VIEWERSHIP OF MOVIES IN SOUTH INDIA

NEWSLETTER Nov 2018 - Oct 2019
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

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

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
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**
  - Movies: 17%
  - Other Programme Genre: 83%

**Share of Telecast Time**
- **South Indian Languages**
  - Movies: 23%
  - Other Programme Genre: 77%
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

Movies

30%

Other Programme Genre

70%

South Indian Languages

Movies

42%

Other Programme Genre

58%

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.

- Tamil: 42
- Telugu: 27
- Bengali: 20
- Malayalam: 18
- Kannada: 17
- Bhojpuri: 26
- Marathi: 13
- Assamese: 11
- Oriya: 05
- Punjabi: 11
- Gujarati: 03
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


[Graph showing the number of unique titles in various languages]
APPETITE FOR MOVIES ACROSS REGIONAL LANGUAGES

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.

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

*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.**
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
- Movies: 15%
- Other Programme Genre: 85%

Share of Viewership
- Movies: 26%
- Other Programme Genre: 74%

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/PONDICHERY

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
  - Movies: 21%
  - Other Programme Genre: 79%

- Share of Viewership
  - Movies: 38%
  - Other Programme Genre: 62%

AP/Telangana, 2+, Nov 2018 – Oct 2019
VIEWERSHIP LANDSCAPE IN AP/TELANGANA

6186
All Channels

5618
Telugu Content

2131
Movie viewership in All Channels

968
Movie viewership in Movie channels
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 Viewership

- Movies: 24%
- Other Programme Genre: 76%

Share of Telecast Time

- Movies: 18%
- Other Programme Genre: 82%

Karnataka, 2+, Nov 2018 – Oct 2019
VIEWERSHIP LANDSCAPE IN KARNATAKA

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

- 3251 Kannada Content
- 4320 All Channels
- 380 Movie viewership in Movie channels
- 788 Movie viewership in All Channels
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

Movies

80%
Other Programme Genre

30%
Movies

70%
Other Programme Genre

Share of Viewership

Kerala, 2+, Nov 2018 – Oct 2019
VIEWERSHIP LANDSCAPE IN KERALA

1780 All Channels
1512 Malayalam Content
458 Movie viewership in All Channels
133 Movie viewership in Movie channels
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%.
Movies hold 7% of the pie out of Total Viewing Minutes among Premium Audiences in South

**Hyderabad**

- **Movie Genre**
  - 457326.56
- **Total TV**
  - 518537.13

**Bangalore**

- **Movie Genre**
  - 577488.68
- **Total TV**
  - 9311446.85

**Chennai**

- **Movie Genre**
  - 303595.88
- **Total TV**
  - 4564614.45

**South Megacities**

- **Movie Genre**
  - 1338411.12
- **Total TV**
  - 19061798.33

<table>
<thead>
<tr>
<th>Sum of Viewing Minutes</th>
<th>Week 28-30</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hyderabad</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Bangalore</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Chennai</strong></td>
<td></td>
</tr>
<tr>
<td><strong>South Megacities</strong></td>
<td></td>
</tr>
</tbody>
</table>

**share of Movies to Total TV**

- **Hyderabad**: 8.82%
- **Bangalore**: 6.20%
- **Chennai**: 6.65%
- **South Megacities**: 7.02%
Premium Audiences in Chennai prefer HD content more than in Hyderabad and Bangalore

### Movie Genre

#### Sum of Viewing Minutes

<table>
<thead>
<tr>
<th>Location</th>
<th>HD Channels</th>
<th>SD Channels</th>
<th>%HD</th>
<th>%SD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hyderabad</td>
<td>81409.01</td>
<td>375917.55</td>
<td>17.80%</td>
<td>82.20%</td>
</tr>
<tr>
<td>Bangalore</td>
<td>97147.64</td>
<td>480341.04</td>
<td>16.82%</td>
<td>83.18%</td>
</tr>
<tr>
<td>Chennai</td>
<td>69606.27</td>
<td>233989.61</td>
<td>22.93%</td>
<td>77.07%</td>
</tr>
<tr>
<td>South Megacities</td>
<td>248162.96</td>
<td>1090248.16</td>
<td>18.54%</td>
<td>81.46%</td>
</tr>
</tbody>
</table>

### Total TV

#### Sum of Viewing Minutes

<table>
<thead>
<tr>
<th>Location</th>
<th>HD Channels</th>
<th>SD Channels</th>
<th>%HD</th>
<th>%SD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hyderabad</td>
<td>432659.76</td>
<td>2208378.39</td>
<td>16.38%</td>
<td>83.62%</td>
</tr>
<tr>
<td>Bangalore</td>
<td>694731.53</td>
<td>4038416.99</td>
<td>14.68%</td>
<td>85.32%</td>
</tr>
<tr>
<td>Chennai</td>
<td>441449.3</td>
<td>1886466.87</td>
<td>18.96%</td>
<td>81.04%</td>
</tr>
<tr>
<td>South Megacities</td>
<td>1568840.6</td>
<td>8133262.14</td>
<td>16.17%</td>
<td>83.83%</td>
</tr>
</tbody>
</table>

*Week28-50*
English language garners the third highest viewership after Telugu and Tamil among Premium South Audiences.
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