



Shamshad TV

Audience Research for the Marketing and Communications Department



TABLE OF CONTENTS

1	INTRODUCTION	3
1.1	A. BACKGROUND OF THE PROJECT	3
1.2	B. SCOPE OF THE EVALUATION	3
1.2.1	<i>Audience Research</i>	3
2	GENERAL HOUSEHOLD CONSUMPTION ANALYSIS	4
A.	SOURCES OF INFORMATION	4
B.	MAIN TV CHANNEL AND PROGRAMMES.....	4
2.1.1	<i>TV channels</i>	4
2.1.2	<i>Programmes</i>	6
C.	AUDIENCE BEHAVIOUR.....	6
3	SHAMSHAD FOCUS	8
A.	BRAND PERCEPTION.....	8
B.	CONTENT	9
3.1.1	<i>General</i>	9
3.1.2	<i>Programmes</i>	10
C.	ADVERTISEMENT.....	10
D.	AUDIENCE CHARACTERISTICS	11
3.1.1	<i>Gender</i>	11
3.1.2	<i>Province</i>	11
3.1.3	<i>Ethnicity</i>	12
3.1.4	<i>Education</i>	12
3.1.5	<i>Age</i>	13
3.1.6	<i>Income</i>	13
4	CONCLUSIVE RECOMMENDATIONS	14
A.	ORGANISATION	14
4.1.1	<i>Programming: Organisation</i>	14
4.1.2	<i>TV hosts</i>	14
4.1.3	<i>Programming quality</i>	15
B.	CONTENT	15
4.1.4	<i>Programming: General content</i>	15
4.1.5	<i>Programming: A focus on the News Department</i>	15
4.1.6	<i>Advertisement</i>	15
C.	AUDIENCE SCOPE.....	16
4.1.7	<i>Coverage</i>	16

4.1.8	<i>Pashto Focus</i>	16
4.1.9	<i>Additional Surveys</i>	16
5	BIBLIOGRAPHY	17
6	ANNEX 1 – FIELDWORK METHODOLOGY	18
6.1	A. OVERALL APPROACH.....	18
6.2	B. GEOGRAPHIC SCOPE	18
6.3	C. RESEARCH TOOLS	18
	3.C.1. <i>QUALITATIVE TOOLS</i>	18
	3.C.2. <i>QUANTITATIVE TOOLS</i>	19

1 Introduction

1.1 A. Background of the Project

Established in 2006, Shamshad TV has become a fast-growing satellite television station broadcasting nationally and catering mostly to the country's Pashto speakers. The channel broadcasts 24 hours a day, providing educational content, news, shows, dramas, and entertaining programmes to both local areas of Afghanistan as well as other countries via satellite. Shamshad TV is also the official partner of the Afghanistan Cricket Board for the broadcasting of its Domestic League matches.¹

Airing mainly in Pashto (80%), Shamshad TV programmes are predominantly watched in the South and East of the country. Shamshad TV has a higher audience viewership in the following provinces (Kabul, Herat, and Mazar-e-Sharif in terms of cities, and more generally in the provinces of Nangarhar (Jalalabad), Kunar, Laghman, Ghazni, Baghlan, Kunduz, Nimroz, Helmand (Lashkar Gah), Kandahar and Uruzgan), than in the rest of Afghanistan.

In order to continue being a company that duly caters to its customers, Shamshad TV commissioned *Samuel Hall* with a phone-based audience research. Conducted in Kabul and other relevant provinces, it targeted a sample of 2000 respondents, both male and female.

This research aims shape Shamshad TV's future strategy in terms of programming and time viewership.

1.2 B. Scope of the evaluation

Samuel Hall's main role is to undertake an audience research.

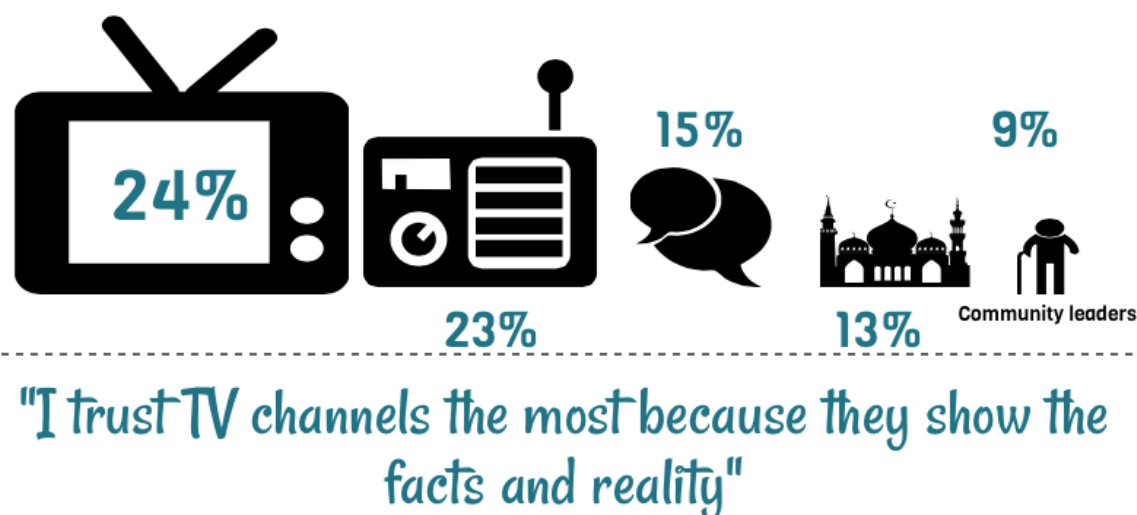
1.B.1. Audience Research

- Gathering information on media habits, needs, attitudes, knowledge, preferences, interest and behaviours in Afghanistan, concentrating on Pashto-speaking areas.;
- Understanding which demographics constitute Shamshad's main audience (gender, age, socio-economic categories);
- Understanding the level of satisfaction in Shamshad TV programmes as well as its timeslots.

¹ <http://sports.af/live-streams/shamshad-tv-online/>

2 General Household consumption Analysis

A. Sources of Information



TV channels are the most useful source of information for the family of the KII respondents, they mostly get information about the current and country affairs from TV channels the most but in rare case people use Radio, Internet and social media because they have easy and closest access to as a big number of youths have access to the internet and have used to social media in urban centres.

A similar insight comes from the FGDs were social media like Facebook and Twitter are mentioned as common sources of information. The main reason behind this trend lies on the apparent lack of censorship on social media.² Moreover, increasingly youth is using mobile for sharing or getting information. Mobile phone companies are texting news headlines to the subscribers of this service.³

For people living in rural or semi-urban areas, they mainly watch TV channels and listen to the Radio. The most common Radios broadcasting for Afghanistan are Radio Liberty, VOA Ashna Radio and BBC.

The most trustworthy sources for the people interviewed is TV channels because of its life airing programmes and the *'fact that Camera eyes never lie.'*

B. Main TV channel and programmes

2.1.1 TV channels

When looking at the TV channels, it is important to remember that only a Pashto speaking audience was interviewed. Moreover, the tendency for viewers to channel hop showed the importance of identifying the two main channels that people watch. The research does not give the number of hours spent on each channel so it is difficult to assess the most popular ones in terms of hourly viewership. With these elements in mind, Shamshad is the TV channel that was mentioned the most

² FGD Youth

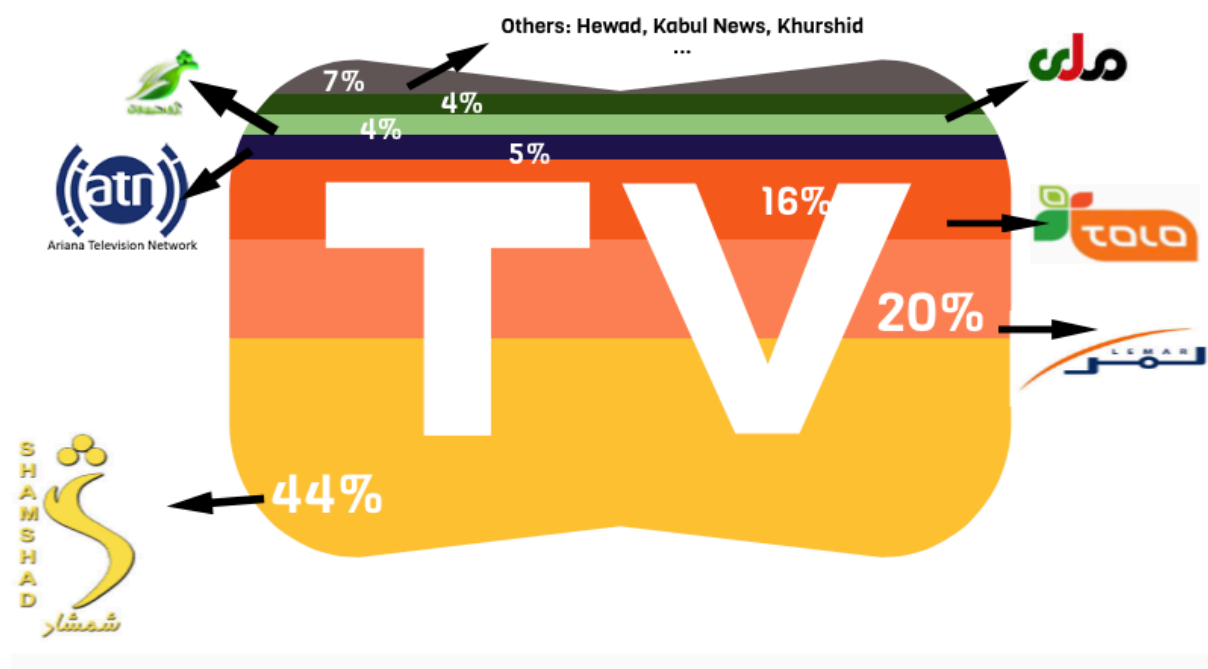
³ FGD Male Household (2) / FGD Youth (1)

as part of the two TV channels – with 88% of respondents mentioning Shamshad. Most of the TV channels mentioned either broadcast in Pashto or have a wide audience share (such as Tolo TV).

More than 30 TV channels are airing in the country and most of them are accessible on the local satellites, but some of them like, Shamshad, Tolo, Ariyana, Khurshid, Lemar, 1 TV and Zhwandoon are the most popular and mentioned by the respondents throughout the FGDs.

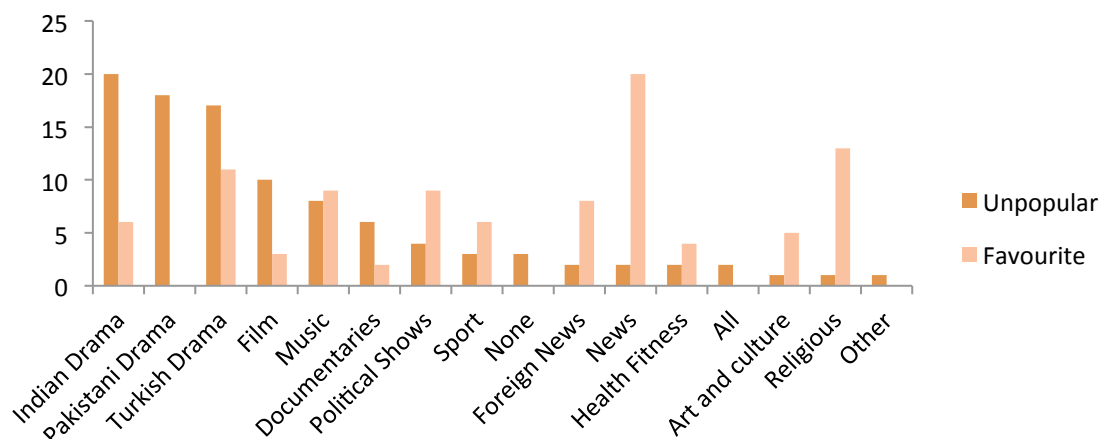
In terms of specific channels watched during the prime times, both the qualitative survey and the Facebook survey mention similar channels as the quantitative survey data.

- Shamshad is either watched in the morning (FGD female 2) or watched between 5pm-6pm for its religious programmes and BBC news and Lemar from 7-10 for its news and series (all FGDs: female, youth and male head of households). Except on Fridays from 9pm-10pm when Jor Pa Khair is airing (FGD female 1, male FGD 1). Tolo is also mentioned as a channel that individuals watch in the afternoon (Male FGD 2, Youth 1).
- Khorshid is also mentioned by youth as a TV channel they watch in the evening for its series on the Wolves.
- In terms of news, Tolo, Lemar, Shamshad and 1 TV comes in the first batch of television channels watched by Pashto speakers because of their experienced presenters, on-time and quickly breakings and accurate news. The other TV channels are not regarded as highly. ⁴



⁴ FGD Female (2), KII Mohyidin Noori, KII Ministry of Agriculture, KII Government Media House

2.1.2 Programmes



Respondents to the quantitative questionnaire when asked about the most unpopular programme, answer in 60 % of cases dramas: Indian, Pakistani and Turkish. Despite the fact that some respondents have mentioned Indian and Turkish dramas as part of their favourite programmes, the same cannot be said of the Pakistanis dramas, which have never been mentioned. As the report is going to illustrate later on, the Pakistani influence on Shamshad has been mentioned as a negative aspect of Shamshad.

Amongst the favourite programmes, the following are mentioned:

- **Religious Programmes:** 6pm on Dawat TV
- **Turkish Series:** Neek Aw Bad (Lemar), Samar and Maroli series (Khordish), Pol e Siyah (Tolo TV), Valley of Wolves (previously on Tolo and now on Lemar and Khurshid)
- **Indian Series:** Meeny Deewa and Madhu Bala (Lemar).

C. Audience behaviour

In Afghanistan in general and in the Pashto tribe specifically – individuals act as a group and families living under one roof follow the rules and customs implemented by the family elders or most influential person. Looking into family behavior towards media outlet - freedom of viewership will depend on the kind of family, the type of geographical locations, the programmes and the TV channel in general. Some women or children are not allowed to watch specific programmes and usually individuals in general watch TV channels mostly with other family members, *'most of the times family members when they comes home they watch TV in their sitting room (parents room or hall) together with other family members, where the elders have the control over the remote-controller.'* Youths increasingly watch series, drama, sports, Hollywood or Bollywood films alone and until late night.

The data derived from different FGDs illustrate these differences, *'in some families women and youth can watch TV, in others women cannot watch it alone, in some women can watch together with their families, in some families in depends on the age of the female viewer, in urban areas they usually can watch TV and for those who live in rural areas the percentage of those who has the permission to watch is not that high.'*

Viewership numbers peak on Fridays and are interchangeable all other days of the week



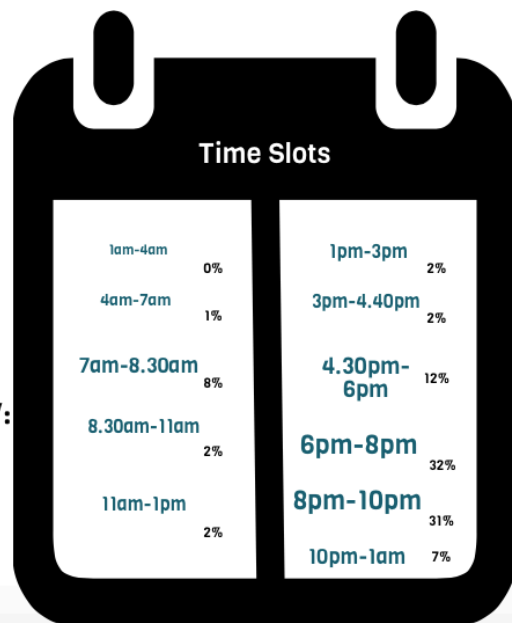
In terms of timeslots, people are usually busy with work and school/university from 7am or 8am until 5pm. However some people mentioned they watch television at work and there is still a proportion of individuals who are at home 'like women, elderly people or those unemployed.'⁵ Taking in consideration those elements, most of the people watch television at 6 – 7am, 5 – 6pm, 7 – 8pm, 8-11pm and then until 1:00am at night as during these timeslots people come together for dinner, taking tea or generally spending time with their family members.

The qualitative data corroborates the quantitative data:

Most people watch TV between 7am-8.30am and from 6pm-10pm.

Main reasons for watching TV:

- *Out of work
- *Out of studies
- *Better programmes airing



In term of the time, Shamshad TV programs are running about 30 minutes to two (2) hours daily on the TVs at the viewer's family and some audience are watching only Jor pa Khair program on Fridays nights.⁶

⁵ KII MRRD

⁶ FGD MHH (1), FGD Female (4), FGD Youths (1)

3 Shamshad Focus

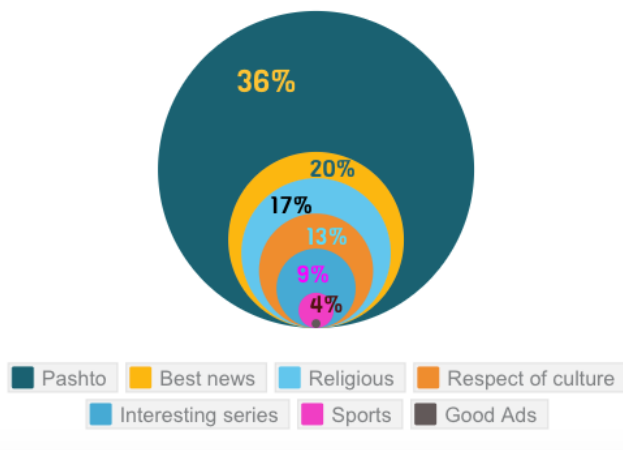
A. Brand Perception

The main image that individuals have of Shamshad is a TV channel that represents Pashto culture and customs. Therefore it explains how the channel is respected amongst the Pashto community, both in and out of the country. In the FGDs the type of traditional clothing is also mentioned as a positive point, in addition to the language and types of programmes.

“Shamshad’s strong point is that this is the only channel that respects national interests and is not the fanatical TV channel like others airing in the country”¹

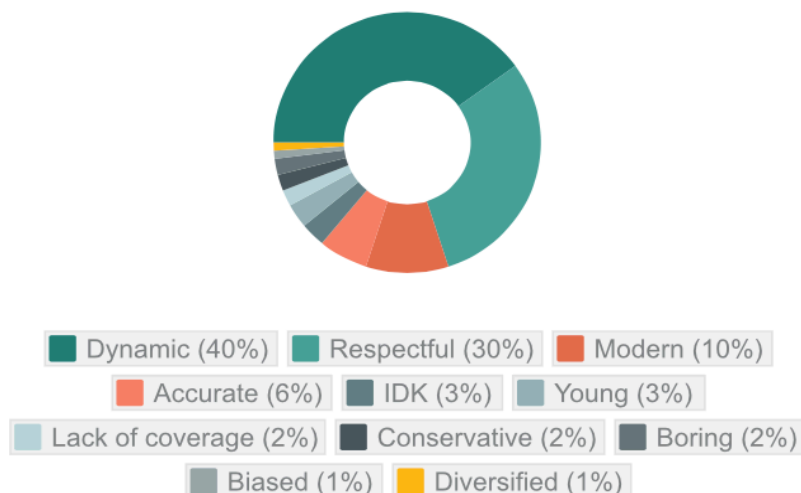
In the quantitative data, when asking respondents who watch Shamshad, more than half of the reasons put forward look into Pashtun culture and language (53%).

The quality of the news is also favoured, even if some changes are needed.



In terms of general image - when asked about the adjective they would associate with Shamshad TV the most – both viewers and non-viewers mentioned positive adjectives: dynamic, respectful, and modern.

Shamshad’s image is clearly associated with the *on-going modernization and social changes in the*



country. However, it is important to keep in mind that there could be a bias in the respondents answers as they could understand that it is a survey for Shamshad and therefore would be more inclined to answer positively about this channel.

B. Content

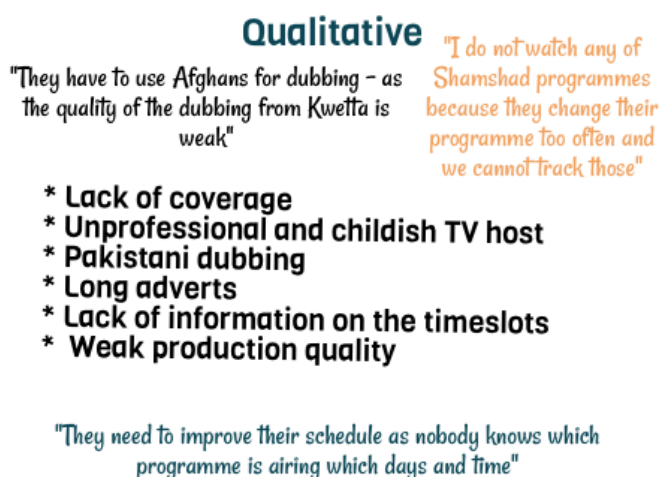
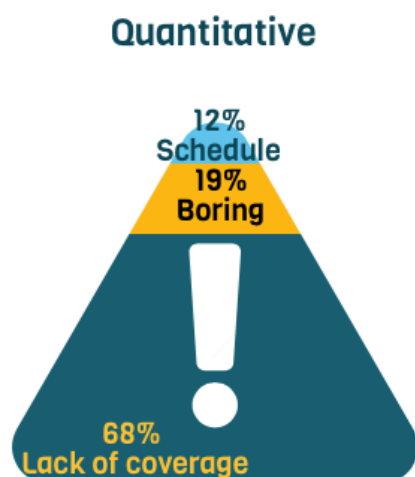
3.1.1 General

Despite these positive adjectives characterising Shamshad, media experts or people working in the field of media prefer go through other TV channels for professional purpose and do not watch Shamshad for the below reasons, which are also mentioned in the FGDs:

- The lack of **qualified TV hosts** prevent media representatives of the government to use Shamshad TV as a channel for political purposes or government participation in the political debates programmes.
- The Pakistani aspect of the channel is questioned:
 - The numerous **Pakistani series**
 - Weak quality of **dubbing** is an issue, as people have difficulties identifying themselves with Pakistani dubbing and could shed a particular light on the political views of Shamshad TV
- The lack of **objectiveness** regarding government actions and policies
- The lack of quality for their programmes (both in house and bought programmes), their repetitiveness and their lack of punctuality
- The lack of education programmes
- The profusion of comic series like 'Janan' which are not educative or entertaining
- The undetailed news and lack of ground access

These are the main areas of opportunity for Shamshad to improve its services. They all show that the viewers value the network while calling for more 1) objectivity, 2) quality and 3) Afghan programmes.

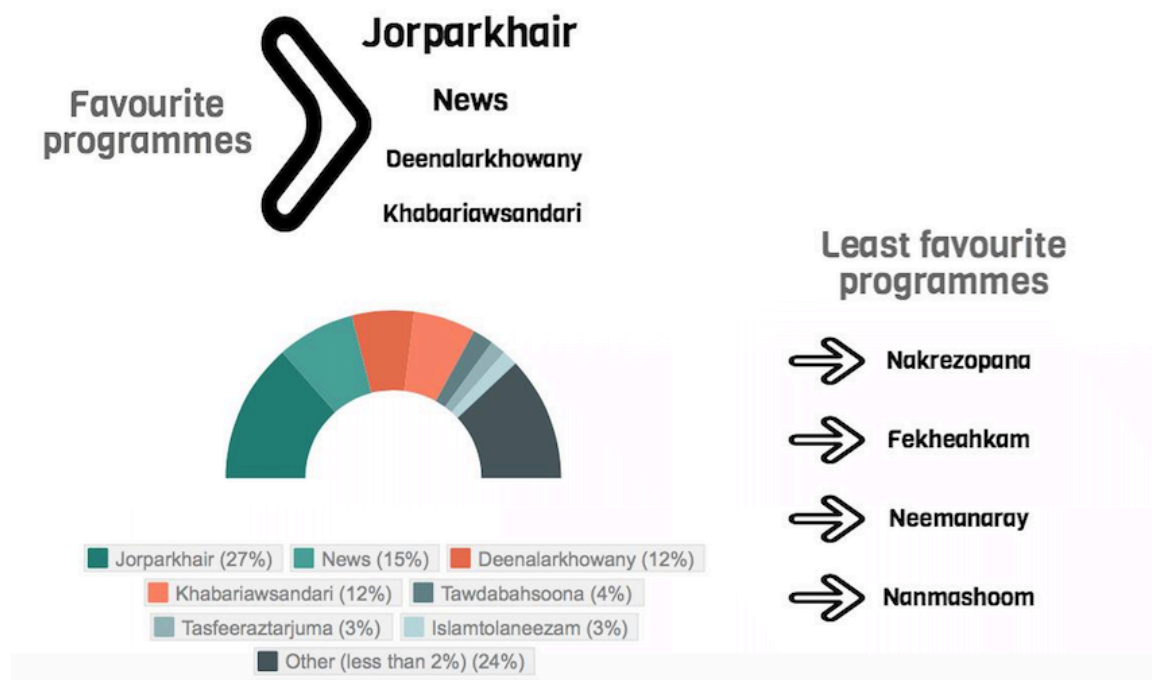
In the quantitative survey, the main reasons underlying why individuals were not watching Shamshad revolved around a technical aspect: the lack of coverage. However, the issue of scheduling and lack of interest in their programmes was also mentioned.



3.1.2 Programmes

Taking into consideration the comments mentioned above, in terms of news – it appeared in both the qualitative and quantitative data that respondents think that news are out-dated and Shamshad is slow in airing breaking news as well as rarely reports on world news. However, they all agree that they give an insight into local news. In terms of series, they are generally considered as badly dubbed and concentrating on too many foreign series. For political debates, what is criticised are the political bias of the TV hosts and the repetition of political debates already aired. The religious programmes have not been criticised and are considered of good quality.

'Jor pa Khair (the music and talk show) of Shamshad is the only program people like it the most and they love watching it'



More specifically respondents to both the qualitative and quantitative tools mention Jor Par Khair as their favourite programme.

C. Advertisement

Key informant interviews when asked about Shamshad ads, mentioned their extensive lengths and their foreign origin. Moreover that if the ads are designed and created outside, they first need to be checked inside the organization and outside with some media experts to make sure these are suitable to be aired on Shamshad. FGD members also mention this aspect of being suitable culturally to be watched with other family members - *'They should not be in the conflict with the culture and religion of the viewers.'* They also question the quality of their dubbing - *"Sandhi Sudha is translated and dubbed with boring and non-Afghan Pashto"*⁷

⁷ Media analyste tells

Most of the respondents have mentioned that they like ads to be about clothing, food, beverages, school, education, health and fitness and they should advertise TV Channels future programmes.

‘Shamshad should compete with other channels and raise its standards so it wont have to accept commercials that are absurd such as’:

- Homeopathic medicine
- Sandhi Sudha
- Bawasir – haemorrhoids

D. Audience Characteristics

Shamshad TV is not viewed by a particular type of individual – by crossing with several socio-economic characteristics, education level, or province of origin, it appears that Shamshad TV’s audience are Pashto speakers as a whole.

3.1.1 Gender

As mentioned previously, the respondents for this research have been mostly male respondents – 92%, therefore it is difficult to draw a statistical significant conclusion for the female. However, it is interesting to see that 79% of the female respondents watching TV, across provinces, are watching Shamshad versus 88% for men. Both male and female watch Shamshad TV’s different programmes – political debates are in majority watched by the male viewers whereas both watch religious programmes.

3.1.2 Province

In term of Provinces, Nangarhar province (with its capital city Jalalabad) is the province in which the highest number of respondents has replied that Shamshad was one of the two channels they were watching. This province is followed closely by Helmand (95%) and Kandahar (91%). At the other end of the spectrum, Kunar and Baghlan are the provinces, amongst those surveyed, that have the smallest number of inhabitants that watch Shamshad.

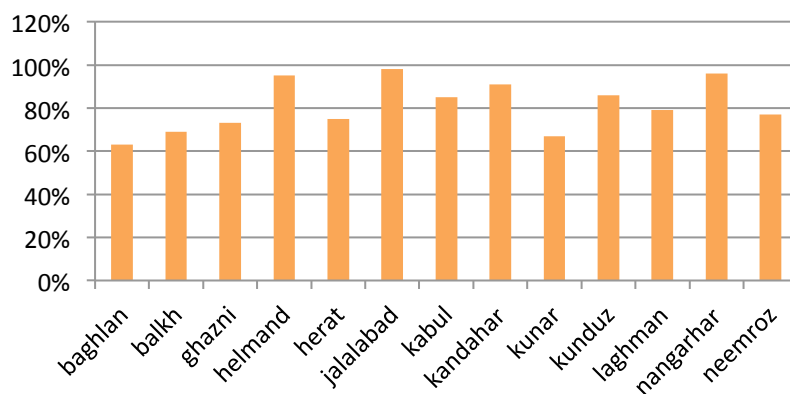
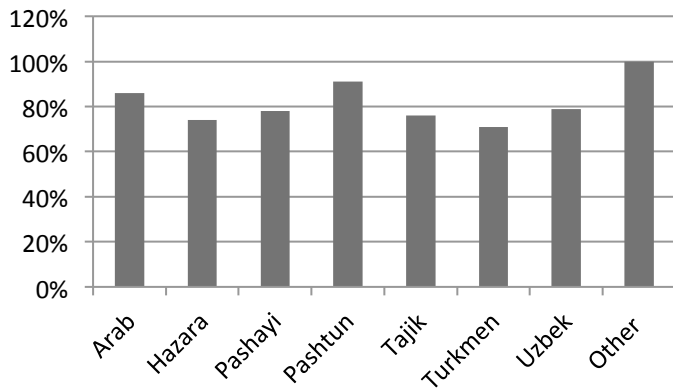


Figure 1 - Breakdown by provinces of respondents that mentioned Shamshad as one of the two TV channels they watch

3.1.3 Ethnicity



The survey was intended for Pashto speakers and not just individuals belonging to the Pashto ethnicity. Therefore it is interesting to test certain hypothesis on the type of audience that Shamshad think they are targeting. Unsurprisingly the ethnicity were the higher number of respondents watch Shamshad are the Pashto. It is important to note that in the other category there are 10 respondents from different ethnic

background - Aymaq, Baloch, Sadat and Sujani – however the sample is too small to be significant.

It is interesting to note that it despite Shamshad having a strong focus on Pashto culture and customs and is labelled as such – it also draws different ethnic groups that speak Pashto to watch it.

Figure 2- Breakdown by ethnicity of respondents that mentioned Shamshad as one of the two TV channels they watch

3.1.4 Education

In terms of education, it is interesting to see that Shamshad audience is neither the least educated nor the most educated – it seems that all types of education levels are to be found amongst its audience. However it is interesting to note that the type of education, which is the least, represented (with still 83%) is the madrassa background. Despite Shamshad strong recognition for its religious programmes – it is not only viewed by respondents with a strong religious background but its outreach is very broad.

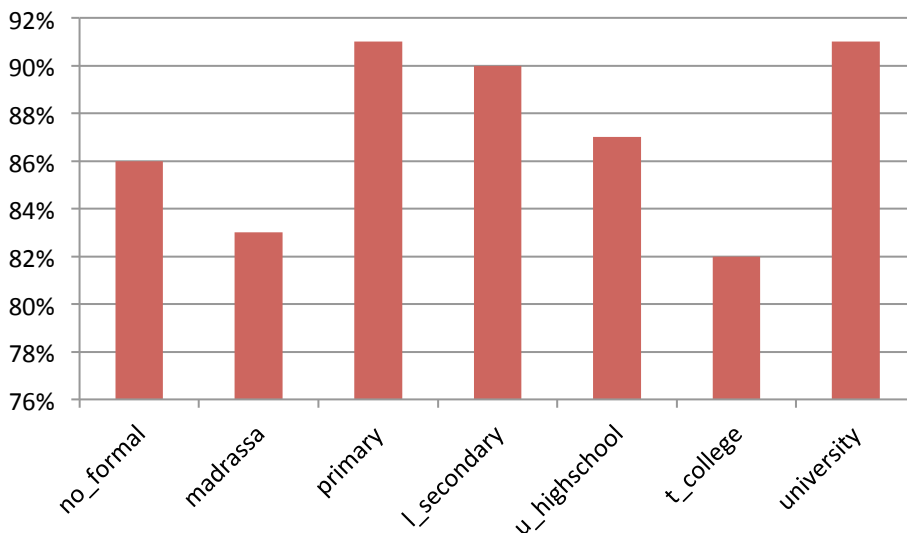


Figure 3 - Breakdown by education level of respondents that mentioned Shamshad as one of the two TV channels they watch

3.1.5 Age

The age breakdown main insight into Shamshad audience is that the 51-29 years old respondents are the ones amongst which there is the highest number of Shamshad viewers, 90%. This age category is followed closely by the youth (89%).

However like the other characteristics breakdown, the differences between the categories are very slim.

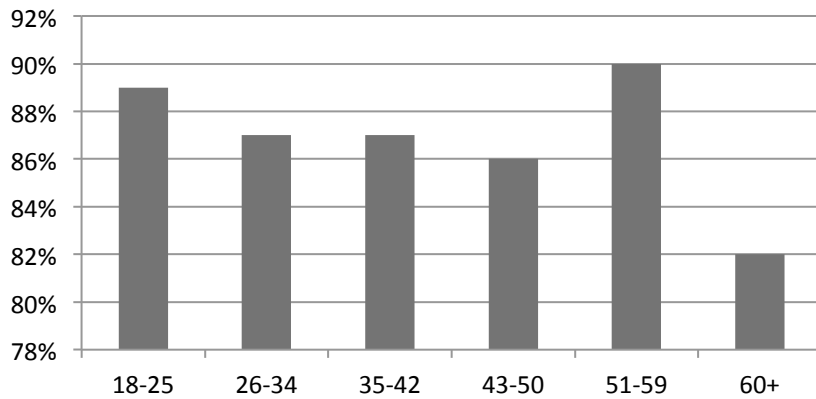


Figure 4 - Breakdown by age of respondents that mentioned Shamshad as one of the two TV channels they watch

3.1.6 Income

In terms of income breakdown, it is interesting to see that similarly to the other characteristic breakdown, there are only slight differences along income lines.

The highest number of respondents watching Shamshad can be found in one of the lowest income category, however this is only 5% of our sampling. The three middle categories which encompasses monthly income from 2,000 to 50,000 correspond to 84% of our sampling and correspond to the income slot were most Afghans can be situated.

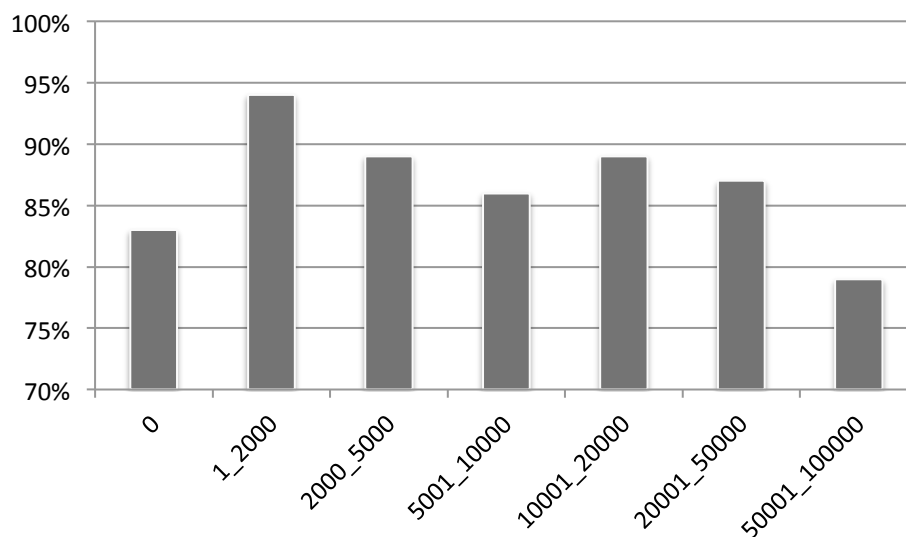
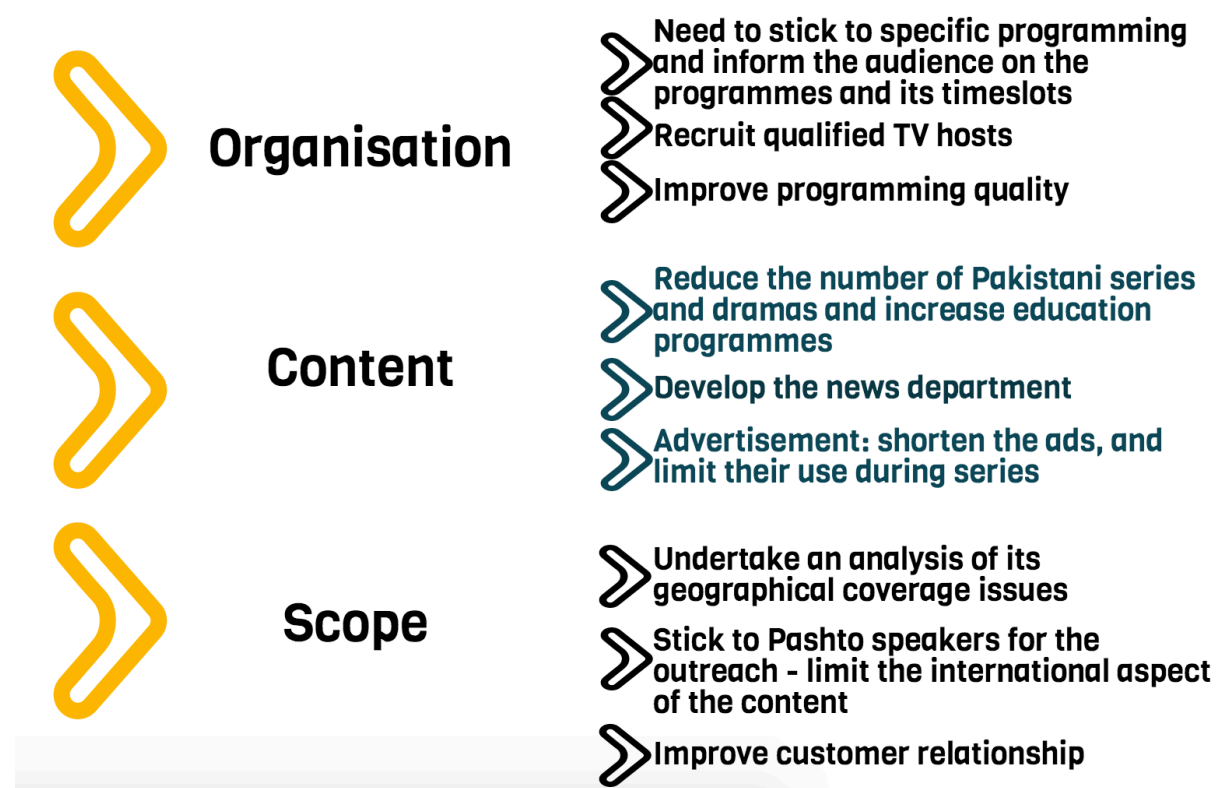


Figure 5 - Breakdown by income of respondents that mentioned Shamshad as one of the two TV channels they watch

4 Conclusive recommendations



A. Organisation

One of the main critics of Shamshad TV is its lack of organisation and professionalism – that prevent it from being not only viewed as a respectful TV channel but also one of quality.

4.1.1 Programming: Organisation

In terms of the organisational aspect of programming, it is important to set specific times for the different programmes and be on time for the airing. This is especially important if you want to retain the attention of the viewer – who will change channel otherwise. In addition to stick to a specific timetable, it is important for viewers to know about the airing time in advance so they can plan – advertising for Shamshad own programmes in between shows and on the social media is crucial to keep the viewers informed. They are often compared to Tolo and Lemar which air their different programmes on time, which shows a sign of respect and professionalism to the audience. The final point on the organisation of the programmes is the timeframe giving to a programme – there is a need to renew the different programmes to keep them up to date, however there needs to be some consistency with certain programme like series so people are aware that for a certain period this particular programme will be aired and it can shape their TV habit.

4.1.2 TV hosts

TV hosts on Shamshad are respected for their traditional take, however their lack of neutrality and objectivity are an aspect recurrently mentioned. They are said to be siding with the government and not taking an independent stand to politics. TV hosts presenting inon-political programmes are

considered as less educated and informed (quite freshly out of their studies) than TV hosts on other TV channels. One aspect that is mentioned is the small salary that pushes the good TV host to join other TV channels. The example of Navida Khushbo, who joined Lemar, is mentioned in one of the KIIs.⁸

4.1.3 Programming quality

One of the main area in which Shamshad could make significant changes that would lead to a wider appreciation of this channel is the programming quality. In both the FGDs and the KIIs the quality of the sound and image is questioned. In terms of sound, the quality is generally weak, but most importantly what is criticised is the dubbing aspect. Dubbing is the first thing that is mentioned, as in most of the cases, when programmes are bought from a foreign country – the dubbing is done in Pakistani and not in Afghan Pashto. Moreover, in terms of visual – the background used for the in-house made programmes such as the political shows is old and of bad quality. For specific programmes the quality in itself is quite limited.

Therefore it would be essential for Shamshad to source its dubbing in Afghanistan, develop new TV sets and be attentive in the quality of the programmes they buy.

B. Content

As mentioned briefly in the previous section, it is also important to note that the pride that people get in having a Pashto oriented TV channel comes with many expectations. One of them being that the programming and content of the TV channel is Afghan Pashto and not an aggregate of foreign, especially Pakistani, content.

4.1.4 Programming: General content

Shamshad most appreciated programmes are the news, religious programmes and Jo Par Khair. Therefore it needs to make sure to keep those programme aspects in their programming strategy. The most unpopular programmes on the other end are Drama series, especially the Pakistani ones. Those are criticised for not corresponding to Afghan culture, and should be replaced with ones with Afghan actors and specific Afghan contextual storylines. In terms of programmes that people would want to see – educational and instructive shows as well as series such as those aired on Lemar: Turkish and Indian which are viewed of very good quality and of high entertainment.

4.1.5 Programming: A focus on the News Department

Shamshad news is widely appreciated and is one of the reasons why people watch Shamshad. However if it wants to stay competitive with Lemar 7pm news for instance some aspects need to be improved. Amongst several things mentioned, it seems that people would want the news department to have a better investigative team that comes up with in-depth relevant subject for nowadays Afghanistan. Moreover, the news in itself need to be politically unbiased and aired as soon as possible, as Shamshad is said to be slower than the others in airing breaking news. One last aspect that could be looked into is to air some international news whilst still focussing, as it is doing now, on local and national news. This later aspect is greatly appreciated.

4.1.6 Advertisement

The advertisement aspect is important to look into as it is the main income stream for TV channels in general. Therefore it is difficult to comply to all of the audience requests, especially the ones of simply deleting adverts. However some changes can be brought for individuals to appreciate those and prevent them from switching channels, which leads to a decrease in audience viewership.

⁸ Mohyidin Noori, spokesman of Ministry of Mines and Petroleum

Shamshad should choose adverts which are in general shorter than the ones they are airing, and more traditional in their content. Individuals have mentioned several advertisement that they felt were against Pashto culture and impossible to watch by a family – especially for children and women. Therefore adverts should be carefully selected to respect Pashto culture – such as clothing or food and beverages adverts. The last aspects of adverts that was mentioned is the poor quality of the adverts selected – especially the ones coming from Pakistan or dubbed in Pakistan. As mentioned earlier Shamshad audience is proud of their Afghan culture and want it to be reflected in all aspects of Shamshad strategy: programme quality and content as well as advertisements.

C. Audience Scope

Looking more into the geographical scope of Shamshad and its potential growth, it is key to address the issue of coverage as well as content.

4.1.7 Coverage

One of the main impediments for Shamshad to be viewed by a higher number of individuals is the lack of coverage in certain regions. Therefore Shamshad should undertake a nation-wide assessment to understand where the holes in their coverage are and make sure to address those.

4.1.8 Pashto Focus

Shamshad is mainly known for its Pashto characteristics, and should keep it that way. It is important to draw into international content and news for additional material, however it is key for Shamshad to have all programming in Pashto. It could be a good idea to have subtitles in Dari for certain type of programmes, which are known to be popular, however it should be limited.

4.1.9 Additional Surveys

To make sure that the improvements or changes in strategy linked to this specific research match the expectancies of Shamshad audience, it is important for them to undertake other surveys or Focus Group Discussions to better inform them on the perception of their brand, and the content of the programmes.

Moreover in general, it is key to develop a stronger link with the audience and make sure to constantly keep up to date with changes in audience media consumption. Therefore it would be interesting to be more reactive on different social media platforms for the audience to feel that their requests are taken into consideration.

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6 Annex 1 – Fieldwork Methodology

6.1 A. Overall approach

The fieldwork will be based on a mixed methodology, including a phone-based quantitative survey of 2,000 respondents and a qualitative component to collect robust data for a proper audience research.

The tools used by Samuel Hall are designed to ensure a wide-ranging access to all relevant qualitative and quantitative data through four distinct tasks:

- A desk review of existing documents, papers and briefings of current and past market research, national and international initiatives, and other topics related to improving customer experience in settings such as Afghanistan;
- Key informant interviews with department heads, communication specialists and international advisors;
- Focus group discussions with adults, teenagers, parents, women, community leaders and any other relevant demographic for the survey;
- Quantitative surveys for selected demographics in key urban centres.

6.2 B. Geographic scope

We will make sure that the people surveyed for this purpose, are presently residents and viewers in: Kabul, Herat, and Mazar-e-Sharif in terms of cities, and more generally in the provinces of Nangarhar (Jalalabad), Kunar, Laghman, Ghazni, Baghlan, Kunduz, Nimroz, Helmand (Lashkar Gah), Kandahar and Uruzgan. We need to have some feedback on these locations from Shamshad.

6.3 C. Research tools

Below is a list of **qualitative and quantitative methods** for data collection that will be used.

3.C.1. QUALITATIVE TOOLS

Table 1 – Qualitative tools

	Target Sample Size
Focus Group Discussions	10 <ul style="list-style-type: none">• 4 youth• 3 female• 3 Head of Household
Key Informant Interviews	10

Samuel Hall will conduct **focus group discussions** and **key informant interviews** in order to provide Shamshad TV with a better contextual analysis of its station's reach and perception.

a) Key Informant Interviews

The evaluation team will conduct interviews with a range of key informants, including but not limited to early users, trend-makers, communication specialists and international advisors. These will be used to assess the impact of the product and strategies that could be used. They will last approximately one hour and follow an in-depth format with open-ended questions designed to elicit new angles and unanticipated insights. Specific questions will be drafted for each different type of respondent and a full list of interviewees will be added in the annex of the final report.

b) Focus Group Discussions

The focus groups will look into three different categories: youth, women and male head of households. From each of these groups we will have individuals from the East, South-East and Kabul. As we will not travel to those areas and all of the FGDs will be based in Kabul, we will try to target recently arrived groups in Kabul.

The research team will be able to probe feelings, behaviours, challenges and potential opportunities in the different targeted groups. These interviews will have six to eight participants each.

Through these focus groups we will look into general household media consumption trends, as well as specifics for Shamshad TV on (1) brand - audience awareness, perception, and opinions of the channel - and (2) content testing - perception of popular TV programmes, and what makes these programmes popular.

c) Complementary Data

Information will be gathered through the Facebook and Twitter pages of Shamshad TV as well as its main competitor Lemar. The information will focus on:

- Understanding the difference in terms of online community management in a country where urban youth is using social media to tailor its consumption patterns.
- Understanding their advertising strategies on these social media channels.

Moreover, making the hypothesis that most of the people on Shamshad TV’s Facebook page represent their youth viewership, Samuel Hall will be using the poll option on Facebook to understand the demographics of its Facebook followers as well as their favourite programmes, preferred timeslots and general questions on Shamshad TV. This will allow for an alternative and original data collection method as we will be able to draw from a bigger pool of respondents.

3.C.2. QUANTITATIVE TOOLS

a) Household Survey

The quantitative data will be primarily gathered from a household survey through telephone interviews. Questions will include a variety of topics to better capture media consumption trends, specific understandings of Shamshad TV programme viewership (both along age and gender). This household questionnaire will include approximately 10-15 questions and should not exceed 20 minutes to complete, to limit both the enumerator and respondent fatigue and increase the level of accuracy of responses.

The respondents for this household survey will Pashtu speakers drawn from the urban and rural classes of Afghanistan.

Type of quantitative tools	Target Sample Size
Household Survey	2000 (1000 female and 1000 male)

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