

Q29	Reason for this preference	Code (171)	Route
	TV is visual / has pictures .....	1	
	Radio is more interactive - phone-ins etc. ....	2	
	I listen to radio more often .....	3	
	Listening to radio is more convenient .....	4	
	I watch TV more often .....	5	
	Watching TV is more convenient .....	6	
	I do not own a TV .....	7	
	I do not own a radio .....	8	
	Other (specify) .....	9	

Q30	What would you want a business radio or TV programme to provide? <i>Unprompted response</i> <i>(tick as many as are mentioned)</i>	Code (172)	Route
	Information on markets .....	01	
	Information on business opportunities .....	02	
	Information on services for your business (financial/non-financial) .....	03	
	Information on new technologies/machinery .....	04	
	Information on new equipment .....	05	
	Question and answers to business issues and problems .....	06	
	Tips and business advice from 'experts' .....	07	
	Imparting knowledge and experience from successful business people .....	08	

Platforms to discuss and air business problems and issues .....	09	
Other (specify) .....	10	

Q31a **Show card**  
 What day and time would you prefer a business radio programme to air?

Q31b **Show card**  
 What day and time would you prefer a business TV programme to air?

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Early morning (7am - 9am) .....	1	1	1	1	1	1	1
Mid morning (9am to 12 noon) ...	2	2	2	2	2	2	2
Early Afternoon (12 noon to 4pm)	3	3	3	3	3	3	3
Late Afternoon (4pm – 6 pm) .....	4	4	4	4	4	4	4
Early evening (6pm – 8pm) .....	5	5	5	5	5	5	5

Late evening (8pm – 10pm) .....	6	6	6	6	6	6	6
Other times.....	7	7	7	7	7	7	7
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Early morning (7am - 9am) .....	1	1	1	1	1	1	1
Mid morning (9am to 12 noon) ...	2	2	2	2	2	2	2
Early Afternoon (12 noon to 4pm)	3	3	3	3	3	3	3
Late Afternoon (4pm – 6 pm) .....	4	4	4	4	4	4	4
Early evening (6pm – 8pm) .....	5	5	5	5	5	5	5
Late evening (8pm – 10pm) .....	6	6	6	6	6	6	6
Other times.....	7	7	7	7	7	7	7

Q32a How long should such a TV programme be?

Q32b How long should such a radio programme be?

	Q32a	Q32b
	TV programme	Radio programme
	(180)	(214)
30 minutes .....	1	1
30 – 45 minutes .....	2	2
1 hour .....	3	3
More than one hour .....	4	4
Other (specify) .....	5	5

Q33 **Show card**

At the moment where do you get the following information from?

Note: options stated (maximum 2 for each)

	No source of this information	From TV	From Radio	From newspapers and magazines	From family members	From business friends and associates	From associations and Chambers	From government officials	From private companies (e.g. service providers)	From NGOs and business development projects	Other (specify)
(R1) Information on markets .....	(215) 01	02	03	04	05	06	07	08	09	10	11
(R2) Information on business opportunities .....	(217) 01	02	03	04	05	06	07	08	09	10	11
(R3) Information on services for your business (financial/non-financial) .....	(219) 01	02	03	04	05	06	07	08	09	10	11
(R4) Information on new technologies .....	(221) 01	02	03	04	05	06	07	08	09	10	11
(R5) Information on new equipment .....	(223) 01	02	03	04	05	06	07	08	09	10	11
(R6) Information on new laws and business legislation .....	(225) 01	02	03	04	05	06	07	08	09	10	11

	(227)										
(R7) Business tips and advice ..	01	02	03	04	05	06	07	08	09	10	11
	(229)										
Information on starting up a (R8) new business .....	01	02	03	04	05	06	07	08	09	10	11

**D) USE OF SMS**

Q34	Does your household own a phone?	Code (231)	Route
	Yes .....	1	Q35
	No .....	2	Q40

**Interviewer should make the respondent aware about SMS**

Q35	Do you know about SMS? That is a way of sending text messages through telephones	Code (231)	Route
	Yes .....	1	
	No .....	2	

Q36	Is it possible to send SMS with your phone?	Code (232)	Route
	Yes .....	1	
	No .....	2	

Q37	Do you use the phone to send or receive SMS or text messages for business purposes?	Code (233)	Route
	Yes .....	1	

No .....	2	
----------	---	--

Q38	Would you be interested to receive text messages with information useful for your business?	Code (234)	Route
	Yes .....	1	
	No .....	2	

Q39	Would you be willing to pay a small charge for such a service?	Code (235)	Route
	Yes .....	1	
	No .....	2	

Q40	Would you consider to buy phone if you could receive information useful for your business? For instance information on markets, prices for your products or supplies	Code (236)	Route
	Yes .....	1	
	No .....	2	

**E) BACKGROUND INFORMATION**

Q41	What is your age?	Code (239)	Route
	Under 15 .....	1	
	15 to 24 .....	2	
	25 to 34 .....	3	
	35 to 44 .....	4	
	45 to 54 .....	5	
	Over 55 .....	6	

Occupation and education level of the **chief wage earner (CWE)** and **Respondent**

Occupation	Educational Level				
	Illiterate	Up to grade 5	Grade 6-9	O/L and A/L	Graduates/ Professional
1. Farming/agriculture	E2	E2	E1	D	-
2a. Administration/ Managerial – senior	-	B1	B1	A2	A1
2b. Administration/ Managerial – junior	-	B1	B1	A2	A1
3. Labourer / trained	E2	E1	D	C	-
4. Labourer/ untrained	E2	E2	E1	D	-
5. Clerk	D	D	C	B2	B1
6. Trade	E2	E1	D	C	B2
7. Industrial/ trained	E2	E1	D	C	B2
8. Industrial/ untrained	E2	E2	E2	D	-
9. Professional	-	-	-	-	A1
10. Services	E2	E1	D	C	B2
11. Self employed (zero employees)	E1	D	C	B2	B1
12. Business Self employee – Under him/her (1-9) employees	C	B2	B1	A2	A1
13. Business Self employee – over 9	B2	B1	A2	A1	A1
14. Other (specify)-----					

Q42a Mark the SEC of the **chief wage earner** (CWE) from above

Q42b Mark the SEC of the **Respondent** from above

	Q42a	Q42b
	<b>CWE</b>	<b>Respondent</b>
A1.....	1	1
A2.....	2	2
B1.....	3	3
B2.....	4	4

C .....	5	5
D .....	6	6
E1.....	7	7
E2.....	8	8

Q43a	Q43a	Q43b
What is your household expense?	Expenses	Income
Q43b		
What is your household income?		
Poor (Less than 4000 or E) .....	1	1
Low income – low (4001-7000 or D) .....	2	2
Low income – high (7001-10000 or D) .....	3	3
Middle Income –low (10001- 15000 or C2) .....	4	4
Middle Income – high (15001- 20000 or C1) .....	5	5
High Income (Above 20000 or A+B) .....	6	6

Q44	Code (242)	Route
Are you getting "Samurdhi" benefits?		
Yes .....	1	
No .....	2	

Q45	Code (243)	Route
Where do you live? <i>Interviewer to categorize</i>		
Urban (city) .....	1	
Semi -Urban (town or on outskirts of city) .....	2	
Rural .....	3	

Q46 **Interviewer to note the following**

Gender of respondent

Male .....

Female.....

Code (244)	Route
1	
2	

**THANK YOU FOR YOUR TIME**

*Appendix 3: Acceptance Levels of Proposed Media Programmes – TV and Radio*

	Whether Existing business owner or potential							
	Existing				Potential			
	TV		Radio		TV		Radio	
	Yes	No	Yes	No	Yes	No	Yes	No
Base	352	8	324	36	148	6	135	19
Provide business information, tips and advice	98%	2%	90%	10%	96%	4%	88%	12%
Provide opportunities to learn from other business people	98%	2%	89%	11%	97%	3%	89%	11%
Provide a platform to discuss business issues and influence government on business policy	92%	8%	83%	17%	91%	9%	82%	18%

	Size of Enterprise							
	Small				Medium			
	TV		Radio		TV		Radio	
	Yes	No	Yes	No	Yes	No	Yes	No
Base	178	4	165	17	174	4	159	19
Provide business information, tips and advice	98%	2%	91%	9%	98%	2%	89%	11%
Provide opportunities to learn from other business people	97%	3%	90%	10%	98%	2%	89%	11%
Provide a platform to discuss business issues and influence government on business policy	90%	10%	83%	17%	94%	6%	84%	16%

	Dwelling Area							
	Urban				Rural			
	TV		Radio		TV		Radio	
	Yes	No	Yes	No	Yes	No	Yes	No
Base	341	8	316	33	159	6	143	22
Provide business information, tips and advice	98%	2%	91%	9%	96%	4%	87%	13%
Provide opportunities to learn from other business people	99%	1%	90%	10%	96%	4%	87%	13%
Provide a platform to discuss business issues and influence government on business policy	91%	9%	83%	17%	93%	7%	82%	18%

	Gender							
	Male				Female			
	TV		Radio		TV		Radio	
	Yes	No	Yes	No	Yes	No	Yes	No
Base	307	8	282	33	193	6	177	22
Provide business information, tips and advice	97%	3%	90%	10%	97%	3%	89%	11%
Provide opportunities to learn from other business people	97%	3%	90%	10%	98%	2%	89%	11%
Provide a platform to discuss business issues and influence government on business policy	91%	9%	82%	18%	93%	7%	84%	16%

	Business Sector											
	Manufacturing				Trade				Other			
	TV		Radio		TV		Radio		TV		Radio	
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Base	76	1	66	11	189	5	178	16	87	2	80	9
Provide business information, tips and advice	99%	1%	86%	14%	97%	3%	92%	8%	98%	2%	90%	10%
Provide opportunities to learn from other business people	97%	3%	86%	14%	98%	2%	90%	10%	98%	2%	91%	9%
Provide a platform to discuss business issues and influence government on business policy	96%	4%	83%	17%	91%	9%	86%	14%	90%	10%	79%	21%

*Appendix 4: Preferred Length of Proposed Media Programmes*

	Whether Existing business owner or potential			
	Existing		Potential	
	TV	Radio	TV	Radio
Base	356	330	152	140
30 minutes	54%	51%	38%	39%
30 – 45 minutes	14%	18%	21%	19%
1 hour	27%	25%	35%	36%
More than one hour	3%	3%	5%	4%
Other	1%	3%	1%	2%

	Size of Enterprise			
	Small		Medium	
	TV	Radio	TV	Radio
Base	179	169	177	161
30 minutes	51%	51%	58%	50%
30 – 45 minutes	12%	17%	16%	20%
1 hour	32%	27%	22%	24%
More than one hour	3%	3%	3%	3%
Other	1%	2%	1%	3%
Total	100%	100%	100%	100%

	Dwelling Area			
	Urban		Rural	
	TV	Radio	TV	Radio
Base	346	325	162	145
30 minutes	49%	44%	51%	54%
30 – 45 minutes	18%	22%	12%	12%
1 hour	28%	29%	32%	26%
More than one hour	3%	3%	4%	5%

