

VIEWERSHIP OF MOVIES IN SOUTH INDIA



THINK

NEWSLETTER Nov 2018 – Oct 2019

INTRODUCTION

India is home to one of the largest film industries in the world. Every year thousands of movies are produced in India and is lapped up by a vast film-going Indian public. Indian films have been gaining increasing popularity in the rest of the world, especially in countries with large numbers of emigrant Indians. Back home the love for the silver screen plays out on the small screen as well.

As a program genre, feature films / movies are the largest contributors to television viewership at 30% followed by drama/soaps at 25%. The strong affinity for movies makes it's a mainstay in most media plans. Every major broadcaster has a finger in the movie pie either in terms of one or more dedicated movie channel and / or by way of movies playing on channels in other genres within the network.

It is no secret that the south of India makes and consumes movies on a large scale vis-a-vis the other parts of the country. Picture this, pun unintended, the per capita p.a consumption of respective regional movies range from a whopping 415 hours in AP/Telangana to 206 in Karnataka, Hindi movies in HSM clock 125 hours of per capita p.a. consumption. 4 South languages, accounts for 32% of airtime of all movies on television. And along with Dubbed Movies, most of which are from South, the number rises to 42%.

This edition of THiNK newsletter focuses on the performance of movies from the 4 south states – AP/Telangana, Karnataka, Kerala and TN/Pondicherry. Welcome to Tollywood, Sandalwood, Mollywood and Kollywood to unravel lovely, dark, deep observations in the last 12 months : November 2018 to October 2019.





859 K hours screen time

The combined run time of movies on the small screen in the last 12 month period from Nov 2018 to Oct 2019

135 BN hours of viewing

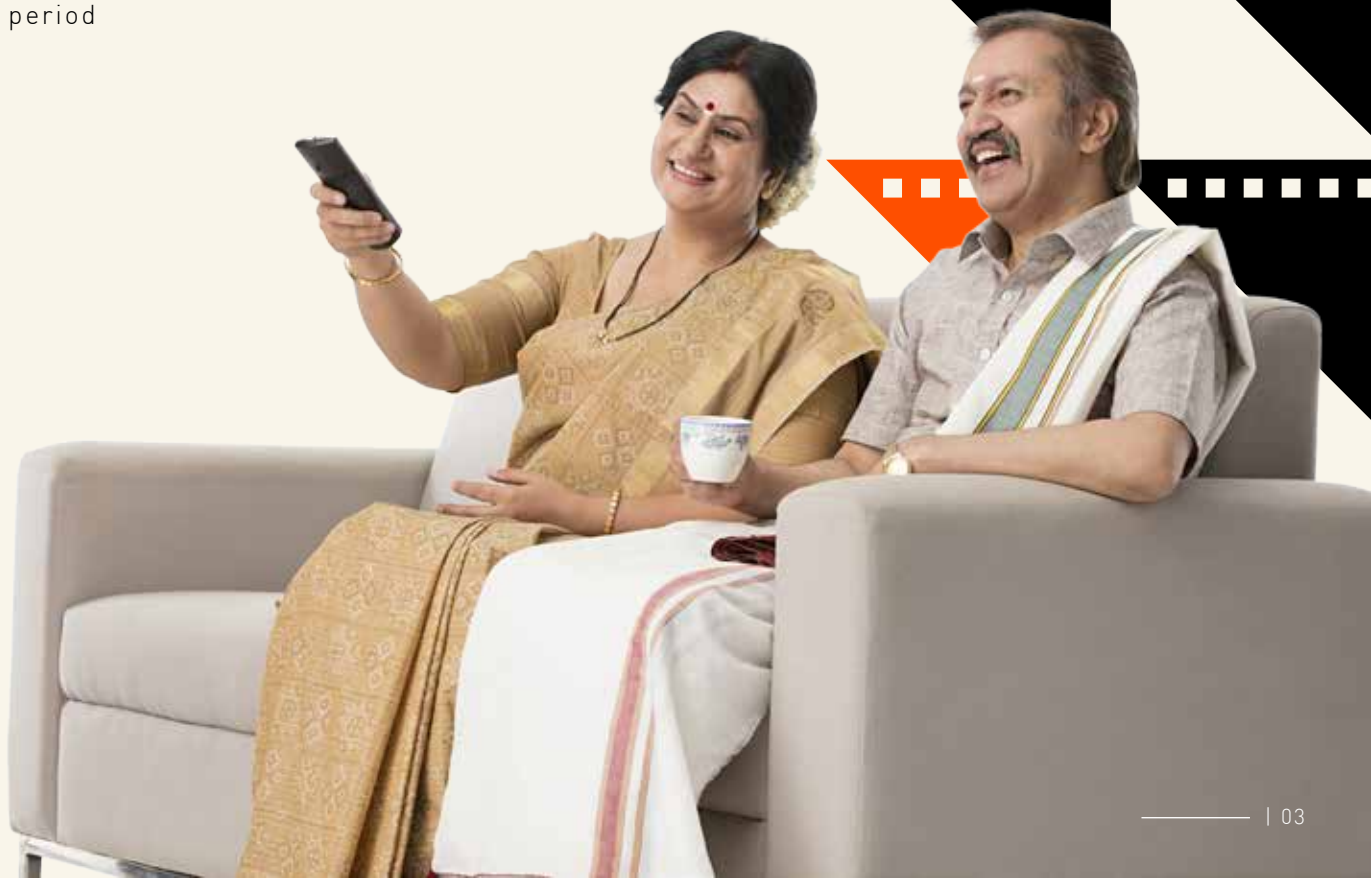
Movies originating from South clocked 135 Bn hours of viewing minutes annually which is 2.6 Bn hours per week on an average

43% movies from South

In terms of duration of movies on television, 43% of movies belonged to South: Telugu, Tamil, Kannada and Malayalam (11%, 9%, 6.1% and 5.6% respectively), Dubbed Hindi Movies contributed 11%

26 K unique movies

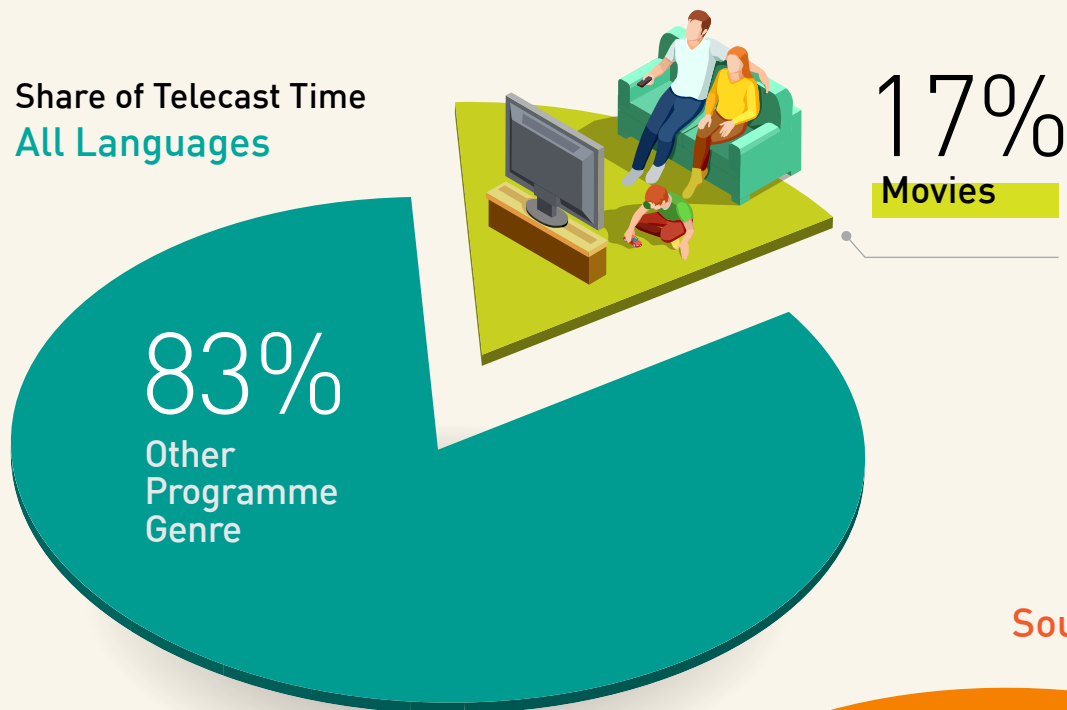
Telecast on 279 channels across 16 languages in the Nov 2018 to Oct 2019 period



LANDSCAPE OF MOVIES ON TELEVISION

Out of the 4.9 Mn programming hours on television annually, movies clocked 17% of airtime in the same period. The contribution of movies to total programming content varies across languages. South languages for instance are higher in terms of movie contribution at 23%.

Share of Telecast Time
All Languages



Share of Telecast Time
South Indian Languages



MOVIES WORK HARD* THAN MOST OTHER PROGRAMME GENRES AND MOVIES FROM SOUTH WORK HARDER

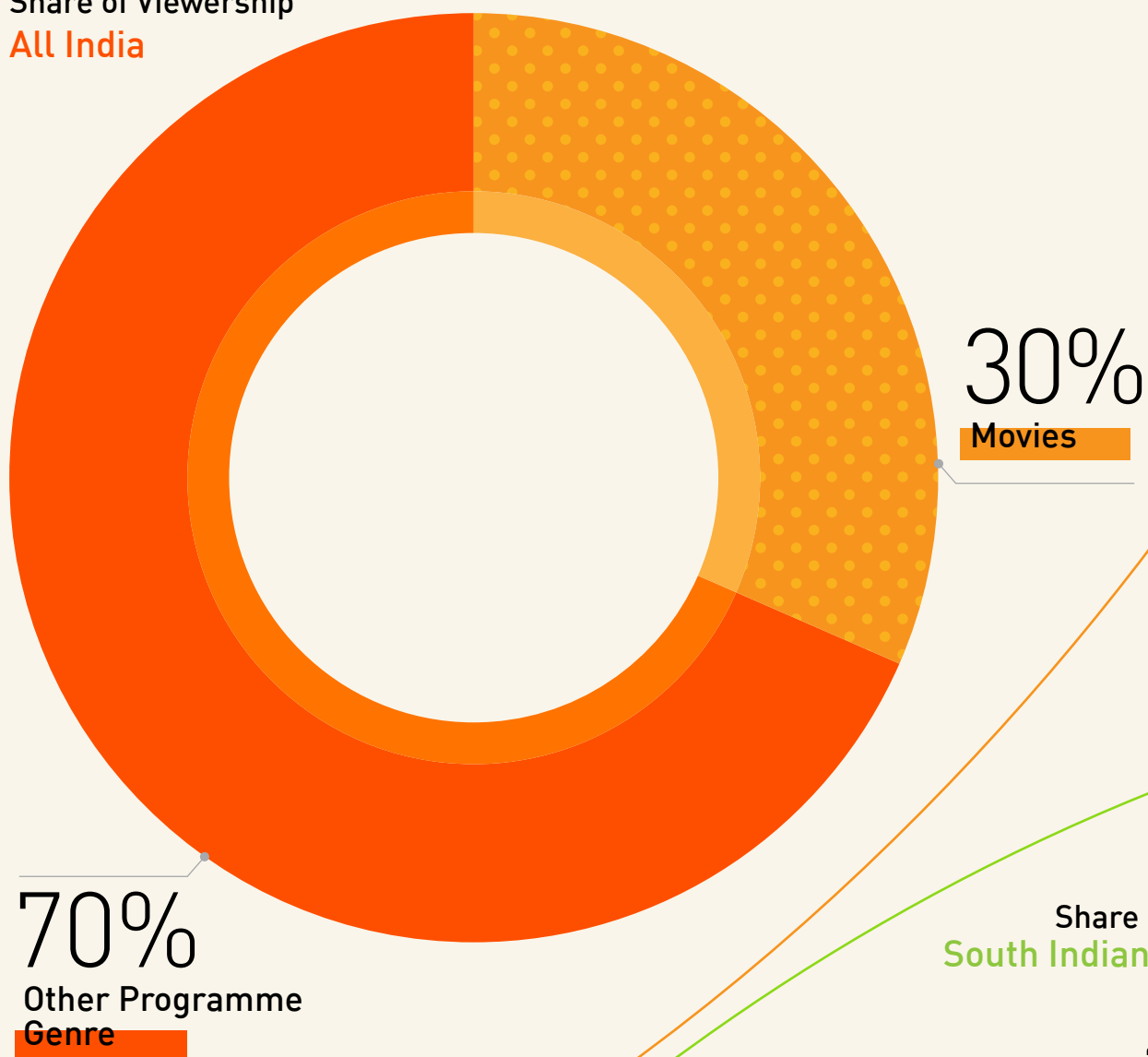
Contribution of movies to total viewership is 30%, and therefore is a winning content on television as it is positively indexed over airtime (30% viewership from 17% of airtime).

Given the differing nature of television viewing and content preference across geographies and audiences, this index is higher for some languages vis-à-vis others. For South languages movies contribute to 42% viewership from 23% airtime.

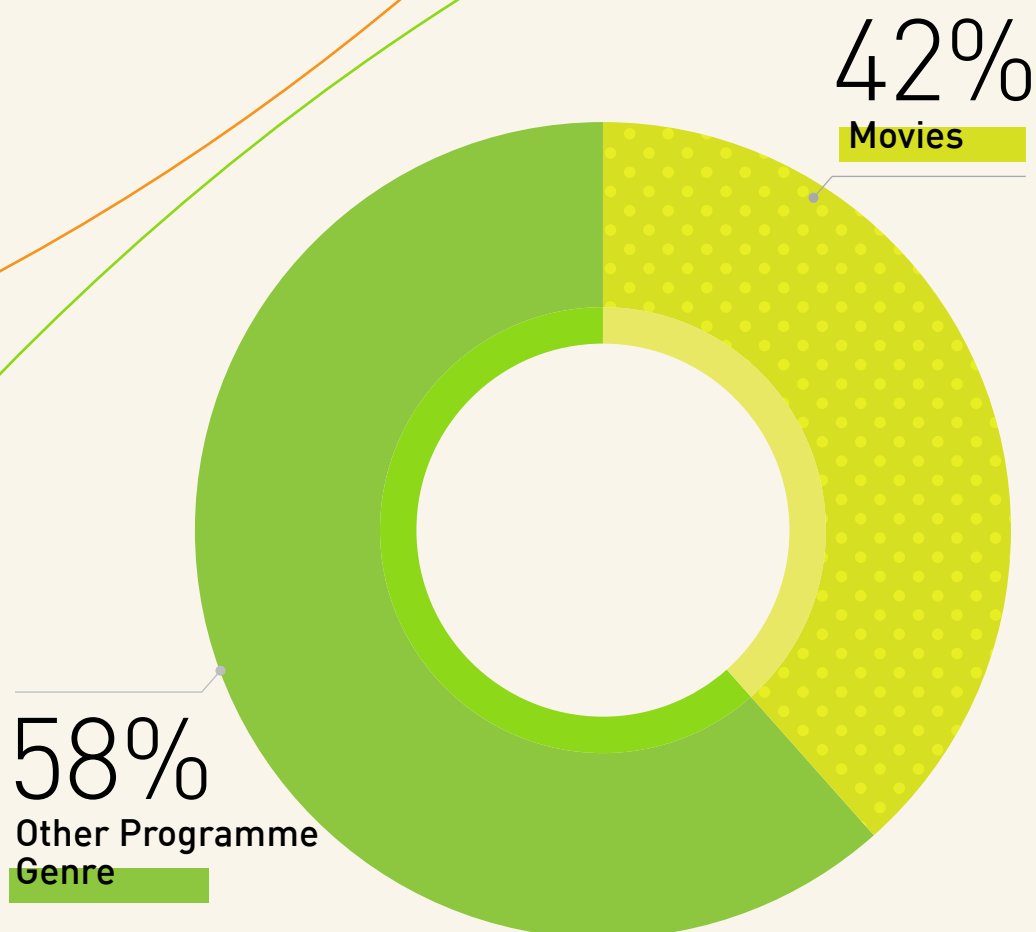
*movie viewership contribution to total viewership of Programmes is greater than movie airtime contribution to total airtime of Programme



Share of Viewership
All India



Share of Viewership
South Indian Languages



All India, 2+, Nov '18 – Oct '19
Languages Considered:
Dubbed Hindi, Malayalam,
Kannada, Tamil, Telugu

SOUTH VIEWERSHIP IS DIFFERENT ON MANY COUNTS DUE TO...



Average daily tune-ins
in each of the Southern
states is higher than
the national
average



Number of channels
showing movies is higher
than other regional
languages



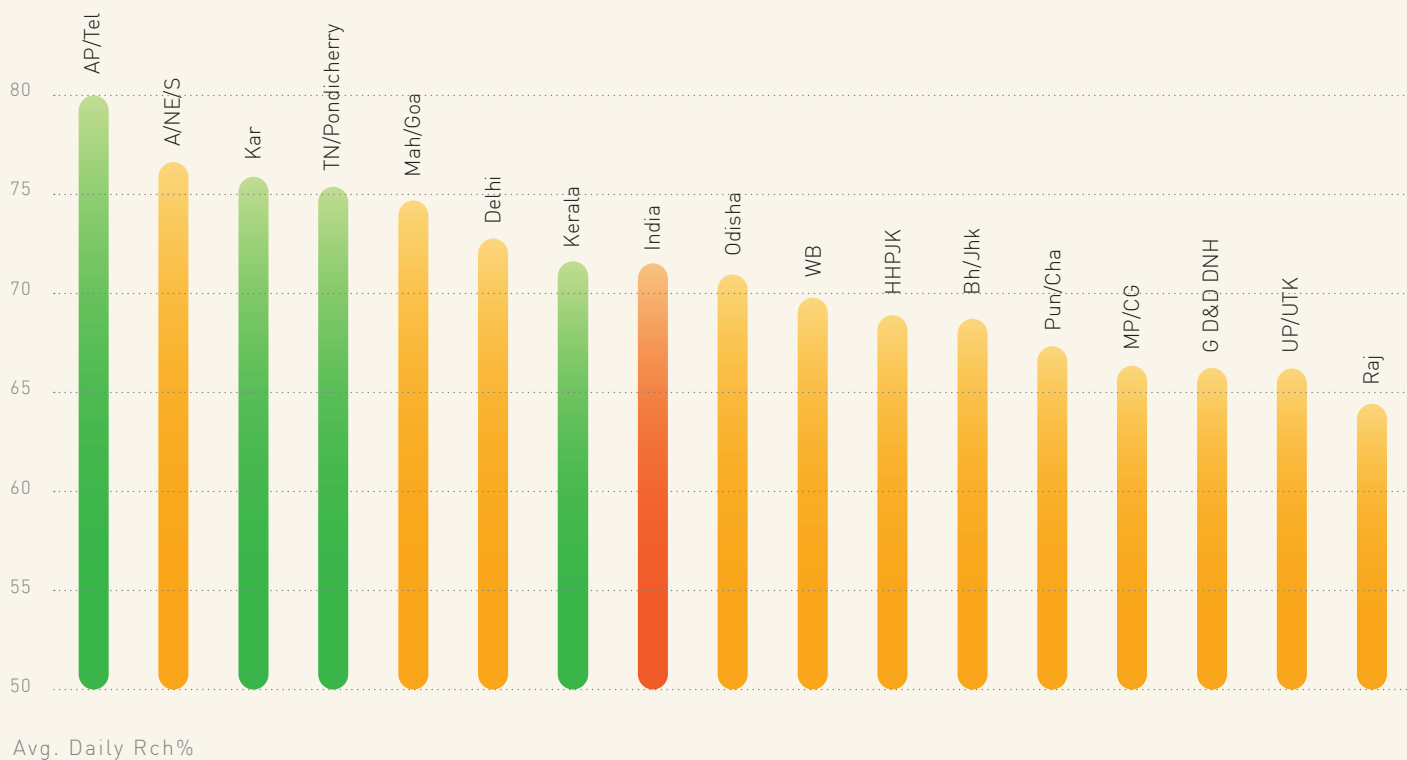
Regional language
viewership share is
highest in the
Southern states



Almost half of total
unique titles*
(12429 out of 26143)
aired are from the
4 South
languages



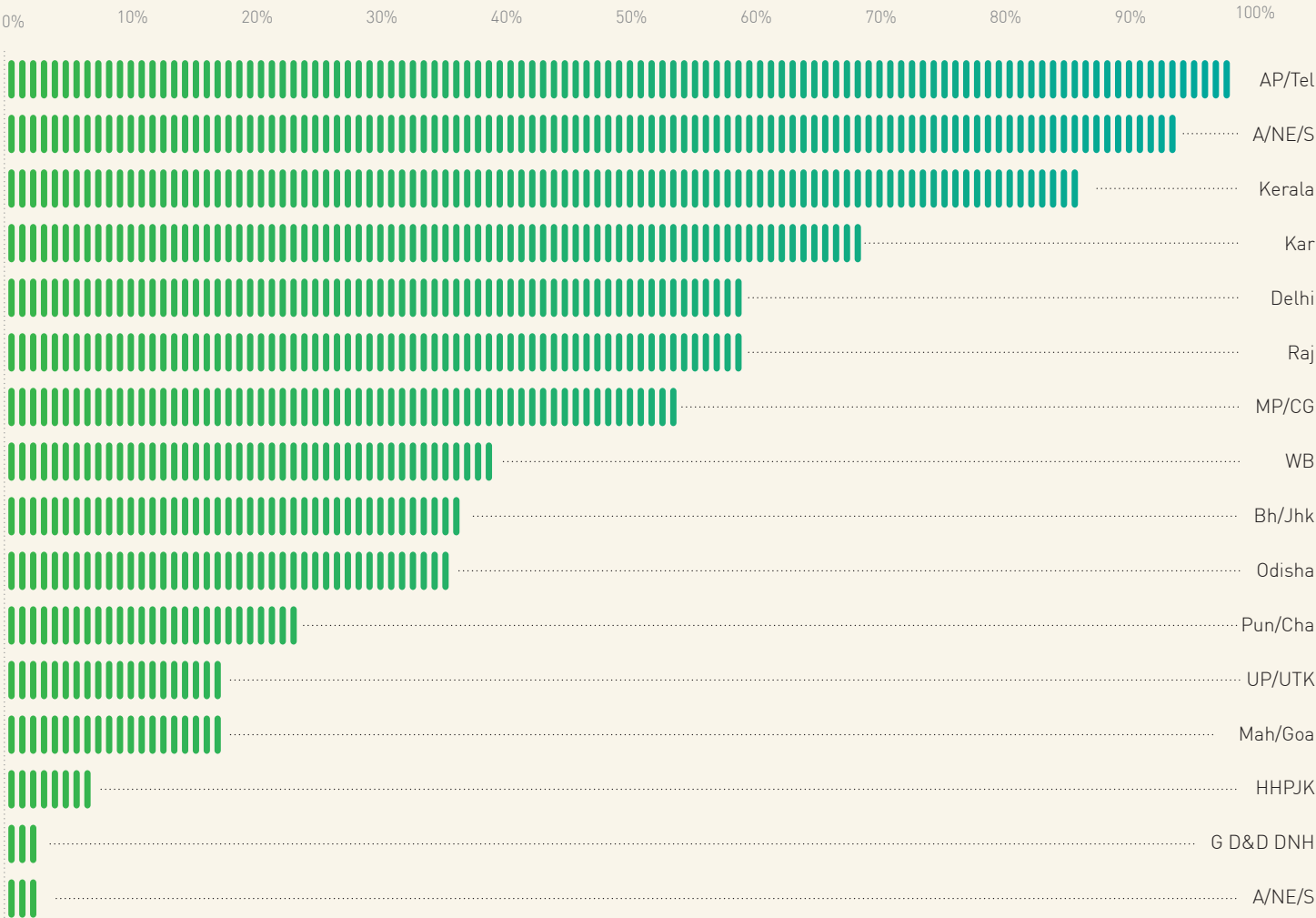
Daily Tune-Ins higher than the national average for all 4 South states



Out of the total 193 channels that telecast movies on television, more than half (104) belong to the 4 South languages.

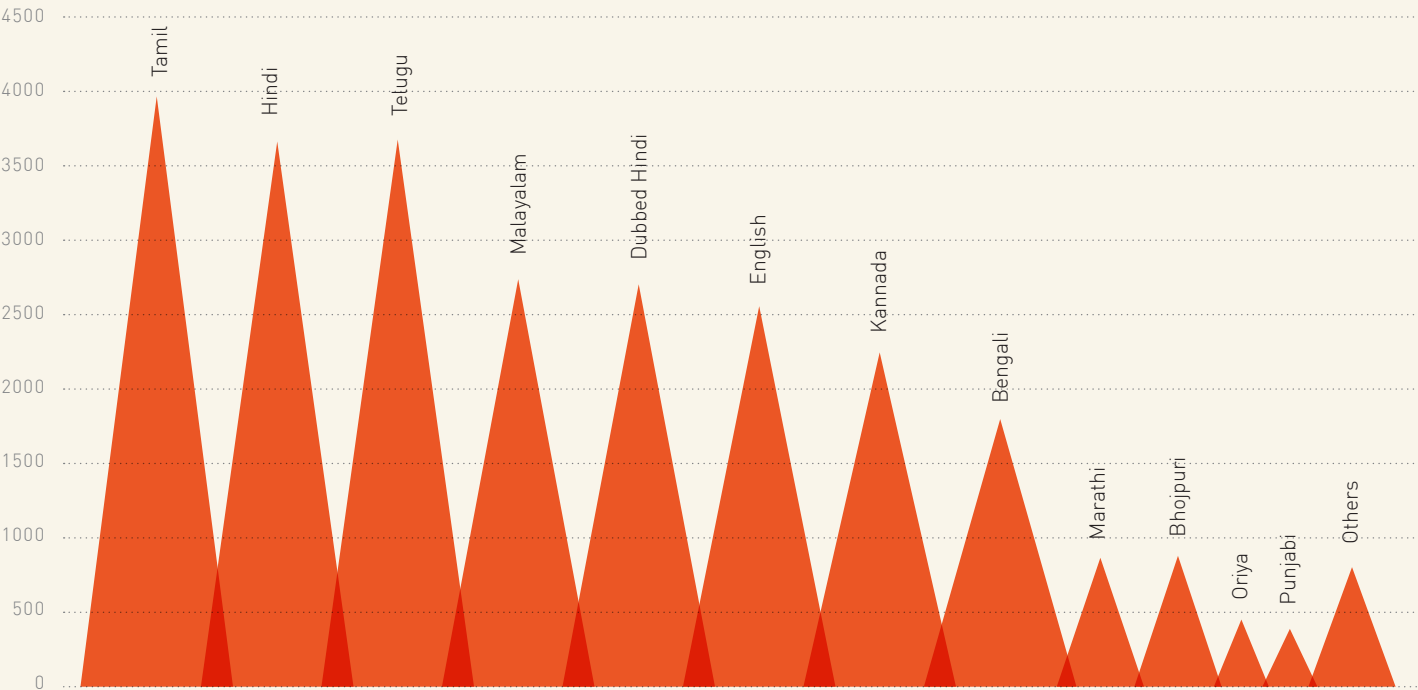


Regional Language Movie Viewership share the highest for the South States



Regional language movie viewership as a % of total movie viewership in the market

Unique Titles across languages



APPETITE FOR MOVIES ACROSS REGIONAL LANGUAGES



Languages	State Group Considered	Movie Viewership in Respective State Group (annual) Bn Minutes	TV Owning Population in Mn	Per Capita Movie (Content) Consumption in Hours
Telugu	AP/Telangana	2131	86	415*
Tamil	TN/Pondicherry	1370	78	293
Malayalam	Kerala	458	31	244
Kannada	Karnataka	788	64	206

*Per capita consumption of Telugu movies in AP/Telangana – 415.4 hours ; means anybody who has a television at home and lives in AP/Telangana on an average watched 415.4 hours of Telugu movies on television in a year .

Per capita consumption refers to the average consumption per person within a population and is usually a good indicator to bring out the similarities or differences between groups compared.

In the table above, we have compared the per capita movie consumption across movies of different languages in their respective region. South Indian languages top the table with each of the 4 clocking more than 200 hours PCPA**.

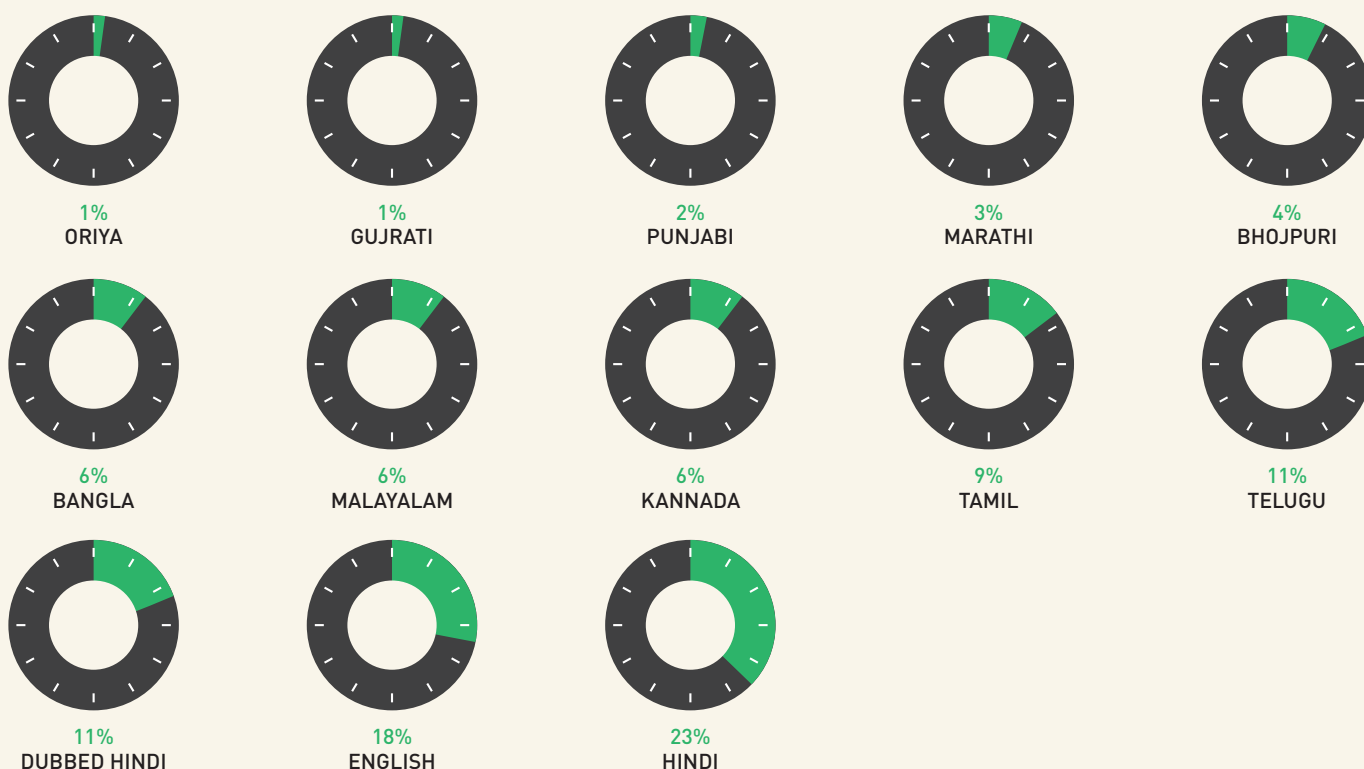
Within the 4 languages – Telugu was highest at 415 hours, which roughly translated into 2- 3 movies weekly per person in the universe, on an average.

**PCAP : Per capita per annum - refers to the average consumption per person within a population for a year.

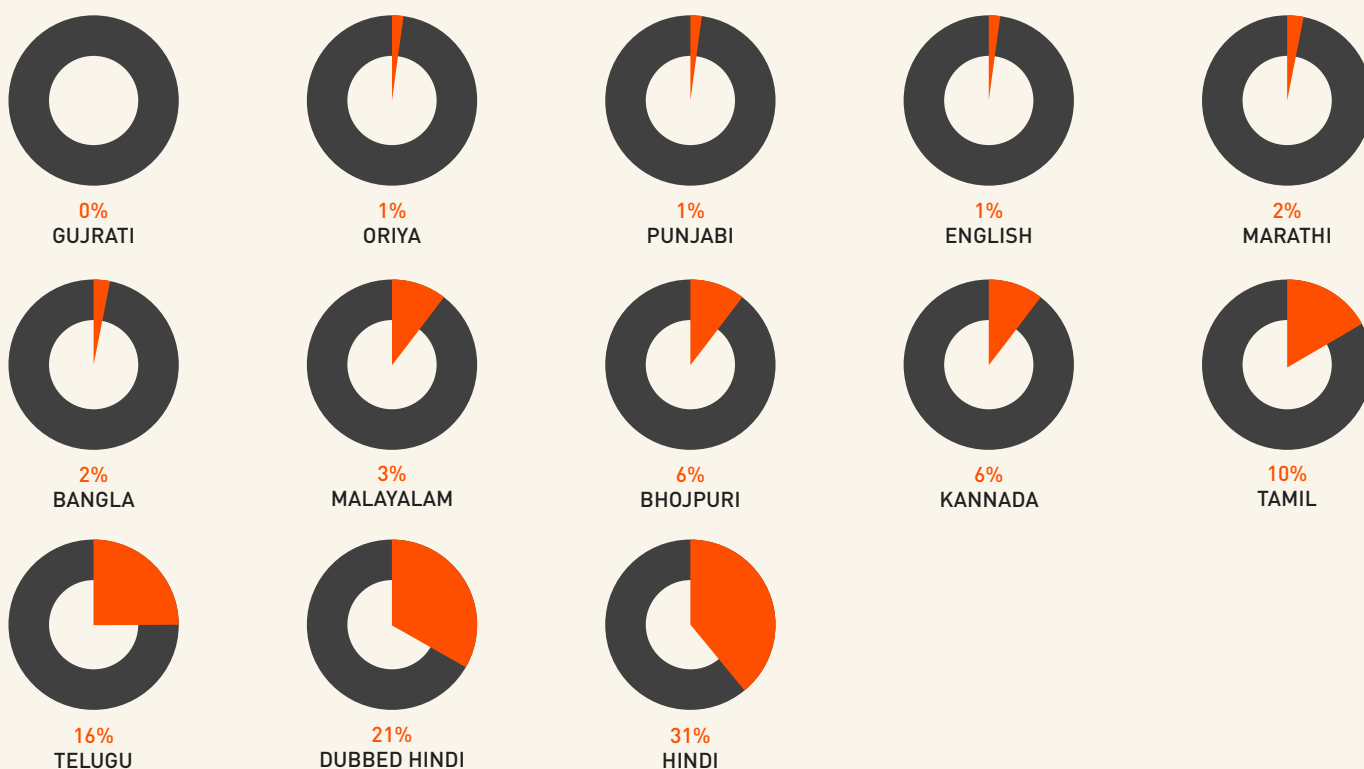
*Per capita consumption of Telugu movies in AP/Telangana – 415.4 hours ; means anybody who has a television at home and lives in AP/Telangana on an average watched 415.4 hours of Telugu movies on television in a year.

Language wise movie dynamics on television

Movies - Telecast Duration



Movies - Viewership

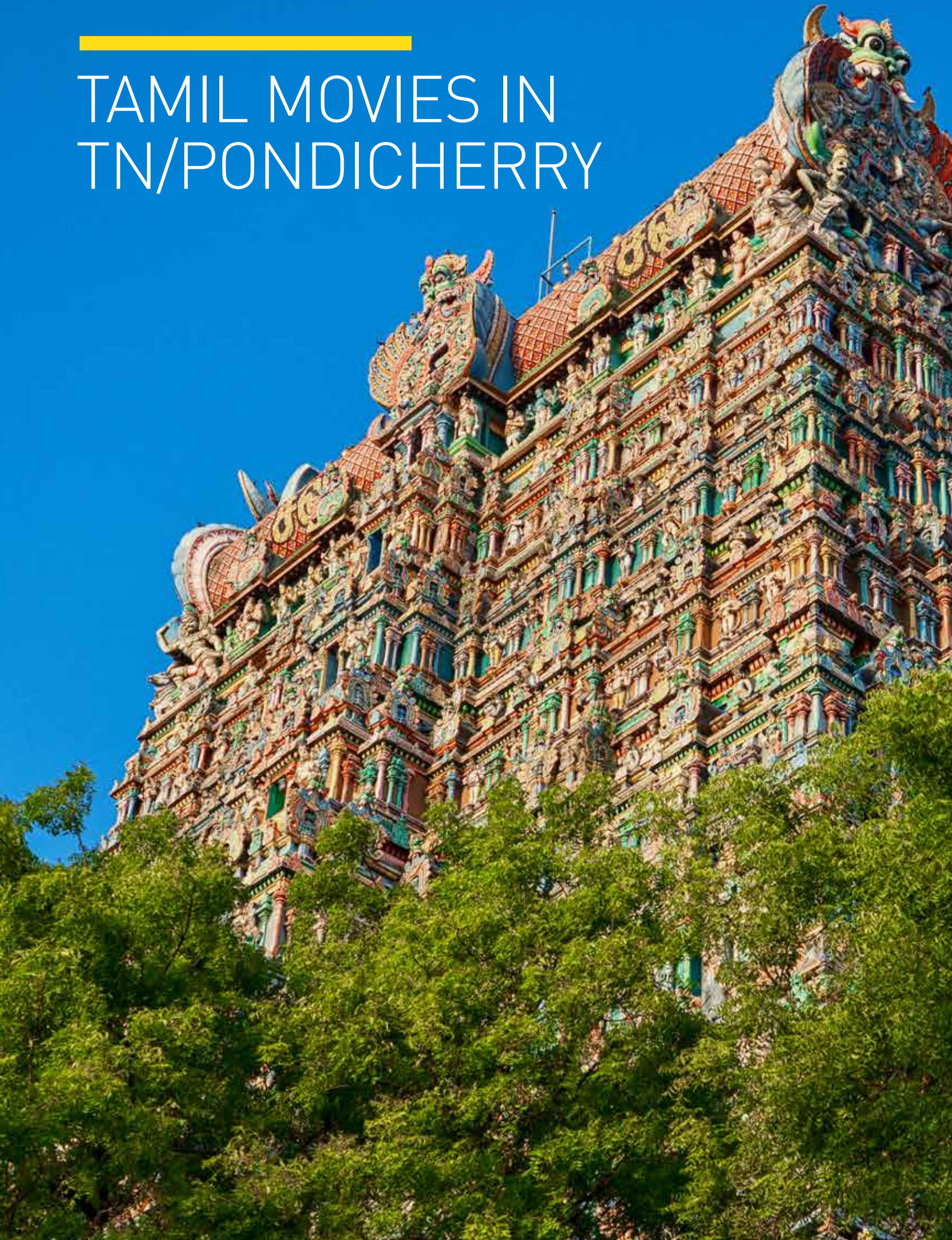


Given the fairly large footprint and reach of Hindi movies, Hindi language movies contribute the most both in terms of supply (23% of total movies duration telecast) and well as consumption (31% of total movies viewership). The combined strength of the 4 languages are higher on both counts, clocking 32% of total movies duration telecast and 35% of total movies viewership).

ROLE OF REGIONAL MOVIES IN SOUTH INDIA

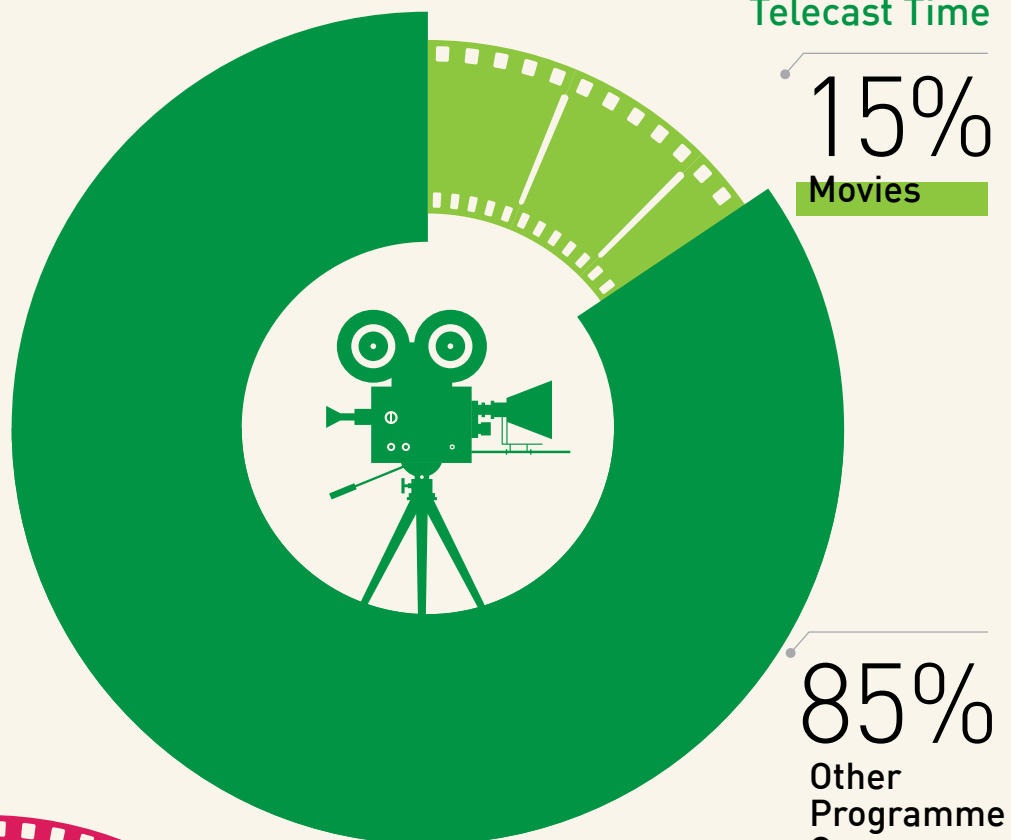


TAMIL MOVIES IN TN/PONDICHERRY

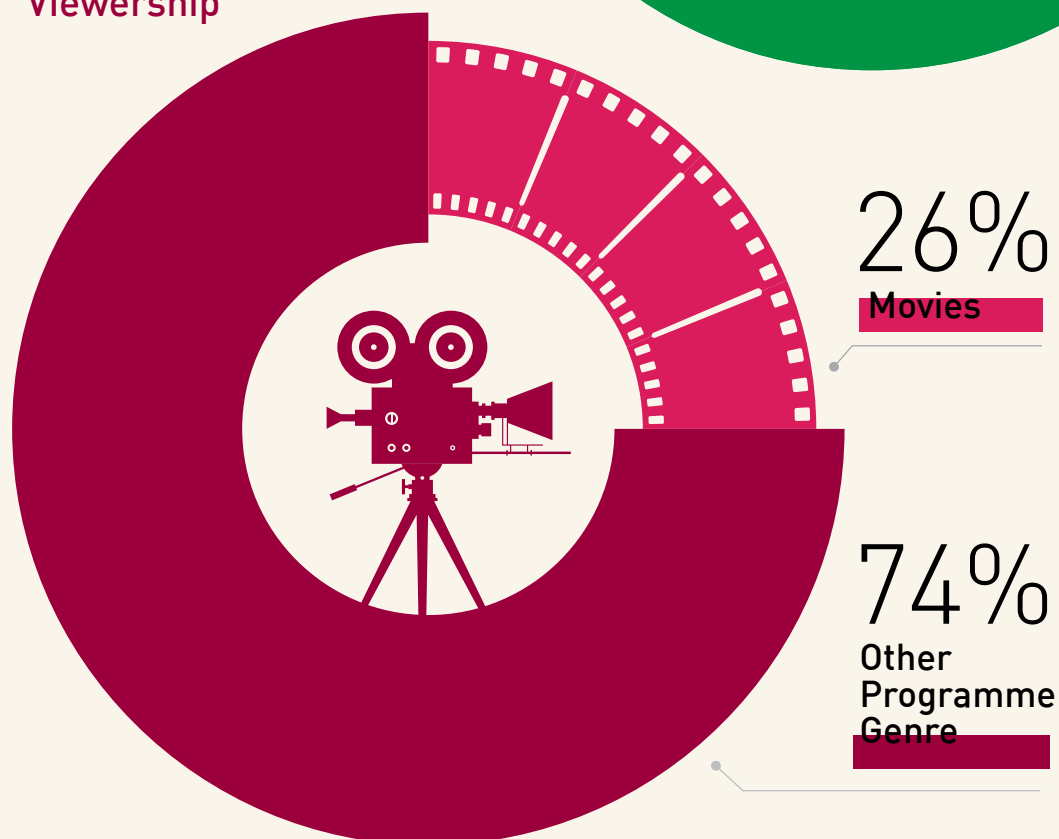


ROLE OF TAMIL MOVIES IN TN/PONDICHERRY

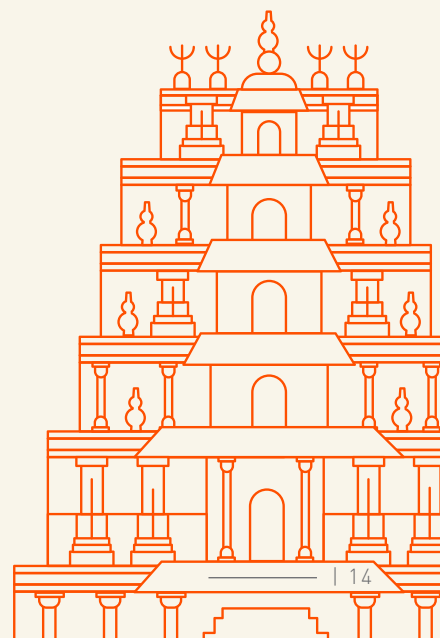
Share of
Telecast Time



Share of
Viewership



TN/Pondicherry, 2+,
Nov 2018 – Oct 2019



VIEWERSHIP LANDSCAPE IN TN/PONDICHERRY

5724
All Channels

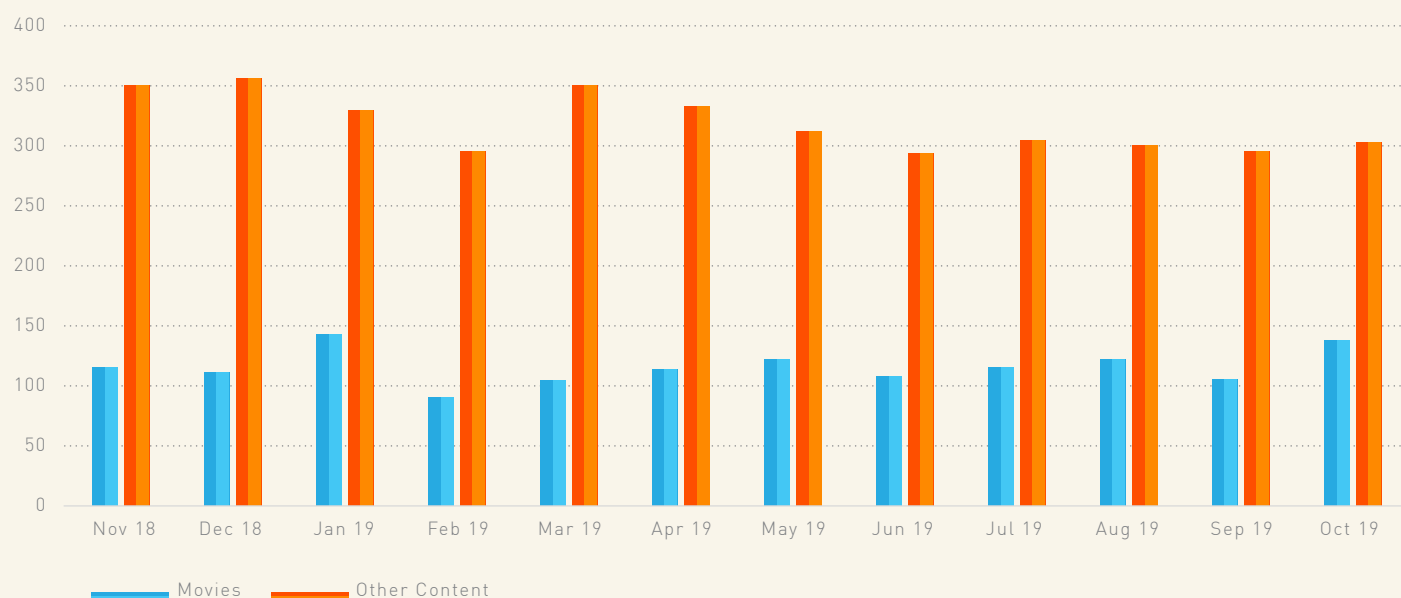
5177
Tamil Content

475
Movie viewership
in Movie channels

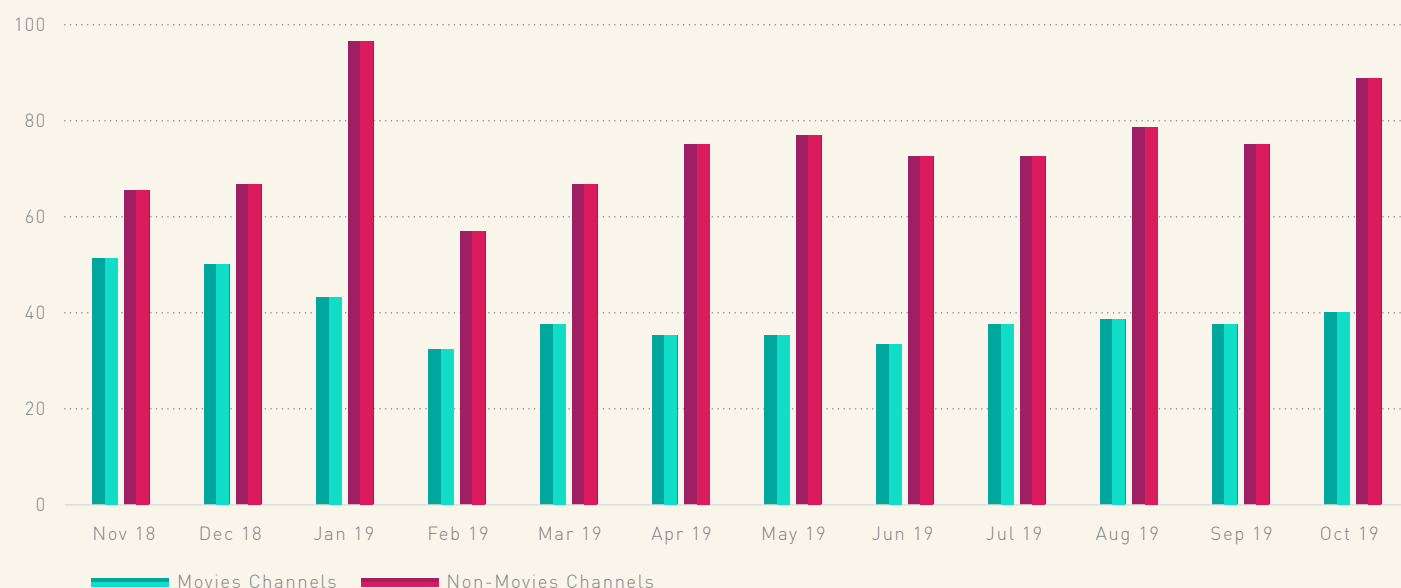
1370
Movie viewership
in All Channels

MONTHLY PERFORMANCE IN TN/PONDICHERRY

Tamil Movies clocked from a minimum of 87 Bn to a maximum of 143 Bn Viewing minutes in the Nov to Oct period



Movie channels contribute 31% to 43% of all movie viewership, while GEC contributes a whopping 53% to 66%, Music channels range from 2% to 6%



TELUGU MOVIES IN AP/TELANGANA



ROLE OF TELUGU MOVIES IN AP/TELANGANA

Share of
Telecast Time

21%

Movies

79%

Other
Programme
Genre

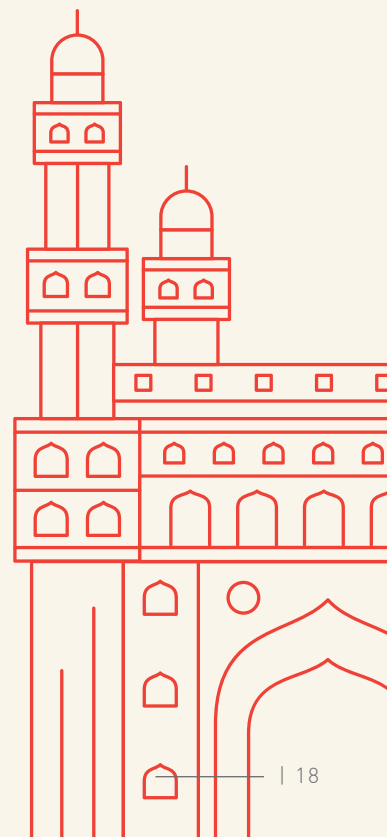
Share of
Viewership

38%

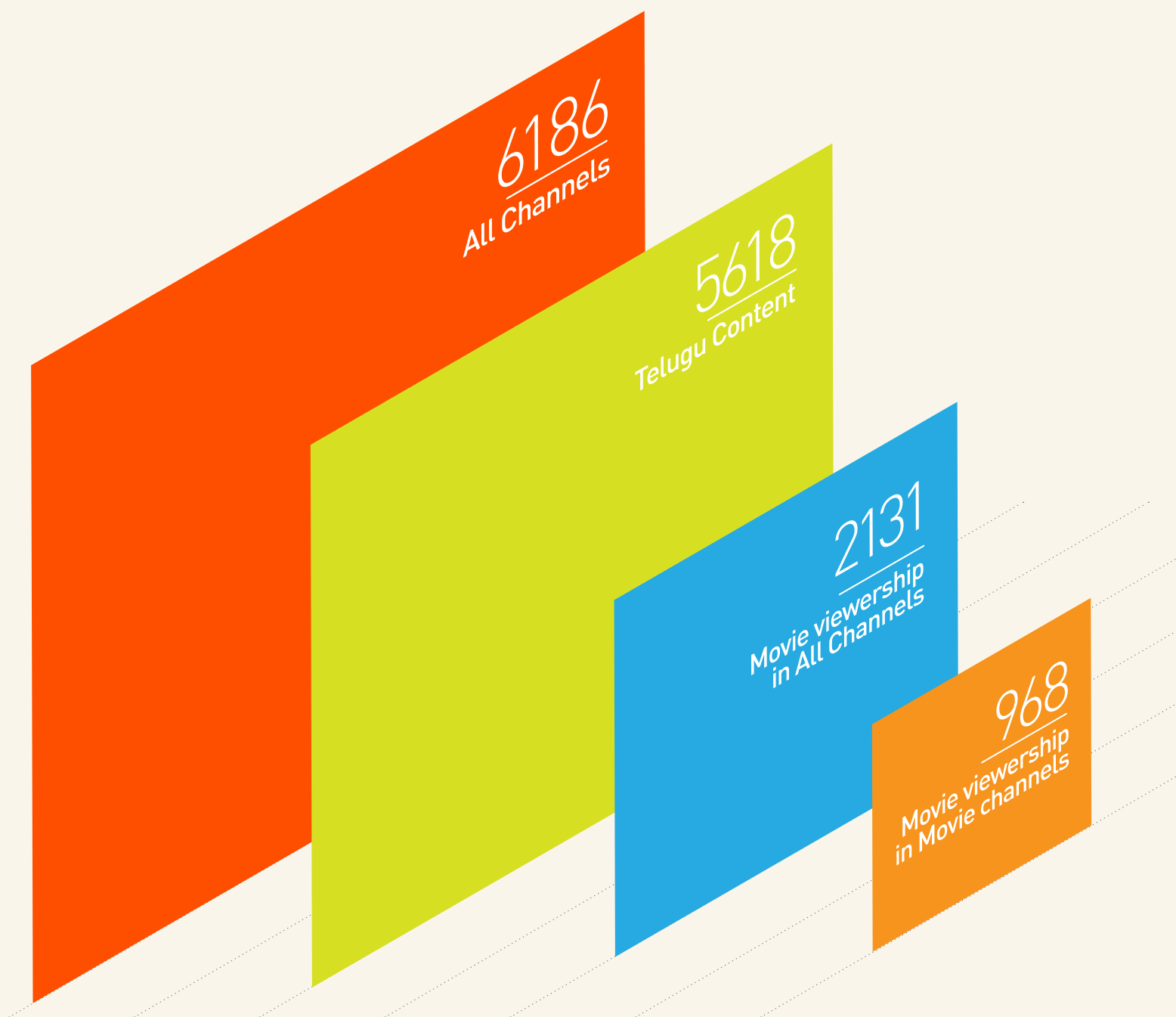
Movies

62%

Other
Programme
Genre



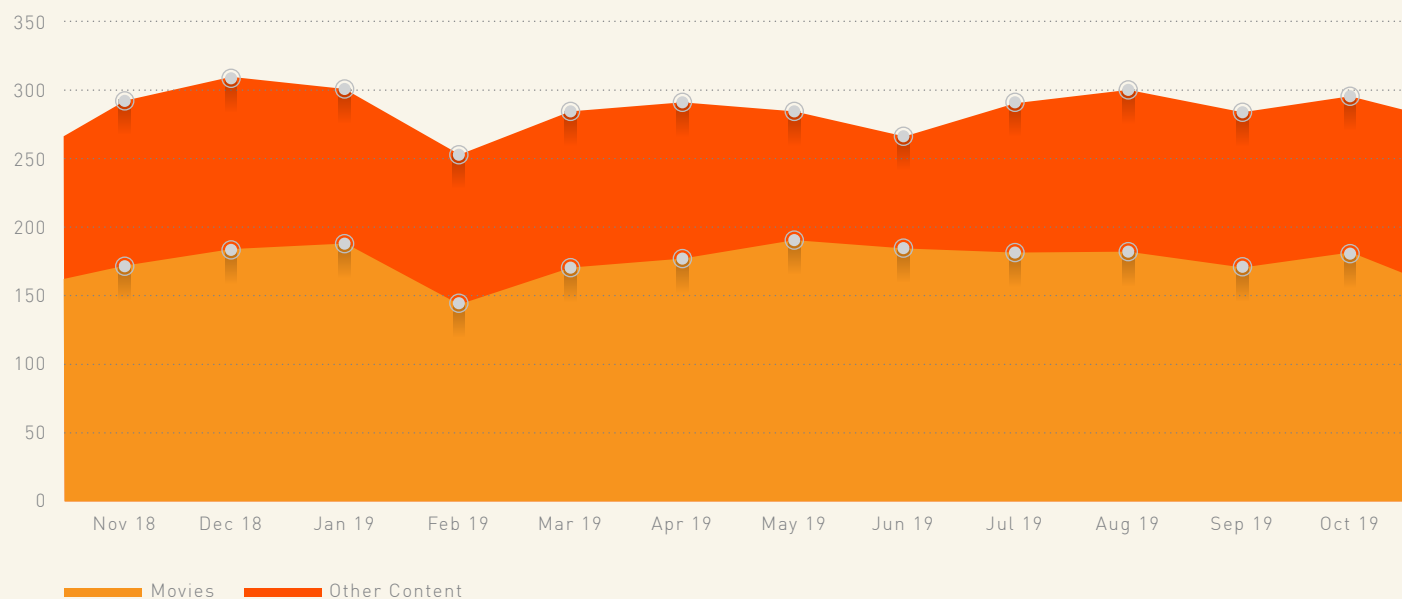
VIEWERSHIP LANDSCAPE IN AP/TELANGANA



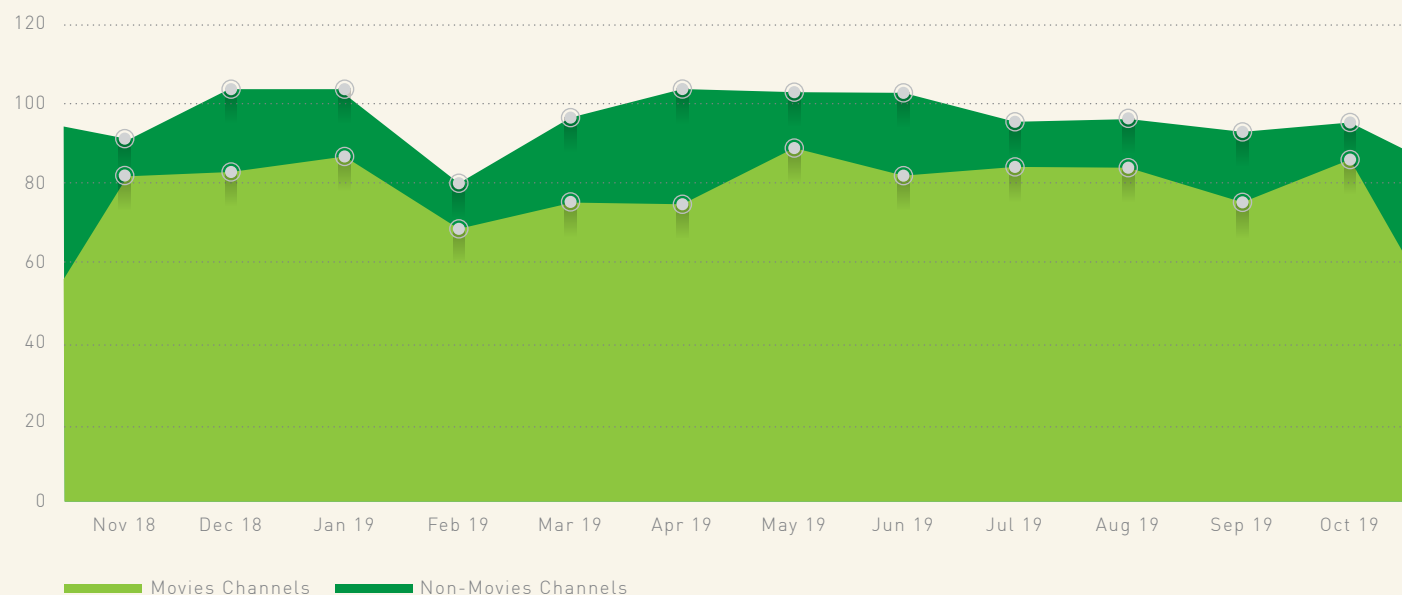
AP/Telangana, 2+, Nov 2018 – Oct 2019 | Viewing Minutes in Bn

MONTHLY PERFORMANCE IN AP/TELANGANA

Telugu Movies clocked from a minimum of 147 Bn to a maximum of 192 Bn Viewing minutes in the Nov to Oct period



Movie channels contribute 42% to 48% of all movie viewership, while GEC contributes a whopping more than 50%, rest come from Music channels



KANNADA MOVIES IN KARNATAKA



ROLE OF KANNADA MOVIES IN KARNATAKA

Share of
Telecast Time

18%

Movies

82%

Other
Programme
Genre

Share of
Viewership

24%

Movies

76%

Other
Programme
Genre



VIEWERSHIP LANDSCAPE IN KARNATAKA

4320
All Channels

3251
Kannada Content

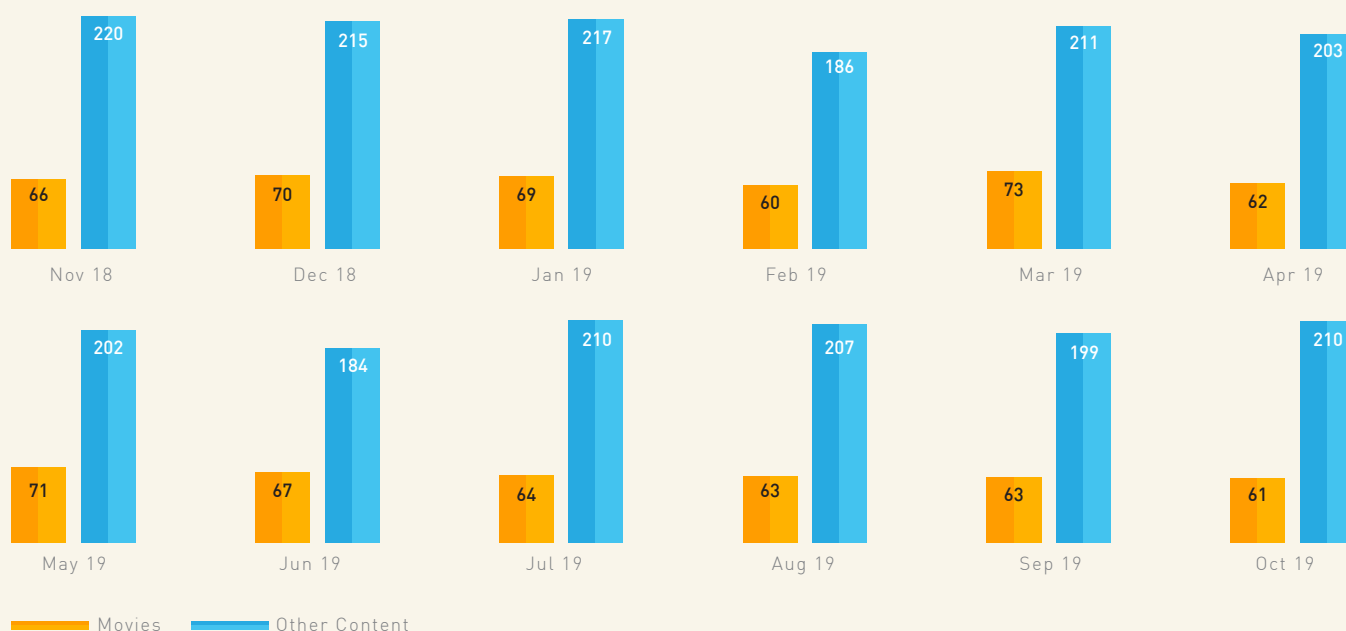
380
Movie viewership
in Movie channels

788
Movie viewership
in All Channels

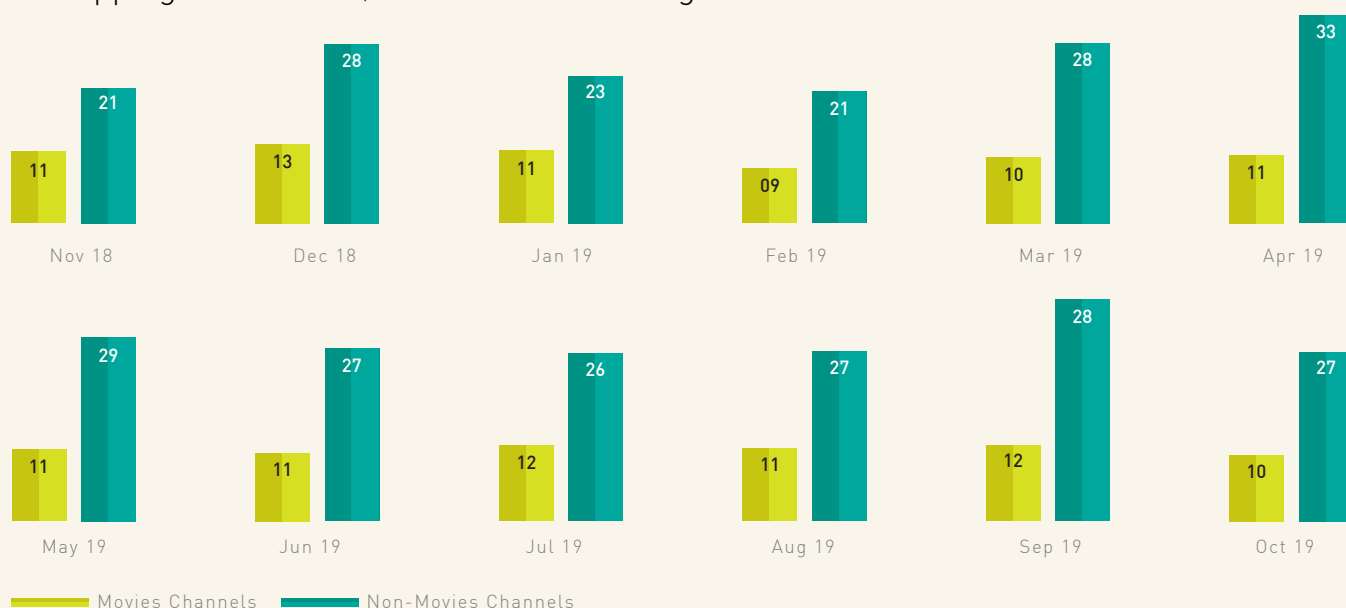
Karnataka, 2+, Nov 2018 – Oct 2019
Viewing Minutes in Bn

MONTHLY PERFORMANCE IN KARNATAKA

Kannada Movies clocked from a minimum of 60 Bn to a maximum of 73 Bn Viewing minutes in the Nov to Oct period



Movie channels contribute 45% to 53% of all movie viewership, while GEC contributes a whopping 53% to 66%, Music channels range from 2% to 6%

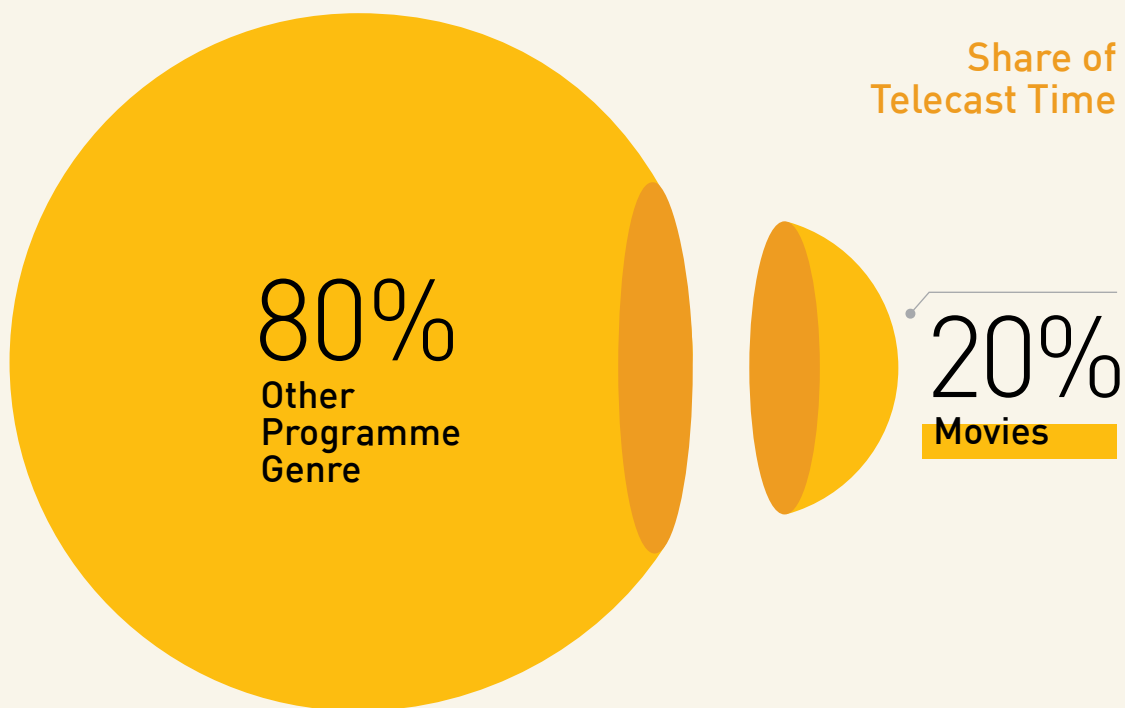


MALAYALAM MOVIES IN KERALA

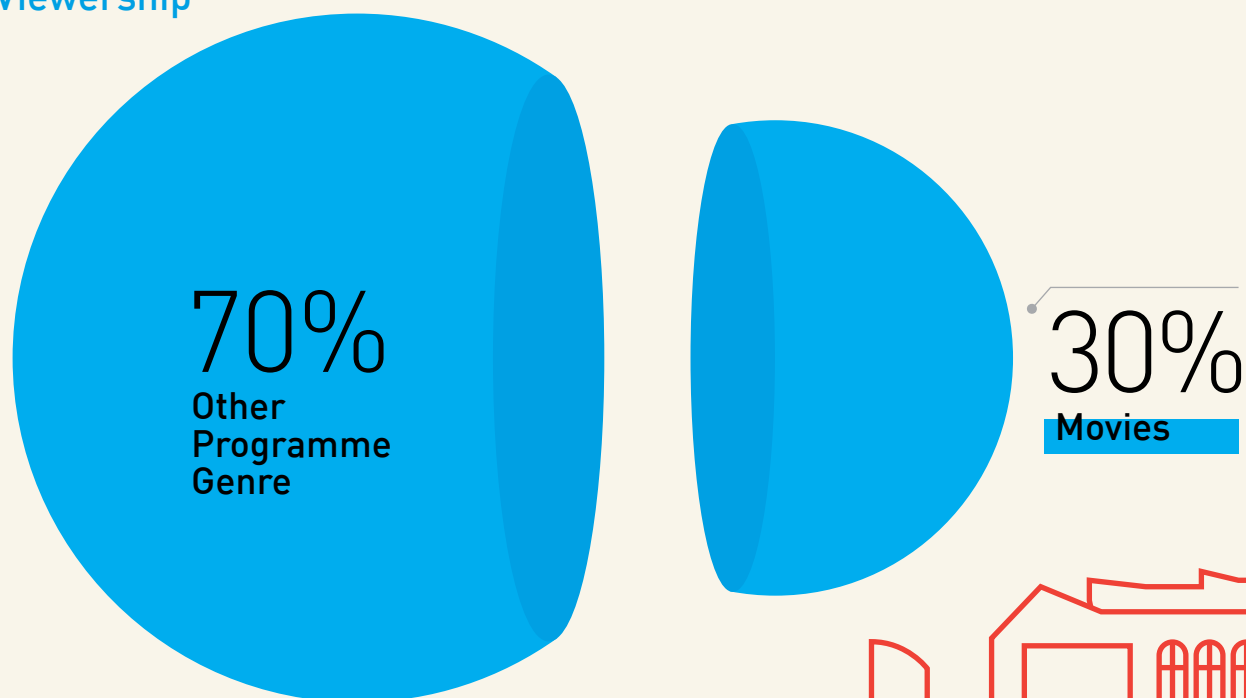


ROLE OF MALAYALAM MOVIES IN KERALA

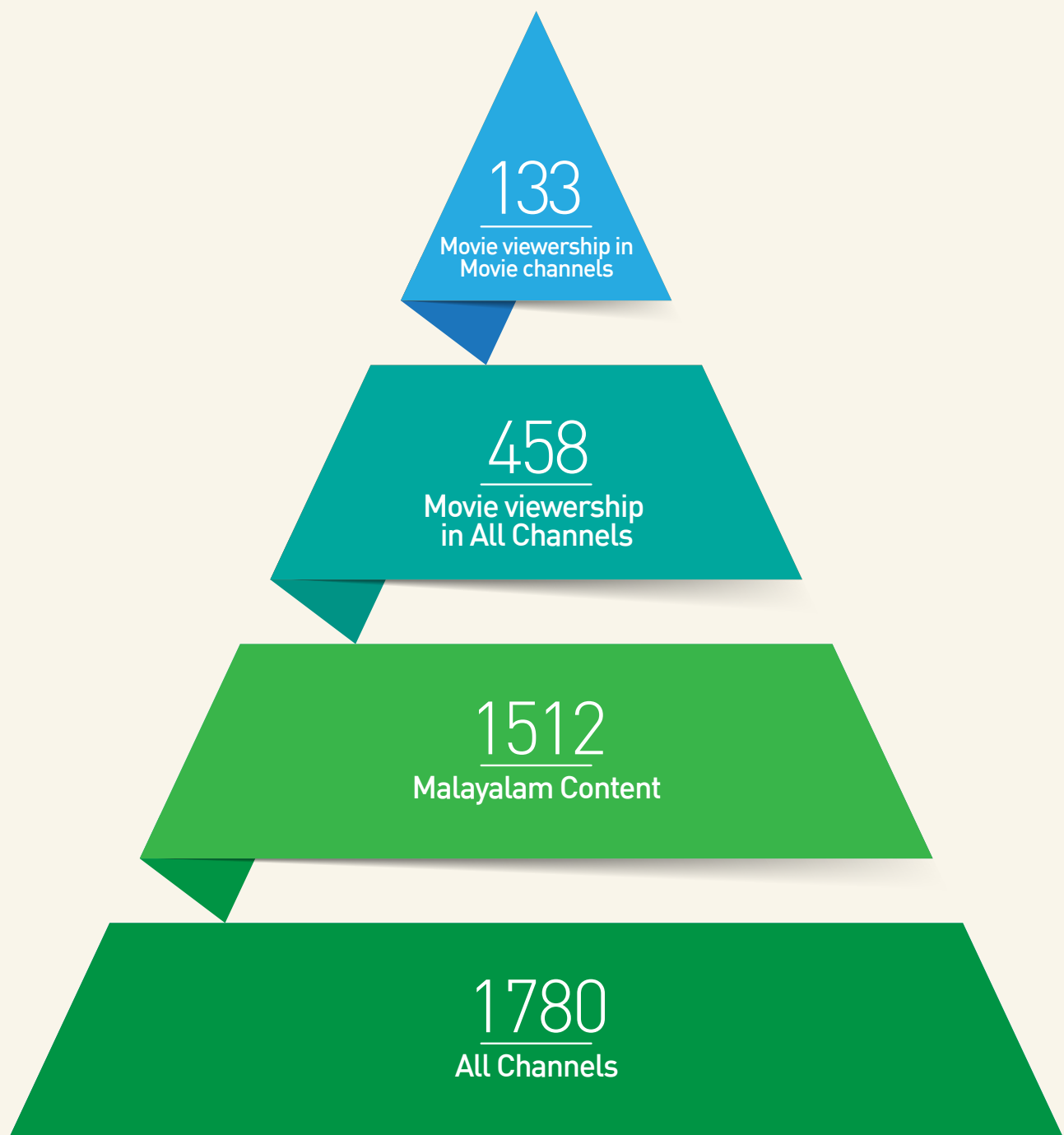
Share of
Telecast Time



Share of
Viewership

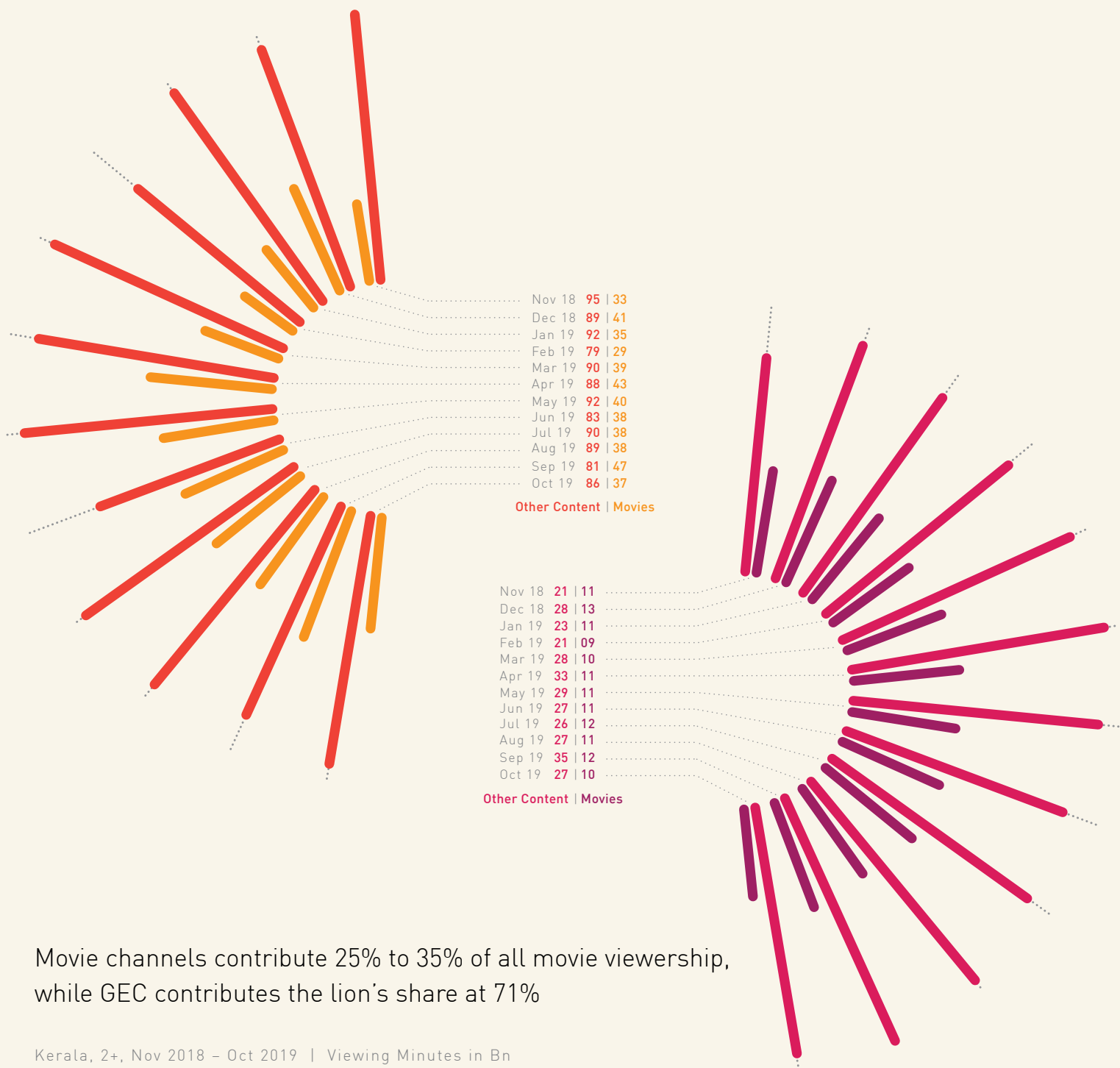


VIEWERSHIP LANDSCAPE IN KERALA



MONTHLY PERFORMANCE IN KERALA

Malayalam Movies clocked from a minimum of 29 Bn to a maximum of 47 Bn Viewing minutes in the Nov to Oct period - peaking during Vishu and Onam months



Movie channels contribute 25% to 35% of all movie viewership, while GEC contributes the lion's share at 71%

INSIGHTS FROM PRIMA VU



Movies hold 7% of the pie out of Total Viewing Minutes among Premium Audiences in South

Hyderabad

Movie Genre



457326.56

Total TV



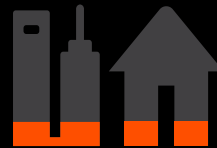
5185737.13

8.82%

share of Movies
to Total TV

Bangalore

Movie Genre



577488.68

Total TV



9311446.85

6.20%

share of Movies
to Total TV

6.65%

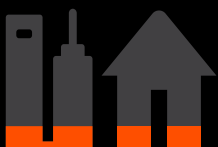
share of Movies
to Total TV

7.02%

share of Movies
to Total TV

Chennai

Movie Genre



303595.88

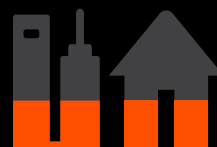
Total TV



4564614.45

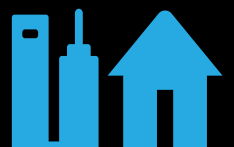
South Megacities

Movie Genre



1338411.12

Total TV



19061798.33

Premium Audiences in Chennai prefer HD content more than in Hyderabad and Bangalore

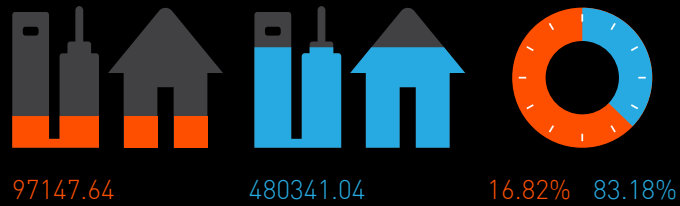
Movie Genre

Sum of Viewing Minutes

Hyderabad



Bangalore



Chennai



South Megacities



HD Channels SD Channels

Total TV

Sum of Viewing Minutes

%Split

Hyderabad



Bangalore



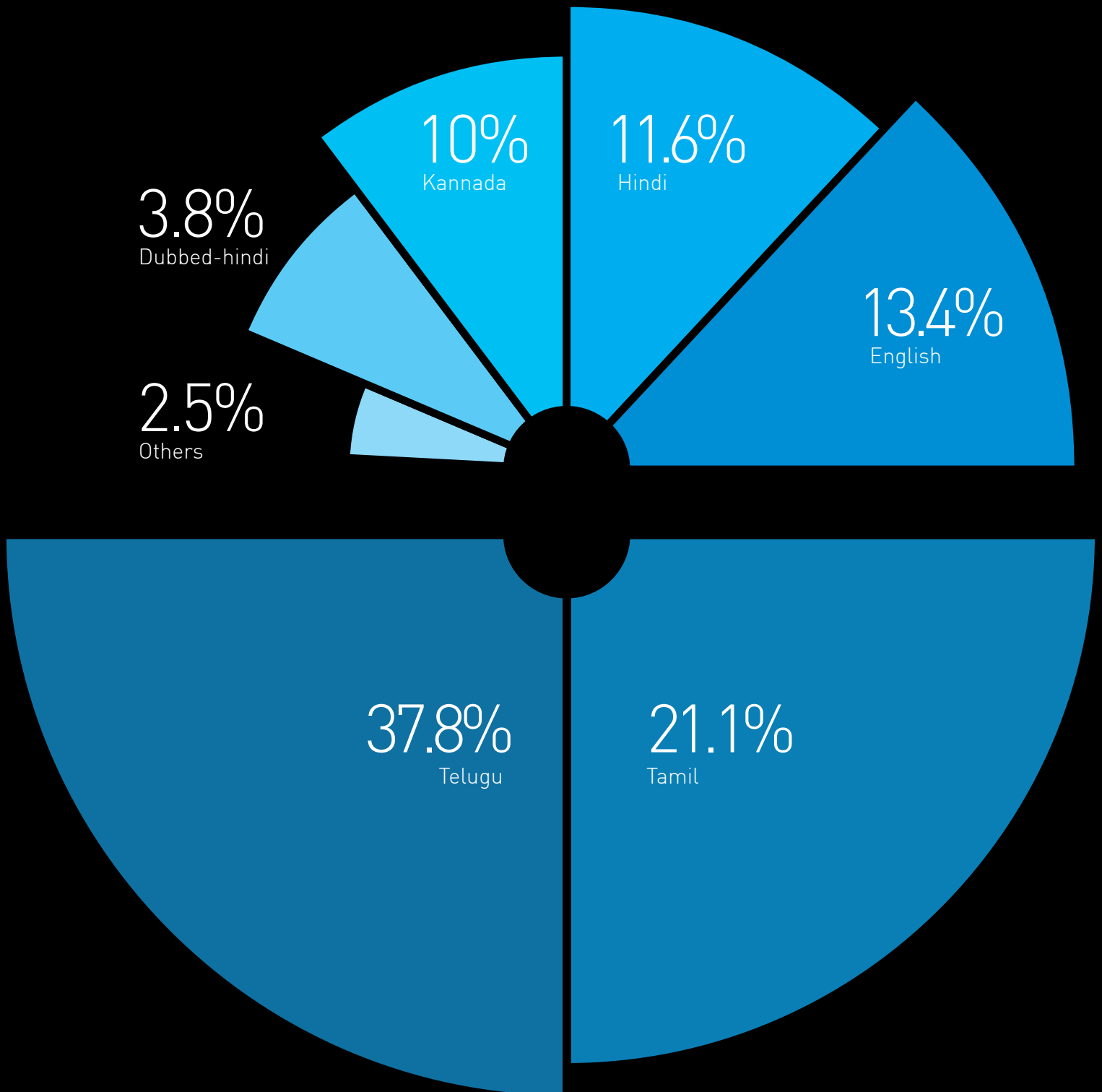
Chennai



South Megacities



English language garners the third highest viewership after Telugu and Tamil among Premium South Audiences



SUMMARIZING



Movies contributed to 17% of all programs telecast in the Nov'18 – Oct'19 period, the same number for movies from South* was 30%



The PCPA consumption of movies of each of the 4 South languages are higher than the other languages, Telugu language tops at 415 hours of movies watched PCPA in the AP/Telangana market

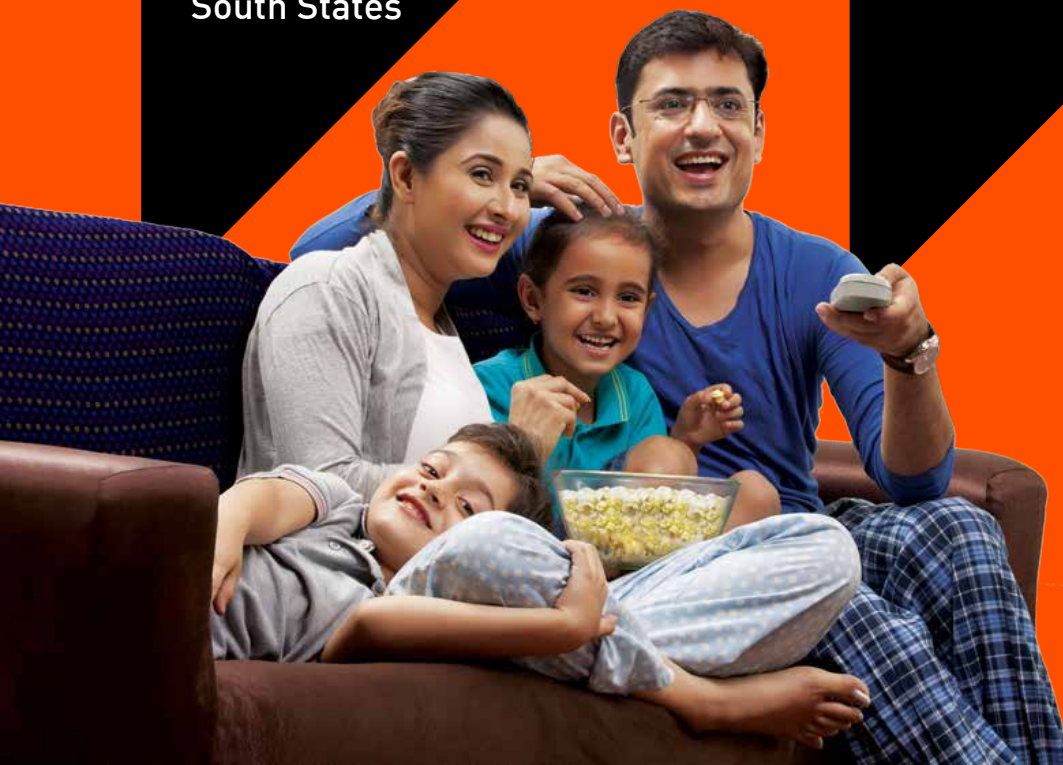


Non-movie channels contribute more than 50% of the movie viewership in each of the 4 South States



PrimaVu data shows that English is the third most preferred language among Premium South Audiences

*Languages Considered:
Dubbed Hindi, Malayalam,
Kannada, Tamil, Telugu





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