

What India watched during lockdown?

Contact:

Madan Sabnavis
Chief Economist
madan.sabnavis@careratings.com
+91-22-6837 4433

Vahishta M. Unwalla
Research Analyst
vahishta.unwalla@careratings.com
+91-22-6837 4408
+91-97699 54253

Mradul Mishra (Media Contact)
mradul.mishra@careratings.com
+91-22-6837 4424

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To restrain the spread of coronavirus in India, Indian government imposed a nation-wide lockdown on 25th March for 21 days, which is now further extended up to 3rd May 2020.

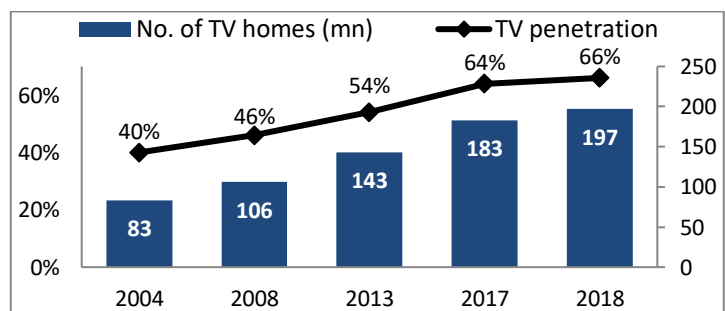
In such a situation, Indians have limited sources to keep themselves entertained and Television being an in-house source of entertainment brought comfort to people. This report is an analysis of what content Indians consumed on television in the days of lockdown. All data has been sourced from Broadcast Audience Research Council (BARC) India and analysed by CARE Ratings.

Such viewership data is of great importance for players operating in the television industry as it helps determine subscription price of channels and influences their advertising income. Channels with higher viewership are in a better position to charge higher price to TV viewers for their subscription. Such broadcasters also have a higher bargaining power with advertisers.

TV households in India

In a country with over 1.3 bn population, about 66% of the total 298 mn households have a TV connection, which brings an opportunity size of another 100 mn more homes in the country. As seen in chart 1, TV households in the country grew ~7.5% Y-o-Y in 2018. India has more than 800 channels today.

Chart 1: TV penetration in India



Source: BARC India

TV viewership during lockdown

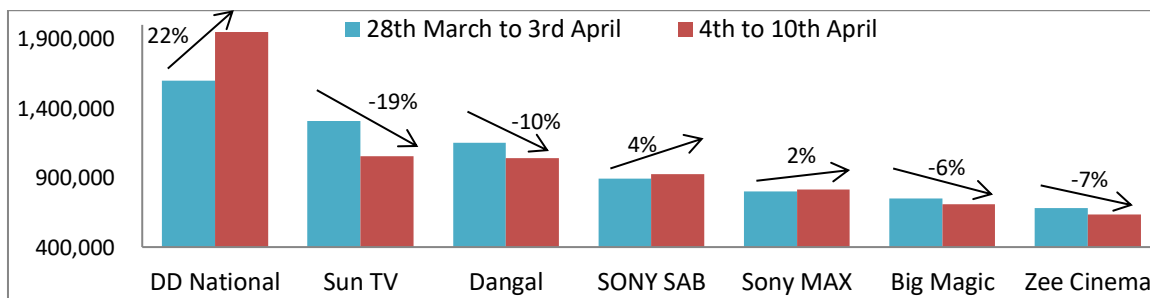
(This section is an analysis of most viewed TV content in the week 4th to 10th April 2020 and comparisons have been made with data from earlier weeks to draw useful insights).

a) Across genres

In the week 4th to 10th April 2020, TV viewership in India rose to 20.4 bn impressions, a sharp rise of 32% over previous week. ('Impressions' refers to the number of individuals of a target audience who viewed an "event", averaged across minutes). Chart 2 depicts the most viewed channels across genres for the week 4th to 10th April and comparison has been made with the previous week's data. The top 7 channels in both these weeks remained constant and most of these channels belong to the General Entertainment (GEC) category.

For the second consecutive week, DD national (free-to-air Hindi GEC), was the most viewed channel with 1.9 bn impressions in week 4th to 10th April. This TV channel's popularity can be largely attributed to the telecast of the super hit show 'Ramayan', which was initially telecasted on TV in the year 1987. In the week 4th to 10th April, viewership of DD national grew sharply by 22%.

Chart 2: Most viewed channels across genres ('000 impressions) for week 4th to 10th April



Source: BARC India;

Note: Data refers to All India (U+R): 2+ Individuals

b) Hindi General Entertainment Channels (GEC)

Within the Hindi GEC genre, top 5 channels in the week 4th to 10th April were DD national, Dangal, Sony SAB, Big Magic and DD Bharti. Top two programs during the same week were mythological shows – 'Ramayan' and 'Mahabharat'. The show 'Ramayan' had nearly 3.5 times higher viewership than Mahabharat and both serials had greater number of viewers in the urban markets, with shares of 56% (Ramayan) and 63% (Mahabharat). Ramayan is telecasted on DD national, while Mahabharat is telecasted on DD Bharati. Three other popular shows such as 'pyaar ki luka chhupi', 'mahima shanidev ki' and 'baba aiso var dhundo' made 'Dangal' the 2nd most viewed channel in India.

c) Sports

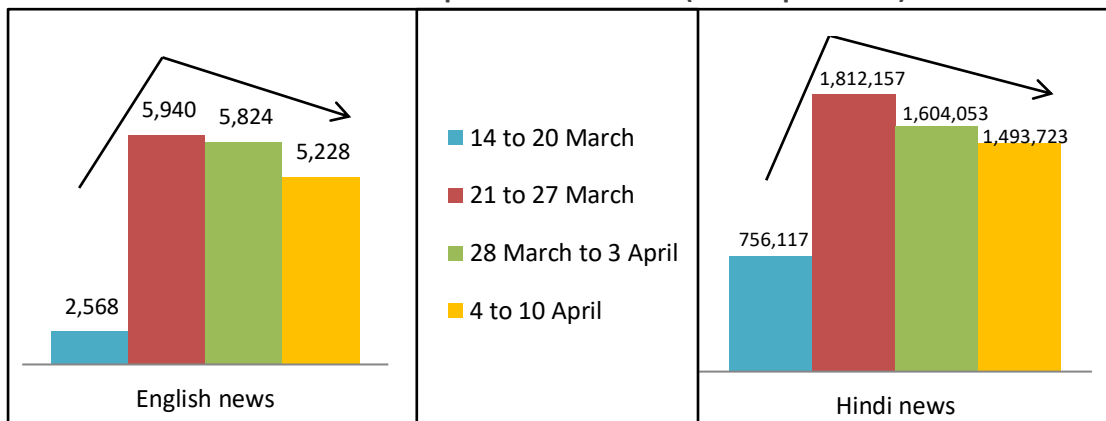
Had the pandemic situation not existed today, the sports genre would have garnered large viewership in India with the telecast of various sports events, which were earlier scheduled to be held during this month. The cricket Indian Premier League is one such event that is held around March to May every year. However, with the world-wide spread of Covid-19, all sports events have either been cancelled or postponed. Due to this, the top 5 sports channels had bare minimal viewership of 238 mn impressions in the week 4th to 10th April. During this week, older matches were telecasted, including ICC World Cup U-19 India vs Pakistan, ICC World Cup T20 India vs Pakistan, Asia Cup T20 India vs Pakistan, etc.

d) News

‘Hindi news’ category had the highest viewership in the news genre. Top 5 channels within this category were Aaj Tak, ABP news, India TV, Republic Bharat and Zee news and cumulative viewership for these five channels rose to 1.4 bn impressions for the week 4th to 10th April. This was followed by regional news channels which have large audiences. On analysing the viewership of top 5 channels in various categories, we understand that Marathi news category was leading with 552 mn impressions, followed by Kannada (484 mn impressions), Telugu (417 mn impressions), Tamil (387 mn impressions), Bangla (286 mn impressions), Malayalam (249 mn impressions), Oriya (159 mn impressions) and Assamese (121 mn impressions). This was followed by English news category with minimal viewership of 5 mn impressions for the week 4th to 10th April.

Chart 3 is an analysis of news channels in two languages: English and Hindi. The chart shows that viewership in both categories rose sharply in week 4th to 10th April, when compared with three weeks earlier data (i.e. 14 to 20 March). However, after witnessing a peak in the week 21th to 27th March, it witnessed a continuous drop in viewership numbers. This is contrary to the belief that news channels would have continued to gain viewership in times of a pandemic situation in the country as well as globally.

Chart 3: Viewership of news channels ('000 impressions)



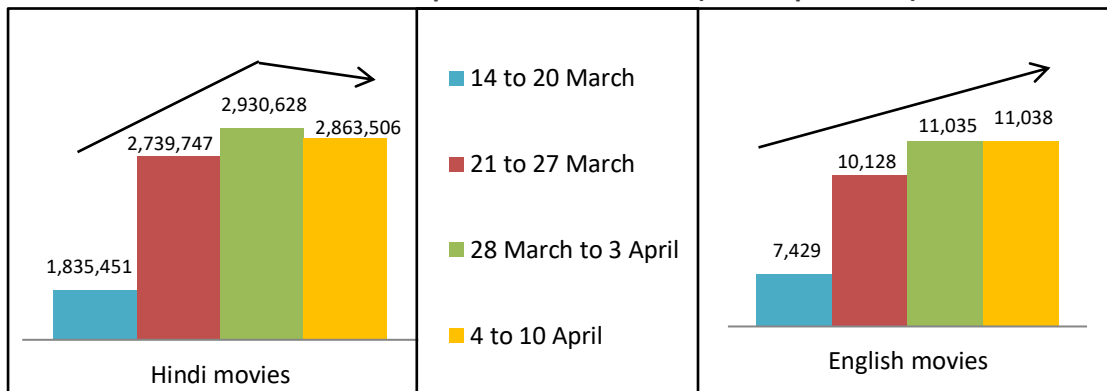
Source: BARC India, CARE Ratings

Note: Data in each category is a summation of weekly impressions of top 5 channels of the category.

e) Movies

- Within the Hindi movies category, top 5 channels for the week 4th to 10th April, were Sony Max, Zee Cinema, Star Gold, B4U Kadak and Star Gold 2. Some blockbuster movies which garnered high viewership for them include Darbar, Jurassic Park, K.G.F.: Chapter 1, Hum Aapke Hain Koun, Total Dhamaal, Chhapaak, etc.
- In the English movies category, top 5 channels were Star Movies, Sony PIX, Movies Now, HBO and MNX. Movies telecasted during this week were Avengers Infinity War, Modern Times, Deadpool, Jurassic Park fallen kingdom, World War Z. Chart 4 shows a weekly growth in viewership of both these categories, except a marginal fall in Hindi movies category in the week 4th to 10th April.

Chart 4: Viewership of movies channels ('000 impressions)



Source: BARC India, CARE Ratings

Note: Data in each category is a summation of weekly impressions of top 5 channels of the category.

Concluding remarks

- TV penetration in CY2018 is at 66% with 197 mn TV households.
- In the week 4th to 10th April 2020, TV viewership in India rose to 20.4 bn impressions, a sharp rise of 32% over previous week.
- Covid-19 has a varied impact on viewership of TV channels. While some channels witnessed a rise in viewership, others witnessed a drop. Sports channels are at a sure loss of viewership as well as advertisement income, as most sports events scheduled during this time of the year have either been postponed or cancelled. Other categories such as news, GEC, movies gained viewership.
- In the week 4th to 10th April, 'Ramayan' was the most viewed show on Indian Television. Its telecast on DD national made it the number 1 channel for the second consecutive week and viewership for the channel rose 22% within one week.
- Top two shows on Indian television: 'Ramayan' and 'Mahabharat', both have mythological concepts, which distinctly shows preferences of Indian TV viewers.

CARE Ratings Limited

Corporate Office: 4th Floor, Godrej Coliseum, Somaiya Hospital Road, Off Eastern Express Highway, Sion (East), Mumbai - 400 022. CIN: L67190MH1993PLC071691

Tel: +91-22-6754 3456 | Fax: +91-22-6754 3457

E-mail: care@careratings.com | Website: www.careratings.com

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