

**Seven things that shaped the Indian Television Industry
in 2007**

**Ajay Vidyasagar
President
STAR India**

60 new shows launched this
year in Hindi GE

35 New channels launched in
2007

A Singing talent hunt show on
every channel

Implementation of CAS

Expansion of TAM Panel

Entry of SRK on Television

Tata Sky touches 1 million new customers
within 9 months of launch

240 new shows launched in
regional television

A Twenty over cricket world cup
lifts the nations happiness
quotient

5 Million Cable & Satellite
homes added over the past 1
year

7 things we learnt this year

A fairy tale wedding

A Story full of high points and a leading lady with 2 lovers from the past

With a dash of every possible emotion – Drama, controversy, love, hate, last min surprises

And finally is this union forever, or are their more twists before we reach the end



1. Everything is General Entertainment

Which is the Top rated Movie in Mumbai TV market in 2007



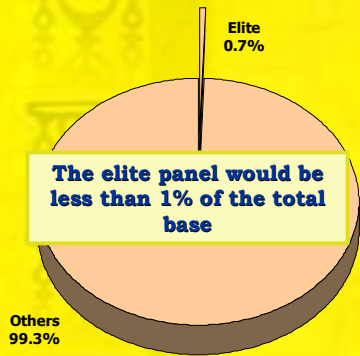
Zee Marathi

Shubh
Mangal
Savadhan

**2.Regional is where the
action is**

**How will the top 1% of the
consumers in the country
behave ??**

How will the top 1% of the viewers in the country behave ??

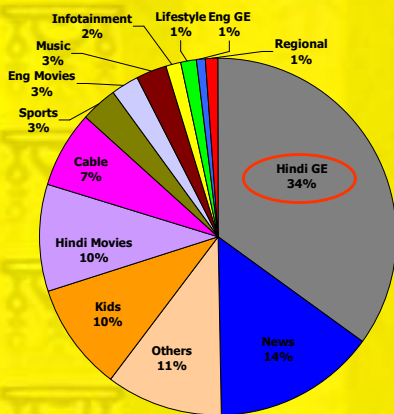


- Make STAR Movies the No 1 channel ??
- Make Doperate houses wives and Heroe the No 1 shows ??
- Completely reject Saas bahu ???...

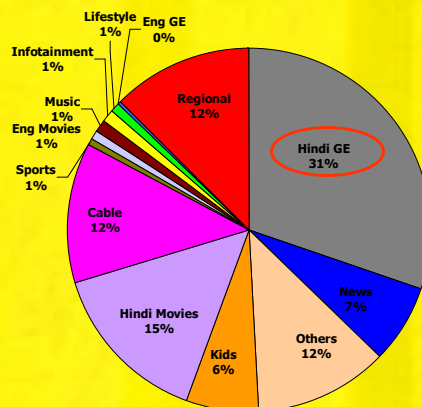


Genre wise split

Among Elite 4+



Among CS4+



Among the Elite Hindi GE is the most preferred Genre.
In fact Hindi GE among the elite is bigger than it is among the mass

80% of the top shows viewed are soaps

Beyond serials: Reality and non fiction shows like Big Boss/Nach Baliye are popular

Regional has a very low presence among these audiences

Desperate Housewives/Prison break and Grey's anatomy don't feature in their list of favorites

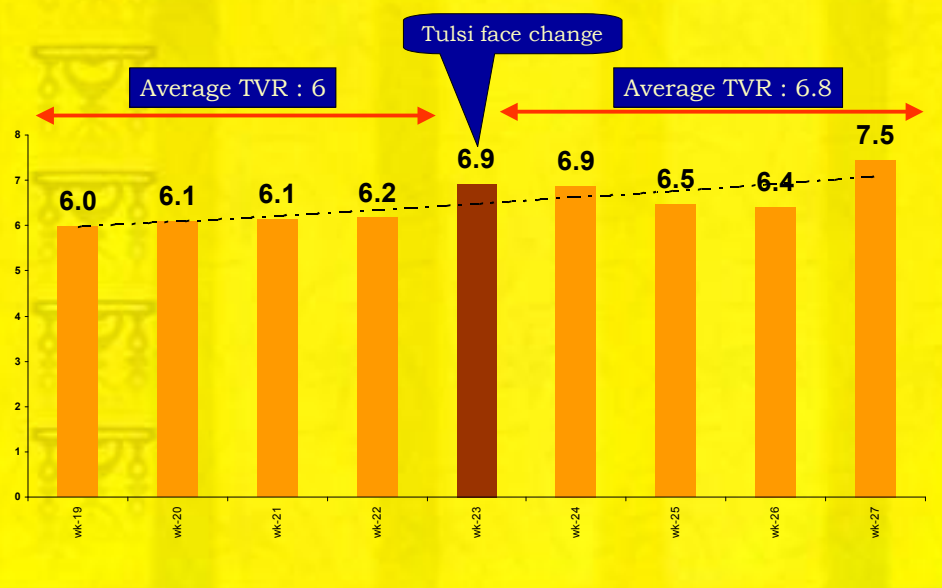
English entertainment comes only after Hindi GE, News and Sports for this viewer base

3. Elite – Not very different after all !!!

In 2007 India's most iconic bahu changed faces...



Did it impact ratings ?



4. **SHOW BRANDS** are bigger than **TALENT BRANDS**

The Power of Movies explodes...

24000

The number of movies a viewer is exposed to in a year

70

The number of movies a viewer is exposed to in a Day

33%

Of the total TV viewing on a weekly basis accounts to Movies, which is bigger than the Hindi GEC genre

35%

Channel GRP for channels like Sahara One & 9X comes from Hindi Movies

**5. The power of movies
explodes.**

Is kahaani mein drama hai,
action hai,
emotion hai,
rona dhona hai
aur nach gaana bhi hai

**Ye India ka
cricket hai !!!**





T 20 : The game changer

- T-20 changed the volume game of cricket to an intensity game
 - From being an all day property, cricket suddenly became a 3 hour event – as simple as watching a movie
- The format managed to successfully woo the Indian woman into the game
 - The ICC T-20 India Pak finale had a 40% female viewership as compared to an average 30% in the past
- The overall TV viewership saw a never before seen impact of cricket with a 40% decline during the T20 finale

6. Cricket: Set for an all new innings.

INX all set to enter market with multiple channels. 2 channels already launched

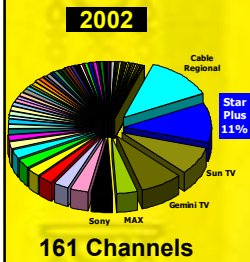
NDTV to enter the General entertainment arena

Viacom 18 to start complete new bouquet

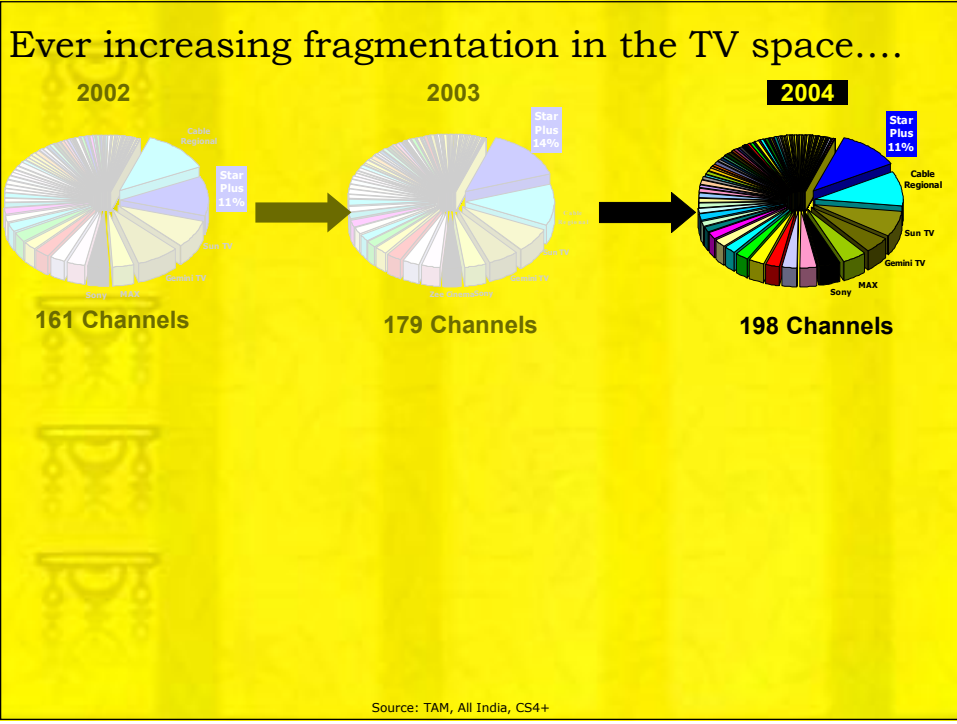
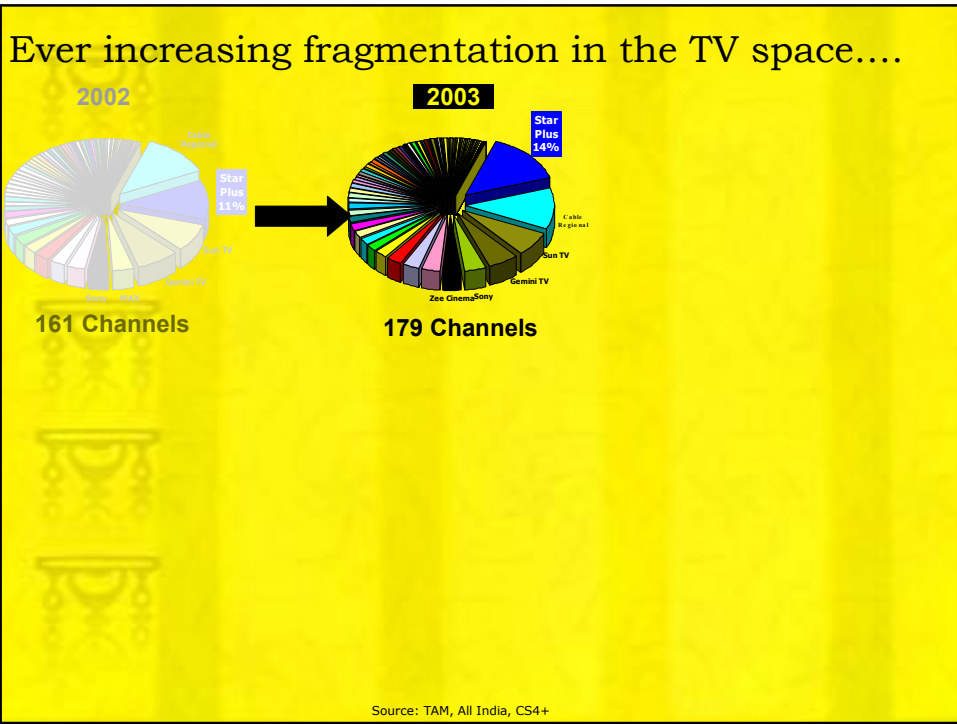
Zee announces the impending launch of their second Hindi GEC

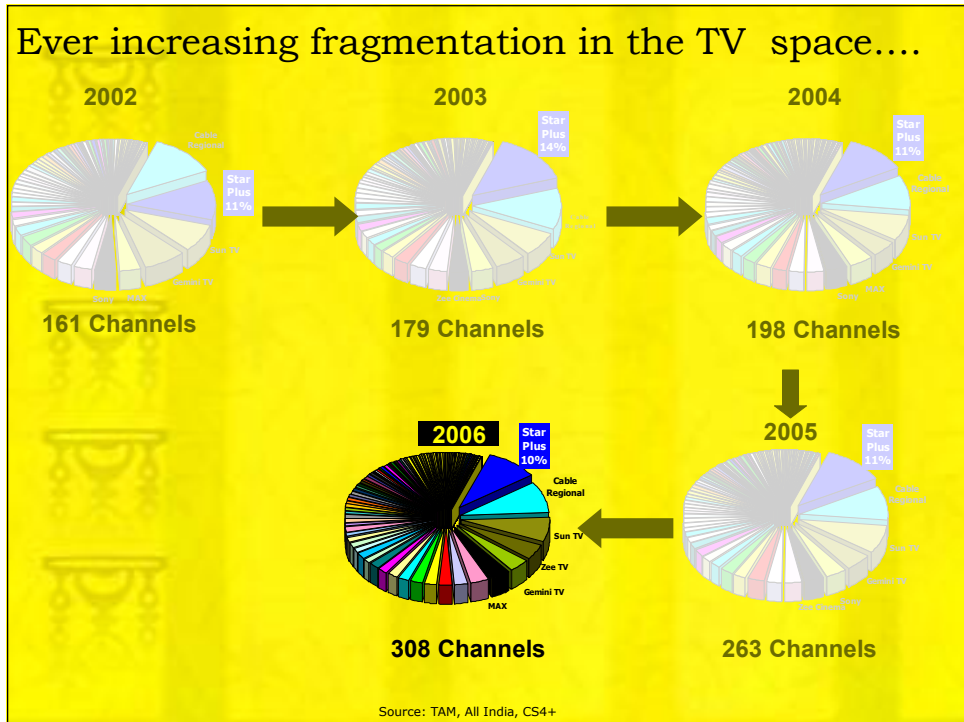
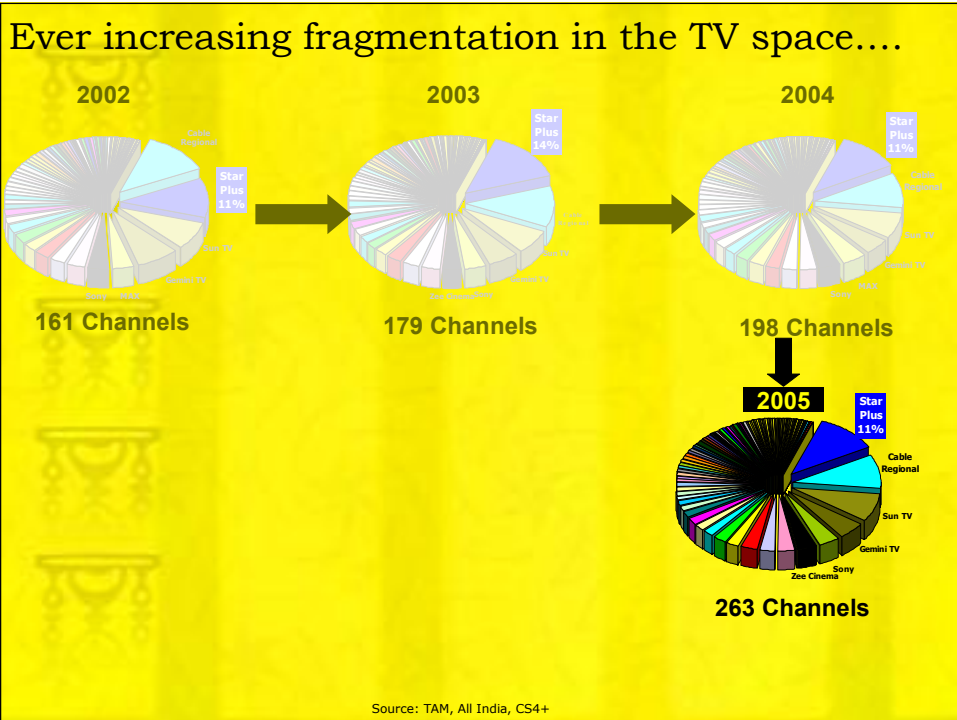
35 channels added in the new year

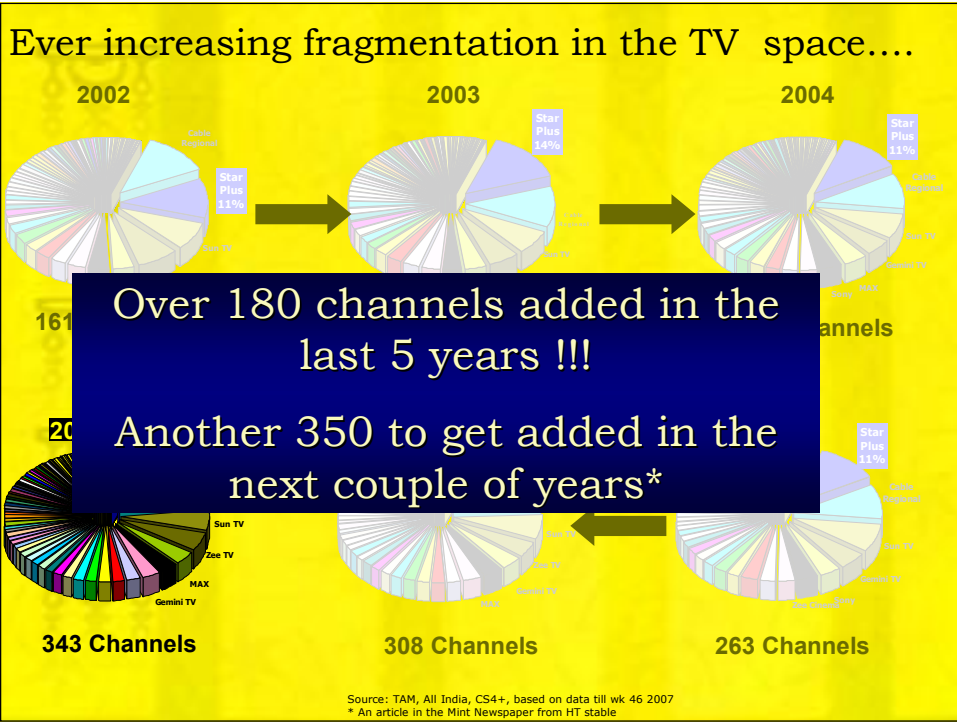
Ever increasing fragmentation in the TV space....



Source: TAM, All India, CS4+







Fragmentation : the war has just begun

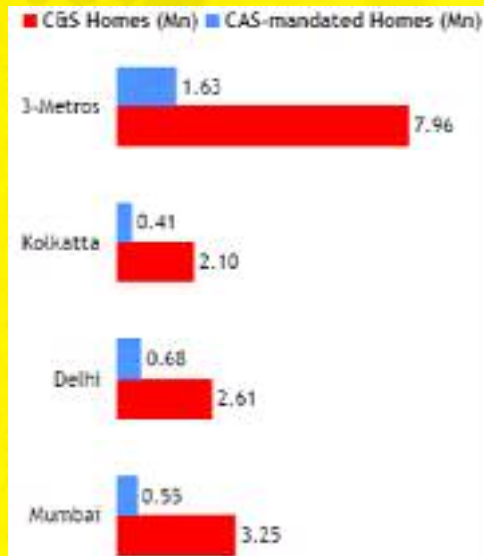
But...



Conditional Access System (CAS)

It is an addressable system for the Cable Operators to provide subscribers with a selective choice of content via the "PAY" mode of TV

How Many Homes???

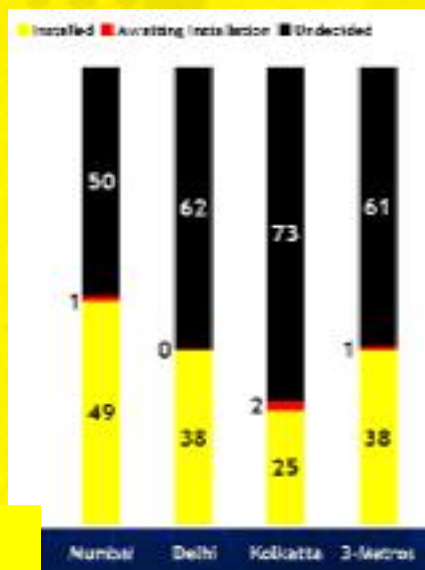


- Total No. of Homes Affected by CAS – 1.6 Mn (21% of Homes in 3 HSM Metros).

- CAS Mandated Zones :
 - South Mumbai
 - South Delhi
 - Kolkata (MC Portion)

- Date of implementation : 1st Jan, 07

Did it take Off???



- As of July, 2007 only 39% of all homes affected by CAS had opted for STBs/DTH...

- Mumbai is the City with the maximum STB/DTH penetration.

- Only 27% of Kolkata has opted for STB/DTH...

What happened Immediately Post CAS??

What Channels saw a Rise in Viewership in CAS mandated Areas??

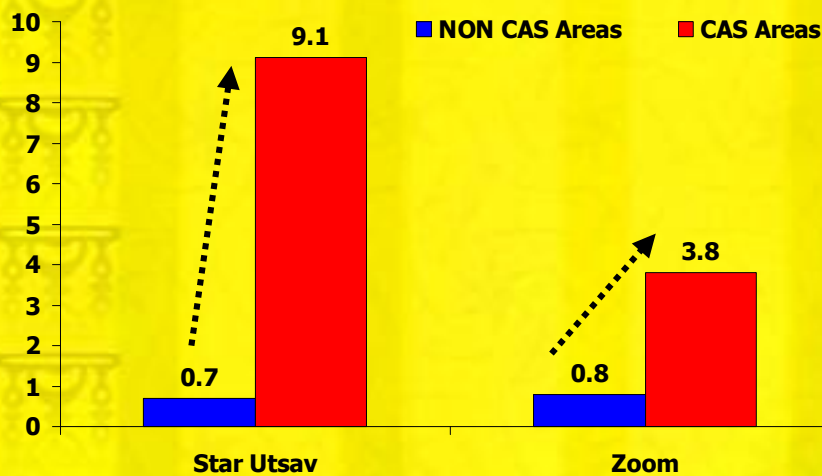
- FTA (Free to Air Channels)
 - Star Utsav
 - Zoom
 - Cable Channels
 - Hindi News
 - Regional Channels

What Channels saw a Fall??

- Pay Channels :
 - Infotainment
 - Kids
 - English Entertainment & Movies
 - Hindi GEC
 - Hindi Movies

Case : Kolkata – FTA Channel

Kolkata – 1st 9 Weeks Post Implementation of CAS





**7. The CAScading
Effect**



Thank You