TRP? Son, anything that raises the viewer's temperature respiration rate & pulse, will raise TRPs.
01

TV Landscape over the years
Growth in TV penetration has been tremendous

- **2004**: 40% penetration, 83 million households
- **2008**: 46% penetration, 106 million households
- **2013**: 54% penetration, 143 million households
- **2017**: 64% penetration, 183 million households

Source: Broadcast India study, IRS, Census, Industry Reports
Terrestrial was the only form of distribution till the mid 90s. With the impetus of digitization, this is nearly extinct!

<table>
<thead>
<tr>
<th>Number of Channels</th>
<th>Share of distribution medium</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year</strong></td>
<td><strong>Terrestrial</strong></td>
</tr>
<tr>
<td><strong>2005</strong></td>
<td>130+</td>
</tr>
<tr>
<td><strong>2010</strong></td>
<td>265+</td>
</tr>
<tr>
<td><strong>2013</strong></td>
<td>550+</td>
</tr>
<tr>
<td><strong>2018</strong></td>
<td>800+</td>
</tr>
</tbody>
</table>

Source: IRS, BI, Industry Reports
Given this pace of change, how does the TV Universe in India now look like?
TV Universe size in rural India is 99 million HHs, which is 17% higher than Urban India, but Rural is only 52% penetrated so far.

Size of TV Universe

- **780 Million Individuals**
- **183 Million Households**
- **87% Urban India**
- **52% Rural India**

Source: Broadcast India 2017
86% of Indian Households still has CRT Television

97% of India still owns single TV. This shows Co-Viewing is high in the country

<table>
<thead>
<tr>
<th>Among TV Universe</th>
<th>U+R</th>
<th>Urban</th>
<th>Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRT TV</td>
<td>86%</td>
<td>80%</td>
<td>92%</td>
</tr>
<tr>
<td>LCD/LED/Plasma TV</td>
<td>14%</td>
<td>20%</td>
<td>8%</td>
</tr>
</tbody>
</table>

77% of large, affluent joint families have single TV
And no matter what the situation, TV remains a favourite family passtime.
How much of TV is India watching?
Viewers in South spend higher time on TV than viewers in HSM

**TOTAL Daily Tune-ins on TV**

- **South**: 190 million
- **HSM**: 367 million

**Daily Time Spent**

- **South**: 04:09:25
- **HSM**: 03:31:36

**Daily Time Spent (HH:MM:SS)**

- **HSM**: 03:44:28

**Daily Time Spent**

- **South**:
  - AP/Telangana: 04:12:56
  - TN/Pondicherry: 04:11:15
  - UP / Uttarakhand: 03:50:06
  - MP / Chattisgarh: 04:11:23
  - Kerala: 03:50:06
  - West Bengal: 03:49:46

- **HSM**:
  - AP/Telangana: 04:01:36
  - Mah / Goa: 04:01:36
  - Mah / Goa: 04:01:36
  - Delhi: 04:00:03
  - Guj / D&D / DNH: 03:46:10
  - Odisha: 03:42:32

---

*HSM stands for Hindi Speaking Markets; South comprises of Tamil Nadu, Andhra Pradesh, Telangana, Kerala & Karnataka. Rest of the States coming under 'Hindi Speaking Markets' (HSM).*
Average Time Spent watching TV in a few states is still far lower than the globally comparable economies

Significant Headroom for Growth!!

- **P/H/Ch/HP/JK**
  - 03:28

- **TN/Pondicherry**
  - 04:11

- **MP/Chhattisgarh**
  - 03:36

- **West Bengal**
  - 03:26

- **Kerala**
  - 03:50

- **Rajasthan**
  - 02:58

- **HUNGARY**
  - 04:39
Contrary to popular perception, viewership is highest amongst youth (15-30 years) even in the digital age.
Why is TV watching growing?
There is an interplay of several factors which influences TV viewership

Source: Broadcast India study 2017
Let’s start with distribution
The number of channels available to viewers has increased manifold, FTA has played a big role.
Moving on to the availability of content
Pride in local is showing!

Hindi Language growth is under-indexed to Total TV growth while Regional genre growth is significantly over-indexed while Hindi Language remains a behemoth, regional content has seen huge growth.

<table>
<thead>
<tr>
<th>Language</th>
<th>% Change in viewership (2017 over 2016)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>32%</td>
</tr>
<tr>
<td>Gujarati</td>
<td>146%</td>
</tr>
<tr>
<td>Assamese</td>
<td>123%</td>
</tr>
<tr>
<td>Marathi</td>
<td>74%</td>
</tr>
<tr>
<td>Bangla</td>
<td>68%</td>
</tr>
<tr>
<td>Oriya</td>
<td>65%</td>
</tr>
<tr>
<td>Kannada</td>
<td>63%</td>
</tr>
<tr>
<td>Bhojpuri</td>
<td>58%</td>
</tr>
<tr>
<td>Punjabi</td>
<td>38%</td>
</tr>
<tr>
<td>Telugu</td>
<td>33%</td>
</tr>
<tr>
<td>Tamil</td>
<td>30%</td>
</tr>
<tr>
<td>Hindi</td>
<td>27%</td>
</tr>
<tr>
<td>Malayalam</td>
<td>16%</td>
</tr>
</tbody>
</table>
In the sports genre, while cricket still remains the most popular sport watched on TV, local sport Kabaddi is fast gaining share.

**Share of Sports Viewership (2017)**

- **Cricket**: 69%
- **Kabaddi**: 15%
- **Wrestling**: 5%
- **Soccer**: 5%
- **Others**: 6%

**Kabaddi Viewership Growth**: 83%
In the case of movies, Salman is Sultan! Tiger is on the prowl!

Top 15 WTPs | Since 2015

Bajrangi Bhaijaan 7.82
Prem Ratan Dhan Payo 7.66
Bahubali 2: The Conclusion 7.10
Bahubali: The Beginning 6.45
Golmaal Again 4.88
Dangal 4.43
Judwaa 2 4.39
Sultan 3.49
The Jungle Book 3.34
Baaghi 3.32
The State vs Jolly LLB 2 3.27
Toilet Ek Prem Katha 3.20
Singh Is Bliing 3.05
Dishoom 2.96
A Flying Jatt 2.85
Tubelight 2.87
What about electricity?
Improving electricity situation is one of the contributing factors for higher TV viewing.
Does the time of year impact TV viewing?
As Temperature Rises, Primetime Viewership Drops

In 2016 and 2017, during summers (week 14-week 30), viewership has dropped significantly.
Total TV increases in South during Festival Holidays, while in HSM it remains stable

Dussera - 30th Sep 2017

HSM
- 25,80,292
- 25,98,361

South
- 16,12,614
- 18,64,260

1% increase

Diwali - 18th - 20th Oct 2017

HSM 19th Oct
- 25,06,291
- 25,31,241

Tamilnadu 18th Oct
- 4,73,992
- 6,16,796

Kerala 18th Oct
- 1,58,118
- 2,08,913

Andhra Pradesh 19th Oct
- 5,60,951
- 6,68,384

Karnataka 20th Oct
- 3,71,087
- 4,47,547

1% increase

16% increase

30% increase

32% increase

19% increase

21% increase
Total TV increases in both HSM and South during Public Holidays

Independence Day - 15th Aug 2017

HSM
- Prv 4W Avg: 23,66,130
- Wk 33: 28,13,307
- Increase: 19%

South
- Prv 4W Avg: 14,74,103
- Wk 33: 17,53,860
- Increase: 19%

Gandhi Jayanthi - 2nd Oct 2017

HSM
- Prv 4W Avg: 23,98,130
- Wk 40: 27,64,754
- Increase: 15%

South
- Prv 4W Avg: 14,97,854
- Wk 40: 16,82,895
- Increase: 12%
What about migration?
A majority of this content is consumed within the home state....however

Out of Total viewership in other states, majority comes from....
Tamil is the 2nd most popular channel language in Bangalore....
And of course literacy... Padhega India toh aur TV dekhega India!
Co - relation between TV viewing and literacy is quite high. It is observed that viewers in states with higher literacy watch more TV.
What about the changing role of women?
Women make a significant contribution to News genre viewership (~44%)

8th Nov - Demonetization - Wk 45’16

P4 Wk  | Wk 45’16  | G/D %
-- | -- | --
Male | 3,770 | 5,727 | 52%
Female | 2,826 | 4,583 | 62%

W.r.t. to pre-demonetization weeks, demonetization weeks had 37% higher female viewership

31st Dec - Rastra Ke Naam Sandesh - Wk 1’17

P4 Wk  | Wk 01’17  | G/D %
-- | -- | --
Male | 4,908 | 17,340 | 3.5x
Female | 3,880 | 13,820 | 3.6x

% Contribution to Genre

<table>
<thead>
<tr>
<th>Wk 45 ‘16-Wk 7 ‘17</th>
<th>Target Group</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hindi News genre</td>
<td>HSM 15+</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td>Hindi Movies genre</td>
<td>HSM 15+</td>
<td>54%</td>
<td>46%</td>
</tr>
<tr>
<td>Hindi GEC genre</td>
<td>HSM 15+</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>English News genre</td>
<td>All India 22+ AB</td>
<td>57%</td>
<td>43%</td>
</tr>
</tbody>
</table>
Women make a significant contribution to News genre viewership (~44%)

<table>
<thead>
<tr>
<th></th>
<th>Wk10'17</th>
<th>Wk 11'17</th>
<th>G/D %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>76</td>
<td>252</td>
<td>3.3x</td>
</tr>
<tr>
<td>Female</td>
<td>60</td>
<td>182</td>
<td>3.2x</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>P4 Wk</th>
<th>Wk 1’17</th>
<th>G/D %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>73</td>
<td>162</td>
<td>2.2x</td>
</tr>
<tr>
<td>Female</td>
<td>56</td>
<td>124</td>
<td>2.2x</td>
</tr>
</tbody>
</table>
What about local habits?
Evening Prime Time contributes to over 30% for Hindi, English and Regional News. However, Morning Time contributes maximum to News in AP and Tamil Nadu.
Appetite of TV Viewers
What is it that India watches on TV?
HINDI CONTENT rules!
The associated genres reach more than 500 million people weekly.

- HINDI GEC: 499 million
- HINDI MOVIES: 471 million
- HINDI MUSIC: 319 million
- HINDI NEWS: 309 million
- KIDS: 255 million
- ENGLISH SPORTS: 200 million
- HINDI YOUTH: 176 million
- SPORTS: 159 million
- BHOJPURI GEC: 141 million
- HINDI NEWS-Regional: 139 million
- BHOJPURI MOVIES: 128 million
- TELUGU GEC: 107 million
- INFOTAINMENT: 107 million
- TAMIL GEC: 106 million
- ENGLISH MOVIES: 82 million

Source: BARC Data (2016-2017)
GEC related content is king in both urban and rural India

INDIA URBAN
- Talent search/feats/ Reality show
- Drama/soap
- Mythological/costume dramas
- Horror serial
- Game show/quiz
- Cartoons/animation
- Feature films

INDIA RURAL
- Drama/soap
- Mythological/costume dramas
- Talent search/feats/ Reality show
- Children’s program
- Game Show/Quiz
- Feature films
- Cartoons/animation
It's all about Drama!
Aspirations Drive Viewership......
Real life marriages draw inspiration from TV

Marriage tracks, on an average boost ratings by 13% as compared to the previous weeks

Viewers are enamored by the lavishness of the weddings and the “feel good” setting
And so does unwelcome events
Jail tracks increase viewership

Jail tracks, on an average boost ratings by 15% as compared to the previous weeks

Viewers are enamored by the a “twist” in the tale
MAHASANGAMS grab more eyeballs. People love to watch the interplay of characters who would otherwise be in separate shows.

“Maha-sangams”, on an average boost ratings by 20% as compared to the previous weeks.

Viewers are enticed watching their favorite characters in the same frame.
The Drama spills over onto reality shows too

Bigg Boss Season 11 : Episode wise performance on weekdays

‘Padosis’ come face to face with contestants

Priyank Sharma’s wild card entry

Nominations by doing sacrifices for friendship

Luxury Budget Task of ‘Torturing’ other contestants

The Drama spills over onto reality shows too

“Bigg Boss” housemates get high on emotion after meeting their family in the episode of Thu-Fri
Even News events cannot escape the lure of “Drama”

Post July 2016, News category has consistently been on a high owing to back to back News events

- **Wk 33:** Independence Day, multiple holidays
- **Wk 38, 39:** Uri attack, Surgical Strike
- **Wk 45, 46:** Demonetization
- **Wk 49:** Jayalalitha’s death
- **Wk 11:** UP, Utk, Punjab, Manipur, Goa Assembly Election Result
- **Wk 11:** SUPREME COURT verdict on Shashikala, Maharashtra Civic Poll Results
- **Wk 35:** Verdict on Gurmeet Ram Rahim
Drama is important even for Sports
Badminton World Championship

Sindhu takes the score to 18-18 after scoring 4 points against

Sindhu manages a 4 point advantage. Score stands at 9-3

Audience peaks as break ends only to dip as Okuhara pulls a 12-12s

Sindhu pulls score to 7-7

Sindhu gets warning for taking extra time.

Game in favour of Okuhara, 4-1.

Sindhu on the floor, as she hits a shot. Gets up. Sindhu 19-18
Okuhara.

Extended break taken by Sindhu.

Sindhu loses 1st game. Score stood at 19-21.

Viewers exit as Sindhu loses match after a tough fight.

Game in favour of Okuhara, 4-1.

Sindhu fails to convert 3 game points

Sindhu manages a 4 point advantage.

Score stands at 9-3

Sindhu takes lead in 1st game. Score stands at 8.5.

Drama is important even for Sports Women’s World Cup

England Batting as they set 228 to win

Veda Krishnamurthy’s wicket which changed the course of the match

Gripping chase begins to attract viewers
Over to some recent real life “drama”...
There are some misconceptions about ratings

Well, you should watch the news to be better informed. But most TV news doesn’t do that, because of the TRP monster. A new paradigm is needed.

OK, final analysis, who played the TRP game better?

- Sridevi in the bathroom
- News anchor in the bathroom
- Sridevi in the bathtub
- Boney Kapoor in the bathroom

No need to RT - just keep keep Sridevi and future of media in your prayers.

Akshay disappointed with TRP ratings of his TV show

Updated : 6 Oct 2017, 11:48 IST  |  1328 views

Akshay Kumar’s TV show has failed to impress the audience. If reports are to be believed, Akshay is unhappy with the TRP ratings of his show as he was expecting it to be in top 5.

's show is superhit on social media but barc shows zero ratings. Is this credible? Says
But what really drives TRP?

Who is responsible for the low depths to which news TV In India has sunk?

- The journalists: 25%
- The business heads / owners: 33%
- The viewers: 42%