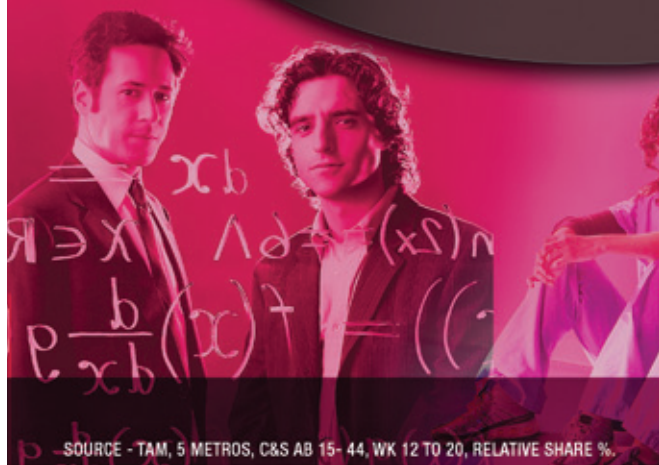
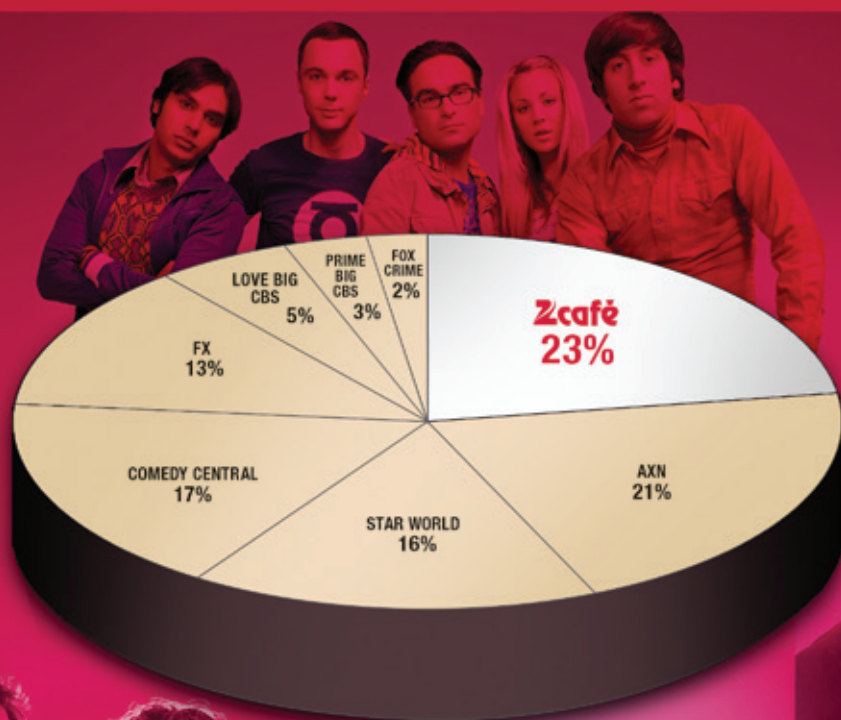


IT'S A COUNTRY OF CAFÉHOLICS.

ZEE CAFÉ IS THE UNDISPUTED LEADER IN THE ENGLISH ENTERTAINMENT GENRE 9 WEEKS IN A ROW.



Zcafé

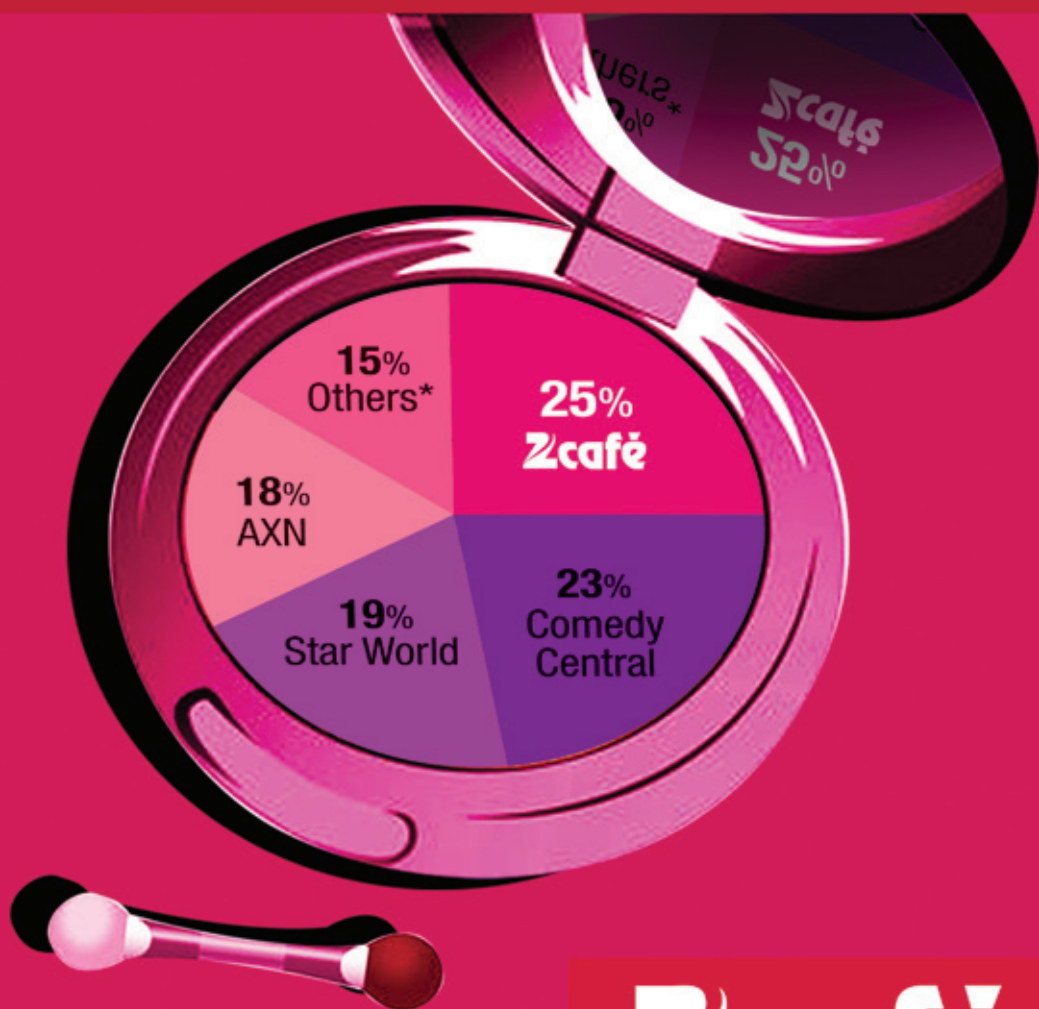
SOURCE - TAM, 5 METROS, C&S AB 15- 44, WK 12 TO 20, RELATIVE SHARE %.

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HOLDING A WOMAN'S ATTENTION LONGER THAN ANYONE ELSE.

ZEE CAFÉ HAS THE HIGHEST SHARE OF FEMALE VIEWERSHIP IN THE ENGLISH ENTERTAINMENT GENRE 7 WEEKS IN A ROW.



* OTHERS – FX, PRIME & LOVE BIG CBS, FOX CRIME.

SOURCE - TAM, 5 METROS, C&S AB F 15-34, WK 14 TO 20, RELATIVE SHARE %

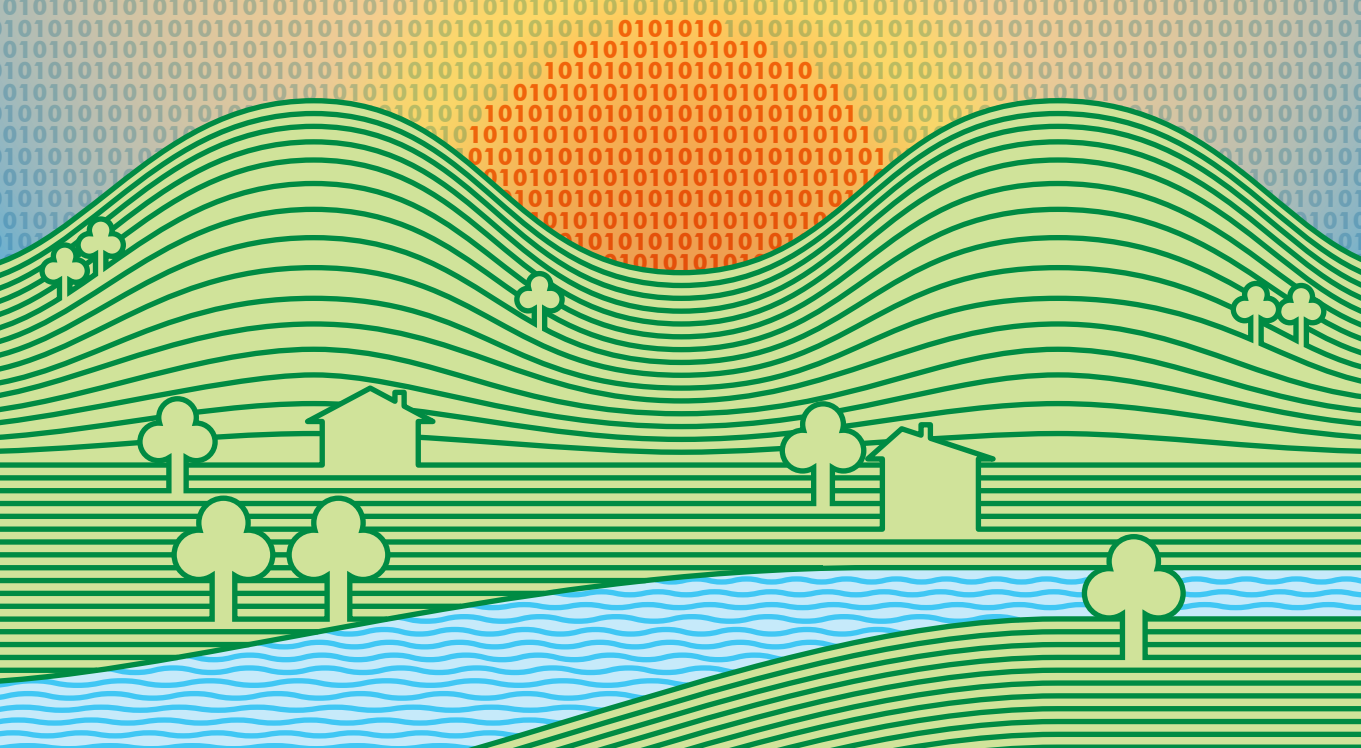
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DIGITAL ADDRESSABLE SYSTEM

SPECIAL REPORT An entire new eco system has come into effect after the second phase of digitisation of the cable & satellite distribution system kicked in. What does it mean for those in the game, the agencies, regulators and the government?



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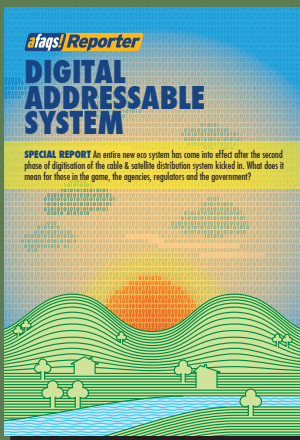
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SPECIAL REPORT

June, 2013

Focus on

DIGITISATION



An entire new eco system has come into effect after the second phase of digitisation of the cable & satellite distribution system kicked in. What does it mean for those in the game - the agencies, regulators and the government?

A detailed report.

By
Prajjal Saha

Design
Vinay Dominic

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THE NEW REGIME

Digitisation of cable television will offer a whole new experience to the viewer while benefitting all other stakeholders in the business.

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BOON IN DISGUISE

The benefits of digitisation of cable television far outweigh those of both analogue and DTH services.

18

A WHOLE NEW UNIVERSE

While Sec A homes have been more receptive to digital television across India, other homes have taken longer to change over.

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THE NEW WORLD OF RATINGS

Digitisation is expected to change viewership patterns - and the fate of many channels.

THE NEW REGIME

Digitisation of cable television will offer a whole new experience to the viewer while benefitting all other stakeholders in the business.

The current state of the cable and satellite (C&S) service in India is pathetic, especially for consumers. On the one hand, over 500 channels are beamed through satellite, but only 100-odd reach the consumer's television sets. She can watch only a handful of 25-odd channels available on Prime band or S-band (which have better quality picture and sound compared to the other bands).

The last link between the channel and the consumer is the LCO (local cable operator). Local politicians - or strong-arm men - manage most of these operations and the consumer is at their mercy when it comes to what she can watch. Under the circumstances, the quality of the service suffered. Direct-to-home (DTH) service came as a solution, but turned out to be too expensive for many families, especially those in the lower SECs.

All this may change by 2014, when digitisation becomes mandatory and the

entire country will start receiving digital signals through the C&S distribution system. This will bring about a sea change in the industry and can be compared to the time when Indian homes moved from terrestrial television to C&S.

How will digitisation affect the stakeholders - the distributor, the broadcaster, the local cable operator, the consumer and the government? If phase 2 (launched in April this year) is any indicator, things look rosy.

DISTRIBUTION ANGLE

The LCO will no longer continue to be the king of the business. Compare this piece of statistic - at present, the entire fleet of 500-odd channels makes around ₹15,000 crore per annum as ad revenue, with heavy investments in infrastructure, technology, content and marketing. On the other hand, LCOs, with little investment and effort, take away more than ₹11,000 crore a year.

LCOs have been managing this business with no transparency. Though ₹20,000 crore is collected as subscription revenue every year, the LCO would keep almost 60 per cent of that by under-declaring the number of subscribers.

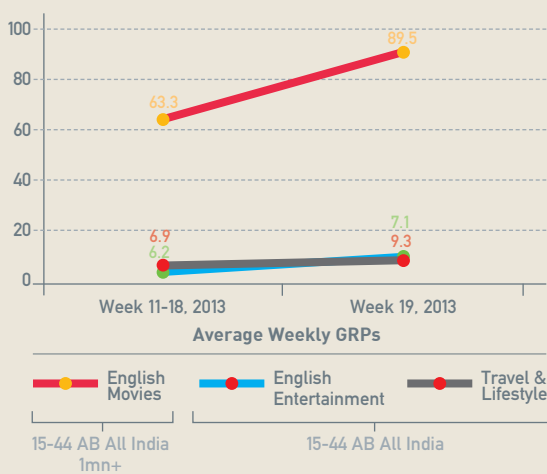
After digitisation, LCOs may continue making the same amount of money as ARPUs rise, but it will be the broadcasters and their distribution partner - the MSOs - that will now take the lion's share of the subscription money. From a 60 per cent share of the subscription revenue, the LCO's share is expected to come down to 24 per cent.

Industry observers predict that the shrinking revenue margin for LCOs may force many players to quit the business, resulting in consolidation at the last

The onset of digitisation can be compared to the time when Indian homes moved from terrestrial TV to C&S.

RISING POPULARITY

(Niche genres show a significant upside)





DIGITIZATION UNLEASHED

YOU OWN THE POWER TO CHANGE



“ In the short term, media plans will have an increased mix of genres or channels to cater to incremental reach. ”

ROHIT GUPTA
Multi Screen Media



mile operator level. This will especially be so in markets with a population of under one million. Organised players and private investors are expected to eye what is promising to be a lucrative proposition.

For the broadcaster, digitisation will open up a plethora of opportunities. For starters, it will save the ₹2,000 crore it pays every year as carriage fees. Subscription revenue alone will increase from ₹4,000 crore to ₹17,000 crore.

ADVERTISING SALES

With digitisation successfully implemented, the advertising to subscription revenue ratio is expected to change from the current 70:30 (in favour of advertising) to 50:50 over the next three-four years. Grabbing eyeballs becomes *the* crucial factor in the former case.

“The broadcaster’s ability to experiment with programming, and



“ The CPRP has outlived its relevance and is part of the issues that we have inherited like absurd increase in inventories and abysmal lowering of ad rates. ”

DEEPAK JACOB
Star India

launch new channels to cater to diverse viewing interests and niche audiences will go up,” says Rohit Gupta, president, network sales, licensing and telephony, Multi Screen Media.

Space selling will, however, continue to operate in a similar fashion. Industry practitioners are hopeful that the measure of evaluation will change from CPRP

(cost per rating point) to CPT (cost per thousand) or CPM (cost per million) - a practice that’s followed in most advanced markets.

As niche genres extend their reach among viewers, new patterns will emerge. Says MSM’s Gupta, “In the short term, media plans will have an increased mix of genres or channels to cater to incremental reach. This will give rise to more efficient planning and reduce spillage or the overlap of marketing spends.”

Industry observers also opine that when the audience gets fragmented further and becomes even more niche, advertising and marketing at retail, regional, and geographical levels will also increase. Field trials by agencies in the US were able to beam specific advertisements intended for local audiences depending on the demographics. For instance, during a test trial, communities with older audiences were able to see ads for cars and home loans, while those with younger audiences saw cola and apparel ads.

“The CPRP has outlived its relevance and is part of the issues that we have inherited - like absurd increase in inventories and abysmal lowering of ad rates. With better transparency in subscriber numbers, the metric for advertisements shall also result in reflecting reality through actual numbers than mere arcane percentages,” says Deepak Jacob, Head of Legal Counsel, Star India.

CONTENT

Special interest content on Indian television is bound to increase with the increased transparency. The new digital environment will increase the reach for 450-odd channels and not just the handful top 50 channels. This means that all channels - big or small, part of a network or a solo, general content or niche - will get an equal field to play in. More viewers, coupled with more consumption of content, will allow the broadcasters to provide a better media platform to its advertisers and also claim

LCOs have been managing this business with no transparency.

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More viewers and more consumption of content, will allow the broadcasters to provide a better media platform to advertisers.

higher subscription revenue.

HBO Hits, HBO Defined, and Discovery HD World are some examples of segmentation of audience and diversification of content. With the launch of full-time specialised channels on cookery or sports such as Zee Golf or Zee Khana Khazana, which have subscription-based revenue models, there are more instances of catering to diverse viewing and content requirements.

Even in the early days of digitisation, niche genres showed a significant upside with easy access to such channels and the availability of the EPG (electronic programming guide), which improved a viewer's ability to navigate within a genre, or between genres. Consider this example.

As per the latest TAM Data, post the implementation of DAS, English movie

genre ratings grew 41 per cent (see chart), and English entertainment genre grew by 50 per cent compared to the eight weeks' average before DAS. Even travel and lifestyle grew by 3 per cent compared to the previous eight weeks' average.

Raj Nayak, CEO, Colors, believes that in the new environment, subscription-only business models will become a reality, and will also be a sustainable one as a result of which, more niche channels and genres will emerge.

The increasing popularity of special interest channels will push existing channels to constantly innovate to stay in the race. "We anticipate viewers to be more experimental than before with even more choices now. So, differentiation will be a key to success," says Saurabh Yagnik, business head, Pix.

Broadcasters who do not create content for the audience, will be left out of the race. The same rule applies for the Hindi general entertainment channels, the most consumed genre in the country today with 28 per cent absolute channel share (CS4+ all India).

Broadcasters have started preparing themselves keeping the digitised world in mind by investing on satellite rights of the latest blockbuster movies, and

“ We anticipate viewers to be more experimental than before with even more choices now. So, differentiation will be a key to success. SAURABH YAGNIK Pix ”



A BIRD'S EYE VIEW OF WHAT TO EXPECT FROM DIGITISATION

CABLE NETWORK OPERATORS

- Consolidation of cable networks (more so in sub-one million population strata)
- Cable and broadcasting will become interesting options for private investment as it will be more organised and transparent
- Higher realisations for MSOs
- A well organised industry with encryption systems, SMS interactivity

ADVERTISERS

- Increase in retail/regional/geographical level advertising and marketing
- Helps segmented marketing
- New CPRP models due to higher access to viewership patterns

VIEWERS

- Increase in viewership of content in modes other than television (mobiles or tabs)
- Richer content: Number of channels will go up, and to win the race, they will improve their content
- Entry of more niche channels results in variety
- Better picture and sound quality, enhanced services such as HD and VOD

BROADCASTERS

- Focus shifts from collections – tackling under declarations to marketing the content
- Niche channel is mostly placed on lower frequency/bands, which adversely affect the



“ In the new environment, subscription-only business models will become a reality and also sustainable as a result of which, more niche channels and genres will emerge. ”

RAJ NAYAK
Colors

international format shows.

Fiction content on GECs will continue to rule contributing 70-80 per cent of the GRPs, but Hindi GECs have already taken steps by moving away from just offering the staple fiction content on their channel. They have experimented with popular international formats and churning out reality shows such as KBC, Indian Idol, Big Boss, India's Got Talent and the most recent and differentiated Satyamev Jayate, across various Hindi GEC channels.

Even the controversy-riddled IPL has redefined cricket viewing in India. It is no longer just a game, but a viewing experience, which is a complete entertainment package. As a result of all these developments, broadcasters are tapping new revenue streams as well as catering to the advertiser's requirement.

THE CONSUMER...

Digitisation will ensure that the consumer gets the quality of service she deserves. The viewer will have the preference of choosing the content - in terms of genre or specific programmes - she wants to watch. This comes with other allied services such as video-on-demand and high-definition (HD) quality and content. There could be many special interest channels in the offing.

On the flip side, the consumer may have to pay a little more than earlier, but that extra money paid will be worth the service the viewer gets.

...AND THE GOVERNMENT

When all parties are gaining from this digitisation drive, why should the government be left behind? In the new, transparent regime, the government can expect higher tax realisations.

There will be a rise in the number of homes using broadband connections pushing up e-commerce and e-transactions and eventually benefiting the government. Analysts predict that a 10 per cent increase in broadband penetration will increase the GDP by 1.5 per cent. ■

viewership quality will find the going better

- Reduced carriage fee monies
- Better content: overall viewership will improve. Television will also attain global standards; the reach will be broader

INDUSTRY AS A WHOLE

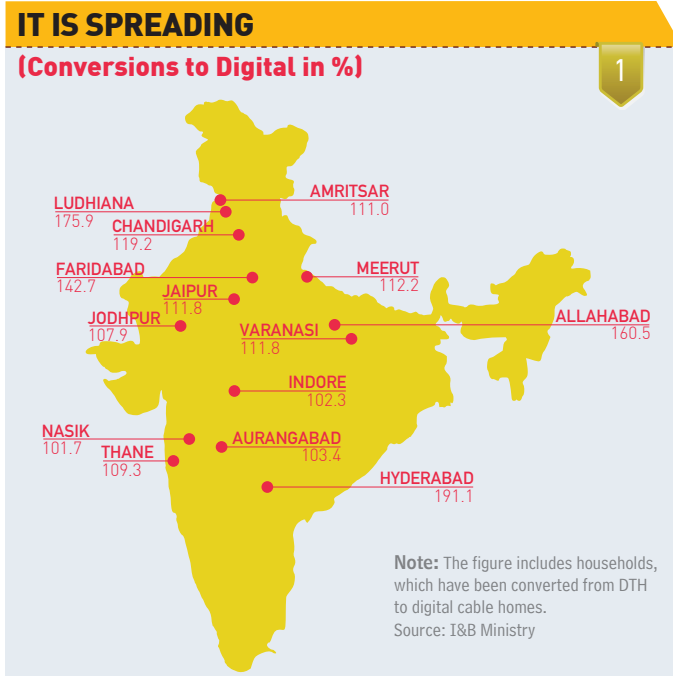
- Ratings: more reliable and authentic, error margins will be low
- Change in the revenue sharing between broadcasters and MSOs
- More FDI for the entertainment industry since content and quality will be as per global standards
- Transparency in transactions, subscription and carriage

GOVERNMENT

- Higher tax realisation
- Increase in e-commerce/e-transactions (Broadband connected homes will increase as a subset of digitisation)
- Digitisation will also help the government pursue India's broadband goals and thereby help boost economic growth
- Analysts suggest a 10 per cent increase in broadband penetration will increase the GDP by 1.5 per cent

BOON IN DISGUISE

The benefits of digitisation of cable television far outweigh those of both analogue and DTH services



What's novel about digitisation is that it will weed out the middleman.

It may have been enforced on a reluctant industry, but the digitisation of cable television has done much good despite initial resistance from many quarters. Industry observers believe that this will be the other big game changer post the telecom growth in the country.

What's novel about digitisation is that

it will benefit both parties - consumers, as well as broadcasters, and weed out the middleman - the last mile operator - who has so far arm-twisted both the consumer and the broadcaster.

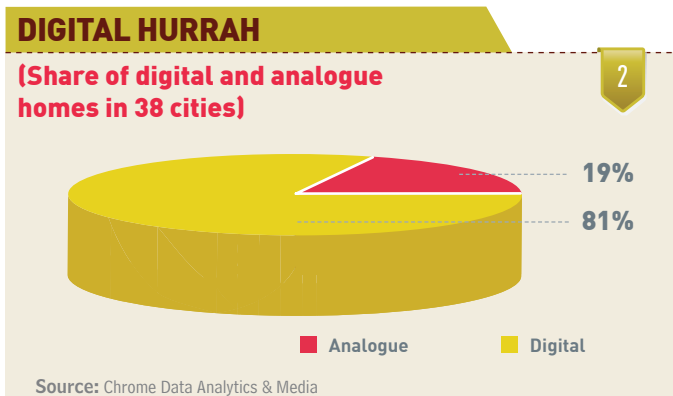
The consumer was forced to shell out a good amount every month even for the poorest quality of service, while the broadcaster was coerced into paying an unreasonable amount to just reach out to the consumer. But, hopefully, all such anomalies will now be put to rest.

CURRENT SCENARIO

Going by a recent report released in the Parliament by the Ministry of Information & Broadcasting (I&B), the penetration of digitisation in 38 cities, across 14 states and one union territory touched 89.8 per cent in the first three weeks of its implementation. This also includes 28.3 per cent DTH homes that switched over to a digitised cable system (though it's hard to understand why a DTH home would switch over to a digitised cable system, which offers a slightly inferior quality of service than the former). It could have to do with the fact that digitised cable has a far superior picture quality in comparison to the analogue system and, at the same time, is cheaper than the DTH service.

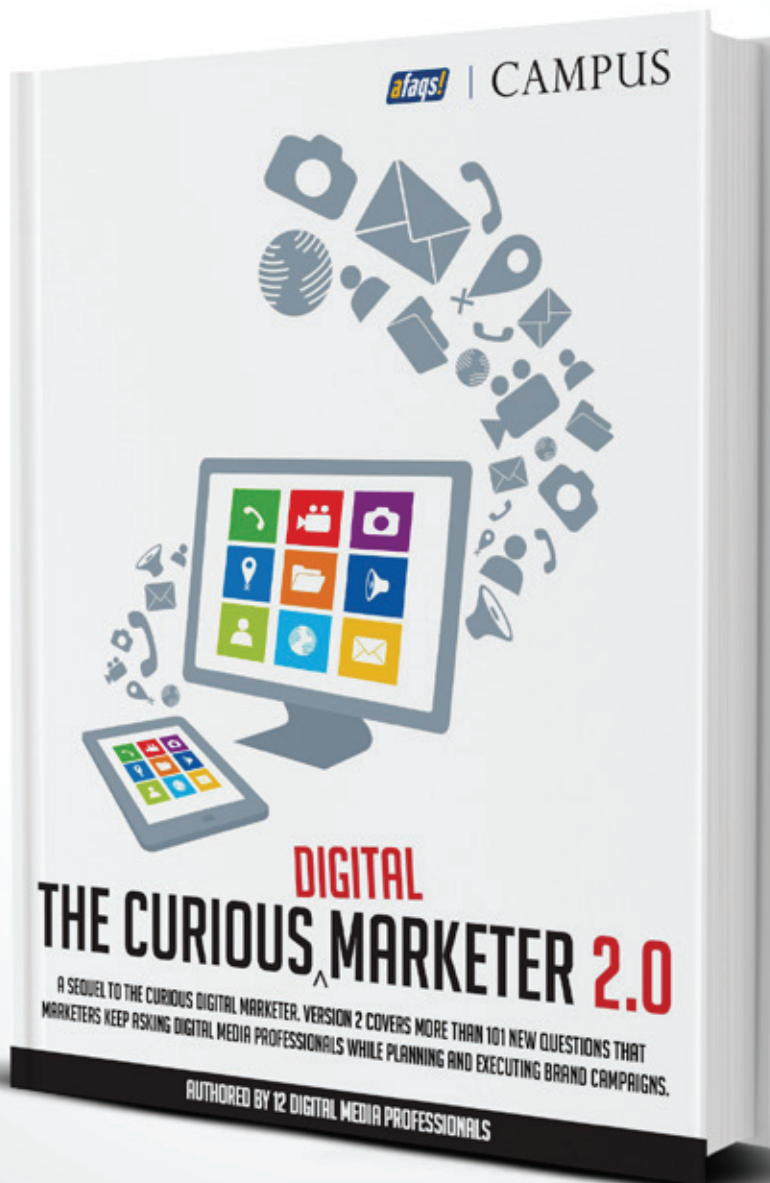
As per data supplied by the I&B Ministry, 14 out of 38 cities in Digital Addressable System Phase 2 have already crossed the 100 per cent mark (see chart 1). The chart implies that while all analogue homes have been converted to digital homes, many DTH homes, too, have been converted.

The I&B Ministry claims that in three cities - Ghaziabad, Pune and Kanpur, digital acquisition has crossed the 90 per

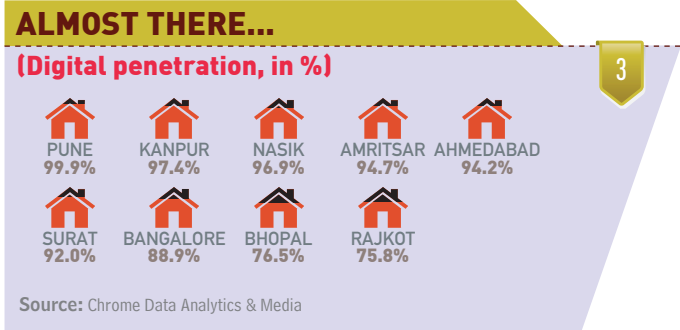
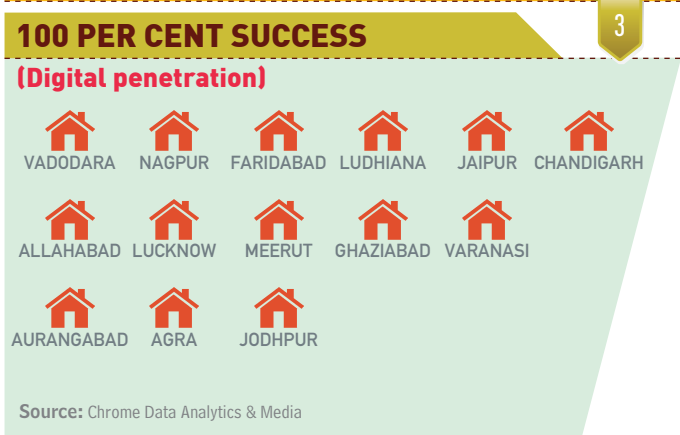


DIGITAL THE CURIOUS MARKETER 2.0

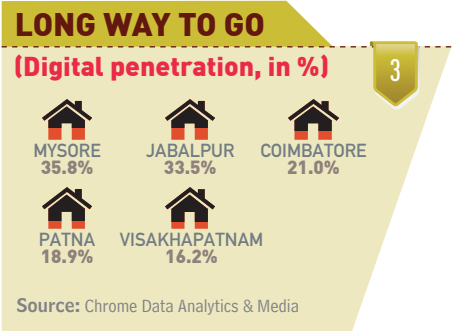
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HOW THE CITIES STACK UP



One reason for the low statistics in cities like Mysore, Jabalpur and Patna is the lack of cooperation from the LCOs.



cent mark. At the bottom of the list are Srinagar, Visakhapatnam, Coimbatore and Jabalpur, with a DAS reach of 22.3 per cent, 29.6 per cent, 29.7 per cent, and 45.3 per cent, respectively. The other 17 cities have crossed the 57 per cent mark.

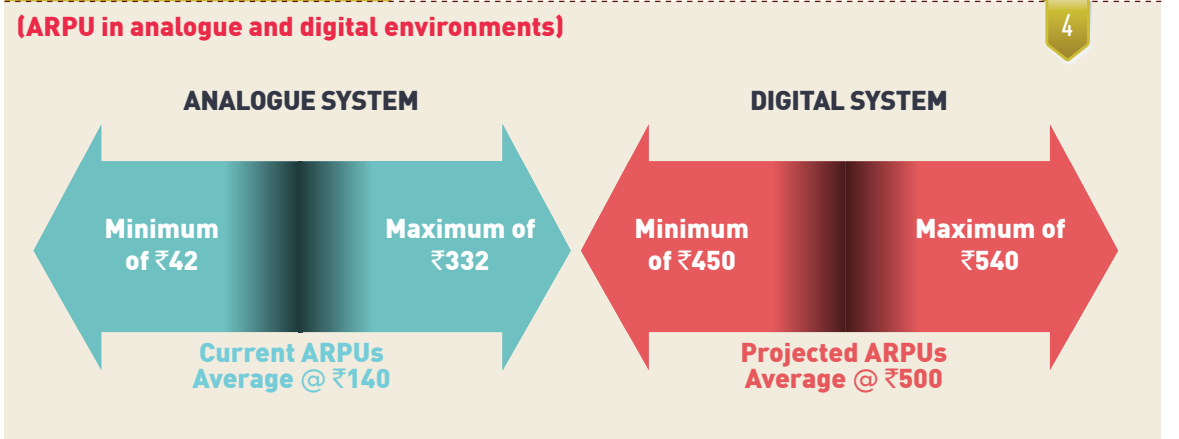
According to the Ministry's report, around 14.4 million set top boxes have been seeded across the 38 cities, while the total demand was for 16.01 million total TV households. The report says that 4.5 million DTH subscribers were also converted to digital homes.

MARKET REALITY

According to Chrome Data Analytics & Media, a company that studies the television distribution system and provides consultancy to broadcasters on optimising distribution carriage fee investments, analogue signals are still running in the 38 cities that were digitised in the second phase. The data suggests that six weeks (May 15, 2013) after the digitisation drive, 19 per cent of the households still receive analogue signals.

The five problem cities are Mysore, Jabalpur, Coimbatore, Patna and Visakhapatnam where the reach of DAS is between 16-35 per cent. One reason for the low statistics is the lack of cooperation from LCOs. The other is the loyalty factor. Stringent government rules force operators to stop analogue signals, but the moment the attention of the watchdog shifts, analogue signals are reinstated.

SEA CHANGE!



Zee Bangla has pioneered television entertainment in Bengal with new thoughts, ideas and content.

Quiz programme ... **Dadagiri**, reality show ... **Dance Bangla Dance, Sa Re Ga Ma Pa**, not only unearths new talents, but keeps Bengal enthralled and glued to television.

For the first time in a region, TV has gone mobile with its innovative app for Dadagiri, revolving around *Dada* of Indian cricket, Sourav Ganguly. Zee Bangla's unique serialised fiction creations, like **Subarnalata**, adapted from Ashapura Devi's well-known novel, keep viewers' emotions ticking day long.

ZEE BANGLA. FOLLOW OR FALL BEHIND.

For its reality shows, Zee Bangla invites direct involvement via mobile polling. Its auditions attract huge footfalls, helping it, over the years, to develop a loyal fan base due to its strong ground connect.

Zee Bangla has also revived the intrinsic theatrical backbone of Bengal, *Jatra*, in Bengal's suburbs strengthening its emotional connect with Bengalis even more.

It also has corporate social responsibility initiatives like distributing free slates to slum children, offering new clothes during the Bengali New Year, among others. Which is why, over time, the pulse of every Bengali reverberates with Zee Bangla. Making it the heart and soul of Bengal.

Partner us. Reach Bengalis when they are most receptive. Enter their minds and hearts. Watch Zee Bangla's magic pave way for your success story in Bengal.

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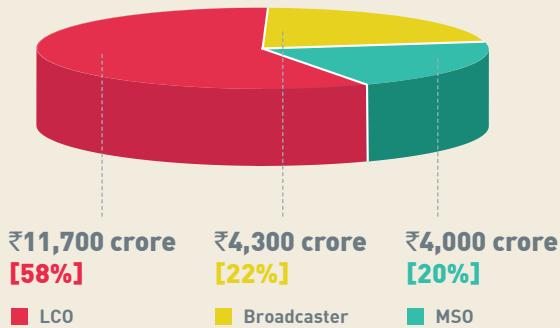
ZEE BANGLA is also available on DTH platform apart from your local cable. Tune in to: Dish TV (Channel no. 840), Tata Sky (Channel no. 861), Big TV (Channel no. 922), Airtel (Channel no. 760), Sun Direct (Channel no. 621) and D2H (Channel no. 701) to watch your favourite channel Zee Bangla.



A CHANGE FOR...

(How the share of subscription revenue will change in a digitised environment)

5



Source: Chrome Data Analytics & Media

Subscription revenue is expected to more than double in due course, from ₹20,000 crore to ₹42,000 crore

REVENUE PIE

Chrome Media and Analytics points out that there has been a massive dip in carriage fees post the digitisation of cable television in the four metros and 38 cities. The carriage fee, which had touched the ₹2,000 crore mark has come down by 40 per cent to ₹1,200 crore.

Chrome Media's DII (Distribution Investments Index) report suggests that the average cost per contact for a single channel has come down from ₹20 per household a year to ₹1 per household a year.

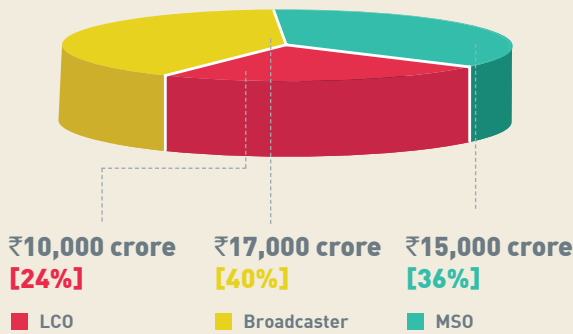
Subscription revenue is expected to more than double in due course, from ₹20,000 crore to ₹42,000 crore. The increase in subscription revenue will be result of an increase in ARPU (average revenue per user). From a median ARPU of ₹140, it is projected to increase to ₹500.

The other big change will be in the distribution of revenue. LCOs, who took away the lion's share in the analogue model, will now be a minority player. On the contrary, the revenue share for both MSOs and broadcasters are expected to see a steep increase in the post DAS era. ■

...THE BETTER

(How the sharing of subscription revenue will change in a digitised environment)

6



Source: Chrome Data Analytics & Media



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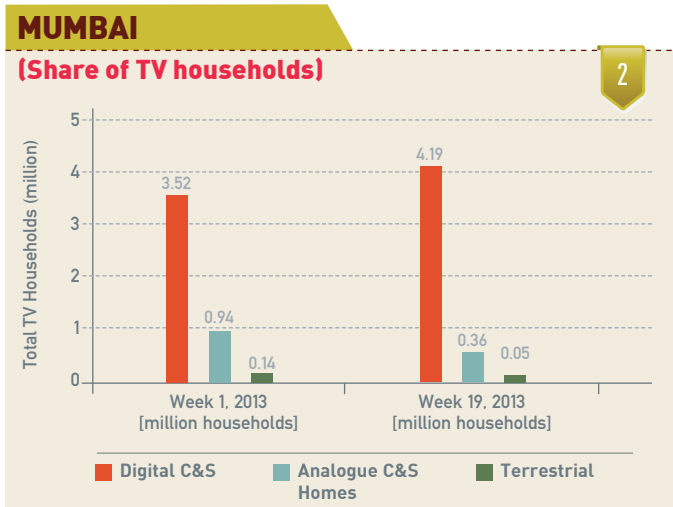
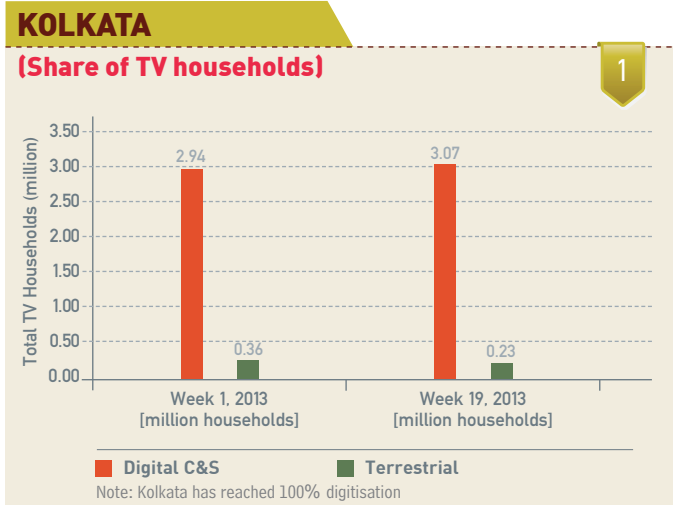
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A WHOLE NEW UNIVERSE

While Sec A homes have been more receptive to digital television across India, others have taken longer to change over



The television universe in India is changing quite fast - probably faster than the industry stalwarts had anticipated. During the initial phase of DAS 2, in

several markets, analogue signals were blocked, but not every C&S home converted to a digital home. The lack of television signals resulted in blackouts of television sets and a shrinkage of the television universe.

A few weeks later all that changed. Many terrestrial television homes directly converted to digital signals. As a result, the C&S universe suddenly expanded. As per TAM Media Research, in the new universe, updated in Week 19, 2013 (beginning May 5, 2013), in Rajasthan, a one million plus market, the penetration of C&S increased from 86 per cent to 91 per cent between Week 1 and 19, for 2013. This implies that around 25,000 new homes converted to digital streaming in the last 18 weeks.

Similarly, in Uttar Pradesh (UP), a 1 million+ and 0.1-1 million market, the number of C&S households increased by 2 percentage points. The other markets in which C&S penetration increased are Gujarat (1 million+), Maharashtra (1 million+) and Madhya Pradesh (1 million+).

Among the major metros, Kolkata's C&S universe increased from 89 per cent to 93 per cent, which implies that 1.3 lakh households joined the C&S club, post DAS 2.

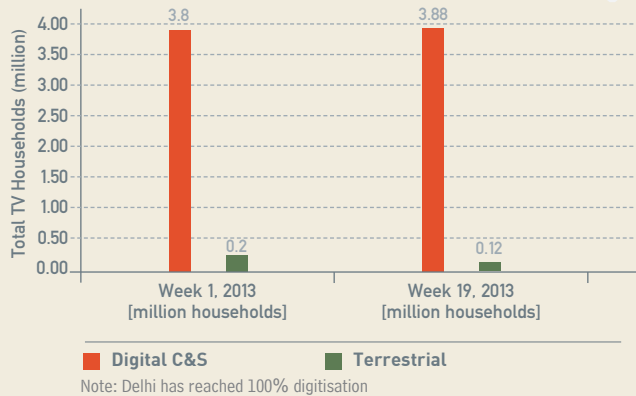
In cities such as Mumbai, Delhi, Pune and Hyderabad, the penetration of C&S TV households increased by 2 percentage points.

At the all-India level, in TAM surveyed markets (60 million households), the

DELHI

(Share of TV households)

3



million households have turned digital. Penetration in the SEC B, C, D & E households increased by 1 percentage point, while it remained steady for SEC A households.

DIGITAL PENETRATION

While Delhi and Kolkata achieved 100 per cent digital penetration level from Week 1, another market to have shown significant growth is Hyderabad.

The digital penetration in C&S homes in the city increased from 20 per cent in Week 1 to 80 per cent in Week 19. This means that around seven million households turned digital in the last 18 weeks. In Ahmedabad, around two lakh households turned digital, while in Pune, the figure stands at four lakh.

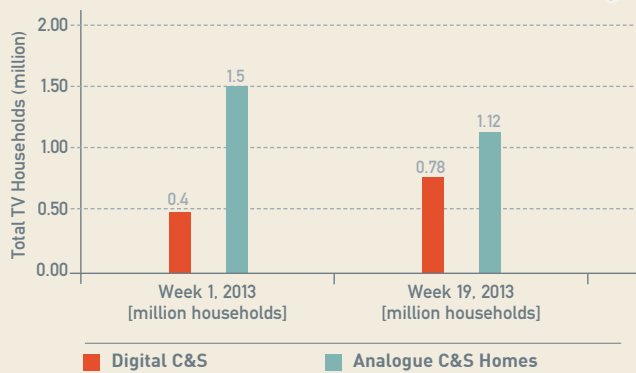
Among other markets, Rajasthan (1 million+) increased its digital penetration from 12 per cent to 92 per cent, while in UP (1 million+), the market increased from 20 per cent to 85 per cent.

In the TAM surveyed markets, SEC A homes have been more receptive to change, and at an all India level, the penetration of digital signals have increased from 51 per cent to 73 per cent of C&S Homes. For SEC B, the same increased from 44 per cent to 63 per cent, while in SEC C and D and E homes, the digital penetration went up from 38 per cent to 56 per cent, and 37 per cent to 53 per cent, respectively. ■

CHENNAI

(Share of TV households)

4



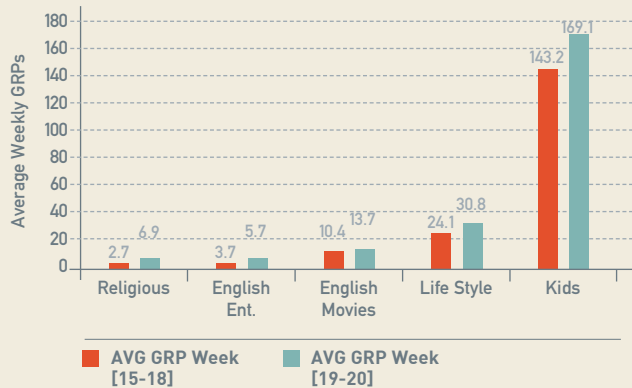
penetration of C&S households increased by 1 percentage point - around 11

THE NEW WORLD OF RATINGS

Digitisation is expected to change viewership patterns - and the fate of many channels.

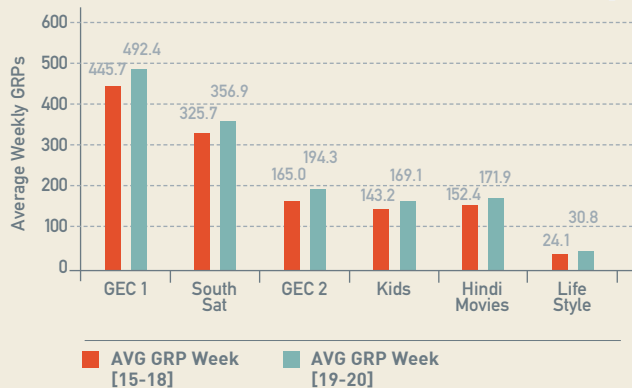
GALLOPING ON

(Genres that grew fast)



JUST BEGINNING

(Absolute growth of channels)



In the first two weeks of implementation of DAS 2, some niche genres showed early signs of growth. Surprisingly, religious channels recorded a growth of more than 150 per cent - though the base is too small to make too much of a difference immediately

One of the big changes to emerge from digitization will be a change in viewership habits. This, in turn, will change the pattern of weekly TAM ratings (the currency used by the Indian broadcasting industry) released by the Mumbai-based rating agency, TAM Media Research. By implication, this will also have its effect on the way media plans are drawn up.

In the first two weeks of implementation of DAS 2, some niche genres showed early signs of growth. Surprisingly, religious channels recorded a growth of more than 150 per cent - though the base is too small to make any difference. It grew from an average weekly GRP of 2.7 in the pre DAS era to 6.9 post DAS2.

In terms of growth rate, English Entertainment channels come in next with a growth of 55 per cent in average weekly GRPs. The category grew from 3.7 to 5.7 during the same period. The growth for English entertainment channels came from the SEC B segment where the average weekly GRP grew by 120 per cent - from 5 to 11.

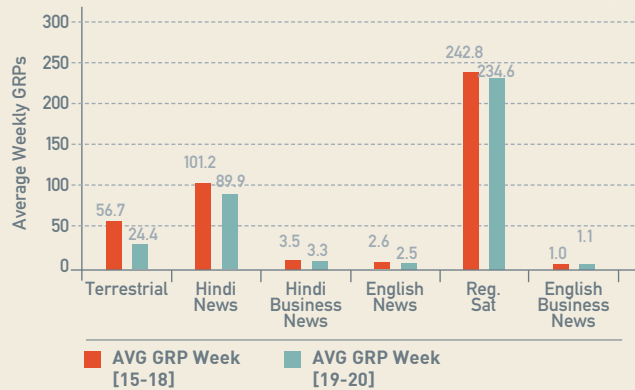
English movies grew by 32 per cent from an average weekly GRP of 10.4 to 13.7. This was followed by lifestyle channels, which grew from 24.1 to 30.8. The growth for English movies and lifestyle channels was the fastest in the SEC A category which grew by 48 per cent and 37 per cent, respectively.

The growth for these genres in absolute numbers might be insignificant compared to the market share that popular genres like general entertainment

SLOW COACHES

(News channels have taken a hit)

3



(*TAM Data analysed with help of Lintas Media Group). C&S, 4+, All India

When the entire country follows the DAS regime, these small trends of growth could be significant and change the media plan

channels garner every week. But it's also true that these are early days of digitization and only 38 cities and 4 metros have shifted to the digitization regime.

When the entire country follows the DAS regime, these small trends of growth could be significant and change the media plan drastically.

In terms of absolute growth, top rung GECs continue to be at the top and have recorded a surplus of 46 GRPs, up from 445 to 492. South-based satellite channels also increased their average weekly GRPs by 31 (from 325 to 356) followed by second-rung GECs, which grew by 29 GRPs.

However, the growth has been significant for the kids genre, which added 25 GRPs at the rate of 18 per cent. The kids genre grew from an average weekly GRP of 143 to 169. Hindi movies also added around 20 GRPs during the same period.

However, the implementation of DAS2 hasn't spelt good fortune for all genres. The news channels seem to have taken a hit. Most news channels were free-to-air and occupied a prime position in the cable format. In the post DAS regime, every channel irrespective of genre gets an equal field to play and content becomes the deciding factor in drawing viewers.

The general Hindi news genre fell by 11 per cent, while the Hindi business news genre dipped by around 6 per cent in the same period. The general Hindi news genre, which used to garner an average weekly GRP of 101 has now come down to 90. The Hindi business channels, in any case, own a very small pie of the viewership but have fallen from 3.5 to 3.3.

The English news genre, which has an even smaller pie of viewership recorded a fall in average weekly GRP from 2.6 to 2.5. On the other hand, the English business channels maintained status quo. The terrestrial channels were bound to see a dip and their average weekly GRP fell by 57 per cent. ■

EXPERTSPEAK

“

With digitization, the saying “Content Rules” has been reinforced. With wider choice of content, viewers have forced the broadcasters to provide for quality content. Superior programming, digital picture and sound is a bonanza to the viewer.

”

RITU DHAWAN
India TV



“

The leader brands have benefited due to a bigger role of the brand value and challenger brands are gaining on account of better sampling opportunity and a focused marketing investment.

”



ASHISH BAGGA
India Today Group

“

Digitalization is the way forward as technological innovation has made it possible to provide options and quality which was not available earlier.

”



ANAND CHAKRAVARTHY
BIG CBS Networks

“

In the digital era, all channels provided by the cable operator will be available to the viewer in the same quality as one another. The viewer will have the choice of subscribing to the channels that they fancy.



KEERTAN ADYANTHAYA
NGC Network (India)

“

Post digitisation, relevance and differentiation of content and strengthening of perception will be important to make the viewer choose a particular channel over and over again.

”

DEBARPITA BANNERJEE
NGC Network (India)



“

The broadcaster’s pie will rise from 21 to 40% of revenues generated from the end-user. The absolute share of revenue will go up from Rs 5,100 crore to ₹28,800 crore per annum.

”

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