



THE CHANGING FACE OF TV IN INDIA

FICCI FRAMES 2018 | BARC REPORT





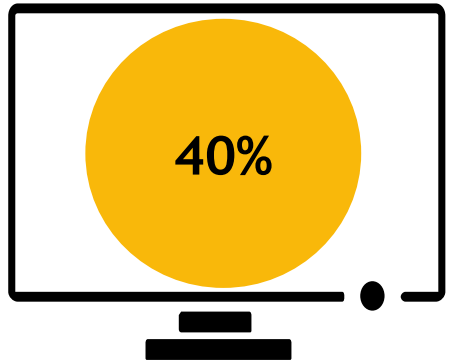
01

TV Landscape over the years

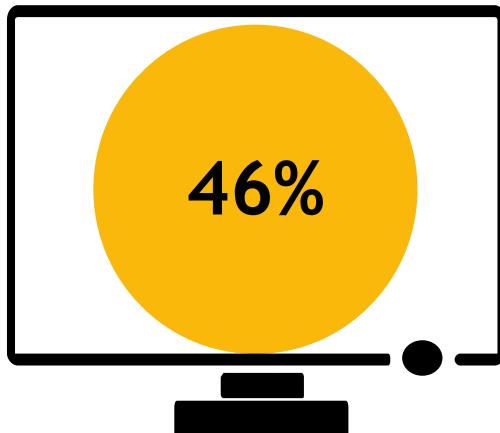


Growth in TV penetration has been tremendous

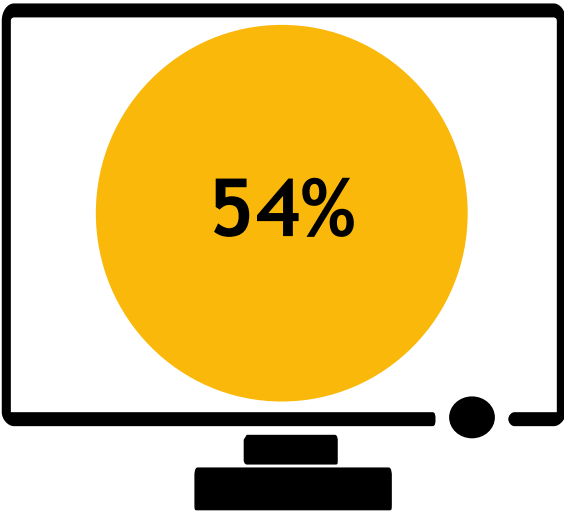
2004



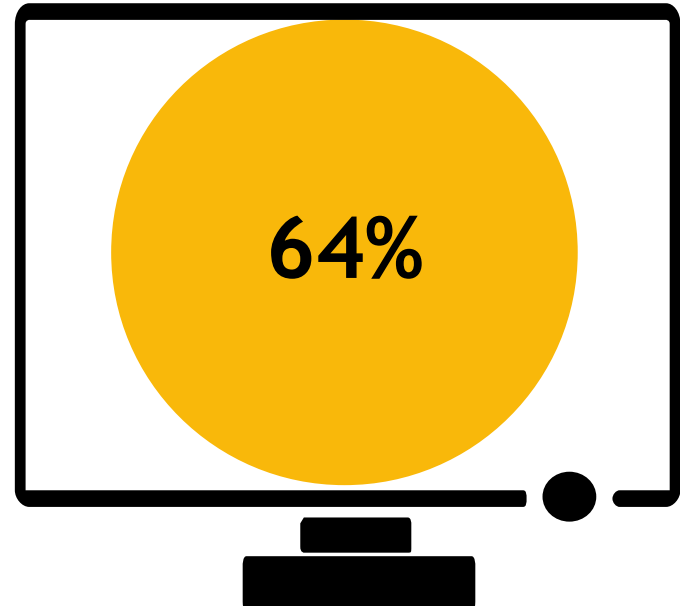
2008



2013



2017



83 million



106 million



143 million



183 million

Terrestrial was the only form of distribution till the mid 90s. With the impetus of digitization, this is nearly extinct!

Number of Channels

Year

2005 **130+**

2010 **265+**

2013 **550+**

2018 **800+**

Share of distribution medium

Year



2005 **50 %**

50 %

2010 **36 %**

64 %

2013 **6 %**

94%

2017 **2 %**

98%

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



84 mn Homes

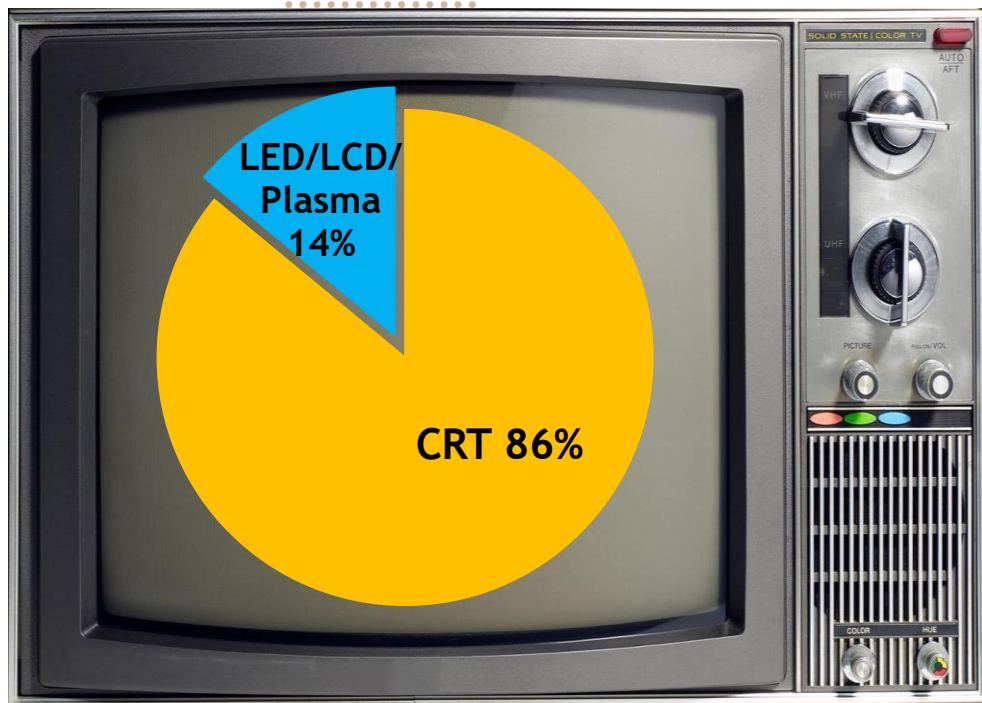
52%
Rural India



99 mn Homes

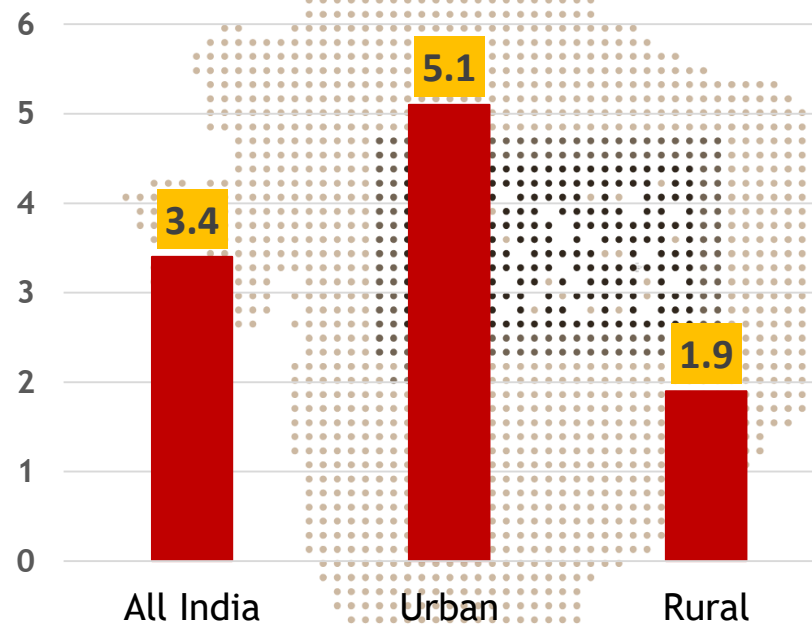
'Old School' Viewing still exists in India...be it URBAN or RURAL

86% of Indian Households still has CRT Television

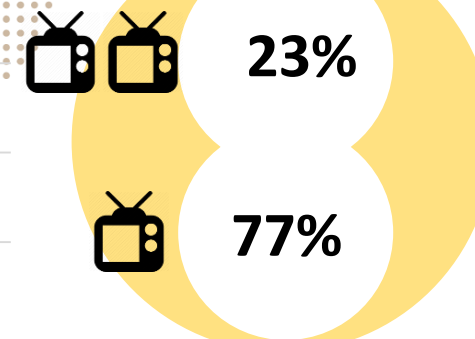


97% of India still owns single TV. This shows Co-Viewing is high in the country

BI 2016 % Multi-TV Household



NCCS A + Large Joint Family



Among TV Universe	U+R	Urban	Rural
CRT TV	86%	80%	92%
LCD/LED/Plasma TV	14%	20%	8%

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
557 million

South

190 million

HSM

367 million

AP/Telangana	64 mn
TN/Pondicherry	58 mn
Kerala	46 mn
Kerala	22 mn

Mah / Goa	70 mn
UP / Uttarakhand	55 mn
MP / Chattisgarh	41 mn
West Bengal	38 mn

Daily Time Spent
03:44:28
(HH:MM:SS)

South

04:09:25

HSM

03:31:36

AP/Telangana	04:12:56
TN/Pondicherry	04:11:15
Kerala	03:50:06
Karnataka	04:11:23

Mah / Goa	04:01:36
Delhi	04:00:03
Guj / D&D / DNH	03:46:10
Odisha	03:42:32

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



04:36

MP/
Chhattisgarh

03:36

West Bengal

03:26



04:18

Kerala

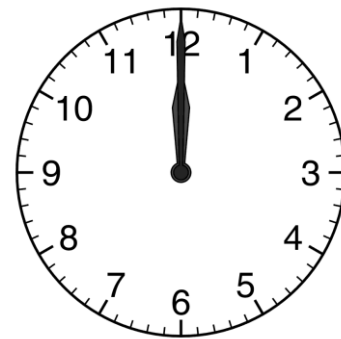
03:50

Rajasthan

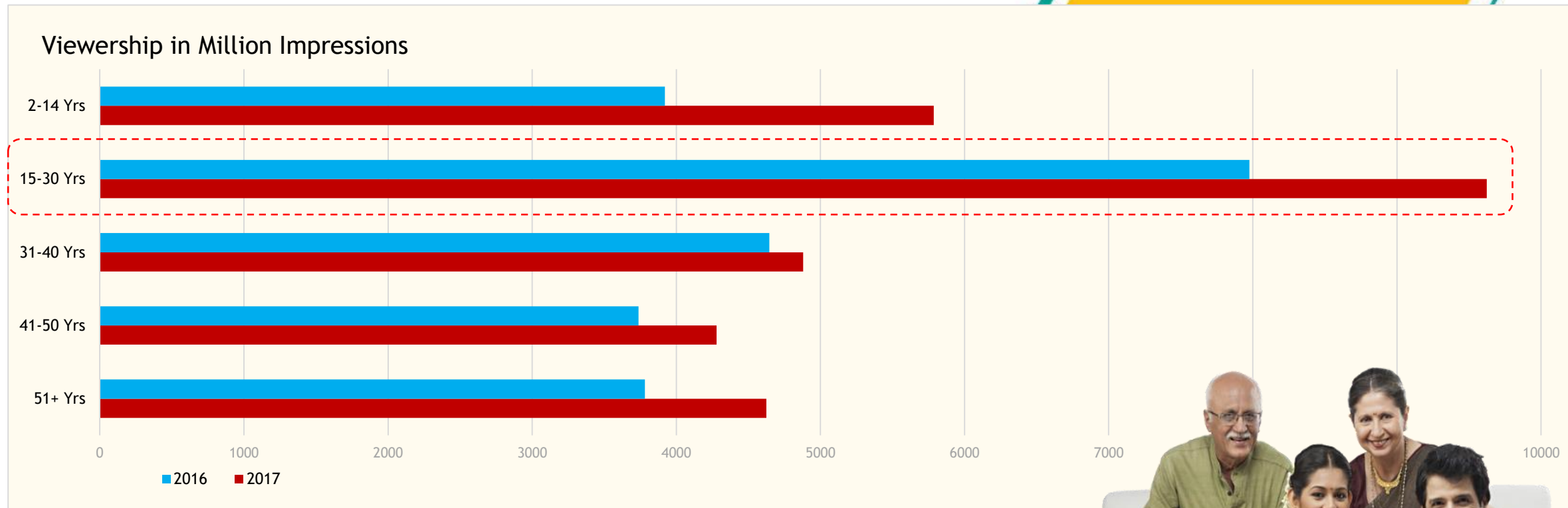
02:58



04:39

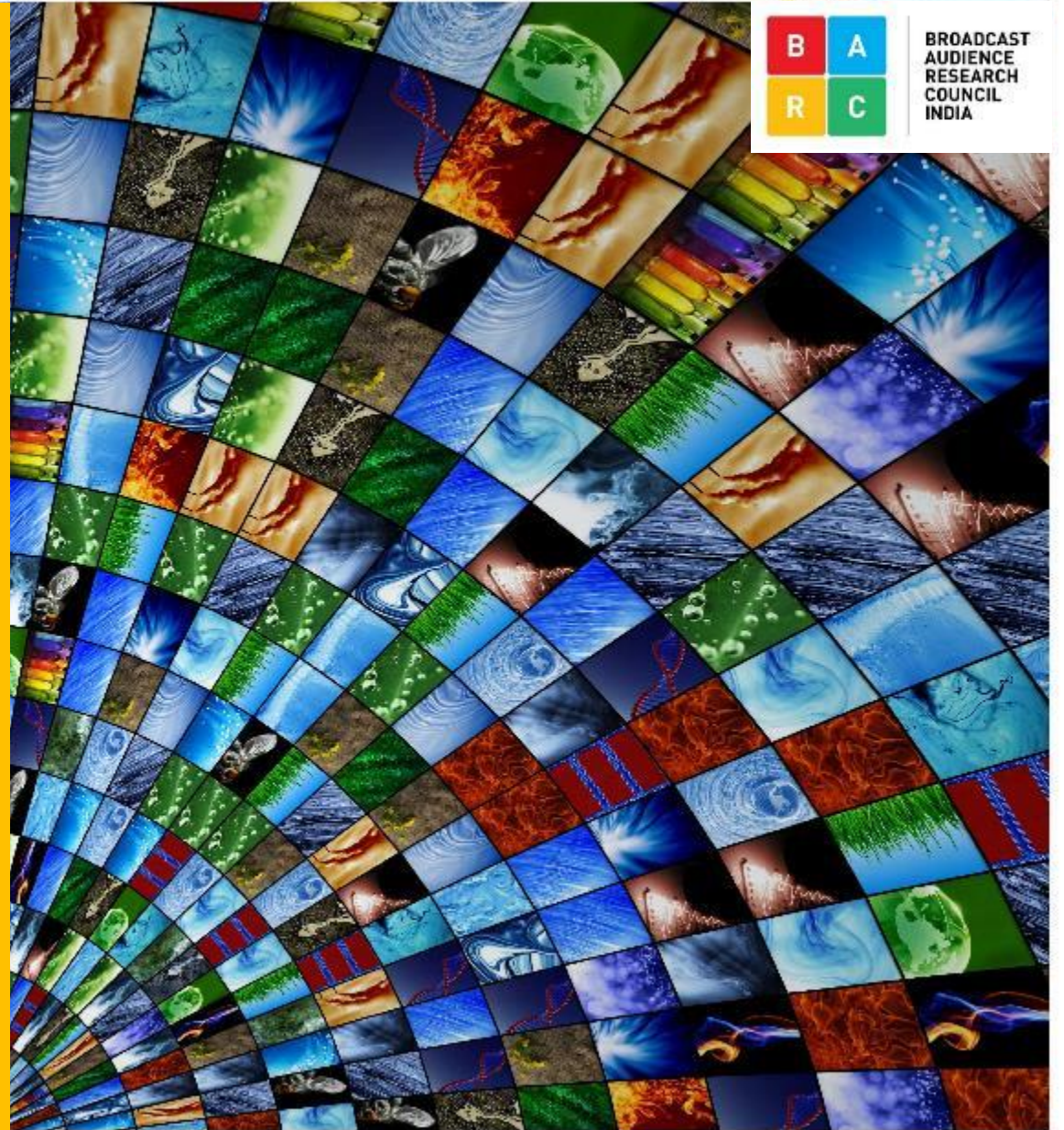


Contrary to popular perception Viewership is highest amongst Youth (15-30 years) even in the digital age

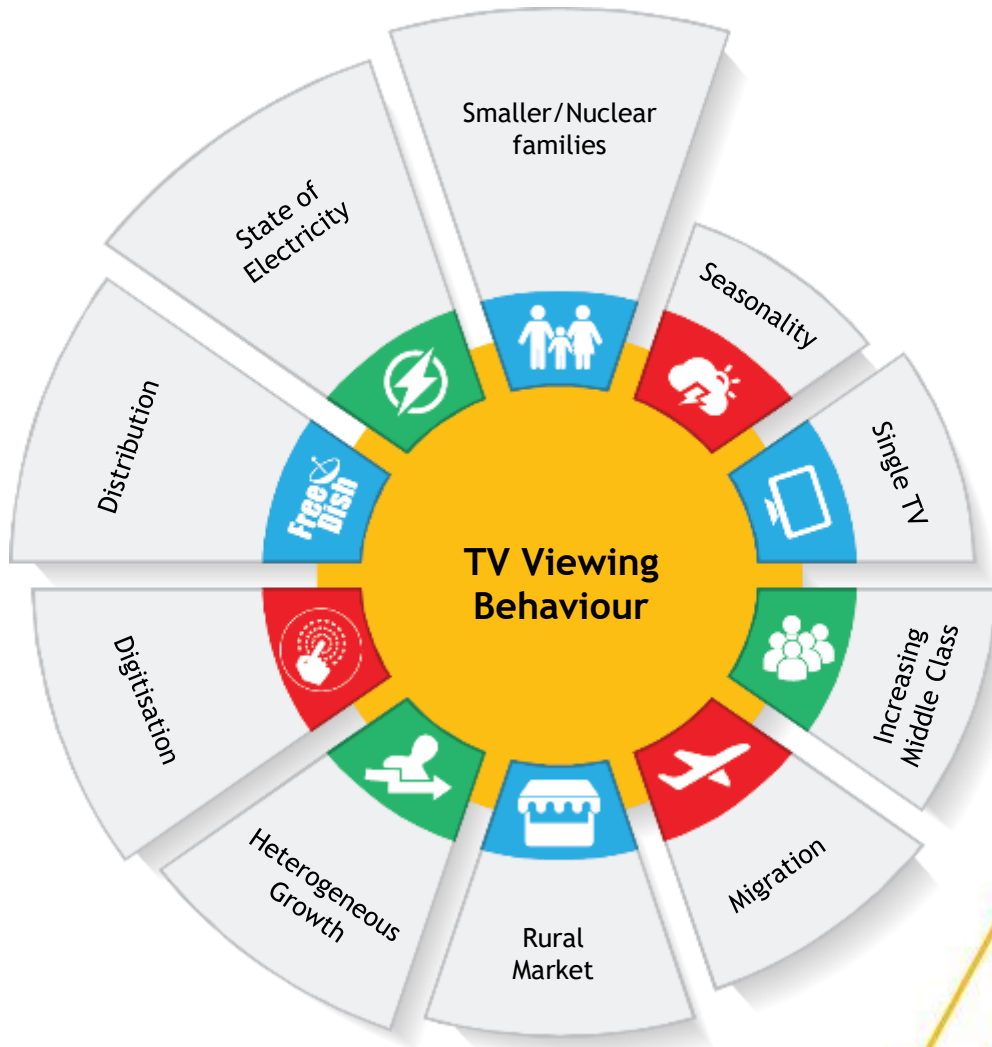


02

Why is TV watching growing?

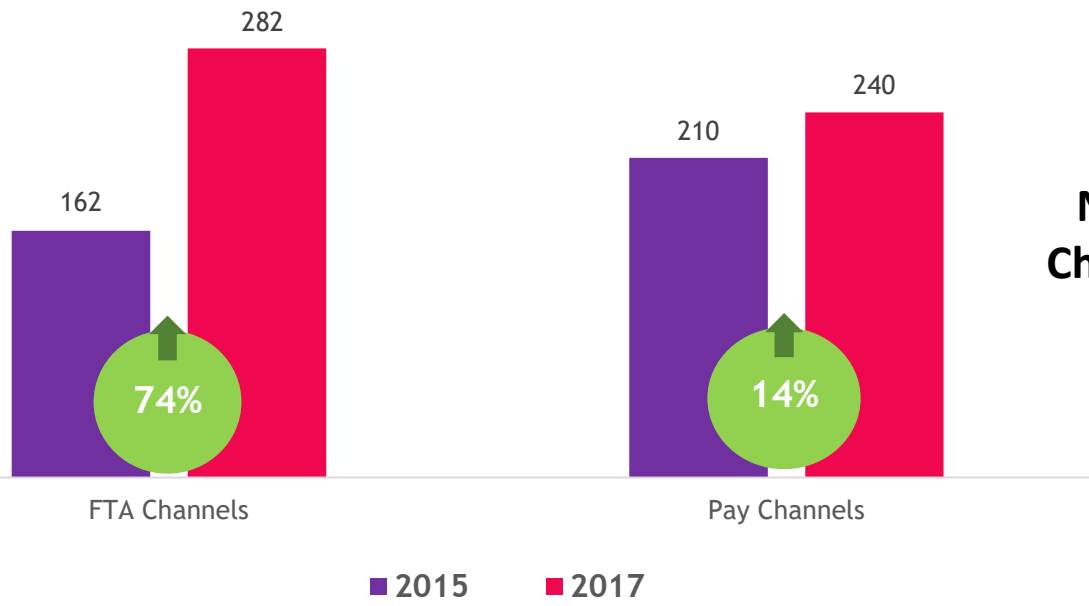


There is an interplay of several factors which influences TV viewership

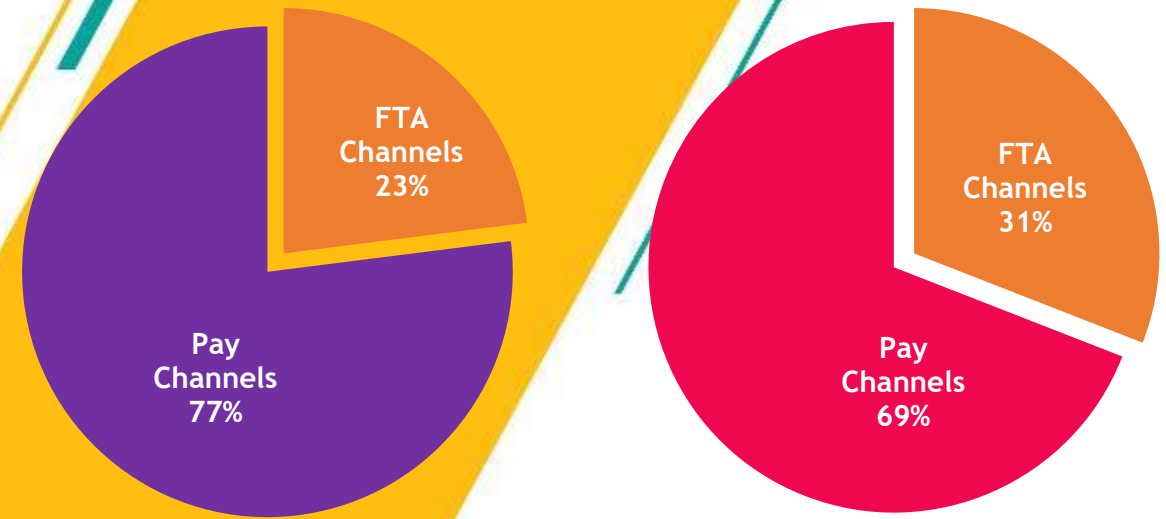


Let's start with distribution

The number of channels available to viewers has increased manifold, FTA has played a big role



Share of Viewership



**Moving on to the availability of
content**

Pride in local is showing!

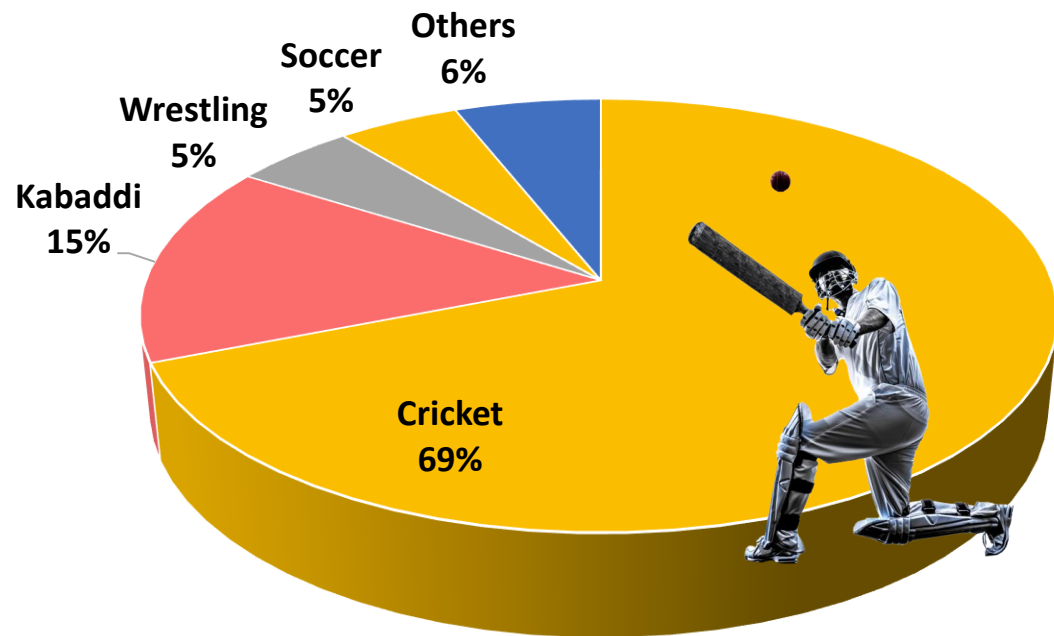
Hindi Language growth is under-indexed to Total TV growth while Regional genre growth is significantly over-indexed while Hindi Language remains a behemoth, regional content has seen huge growth

Language	% Change in viewership (2017 over 2016)
TOTAL	32%
Gujarati	146%
Assamese	123%
Marathi	74%
Bangla	68%
Oriya	65%
Kannada	63%
Bhojpuri	58%
Punjabi	38%
Telugu	33%
Tamil	30%
Hindi	27%
Malayalam	16%



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)



Kabaddi
Viewership Growth
83%

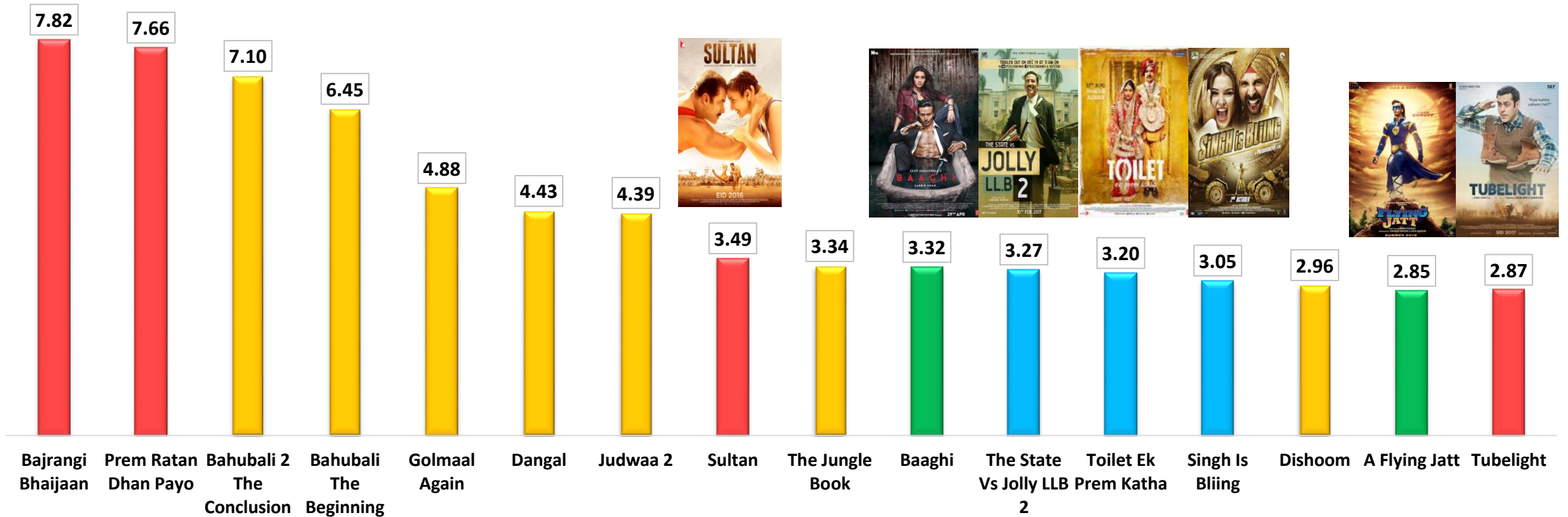


In the case of movies, Salman is Sultan

Tiger is on the prowl



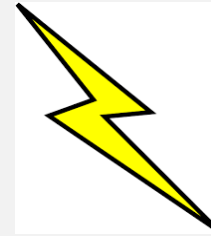
Top 15 WTPs | Since 2015



What about electricity?

Improving electricity situation is one of the contributing factors for higher TV viewing

Bengal



11%

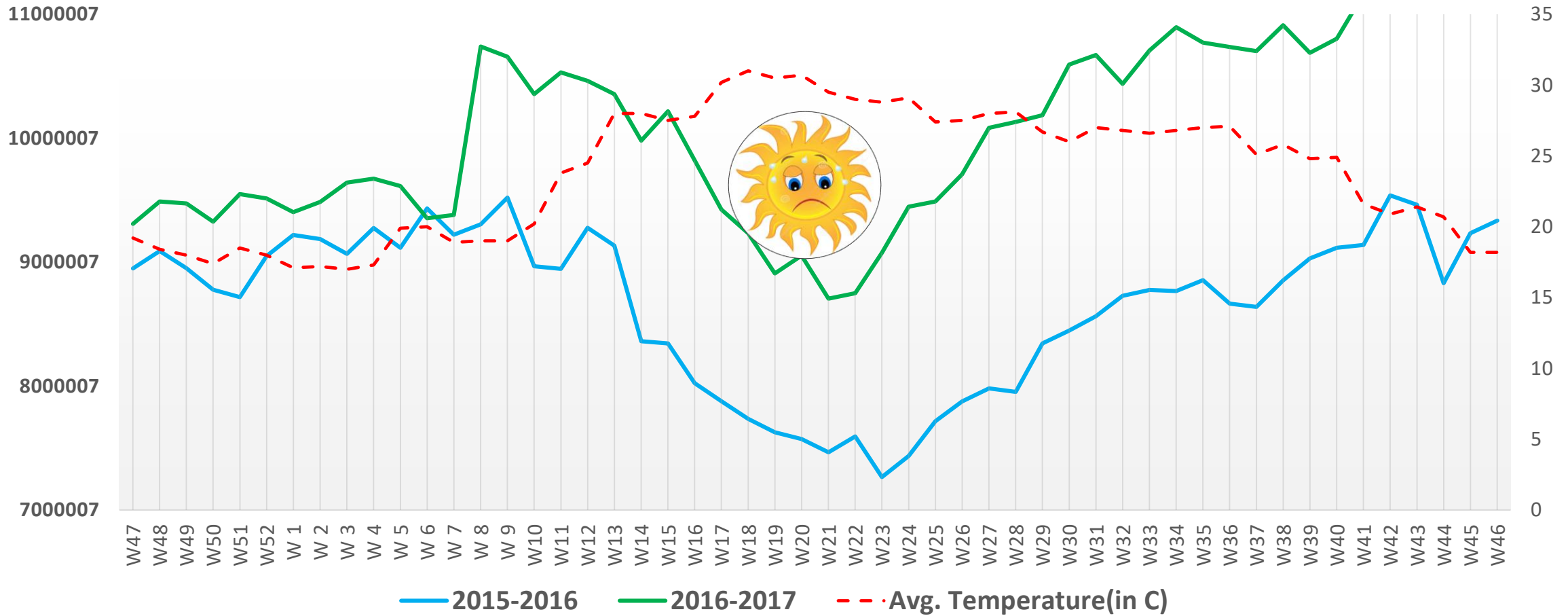


58%

Does the time of year impact TV viewing?

As Temperature Rises, Primetime Viewership Drops

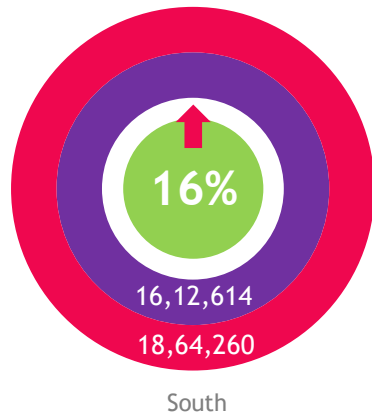
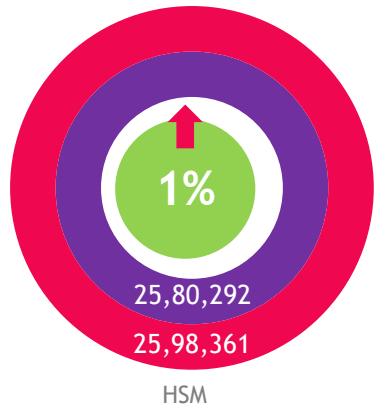
Total TV Impressions'000, week on week (7pm to 11 pm)



In 2016 and 2017, during summers (week 14-week 30), viewership has dropped significantly

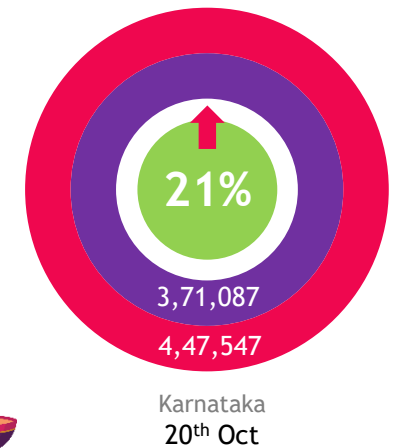
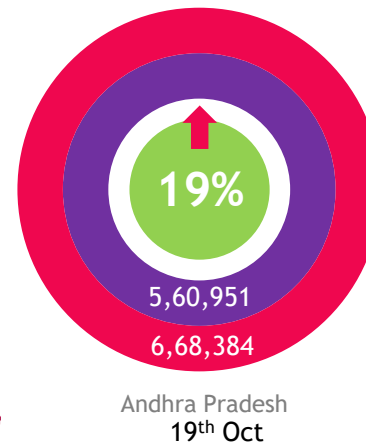
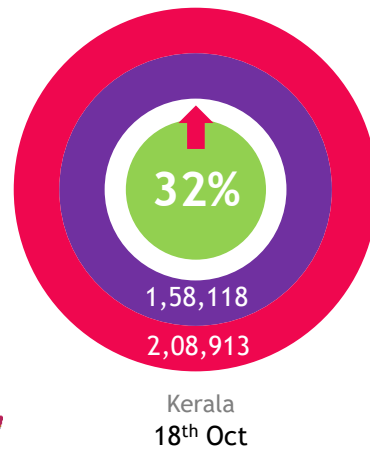
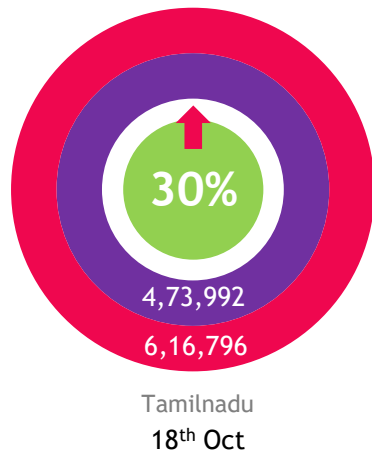
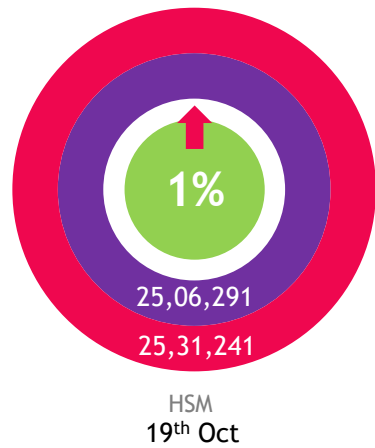
Total TV increases in South during **Festival Holidays**, while in HSM it remains stable

Dusseera - 30th Sep 2017



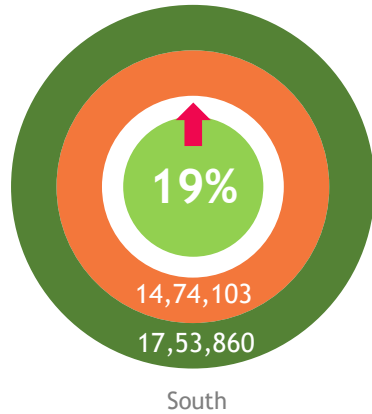
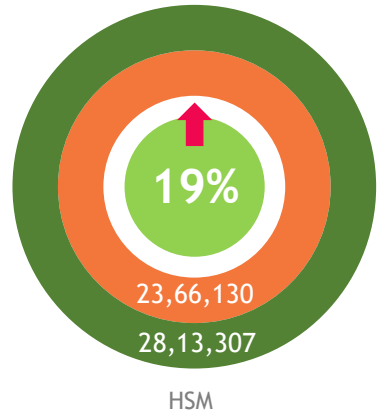
● Prv 4W Avg ● Wk 40

Diwali - 18th - 20th Oct 2017



Total TV increases in both HSM and South during Public Holidays

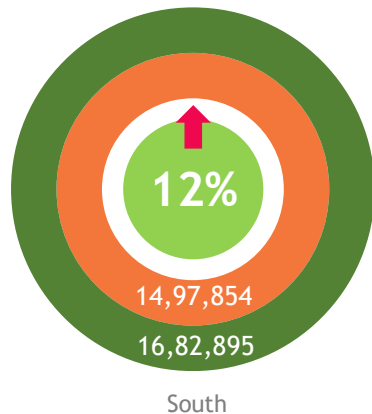
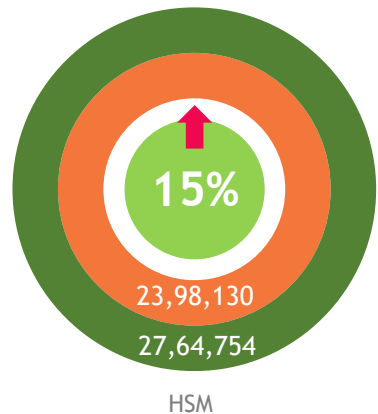
Independence Day - 15th Aug 2017



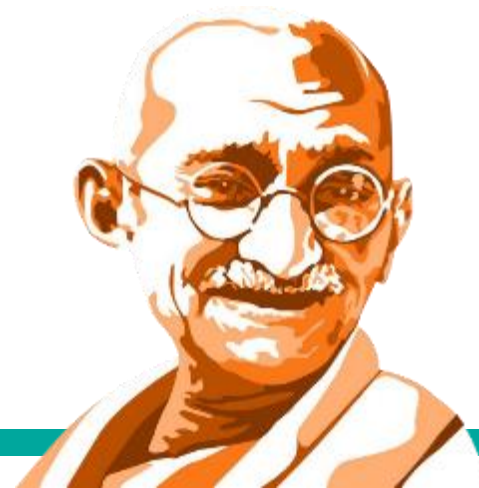
● Prv 4W Avg ● Wk 33



Gandhi Jayanthi - 2nd Oct 2017

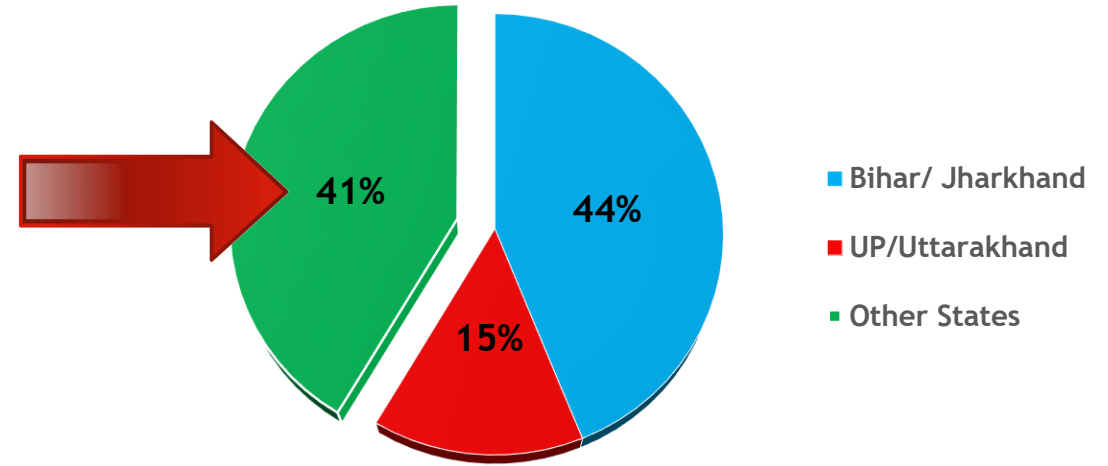


● Prv 4W Avg ● Wk 40



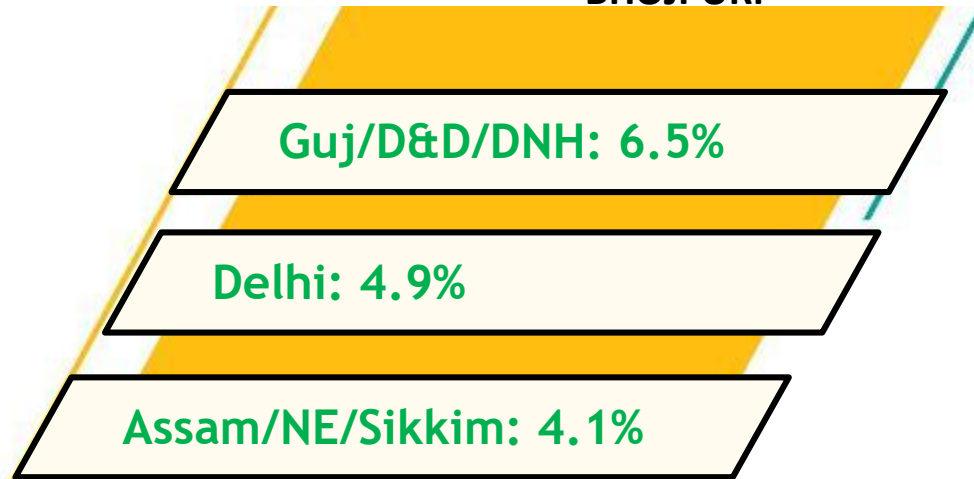
What about migration?

A majority of this content is consumed within the home state....however

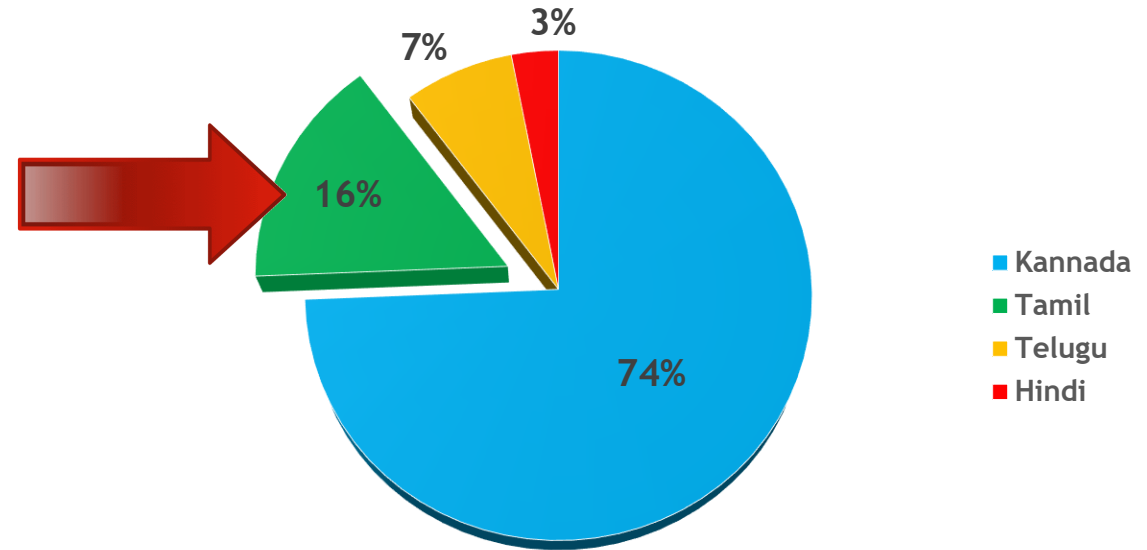


BHOJPURI

Out of Total viewership in other states, majority comes from....

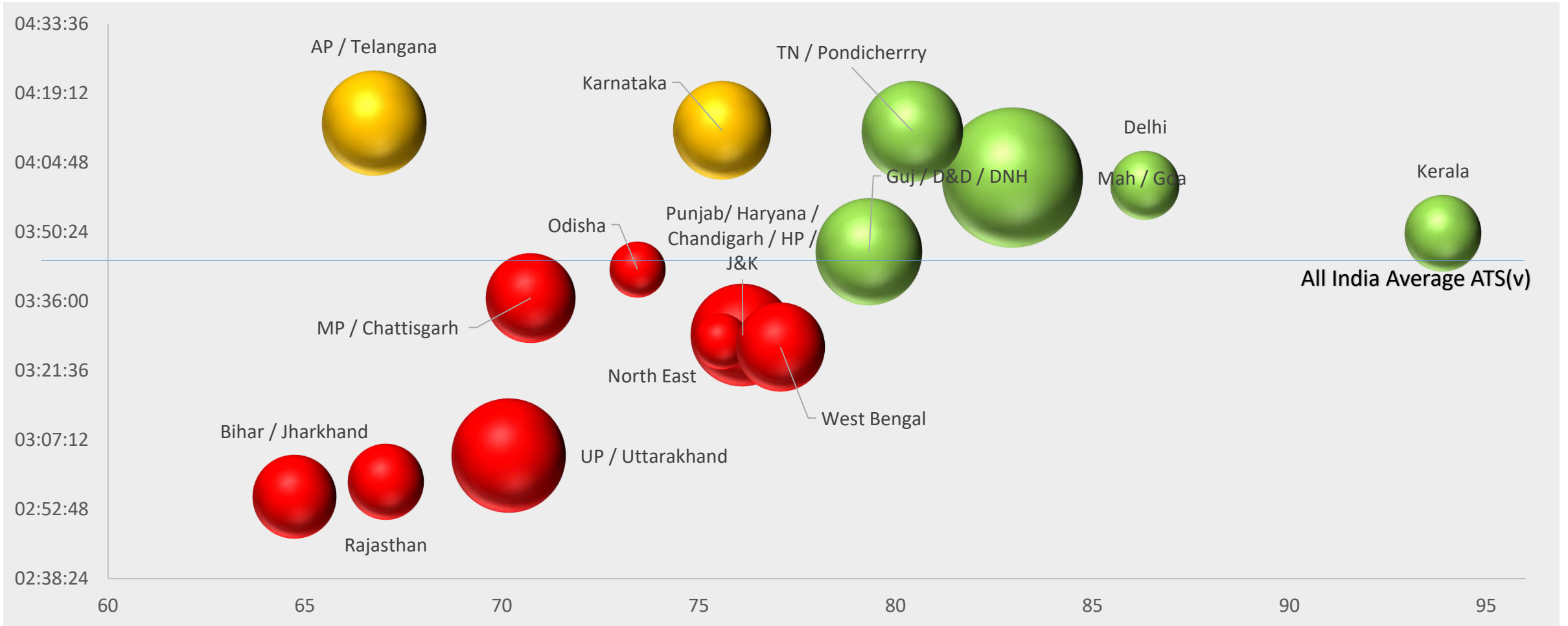


Tamil is the 2nd most popular channel language in Bangalore....



**And of course literacy... Padhega
India toh aur TV dekhega India!**

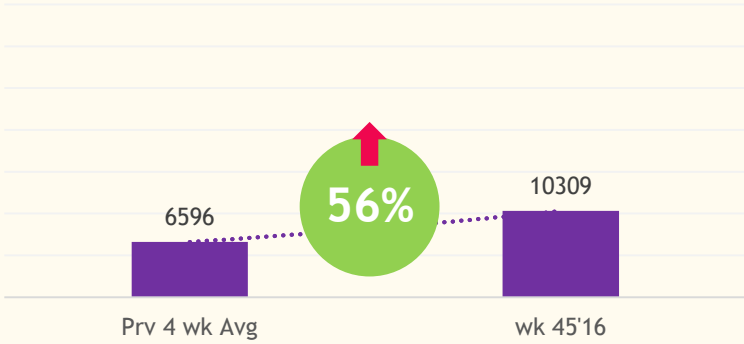
Co - relation between TV viewing and literacy is quite high. It is observed that viewers in states with higher literacy watch more TV



What about the changing role of women?

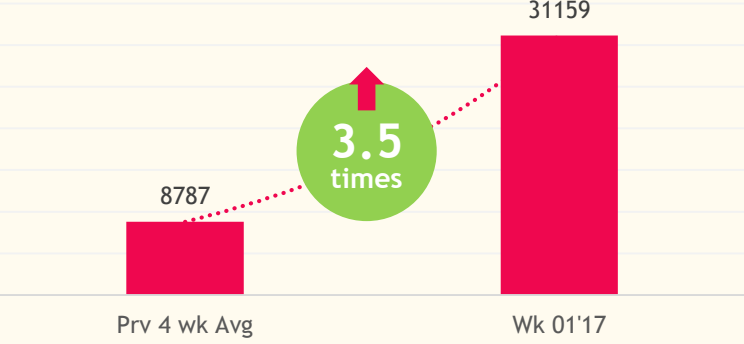
Women make a significant contribution to News genre viewership (~44%)

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%

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



	P4 Wk	Wk 1'17	G/D %
Male	4,908	17,340	3.5x
Female	3,880	13,820	3.6x

37%

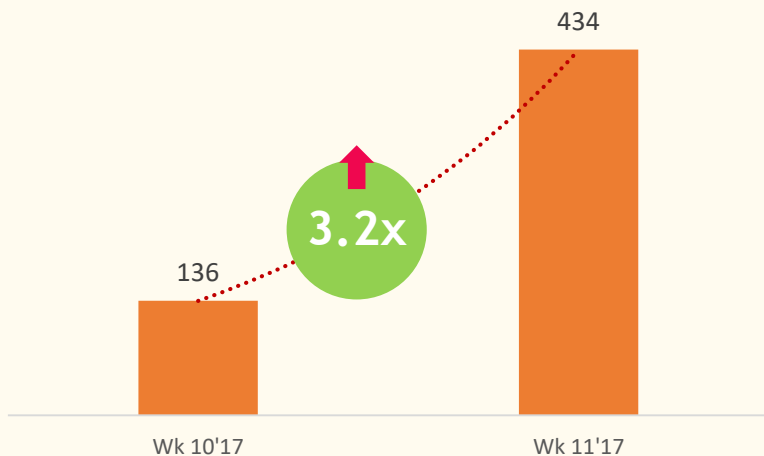
W.r.t. to pre-demonetization weeks, demonetization weeks had 37% higher female viewership

Wk 45 '16-Wk 7 '17	Target Group	% Contribution to Genre	
		Male	Female
Hindi News genre	HSM 15+	56%	44%
Hindi Movies genre	HSM 15+	54%	46%
Hindi GEC genre	HSM 15+	48%	52%
English News genre	All India 22+ AB	57%	43%



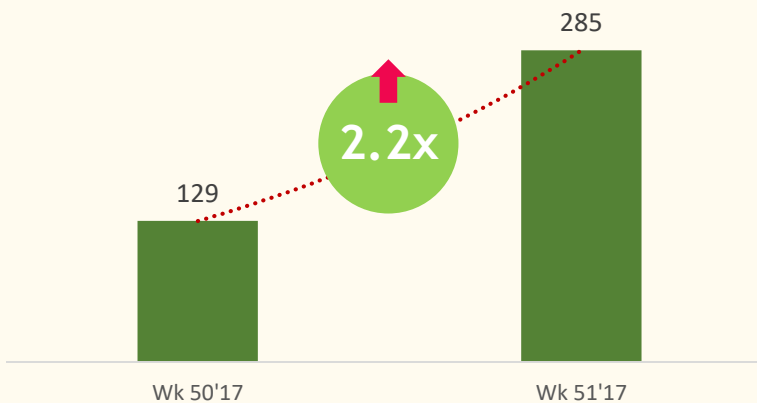
Women make a significant contribution to News genre viewership (~44%)

11th March (Sat) - UP Elections



	Wk10'17	Wk 11'17	G/D %
Male	76	252	3.3x
Female	60	182	3.2x

18th Dec (Mon) - Gujarat / HP Elections

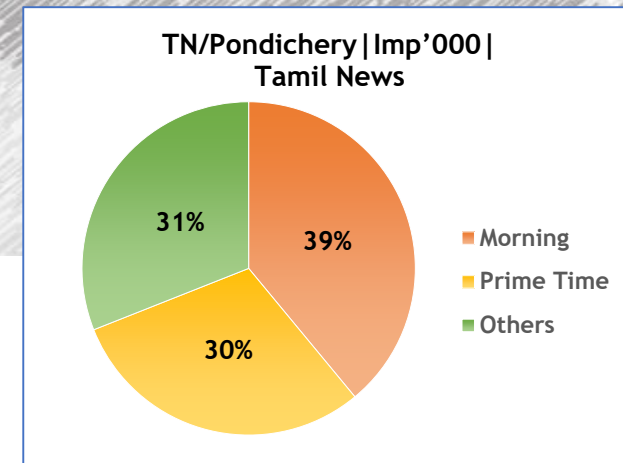
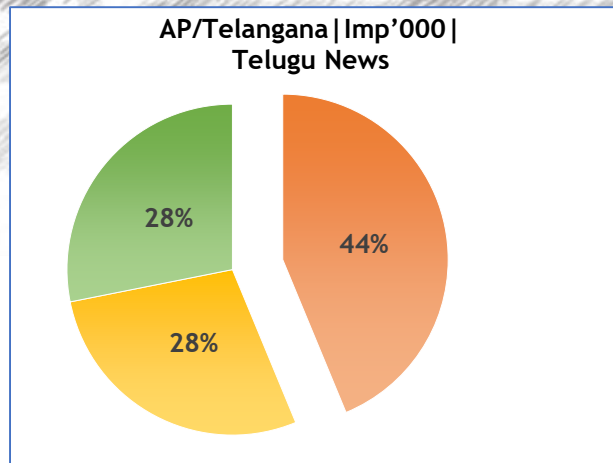
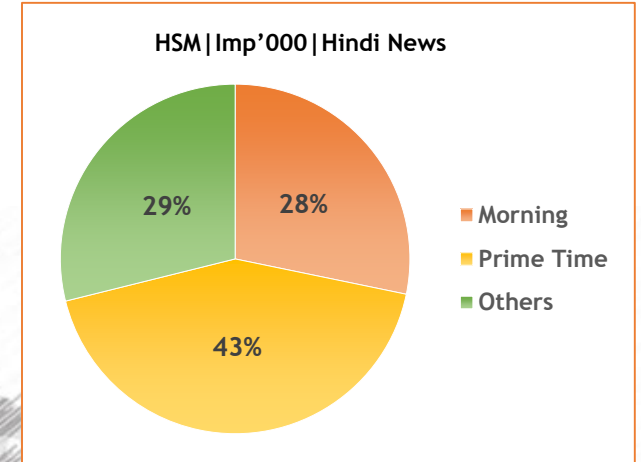
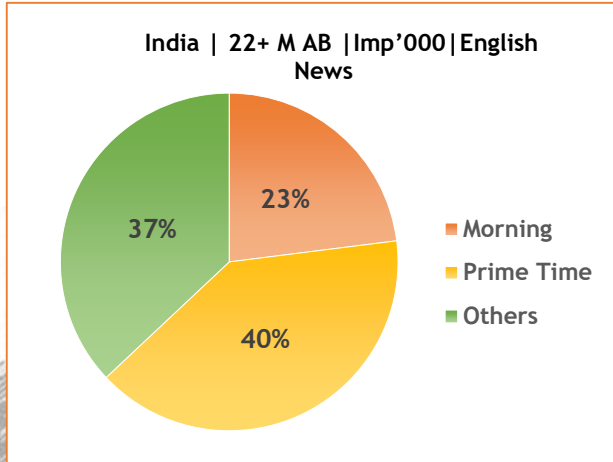


	P4 Wk	Wk 1'17	G/D %
Male	73	162	2.2x
Female	56	124	2.2x



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



03

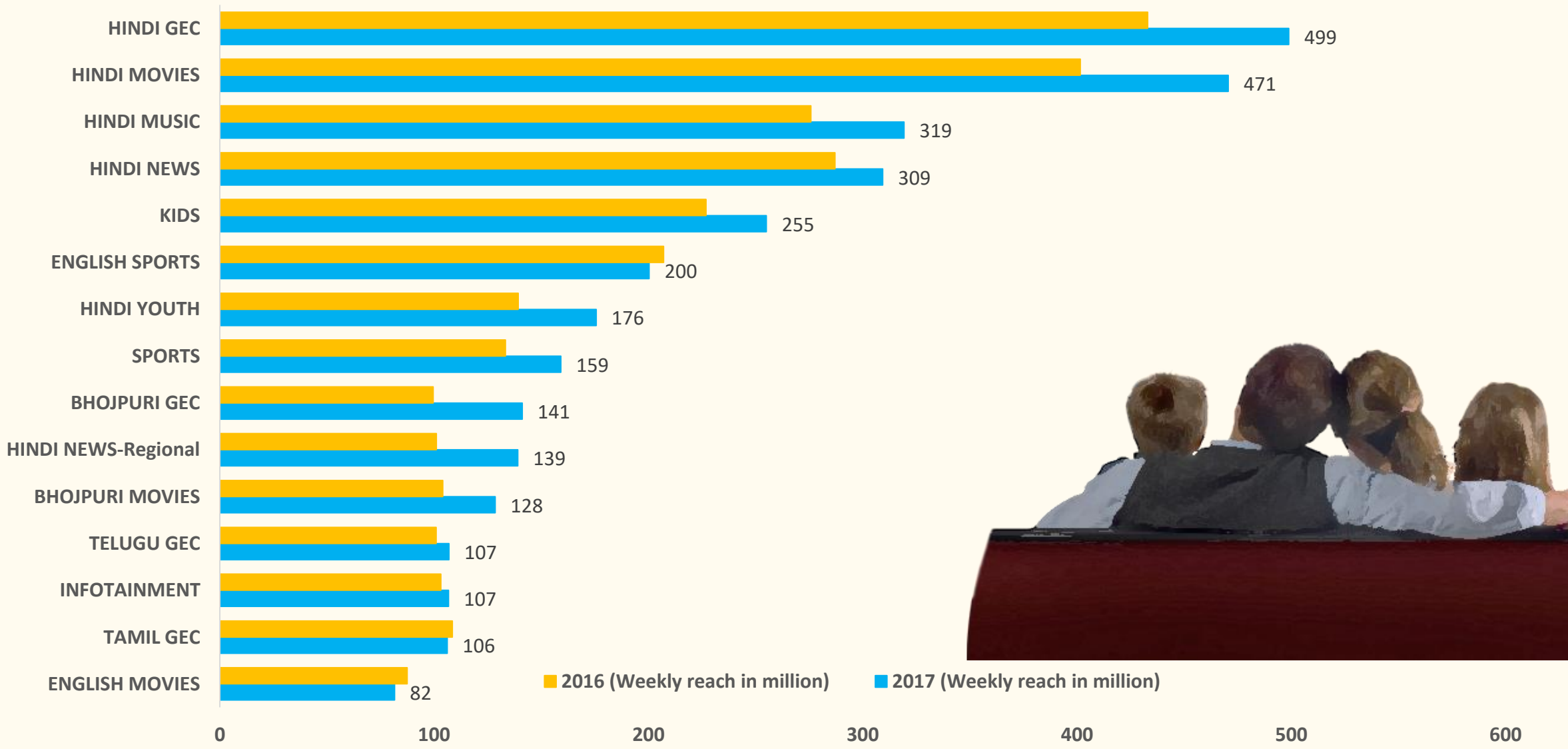
Appetite of TV Viewers



**What is it that India watches on
TV?**

HINDI CONTENT rules!

The associated genres reach more than **500 million** people weekly



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

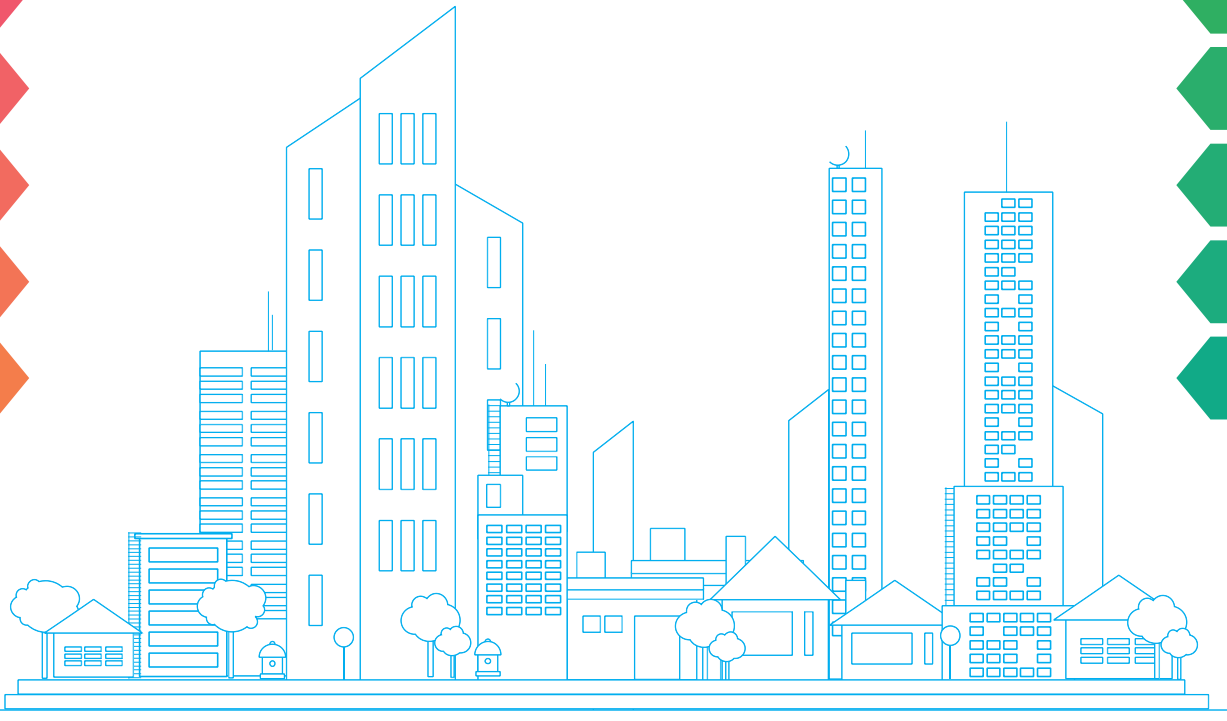
Talent search/feats/ Reality show

Children's program

Game Show/Quiz

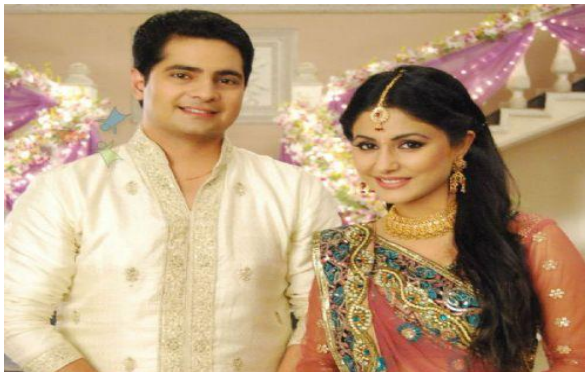
Feature films

Cartoons/animation



Its all about Drama!

Aspirations Drive Viewership..... Real life marriages draw inspiration from TV



13%



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



15%



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



20%

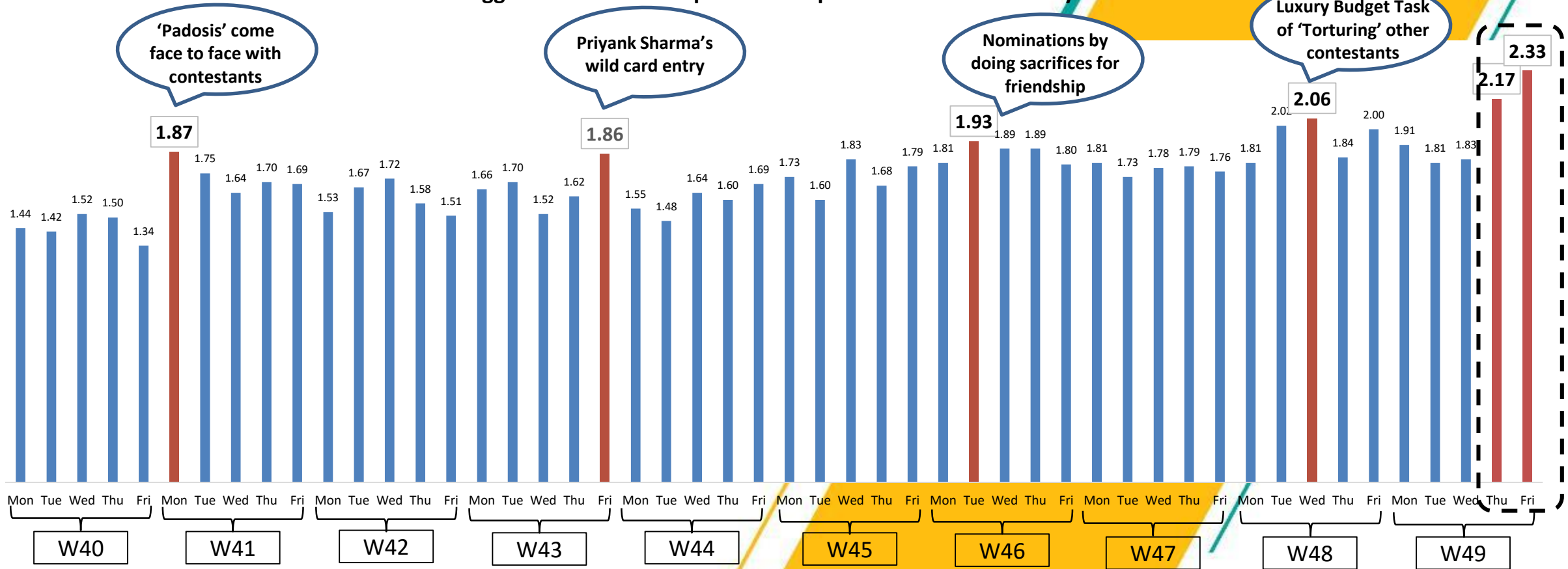


“Maha-sangams”, on an average boost ratings **by 20% as compared to the previous weeks**

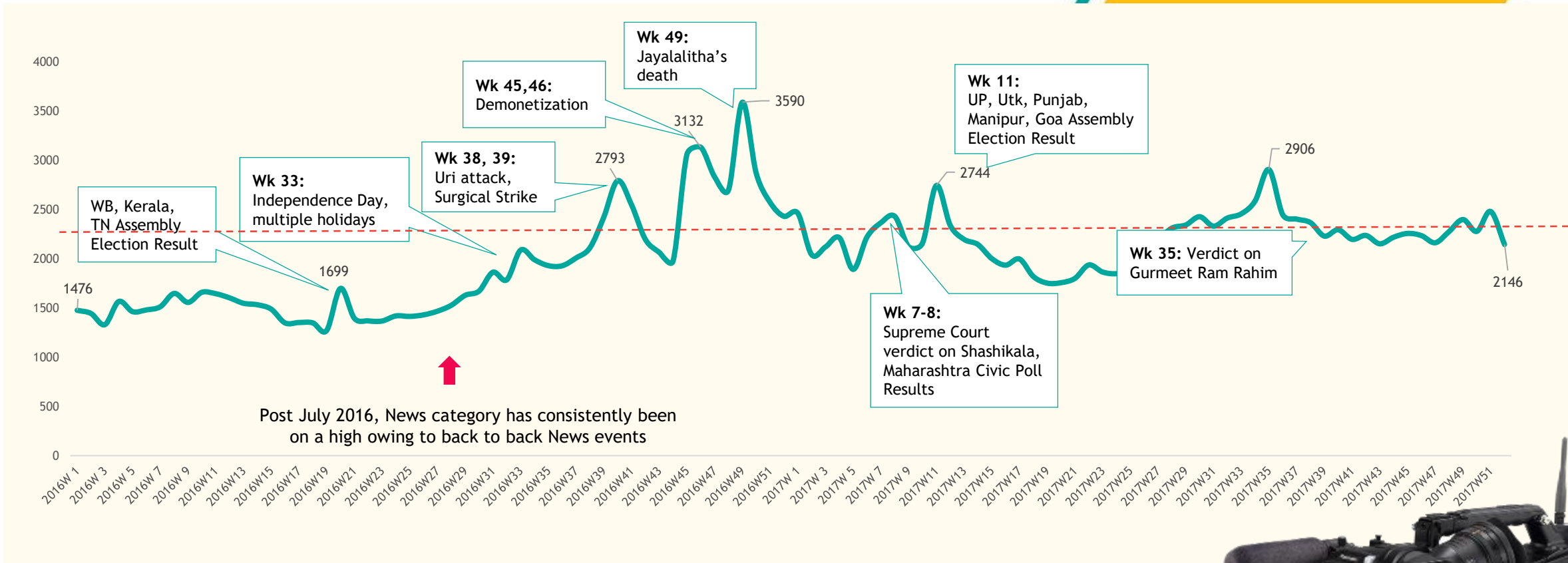
Viewers are enticed watching their favorite characters in the same frame

The Drama spills over onto reality shows too

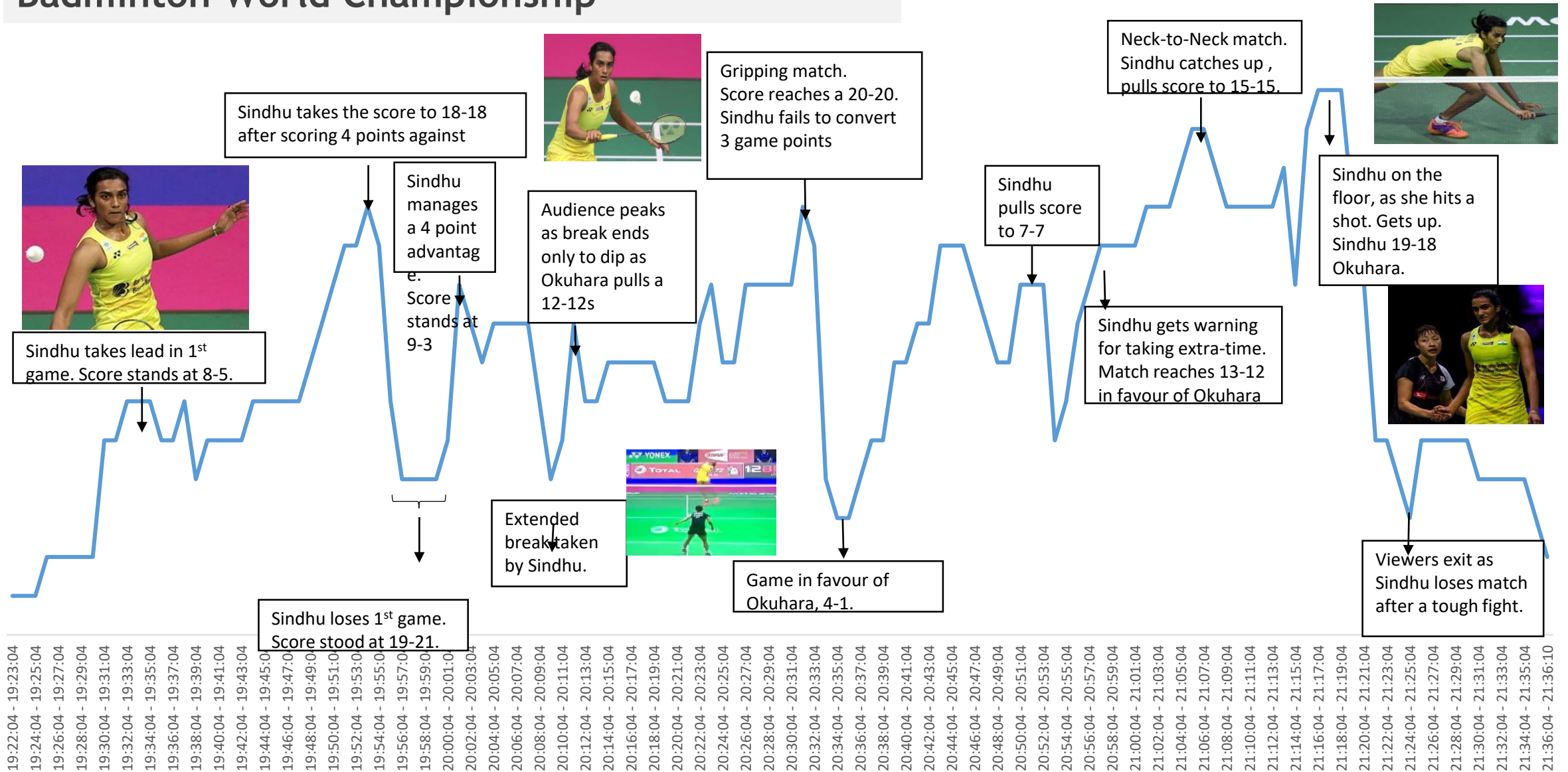
Big Boss Season 11 : Episode wise performance on weekdays



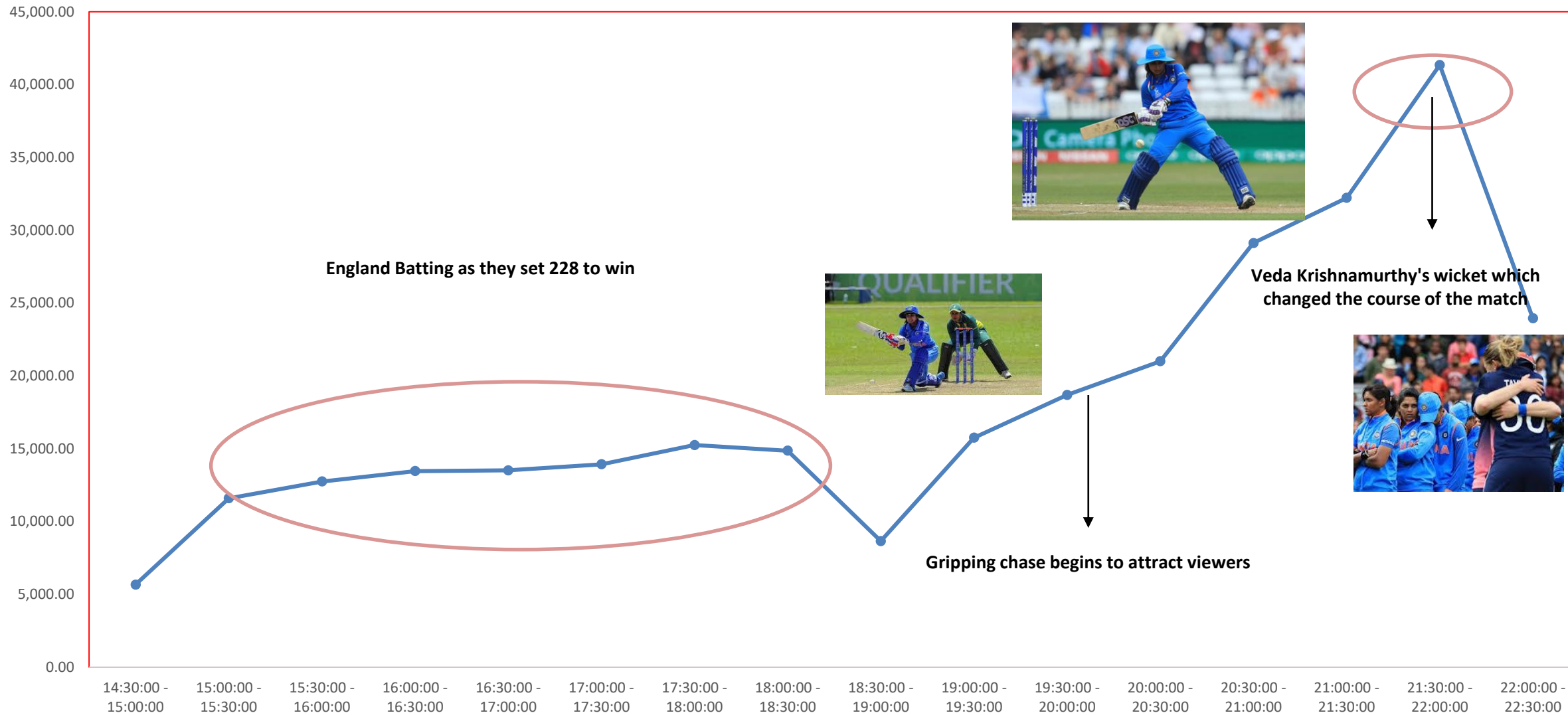
Even News events cannot escape the lure of “Drama”



Drama is important even for Sports Badminton World Championship



Drama is important even for Sports Women's World Cup



**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

SHARE



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.



Follow



'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%

