



South Special Edition



It has been observed that Indian media space is broadly divided into two macro markets namely Hindi Speaking Market popularly called as HSM and Southern Market. They seem like almost two different countries with very different cultures and languages. The southern market does deserve a dedicated newsletter edition to do justice to the size and diversity of the market.

The Questions That We Are Attempting To Answer Are...



How Southern India is different from HSM w.r.t. important audience metrics?



How Southern states differ from each other in terms of programme theme preference, Avg. Time Spent (ATS) vs Opportunity to See (OTS) and performance of product categories?



How are the Urban and Rural markets of southern states different from each other?



How does the popular Hindi content dubbed in southern languages perform?



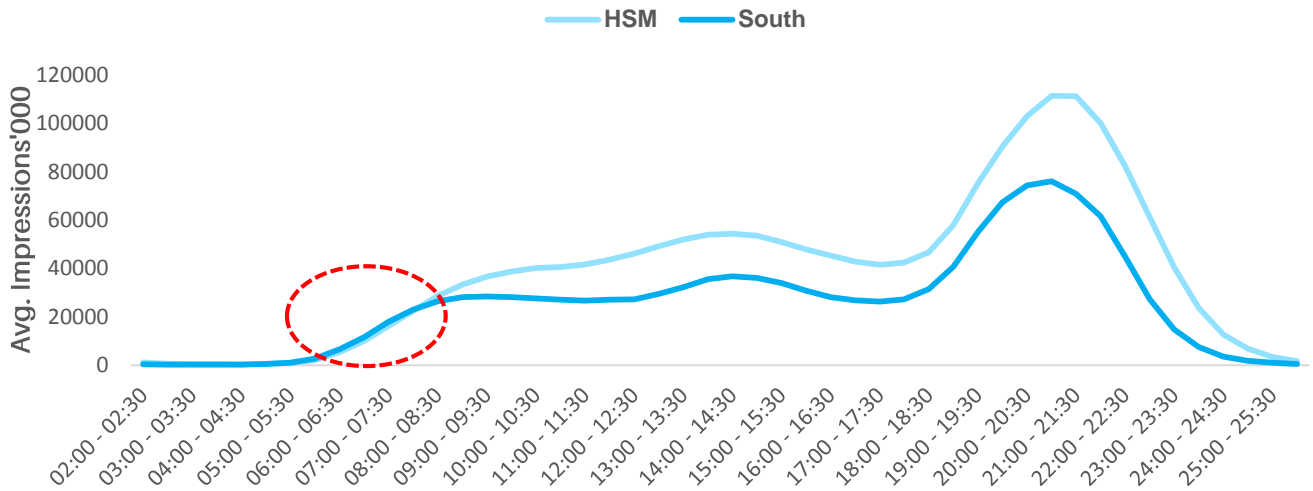
What are the major learnings for broadcasters and media professionals for southern India TV space?



**Is South different
from HSM?**

1. A. All Day Trends

By Viewership

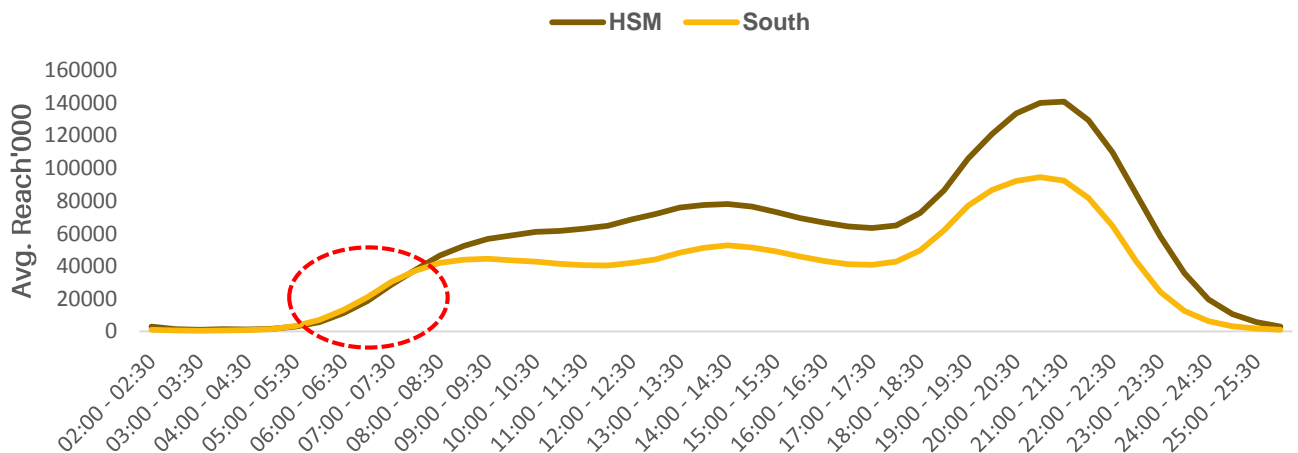


South Indian audiences seem to begin their TV viewing earlier than HSM and also wind up earlier than HSM.

South has higher viewership than HSM only during early morning hours (05:00-08:00).

The gap between HSM and South reduces marginally during 18:00-21:00 hrs. South seems to have an earlier prime-time than HSM.

By Reach



Reach and Impressions show similar trends across HSM and South Market.

Southern India has marginally higher Reach and Impressions during morning hours (05:00-08:00) while HSM has a higher Reach later all day throughout. This could be due to the fact that HSM has higher number of TV homes than southern India.

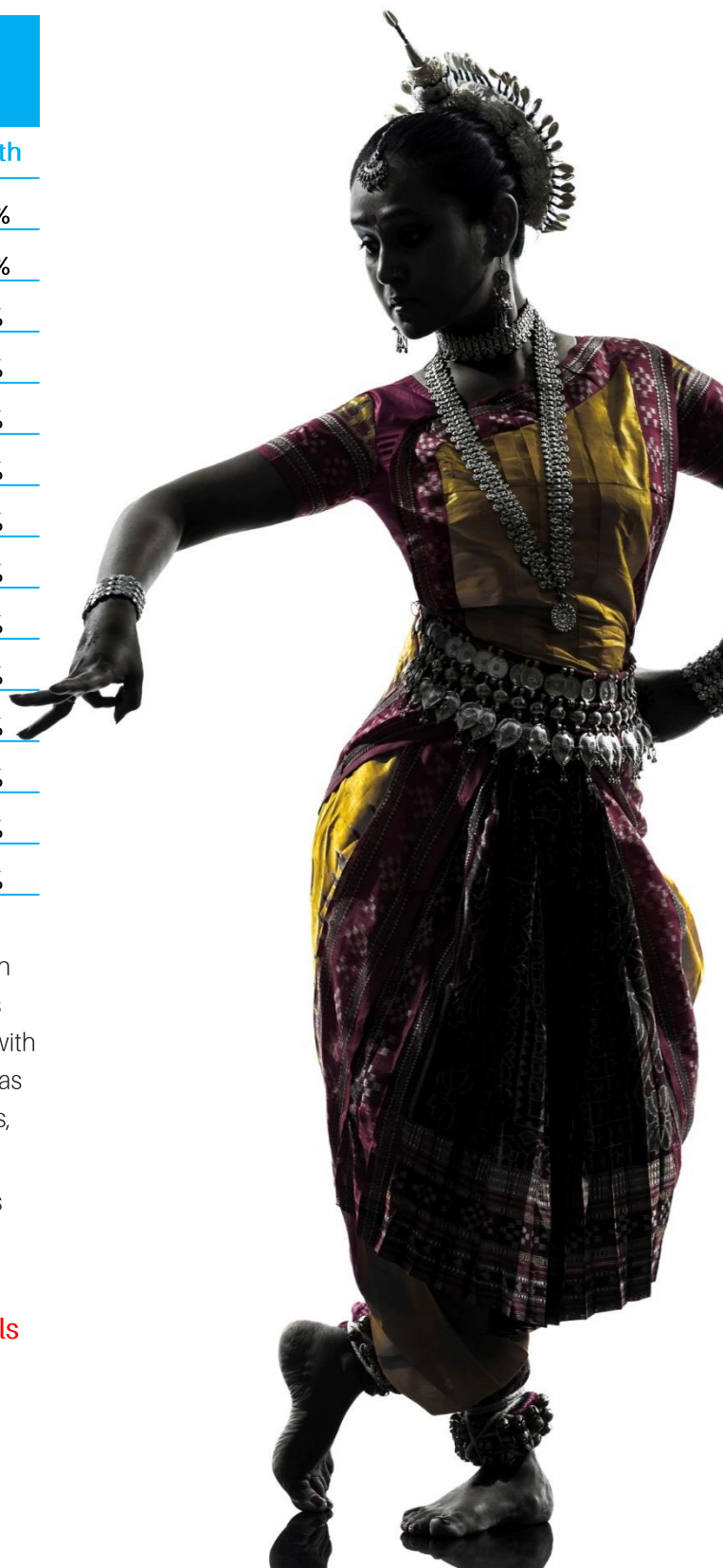
1. B. Channel Share

Genre	Sum Impressions'000		Share (%)	
	HSM	South	HSM	South
GEC	20357	16027	52%	62%
Movies	9848	3711	25%	14%
News	2502	2283	6%	9%
Kids	2381	1370	6%	5%
Music	2045	1343	5%	5%
Sports	991	694	3%	3%
Infotainment	426	213	1%	1%
Youth	353	27	1%	0%
Lifestyle	66	26	0%	0%
Teleshopping	42	3	0%	0%
Spiritual	23	39	0%	0%
Business News	14	2	0%	0%
Property NEWS	0	0	0%	0%
Political	0	0	0%	0%

South has a **lower share for Movies genre than GEC**. On the other hand, their share for GEC & News channels is higher than HSM. This could further be substantiated with respect to program theme table later in the newsletter as program themes could be well spread across channels, irrespective of channel genre.

Within the regions, the relative ranking for most genres remains constant across HSM and South.

However, it needs to be kept in mind that this would be influenced by the number of channels falling under each Channel genre.



1. C. Program Theme Preference

By Impressions

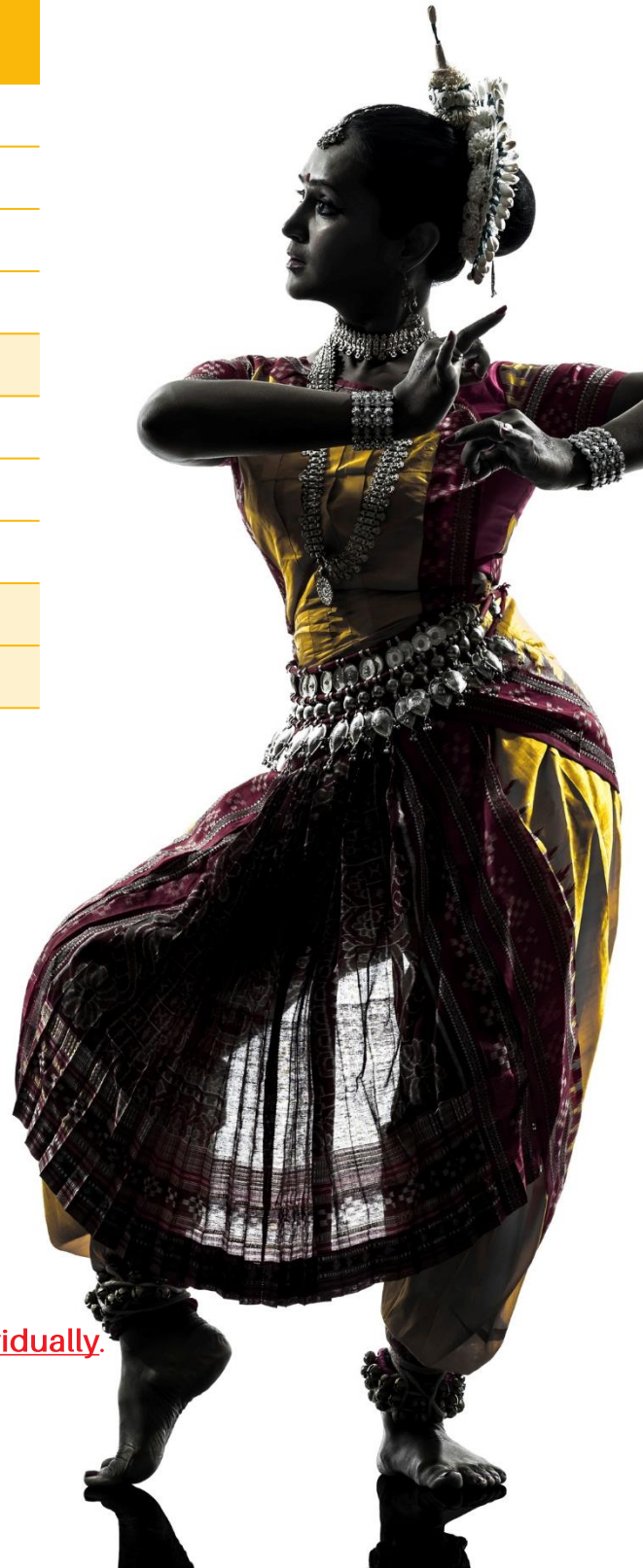
Program Theme	HSM	South	Difference (South – HSM)
Serials	45%	32%	-13%
Film Based	33%	39%	6%
Miscellaneous	10%	12%	2%
News/Business	5%	8%	3%
Sports	5%	4%	-1%
Game/Talk/Quiz	1%	3%	2%
Music	1%	0%	-1%
Nature/Tourism	1%	1%	0%
Lifestyle	0%	1%	1%
Others	0%	0%	0%

% Share of Normalised Impressions'000

Surprisingly, program themes and channel genres **do not** show the same trends across HSM and South. Serials, which are the staple of GEC channels (which saw the highest share in terms of channel genre), sees a drop in share for South as compared to share for channel genre. Similarly, while we saw that Movie channels are viewed lesser than HSM, in South, the **trend is reversed** when it comes to **Film based programs** i.e. South has a **higher share** compared to HSM.

While it is clear that South and HSM **do not** have the same viewership trends, is it enough to look at Southern region at a composite level? Or at state level?

Let us look at the four states in South region individually.





**How Southern
States Differ From
Each Other?**



2. A. By Program Theme

Program Theme	South	AP/Telangana	Karnataka	Kerala	TN/Pondicherry
Film Based	39%	42%	37%	32%	41%
Serials	32%	27%	34%	37%	34%
Miscellaneous	12%	11%	14%	14%	12%
News / Business	8%	10%	5%	6%	7%
Sports	4%	4%	5%	4%	3%
Game / Talk / Quiz	3%	5%	2%	5%	2%
Lifestyle	1%	1%	2%	1%	1%
Nature / Tourism	1%	0%	0%	1%	1%
Music	0%	0%	0%	0%	0%
Others	0%	0%	0%	0%	0%

% Share of Normalised Impressions'000; Miscellaneous contains 'Reality Shows', 'Cartoons/Animation', 'Religious/Devotional/Astrology', 'Health/Fitness' etc.

Southern Market shows highest inclination towards Film-Based content followed by Serials driven by AP/Telangana and Kerala respectively.

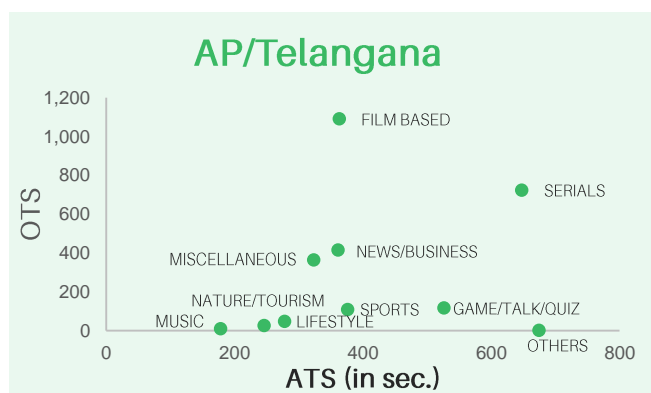
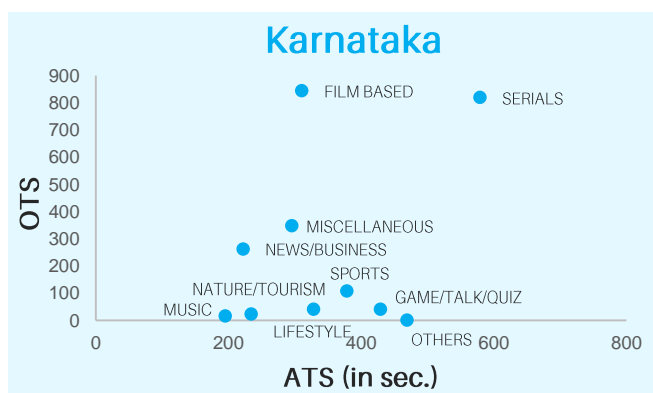
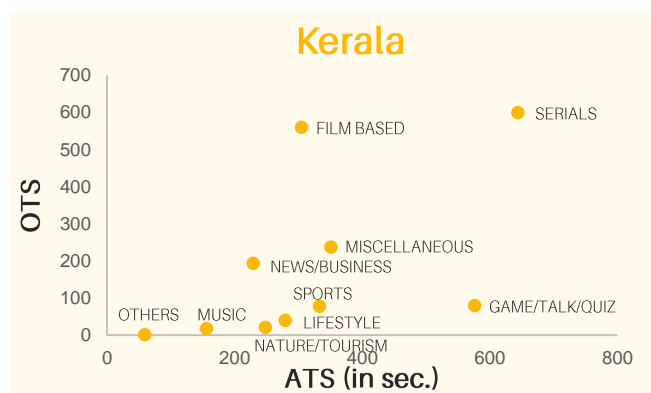
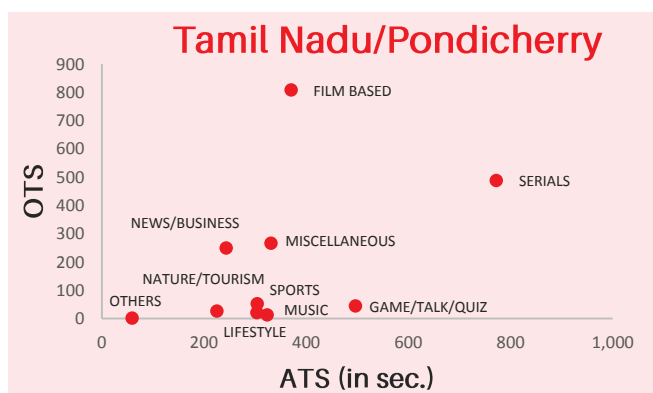
Kerala watches **less Movies** as compared to other markets. Surprisingly, on the other hand, **AP/Telangana** watches less Serials & more of **News/Business** than other southern markets.

In most of the markets, the **most watched** TV content is **Film-based** followed by Serials. Content based on Music and Nature/Tourism is the least popular in southern markets.

2. B. ATS vs OTS

Average Time Spent on any Channel, Genre or Theme by the audience gives an idea about the stickiness of the content. On the other hand, if the same is cross-referenced by the frequency (also called 'Opportunity To See' or 'OTS') at which the content was aired on TV, it could give some deeper and interesting inferences with respect to what kind of content was thrown in to the audience how many times, out of which, where did the audience chose to spent most of the time.

Let's look at the analysis by Program Theme



The relative performance of program themes remains similar across the four states.

Serials has the highest score in terms of ATS for all the 4 states. In terms of OTS it is second only to Film Based, except in Kerala where it has the maximum OTS as well.

As mentioned above, in spite of having highest OTS, Film-based content has lower ATS than Serials. On the other end of the spectrum is Game/Talk Show/Quiz which has a high ATS but is among the lowest when it comes to OTS.

Miscellaneous & News/Businesses based content have a mediocre score on both ATS and OTS.

The worst performing content themes in terms of both ATS & OTS are Music, Nature/Tourism and Lifestyle.

TN and AP looks similar whereas Karnataka and Kerala looks similar. Does this mean that in **Southern Market Divide Is Vertical** in terms of western vs eastern states?

2. C. Top Advt. Categories

Ad Category	South	AP / Telangana	Karnataka	Kerala	TN/Pondicherry
Food & Beverages	24%	22%	24%	26%	25%
Personal Care/Personal Hygiene	19%	19%	21%	14%	18%
Miscellaneous	7%	9%	4%	5%	7%
Hair Care	6%	6%	8%	4%	6%
Services	6%	6%	7%	5%	6%
Auto	6%	5%	6%	7%	6%
Household Products	5%	5%	5%	5%	5%
Personal Healthcare	4%	4%	4%	3%	4%
Laundry	4%	4%	4%	3%	3%
Durables	3%	3%	3%	4%	3%
Personal Accessories	3%	3%	2%	5%	3%
Telecom/Internet Service Providers	3%	2%	3%	4%	3%
Telecom Products	2%	2%	3%	2%	2%
Banking/Finance/Investment	2%	2%	1%	1%	2%
Retail	1%	1%	1%	3%	2%
Building, Industrial & Land Materials/Equipments	1%	1%	1%	4%	1%
Textiles/Clothing	1%	1%	1%	2%	1%
Babycare	1%	1%	1%	1%	1%
Education	1%	1%	0%	1%	1%
Corporate/Brand Image	0%	1%	1%	0%	0%
Computers	0%	0%	1%	0%	1%
Alcoholic Drinks	0%	1%	1%	0%	0%
Fuel/Petroleum Products	0%	0%	1%	0%	0%
Cosmetics	0%	0%	0%	0%	0%
Agriculture	0%	1%	0%	0%	0%
Media	0%	0%	0%	1%	0%
Office Automation	0%	0%	0%	0%	0%
Appointments	0%	0%	0%	0%	0%

% Share of Normalised Impressions'000

Food & Beverages is the most viewed advertised category in the South market, majorly driven by Kerala. The next biggest category for South market is Personal Care/Personal Hygiene, which is driven by Karnataka.

The least popular categories overall are Cosmetics, Office Automation & Appointments.

While the relative ranking of categories remains constant across all markets, some categories are more / less popular in certain markets.

For example, in AP/Telangana market, while Food & Beverages category is the biggest category, it is not as popular as in the other markets. Conversely, Miscellaneous category (Events, Political Ads, Stationery, Music Album, Announcements, Film Trailer etc.) has a higher popularity in AP/Telangana.

Personal Care/Personal Hygiene and Hair Care are more viewed in Karnataka as compared to other southern states. This could further be validated with reference to impressions generated by program theme as lifestyle based content generating better viewership.

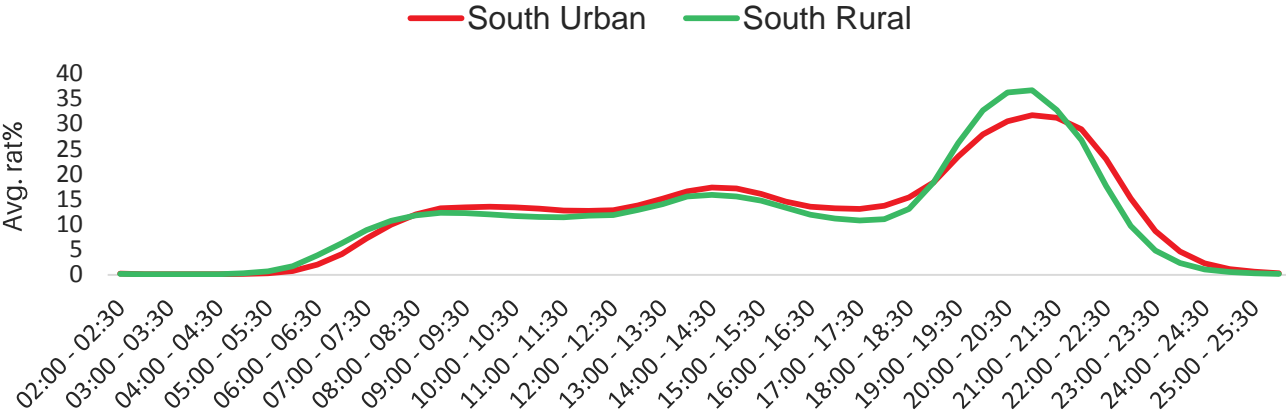
This indicates that among southern states Karnataka Is Skew Towards Affluent Content And Fashion For Self.

Similarly, Building, Industrial & Land Materials/Equipment & Personal accessories categories are more popular in Kerala.

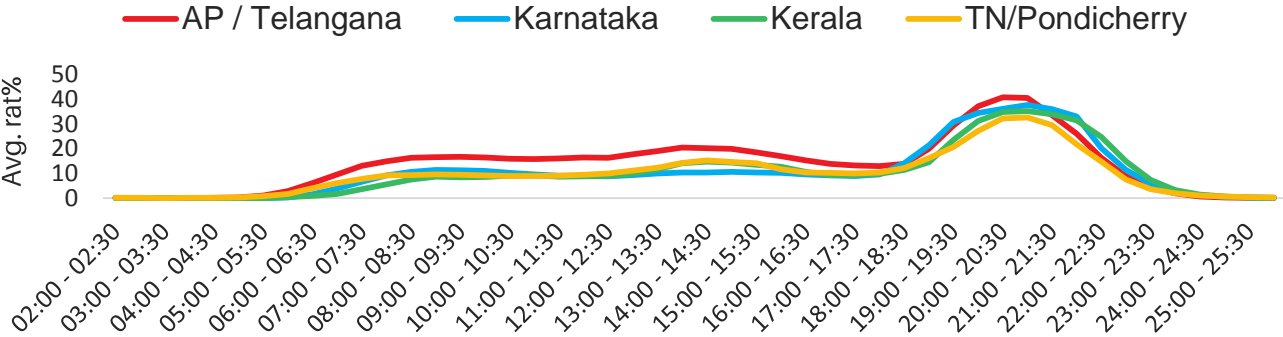


**How different
are Southern
states in terms of
Urban & Rural?**

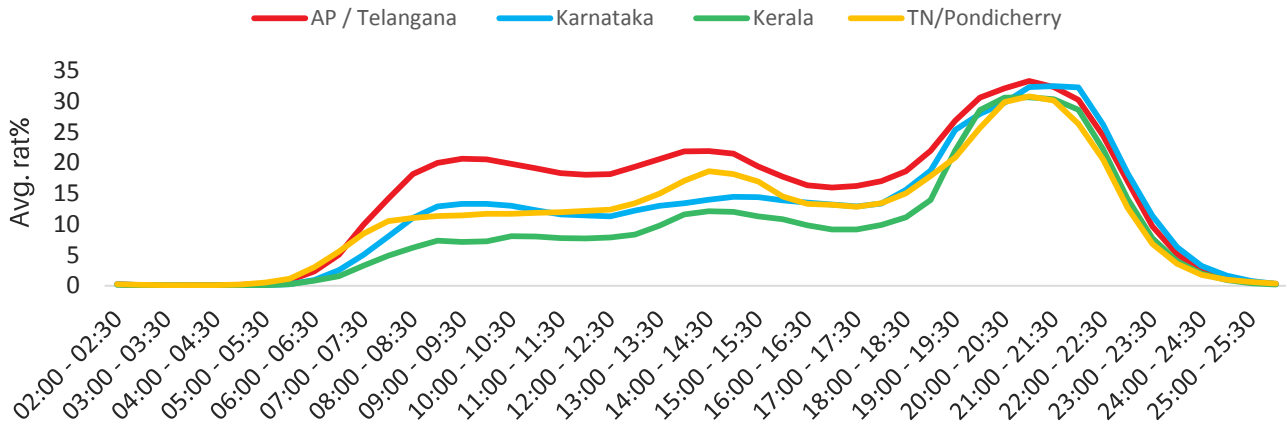
3.A. All Day Trend- Viewership



Rural



Urban



Urban and Rural viewership is comparable throughout the day with both seeing a peak during the Prime-Time hours. However, as opposed to the rest of the day, during Prime-Time hours it is mainly the Rural markets which seems to be driving the viewership and not Urban markets.

When we look at states within Urban & Rural markets, we can see that while Rural markets have similar viewership trends across states, it is not the same case with Urban markets.

In Urban markets, the viewership among markets differs between Prime time hours and non-Prime time hours. During non-Prime time hours, AP/Telangana has a maximum viewership. After AP/Telangana, the maximum viewership alternates between TN/Pondicherry & Karnataka markets with Kerala having the lowest viewership for most dayparts.

However, during Prime time hours, this order is completely changed. Urban Karnataka has the maximum viewership post 21:00 hrs and this lead continues into late night hours as well.

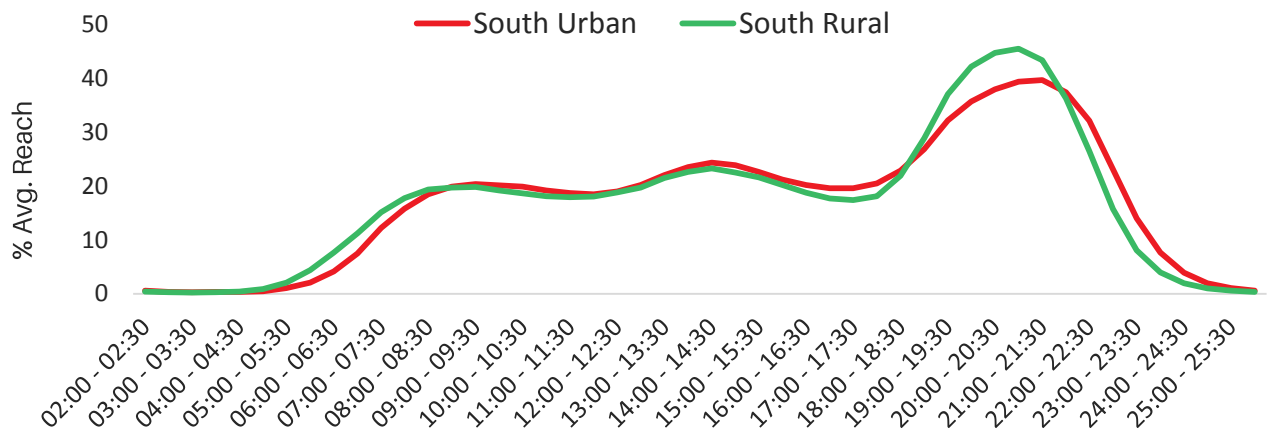
What is interesting is that even among the Rural markets, Karnataka displays similar behaviour with respect to Prime time viewership. During late night hours, Kerala, which is a relatively smaller market sees the highest viewership.

Conversely, TN/Pondicherry, which is one of the bigger markets during non-Prime time hours, shows the least viewership during Prime time hours in both Rural & Urban markets.

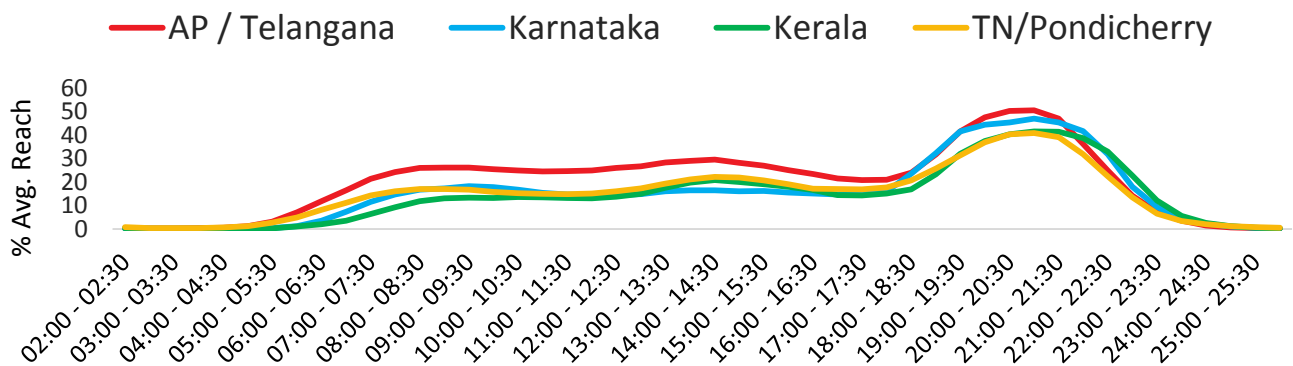
Is The Viewership Divide In South Urban & Rural Market A Result Of The Prime Time And Non-prime Time Divide In Reality?



3. B. All Day Trend- Reach

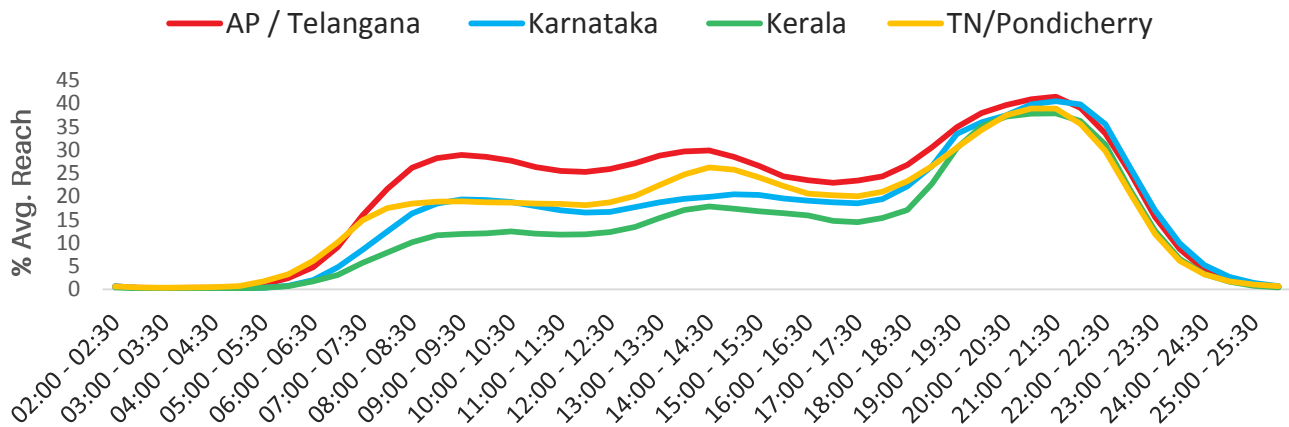


Rural





Urban



The trend remains the same for the markets on comparing Reach. On an overall level, in most time-bands, it is South Rural market which marginally edges South Urban out. Rural as well as Urban south market reach is being driven by AP/Telangana.

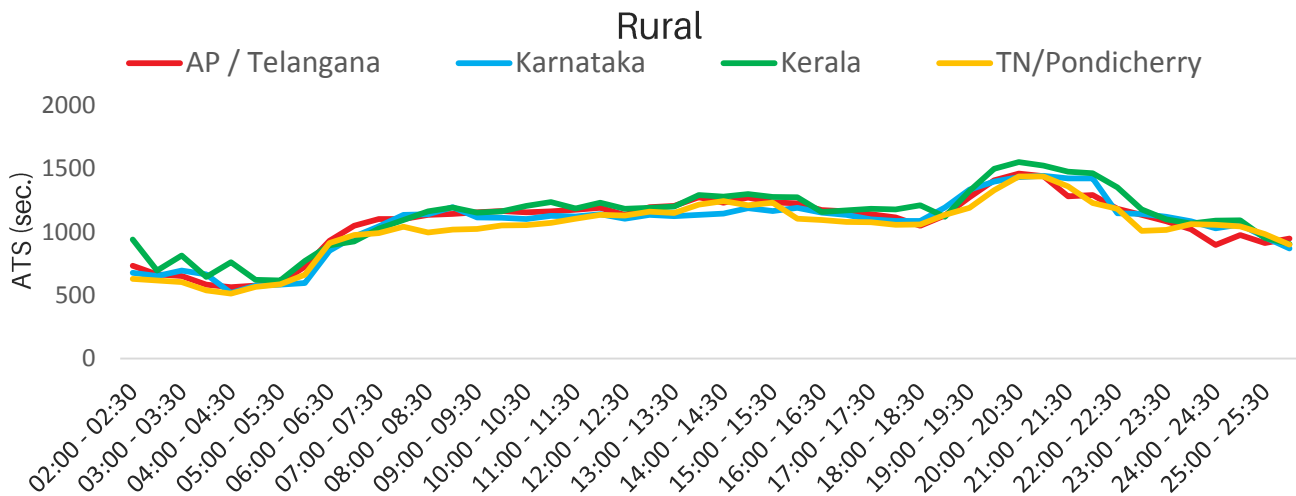
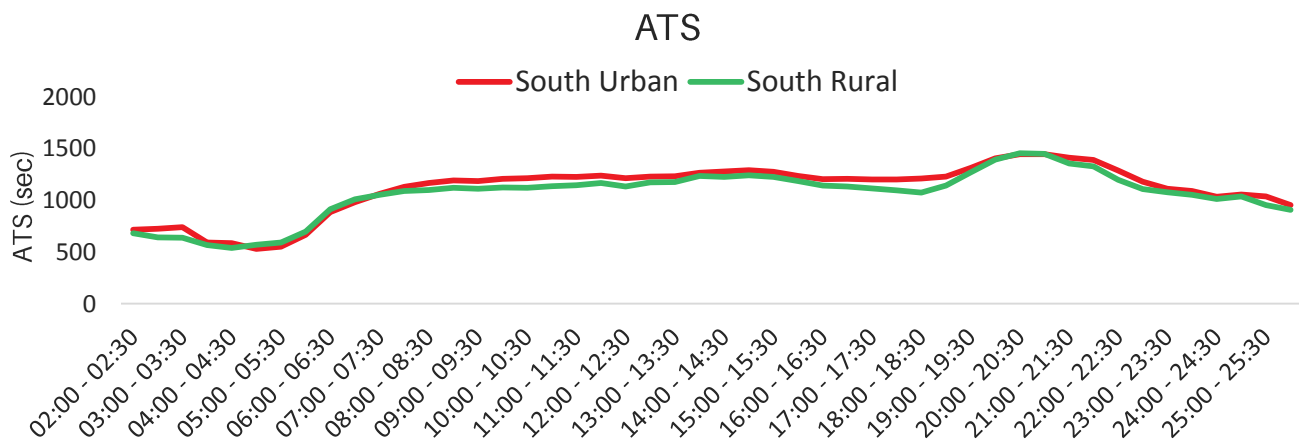
The difference is much starker from 18:00 hrs. onwards. During Prime-time (18:00-22:00), South Rural market has a significantly higher reach than South Urban market. Conversely, post 22:00 hrs. the Reach of South Urban market is higher than South Rural.

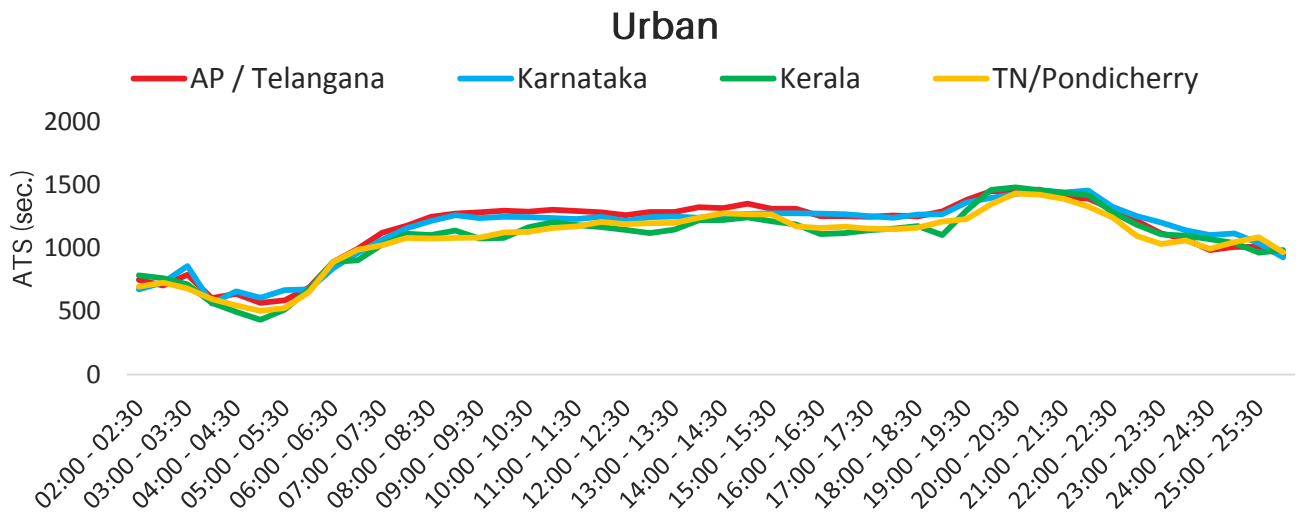
Reach among the southern states differs as the day progresses. AP/Telangana reports the highest reach throughout the day within Rural and Urban market (except during late night bands).

Kerala reports the lowest reach for both Urban and Rural except for late night bands in Rural market.



3. C. All Day Trend – ATS

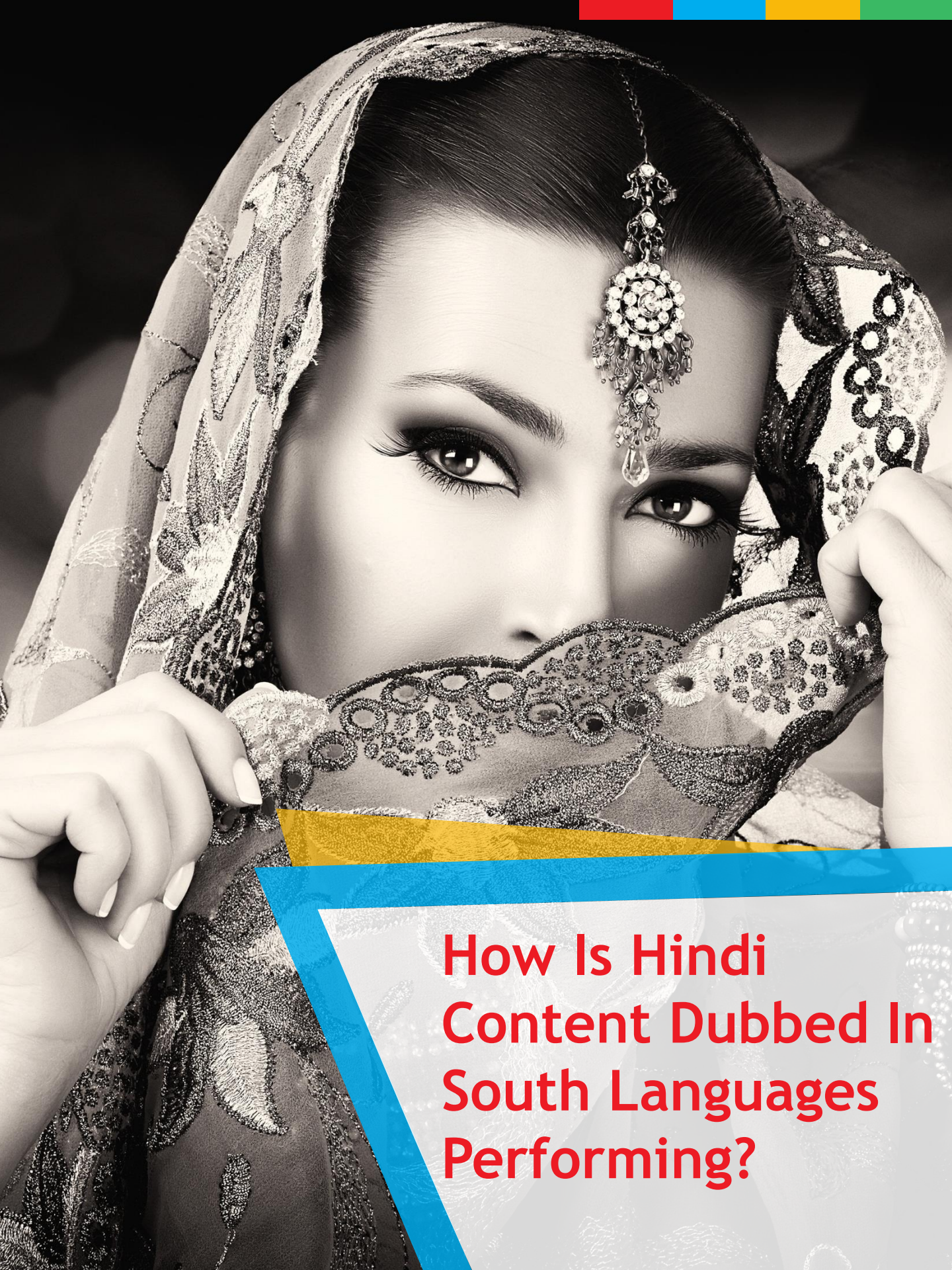




In terms of ATS, South Urban and South Rural markets are almost at par with each other. Urban has a very marginal edge over Rural in some time-bands. The southern rural market is being driven by Kerala during primetime hours.

South Rural market reports a higher ATS during Prime-Time hours (19:30-20:30) than South Urban market. However, during 17:30 to 18:30 South Rural market witnesses dip in its time spent as compared to South Urban market.





**How Is Hindi
Content Dubbed In
South Languages
Performing?**

Popular content from Hindi GECs is now being dubbed and shown on Southern GECs. This phenomenon is seen across all Southern states with the exception of Karnataka.

Popular shows from leading channels like Star Plus (Diya Aur Baati Hum, Siya Ke Ram, etc.), Colors (Naagin, Sasural Simar Ka, Balika Vadhu, etc.), Zee TV (Gangaa, Kumkum Bhagya, Ek Mutthi Aasman, etc.) and Sony (CID, Bade Achhe Lagte Hai, etc.), have been dubbed.

Language	Channel	Hindi dubbed (A)	Original Content (B)	Hindi dubbed as % of Original Content (A/B)
Malayalam	Asianet	97	302	-68%
	Asianet Plus	132	25	419%
	Flowers TV	31	74	-58%
	Surya TV	67	58	16%
	Grand Total	88	119	-26%

Language	Channel	Hindi dubbed (A)	Original Content (B)	Hindi dubbed as % of Original Content (A/B)
Tamil	Jaya TV	57	53	6%
	Polimer	115	54	112%
	Raj TV	22	34	-36%
	STAR Vijay	85	128	-34%
	Sun TV	1225	899	36%
	Zee Tamil	135	85	60%
	Grand Total	103	213	-52%

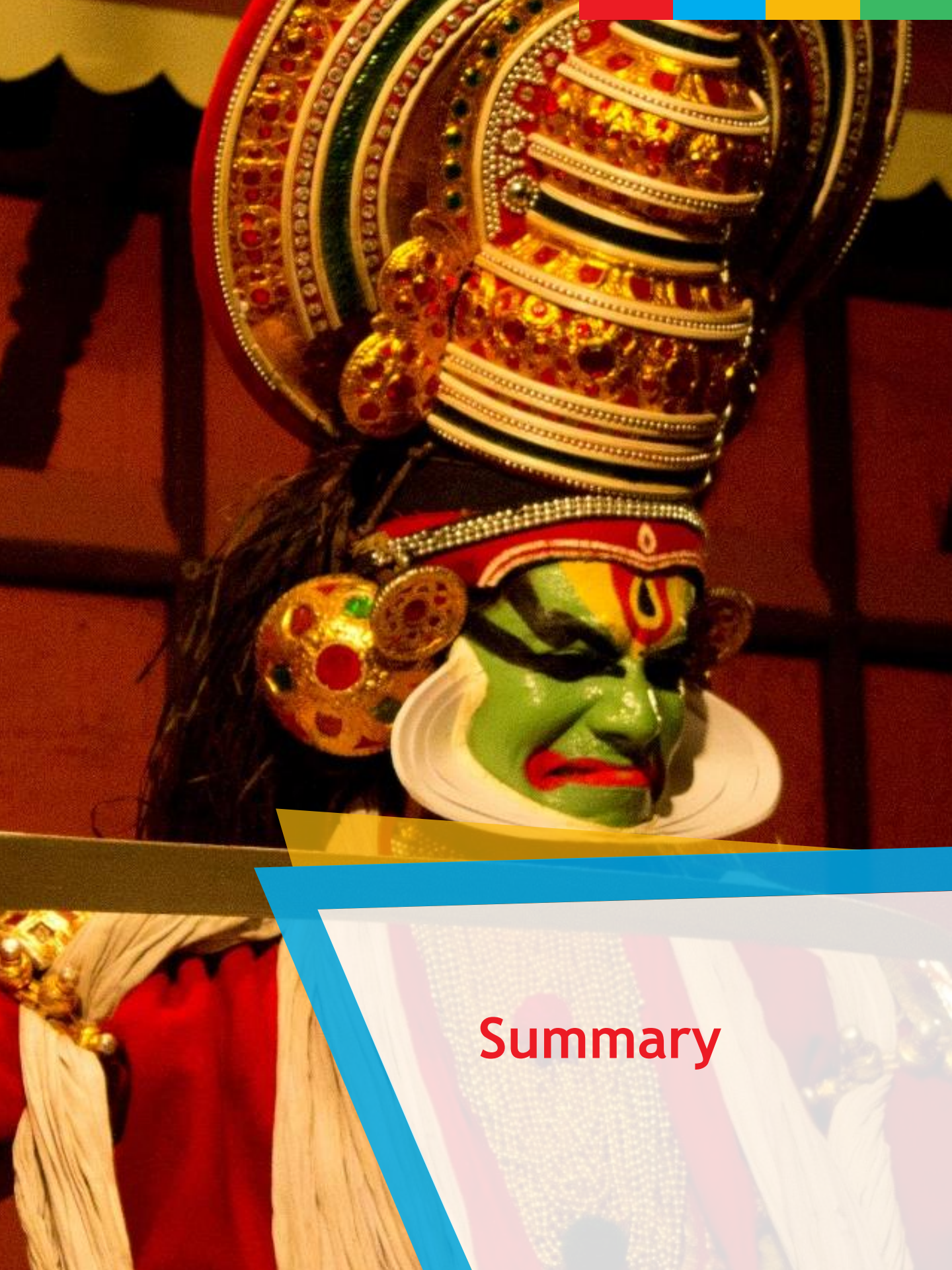
Language	Channel	Hindi dubbed (A)	Original Content (B)	Hindi dubbed as % of Original Content (A/B)
Telugu	ETV Telugu	153	416	-63%
	Gemini TV	286	402	-29%
	Maa TV	307	391	-21%
	Zee Telugu	168	374	-55%
	Grand Total	247	395	-38%

Avg. Normalised Impressions'000 In Kerala Market For Malayalam, TN/Pondicherry Market For Tamil & AP/Telangana Market For Telugu; Only the top popular programs have been considered for the analysis and it is not an exhaustive list

Interestingly, in AP/Telangana market none of the channels see an increase in viewership for Hindi dubbed content. In the other two markets viz. Kerala and TN/Pondicherry, Hindi dubbed content sees a mixed response with some channels seeing higher viewership than original content in regional language.

In Kerala market, the highest spike is seen by Asianet Plus.

Similarly, in TN/Pondicherry market, the maximum growth is seen by Polimer, where viewership for Hindi dubbed content is more than double that of original content. This is on the back of several popular shows.



Summary

Summary



While Film-based content is one of the biggest program themes in South, it is not confined to just Movie Genre channels, but spread across different genres



Southern India believes in the concept of beginning and ending the day early, unlike HSM. This reflects in their viewership trend where South market has a higher viewership during morning hours which reduces during late night hours



The conventional belief that people in South are movie buffs is not quite reflected if looked at just Channel Genre Share, but it does hold true if Program Themes are compared (Film based theme has the highest share). Audiences are program theme loyal and not channel genre loyal.



TN and AP look similar whereas Karnataka and Kerala look similar for program themes w.r.t. OTS vs ATS. Does this mean that in southern market divide is vertical in terms of western vs eastern states?



Food & Beverages is the most viewed product category in all the southern markets followed by Personal Care/Personal Hygiene which is one of the most popular categories in Karnataka.



Furthermore, Karnataka has the highest viewership for Lifestyle based content which shows its inclination towards affluent and aspirational content



In spite of higher OTS of Film Based content than Serials, audiences in southern India spend more time on Serials. This reflects the higher engagement for Serials as compared to Film based content.



In terms of all day trends observed in Urban and Rural markets in Southern region, Urban market, shows an interest in late night TV viewing as compared to Rural market.

Is This An Indication Of Unlearning The Conventional Facts About Some Of The Genres In Southern Market And Also Urban Rural Divide..?



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