Readers' Perceptions of Leading Vernacular Dailies in Ahmedabad, (Gujarat, India)

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Abstract

The vernacular Indian print Industry is growing at a dynamic pace. With the readers today getting an array of options to choose from and the intensified competition between the players in the vernacular print industry, catering to the tastes of the readers has become not only difficult but also an imperative for the vernacular dailies. Further, competition along with survival is becoming the order of the day for them. The present research paper is an attempt to find out the key attributes considered by the readers while evaluating the vernacular newspapers in Ahmedabad (Gujarat, India). Next, we attempt to map the readers' perceptions of leading vernacular dailies in Ahmedabad (Gujarat, India). In addition, through this paper an attempt to find out whether there is an association between the importance attached to attributes and the demographics of the readers surveyed for each of the leading vernacular dailies in Ahmedabad. The study is a combination of exploratory and descriptive research which was carried out using both primary and secondary data. The findings provide insights about the various attributes considered by the readers of the papers while evaluating the vernacular newspapers. The results of attribute based perceptual mapping indicate each newspaper's unique position as perceived by its readers.

Keywords: Indian Newspaper Industry, Vernacular dailies, perceptions, readers, Ahmedabad, Gujarat (India)

Introduction

India is the world's largest consumer of newspapers. According to the World Association of Newspapers, more than 107 million daily newspapers were circulated in India in 2009. In the calendar year 2011, the INR 209 billion print industry grew by 8.4 percent from INR 193 billion in 2010. This means one in every five daily newspapers in the worldis being published in India. With Indian print media accounting for 45 percent of total ad spend, it's clear that print media is widely read and impactful[1].The fact that in 2011, 94 percent of total print revenues were contributed by the newspaper publishing sector up from 92 percent in 2007 throws light on the growth that the industry has been witnessing despite the global economic slowdown[2]. Thanks to the growing rate of literacy and an internet penetration rate of below 2 percent, the newspaper industry is estimated to be worth INR 197 billion. The consumption centres are expanding at a fast pace and penetrating beyond the urban and Tier I cities to the rural and Tier II and Tier III cities. Thus, the language markets which were minuscule earlier are becoming larger and more buoyant as compared to what they were in the erstwhile years. Further, although Hindi continues to be the key language market with 5 out of top 10 Dailies being published in Hindi language, together Hindi and vernacular languages account for a readership of almost 8 times of English readership. The two segments (Hindi and vernacular) now contribute approximately 60 percent of industry's revenues and cater to 89 percent of the readership.[3] Together, the Hindi and Vernacular markets are expected to grow at a CAGR of 10.9 percent over the period 2011-16 as per KPMG's report. [4]The revenue split of vernacular dailies shown in Figure 2 presents an interesting picture of the growth and development of the vernacular dailies in the country.

Gujarat's newspaper industry has also developed quite consistently over the last decade. There were only two leading vernacular dailies namely Gujarat Samachar and Sandesh. However, the strategic entry of DivyaBhaskar in the state in 2003 with a myriad of innovations including colour pages, price reductions and several high-value customer offers; has intensified the competition amongst the Gujarati vernacular dailies.

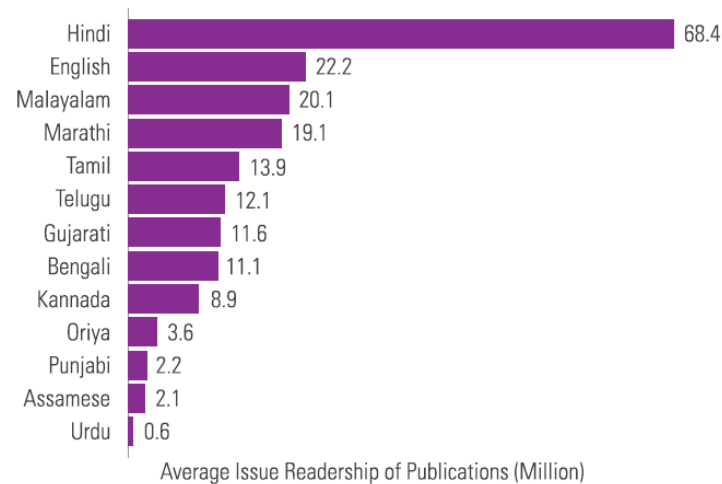[1]*Sources: BBC and World Association of Newspapers and News Publishers*
[2] Source: KPMG in India Analysis
[3] Source: IRS Q3 2011 and KPMG in India Analysis
[4] Source: Industry discussions and KPMG in India Analysis

Average Issue Readership of publications by language

Language	Average Issue Readership (Million)
Hindi	68.4
English	22.2
Malayalam	20.1
Marathi	19.1
Tamil	13.9
Telugu	12.1
Gujarati	11.6
Bengali	11.1
Kannada	8.9
Oriya	3.6
Punjabi	2.2
Assamese	2.1
Urdu	0.6

Average Issue Readership of Publications (Million)

Figure 1

Source: FICCI-KPMG Indian Media and Entertainment Industry Report 2012

Language-wise revenue and readership split

	2011	
	Revenue Split	**AIR Split**
English	40%	11%
Hindi	30%	35%
Vernacular	30%	54%

Note: AIR refers to Average Issue Readership of Any Daily
Source: KPMG in India Analysis, IRS Q3 2011

Figure 2

Source: FICCI-KPMG Indian Media and Entertainment Industry Report 2012

Readershipof Leading Vernacular Dailies in Gujarat

As per the FICCI-KPMG Indian Media and Entertainment Industry Report 2012 (Figure 3), vernacular dailies namely Gujarat Samachar, DivyaBhaskar and Sandesh constitute 85% of total

readership in the state contributing a share of 34%, 27% and 24% each respectively. Thus, the market for vernacular dailies in the state is larger as compared to any other language in the state.

Top 5 publications by readership

State	Name of Publication	% of total readership	Readership of top 5 publications (%)
Gujarat	Gujarat Samachar	34%	
	Divya Bhaskar	27%	
	Sandesh	24%	**90%**
	The Times Of India	3%	
	Saurashtra Samachar	2%	

Figure 3

Source: FICCI-KPMG Indian Media and Entertainment Industry Report 2012

Publication	Language	2012 Q2	2012 Q3
Malayala Manorama	Mal	9710	9752
Daily Thanthi	Tam	7431	7417
Lokmat	Mar	7507	7409
Mathrubhumi	Mal	6493	6415
Eenadu	Tel	5925	5957
Ananda Bazar Patrika	Ben	5859	5788
Sakshi	Tel	5306	5343
Gujarat Samachar	Guj	5205	5153
Dinakaran	Tam	4999	4912
Daily Sakal	Mar	4437	4403

(AIR numbers; All figures in '000)

Figure 4 - Top 10 language dailies

Source: IRS 2012 Q3 Topline Findings

Figure 4 shows the list of Top 10 language dailies as per the Indian Readership Survey report 2012 which indicates that one of the vernacular dailies - Gujarat Samachar has not only got a strong presence not only in the state of Gujarat but also contributes significantly to Average Issue Readership.

A Brief Overview of Gujarat Samachar, Sandeshand DivyaBhaskar

Gujarat Samachar, Sandesh and DivyaBhaskar are the three most read vernacular publications in Gujarat.

Gujarat Samachar - The paper was founded in 1932, and acquired by Shantilal "Seth" Shah (1920-c.1984) in 1952 and is published from Ahmedabad. It has one branch in Surat as well and distributes editions from Ahmedabad, Vadodara (Baroda), Surat, Rajkot, Bhavnagar, Mumbai, Mehsana, Bhuj and New York. It is currently published by ShriShreyanshShantilal Shah and has a readership of 55,10,000, Sunday circulation worth 10,79,168 and daily circulation worth 15,00,619 readers.

Sandesh - Sandesh started its journey in the world of Journalism in 1923 with its headquarters in Ahmedabad. ShriNandlalBodiwala started the daily on a small scale, but its circulation increased by leaps and bounds when ShriChimanbhai Patel took over the press in 1958. Until 1984, Sandesh was a single edition newspaper published from Ahmedabad. Then under an expansion programme new editions were launched at Baroda, Surat, Rajkot and Bhavnagar in 1985, 1989, 1990 and 1998, respectively.

DivyaBhaskar–DivyaBhaskar was launched by Bhopal-based Bhaskar group in the state in 2003 with its headquarters in Ahmedabad. The paper is published from Ahmedabad, Vadodara, Surat and Rajkot.

Figure 5 shows the readership of the three leading dailies in Gujarat. Further, according to the IRS figures, Quarter 4, 2011; months of October, November and December; a major market share has been grabbed by DivyaBhaskar with a readership of 11.59 lac readers. The closest competition is held by Gujarat Samachar with the readership base of 9.01 lac readers, DivyaBhaskar leading the race by 22%. DivyaBhaskar leads ahead of the oldest newspaper in town by 2.3 times the readership of Sandesh which is just a meagre 4.93 lac readers.

Sr. No.	All Publications (AIR)	Language	Readership (000s)			% Difference	
						Year on Year	Quarter on Quarter
			IRS 2010 Q2	IRS 2011 Q1	IRS 2011 Q2	Q2'11 over Q2'10	Q2'11 over Q1'11
1	Gujarat Samachar	GUJ	4506	4449	4444	-1	0
2	Divya Bhaskar	GUJ	3366	3534	3536	5	0
3	Sandesh	GUJ	3127	3232	3329	6	3
4	The Times of India	ENG	232	327	335	44	2
5	Saurashtra Samachar	GUJ	334	231	230	-31	0
6	Gujarat Mitra & Darpan	GUJ	186	170	176	-5	4
7	Kutch Mitra (Daily)	GUJ	101	121	114	13	-6
8	Jai Hind	GUJ	-	-	85	-	-
9	Akila	GUJ	64	59	64	0	8
10	Rajasthan Patrika	HIN	31	71	57	84	-20
11	Phulchhab Daily	GUJ	-	-	54	-	-
12	Ahmedabad Mirror	ENG	28	37	38	36	3
13	The Economic Times (Eng)	ENG	13	24	26	100	8
14	DNA	ENG	30	22	23	-23	5
15	The Indian Express	ENG	9	23	18	100	-22

Top 15 dailies in Gujarat

Figure 5

Source:http://www.exchange4media.com/43830_font-colored1c24-irs-2011-q2-dailies-see-growth-in-gujarat-sandesh-adds-2-02-lakh-readers-in-a-year.html

Perceptual Mapping

Perceptual mapping is used for representing perceptions of respondents spatially by means of a visual display. Perceived or psychological relationships among stimuli are represented as geometric relationships among points in a multidimensional space called perceptual maps. The axes of the perceptual map are assumed to denote the psychological bases or underlying dimensions respondents use to form perceptions and preferences for stimuli. The most common and useful application of MDS is in brand positioning which is essentially concerned with mapping a consumer's mind and placing all the competing brands appropriate slots or 'positions' on it.

Dillon et al(1985) have used perceptual mapping to understand decisions that face consumer researchers as they implement a perceptual product space analysis based on multi-attribute rating

data. Bijmolt and Wedel (1999) have shown the comparison of multidimensional methods for perceptual mapping and their applications to marketing. Hauser and Koppel man (1979) have shown the use of factor analysis and discriminant analysis as alternative methods to perceptual mapping and made a comparison between the two methods.Wong and Teas(2002) have used multi-entity scaling(a multi-attribute measurement) procedure that obtains ratings of two or more entities from a single respondent at the same time to examine experimentally the stability of perceptual maps of retail stores based upon two types of multi-entity scaling data — data produced by attribute and entity-based scaling procedure. Droge and Darmon (1987) have compared attribute versus similarity approaches for finding out associative positioning through comparative advertising.

Research Methodology

Research Objectives

- To find out the most preferred vernacular dailies amongst the readers in Ahmedabad.
- To identify the attributes considered by readers while evaluating vernacular dailies
- To find out whether there is an association between the importance attached to attributes and the demographics of the readers surveyed for each of the leading vernacular dailies.
- To draw a perceptual map using attribute based perceptual mapping for leading vernacular newspapers (Gujarati Language) in Ahmedabad.

Research Design

Exploratory Research

An Exploratory Research Methodology has been utilized so as to understand the market of print media, level of competition and the readership and circulation of the three considered newspapers in Ahmedabad. Secondary data was researched from the Indian Readership Survey (IRS) and Audit Bureau of Circulation (ABC) with the latest data available of Q4 2011 (Months of October, November and December 2011). A primary survey of 50 consumers using telephonic interviewing technique was conducted in order to identify the attributes considered by readers while evaluating vernacular dailies.

Descriptive Research

We conducted a descriptive research in order to map the readers' perceptions of the leading vernacular dailies as well as to find out whether there is a significant difference amongst the preferences of the readers based on their demographics. Therefore, we have considered only those readers for perceptual mapping who read any vernacular Ahmedabad edition dailies.

Sources of Information

Both primary and secondary data have been collected depending on the information needed. The target population as well as the sampling unit comprise readers of vernacular (Gujarati) newspapers namely DivyaBhaskar, Gujarat Samachar and Sandesh in Ahmedabad. The principle sources of secondary information for newspaper data are the IRS Survey 2011, IRS survey 2012, exchange4media.com and KPMG India Analysis report 2012.

Sampling Technique

We have used non-probability, convenience sampling technique. The rationale behind using this technique is the willingness, ability and eligibility of the respondents to be a part of the survey.

Sample Size

A total of 134 responses have been collected of which 101 responses including readers (75) and non-readers (26) of vernacular (Gujarati) newspapers are complete and therefore have been used for analysis.

Limitations

The study is restricted to Ahmedabad region due to access available, readership of Gujarati newspaper and willingness to share information on the part of newspaper readers. There is a possibility of the respondent bias affecting the results.

Instrument Used

We have used Online questionnaire (Please see Annexure 1) so as to ensure that the research objectives are accomplished.

Data Analysis

Appropriate statistical tools and software packages like Excel and SPSS have been used to conduct data analysis. Attribute-based Perceptual Mapping has been used to evaluate the positioning of the three leading dailies.

Data Analysis and Interpretation

Exploratory research enabled us to find out that the attributes considered important by readers while evaluating vernacular dailies. These attributes emerged to be: credibility of the source, speed with which the news is covered, level at which the news (local, global, national) is covered, loyalty, brand name of the newspaper, quality, font size, colour, extra supplements, number of pages, advertisements, classifieds, availability of e-paper, innovations, events and promotions by the newspaper, word of mouth, price, free gifts and national presence of the respective daily. These attributes have been further considered for descriptive research.
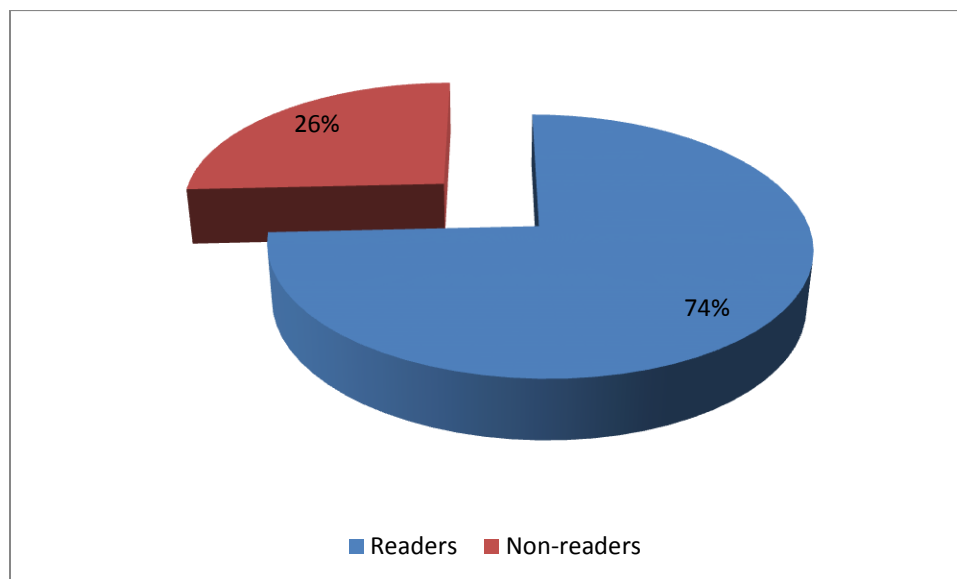
Graph 1: Readership of Vernacular (Gujarati) Newspaper

The pie-chart depicts that 74% of the respondents surveyed, read vernacular i.e. Gujarati newspaper whereas 26% do not read vernacular newspapers. This indicates that there is potential for the vernacular dailies to develop their market in Ahmedabad.
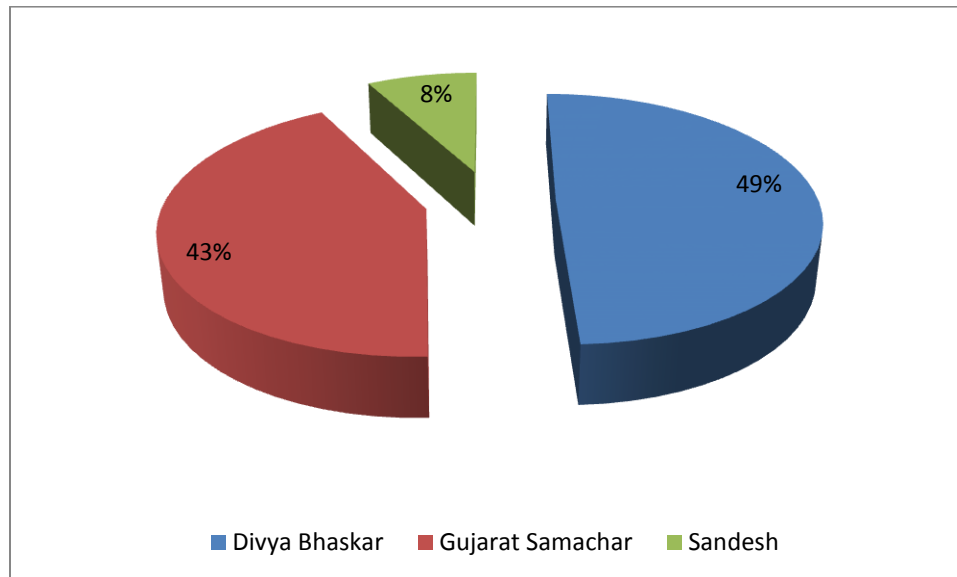
**Graph 2: Responses by Vernacular (Gujarati) Newspaper read**

Of the respondents surveyed, 49% read DivyaBhaskar followed by Gujarat Samachar with a readership of 43% and thenSandesh with a readership of 8%.
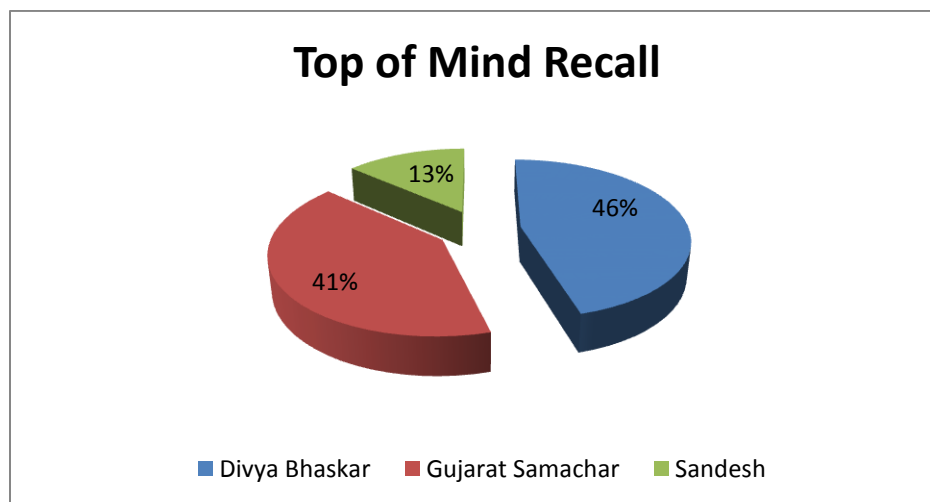
**Graph 3: Analysis of Top of Mind Vernacular (Gujarati) Daily Newspapers in Ahmedabad**

The graph shows that out of the responses received, DivyaBhaskar is the most recalled Gujarati newspaper followed by Gujarat Samachar followed by Sandesh. Interestingly, no other Gujarati newspaper emerged to be recalled by any of the respondents surveyed.

We first tried to find whether attributes considered important differ according to the readers of the three leading vernacular dailies i.e. DivyaBhaskar, Gujarat Samachar and Sandesh.
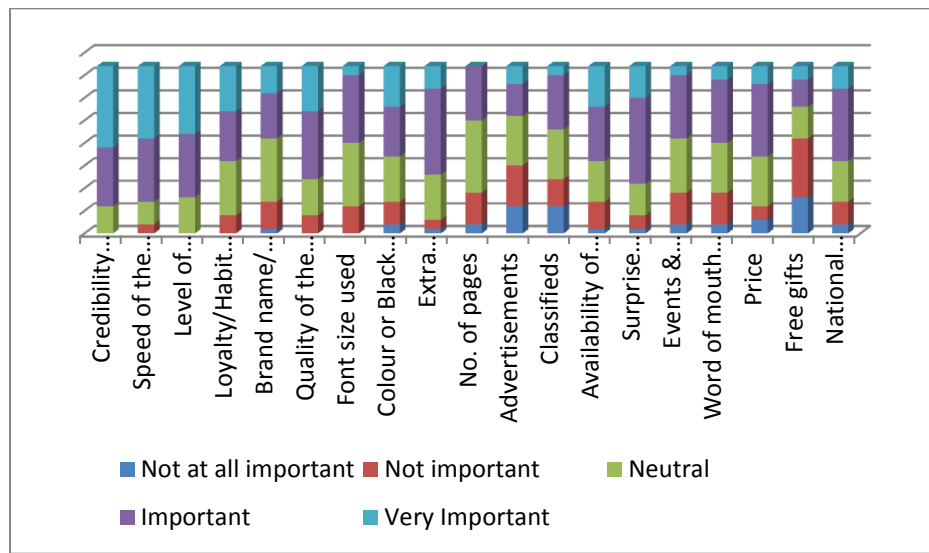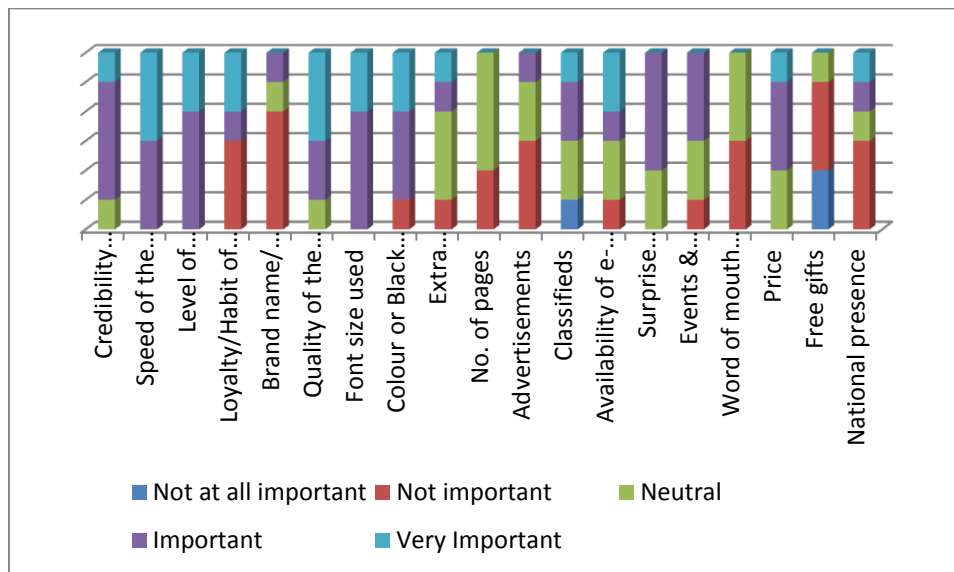

Graph 4: Important attributes according to readers of DivyaBhaskar

The readers of DivyaBhaskar pay more importance to credibility, speed with which the latest news are covered, level of coverage (i.e. local, national, global) and innovations in the newspaper as compared to any other attributes.
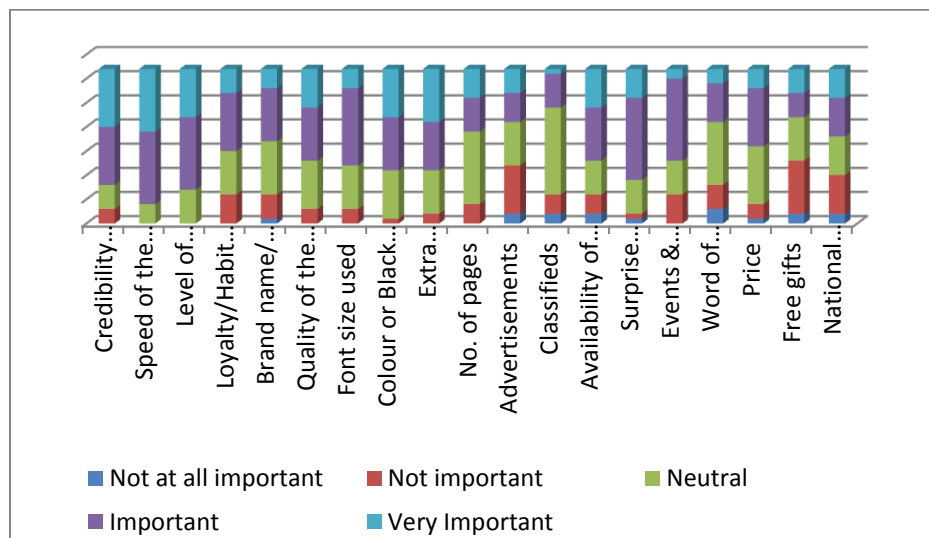
Graph 5: Important attributes according to readers of Gujarat Samachar

The readers of Gujarat Samacharhave rated speed with which the latest news is covered and the level of coverage (i.e. local, national, global) of news in the newspaper as more important as compared to any other attributes.

Graph 6: Important attributes according to readers of Sandesh

The readers of Sandesh give more importance to credibility, speed with which speed with which the latest news is covered, level of coverage (i.e. local, national, global) of news and font size of the print in the paper.
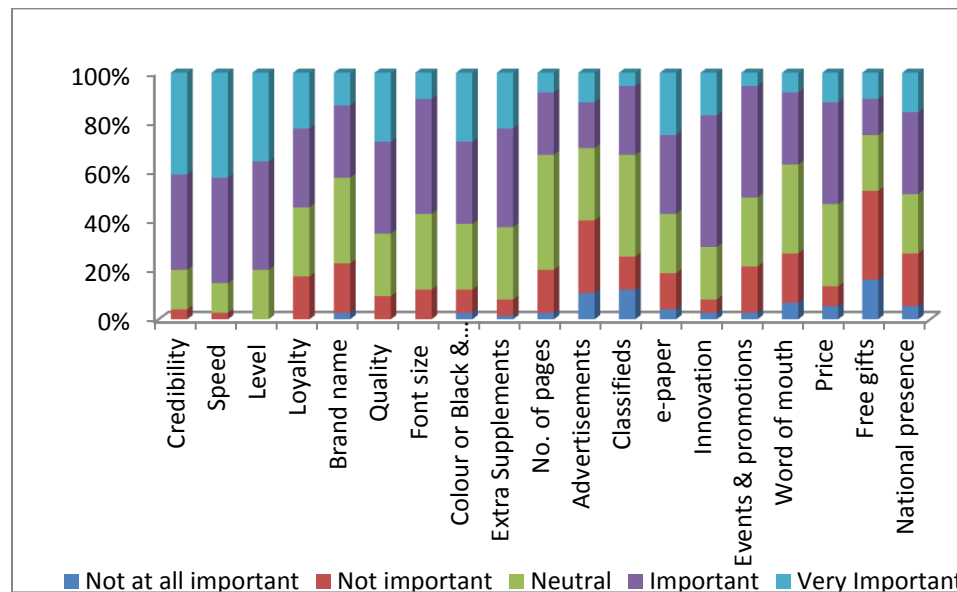
Graph 7: Importance attached to attributes of newspapers by readers

Of the various attributes identified, we then attempted to find out the attributes that are important to the readers while evaluating the newspapers. Speed with which news is covered, credibility of the source, level at which the emerged as more important compared to any other attributes of newspapers. Surprisingly, brand name, font size, loyalty free gifts, advertisements, word of mouth, events & promotions, number of pages and national presence were rated as less important over other attributes.

Hypothesis Tests

i) Association between gender and the daily read

H_0: There is no association between the gender of the readers and the vernacular daily read by them.

H_1: There is an association between the gender of the readers and the vernacular daily read by them.

The results of Chi-square (Please see Annexure 3) with value of p = 0.211 which is greater than the value of α, suggest that there is no association between the gender of the readers and the vernacular daily read by them.

ii) Association between age group and the daily read

H_0: There is no association between the age group of the readers and the vernacular daily read by them.

H_1: There is an association between the age group of the readers and the vernacular daily read by them.

The results of Chi-square (Please see Annexure 3) with value of $p = 0.271$ which is greater than the value of α, suggest that there is no association between the age group of the readers and the vernacular daily read by them.

iii)Association between occupation and the daily read

H_0: There is no association between occupation of the readers and the vernacular daily read by them.

H_1: There is an association between occupation of the readers and the vernacular daily read by them.

The results of Chi-square (Please see Annexure 3) with value of $p = 0.301$ which is greater than the value of α, suggest that there is no association between occupation of the readers and the vernacular daily read by them.

Attribute-based Perceptual Mapping of the Three Leading Dailies

We performed attribute based perceptual mapping using discriminant analysis to draw a perceptual map (Graph 8) of the three vernacular dailies DivyaBhaskar, Gujarat Samachar and Sandesh. The perceptual map has been created considering both the importance attached to the respective attributes rated by the respondents and the rating of the particular daily as perceived by respondents on that attribute. The output of discriminant analysis is attached in the annexure 2.
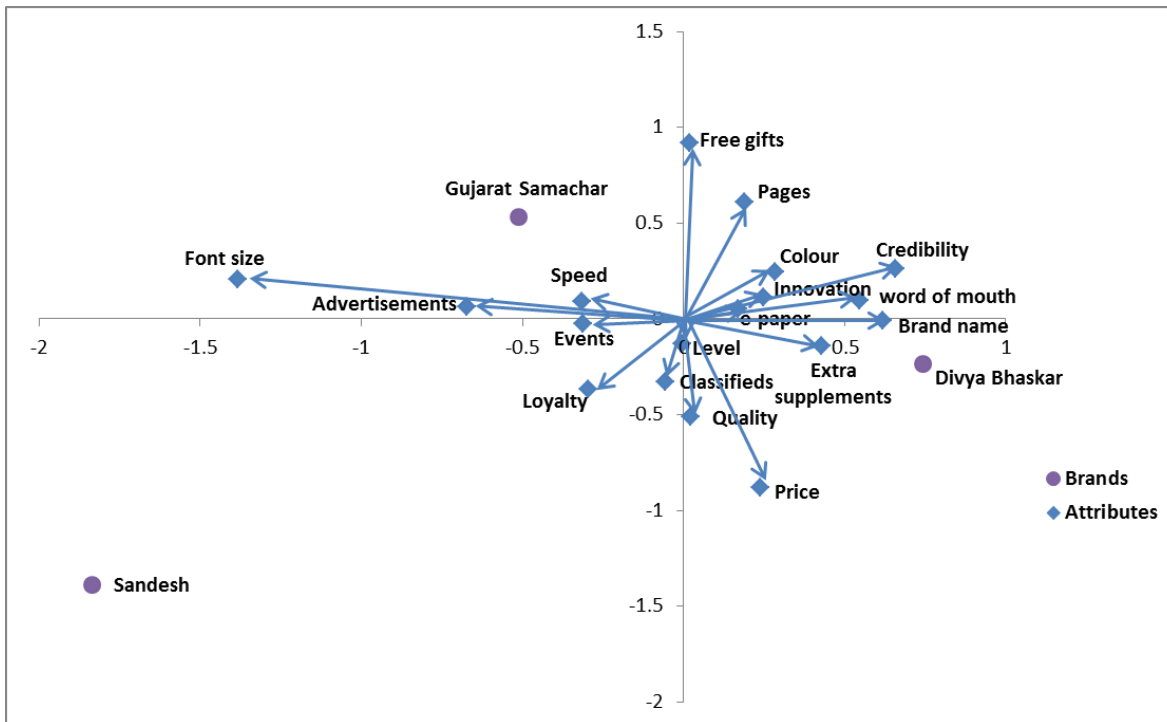
Graph 8: Attribute based perceptual map

The map shows each newspaper's (i.e. Sandesh, DivyaBhaskar and Gujarat Samachar) unique position.As is evident from the map, Dimension 1 comprises of the attributes - colour, credibility, innovation, speed, brand name, e-paper, extra supplements, events, advertisements, word-of-mouth and font size whereas Dimension 2 comprises of the attrributes– free gifts, pages, level of news coverage(local, national, global), price, quality, loyalty and classifieds.

The perceptual map shows that DivyaBhaskar is perceived better than other vernacular newspapers in terms of brand name, word-of-mouth impact, and availability of e-paper, extra-supplements, level of news coverage, quality and price. Further, Gujarat Samachar is perceived better than other newspapers in terms of free gifts, pages, events &promotions, speed, font size and advertisements. Although Sandesh shows negative perceptions on almost all the attributes, it is associated with loyalty and classifieds.

Demographic Profile of the Respondents
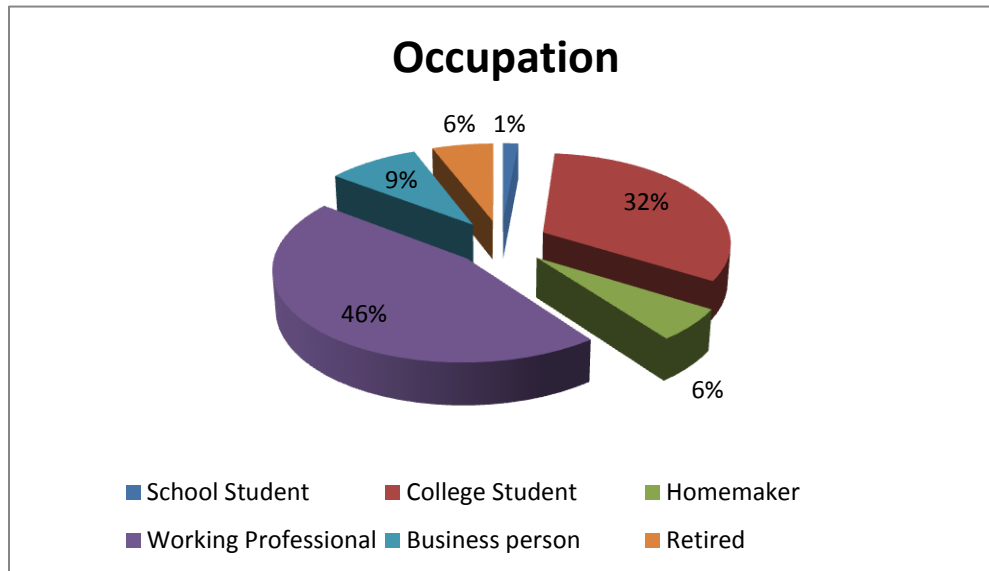
Gender-wise respondent distribution
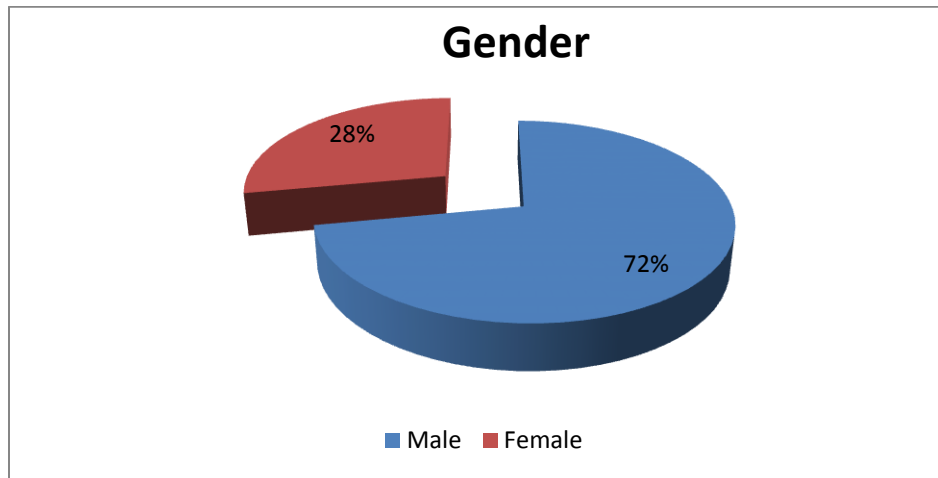
Age-wise respondent distribution
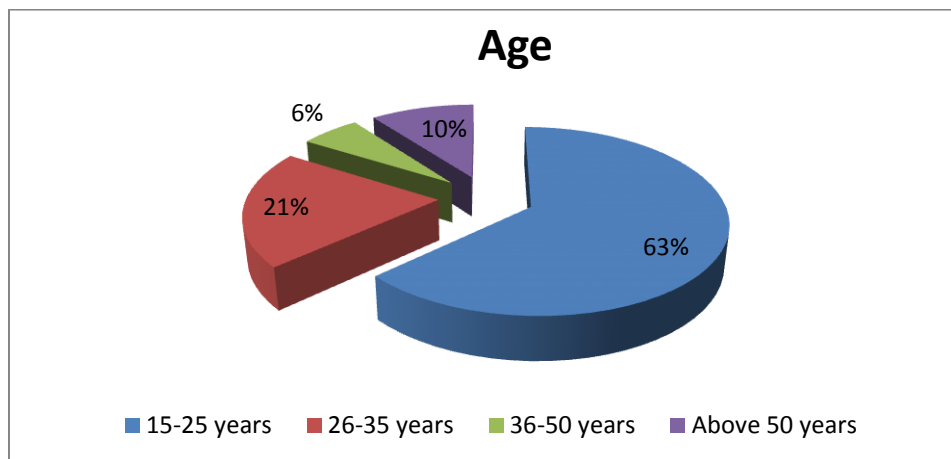
Occupation-Wise Respondent Distribution

Occupation

Conclusion

From the data obtained regarding the Readership from our Primary Research Surveys and the Secondary data sources namely IRS and the Advertisement Market Share distribution obtained the following points are worth contemplating:

- The results of the survey supplement the results of IRS in the sense that Gujarat Samachar, DivyaBhaskar and Sandesh are the undisputed leading vernacular dailies in Gujarat.

- The results of IRS indicate that Gujarat Samachar is the market leader. However, our research shows that DivyaBhaskar is preferred more over the other two dailies i.e. – Gujarat Samachar and Sandesh.

- As per the results of the survey, Gujarat Samachar and DivyaBhaskar are close competitors in terms of readership and their preferences. Sandesh lags behind the two and needs draw more readers.

- The newspaper attributes which the readers consider while evaluating newspapers include - credibility of the source, speed with which news is covered, level at which the news (local, global, national) is covered, loyalty,brand name, quality, font size, colour, extra supplements, number of pages, number of advertisements, number of classifieds,

innovations, events & promotions, price, availability of e-paper, word of mouth, price, free gifts and national presence of the newspaper.

- The attributes that were rated as important by readers of all the three dailiesare - speed with which news is covered and level at which the news (local, global, national) is covered. Apart from these, DivyaBhaskar readers rated credibility of source and innovations as important; and Sandesh readers rated font size and credibility of source as important.

- Overall, the newspaper attributes which are considered as important include - speed with which news is covered, credibility of the source, level at which the news (local, global, national) is covered; innovation, quality, colour, price and extra supplements have been given higher importance by the readers.

- The results of hypothesis testing indicate that there is no association between the gender, age and occupation of the reader with the daily he/she reads.

- The results of perceptual mapping show that DivyaBhaskaris high on credibility, speed, level of news coverage (local, national and global), quality, font size, colour, extra supplements, number of pages, brand-name, loyalty, availability of e-paper and events & promotions. Gujarat Samachar is perceived better than the other two newspapers in terms of free gifts, pages, events &promotions, speed, font size and advertisements. Although Sandesh shows negative perceptions on almost all the attributes, it is associated with loyalty and classifieds.

- The perceptions of respondents regarding the attributes differ from the attributes to which they have rated important for all three leading dailies. This can be attributed to the fact that perceptions about the dailies are mapped irrespective of the fact that he/she is the reader/non-reader of the paper while important attributes have been asked only from the reader of the respective daily. This implies that although the perceptions of these dailies are strong on many attributes, there is a scope of improvement for these dailies to strengthen the strongly perceived attributes among their respective readers.

Recommendations

- Perceptions of the respondents regarding the three dailies on various attribute indicate their strength on those attributes. However, the readers' experiences and the perceptions differ. The newspapers need to bridge the gap between perceptions and experiences in order to strengthen their foothold in the existing market.

- Gujarat Samacharand DivyaBhaskar being close competitors should focus on their perceived strengths and reinforce the confidence of their readers by building on those strengths. However, Sandesh needs to draw more readers in order to be competent with the other two dailies for its survival.

- Each of the vernacular dailies has a unique position in the minds of its readers. The dailies should capitalize on these attributes to reinforce their position in the minds of their readers.

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