

In a Bollywood loving nation like ours, it is no surprise that Feature films aired on Television contribute over 28% to the total Television viewership. The appeal of Movies is amplified by the fact that the varying content within films ensure that there is something for everyone – right from animations for Kids to Youth stories for the Millennials to Mythological stories for Seniors.

Also, repeated viewings do not diminish the value of Movies. A tub of salted popcorn, an ice chilled cola and we're all set to watch our favourite movie for the nth time. For Broadcasters, not only does this increase the life of content but the movie may also ensure a returning viewer.

In this newsletter, we attempt to decode the viewership trends for movies on the TV screen.

Given that Movie content is spread across various channel genres, in the context of this analysis, we will be referring to Feature Films in terms of Program Genre & not Channel genre.

Questions we aim to answer through this Newsletter

- Does availability of content play a role in determining the viewership on different channel genres?
- Who is the audience for feature films?
- What type of channels is India watching movies on? Which channel genres do movies perform better on? Do these trends differ by markets?
- What factors could potentially affect viewership? Is language an influencer on the viewership of movies? To what extent do external factors such as weekends, public holidays and festivals impact movie viewership, if at all?
- How can we measure effectiveness of Top Ad sectors on movies?

Source: BARC India Data; Period: Wk01'2016 – Wk52'2016; TG: Males, 15+ ABC unless specified otherwise; Market: All India unless specified otherwise; Program Impressions normalised to 30 mins; Ad Impressions normalised to 10 secs; All channels included

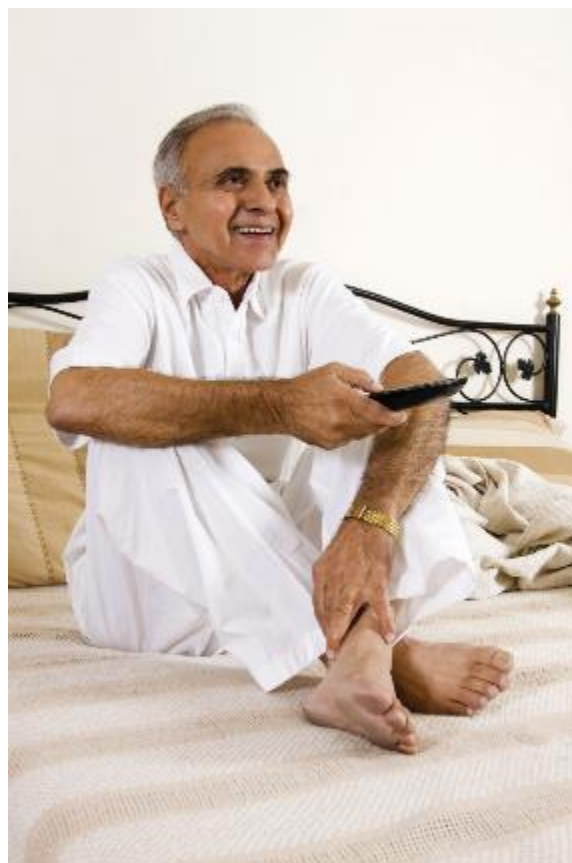
Channel genre	HSM	Regional	Others	Total
Movies	89%	61%	96%	78%
GEC	3%	34%	1%	17%
Others	7%	2%		3%
Music	0%	2%	0%	1%
Kids		0%	3%	1%
News	0%	1%		0%
Youth	0%			0%
Infotainment	0%			0%
Devotional		0%		0%

* % share of Sum of Length (sec)

Feature Films are aired on 9 channel genres. The genre which contributes the maximum content for Feature films is, as expected, Movie channels. It is followed by GEC channels.

However, if we classify channels basis their core viewership market into HSM, Regional and Others, then it must be noted that the content availability on GEC channels is mainly driven by Regional channels. The scenario is similar in case of Music genre, where the content availability is driven by Regional channels.

On the other hand, Regional channels do not have any Feature Films content on Youth & Infotainment. Conversely, HSM channels do not air any Feature Films on Kids & Devotional channels.



After Movie channel genre, GEC channels have the maximum share of Feature Film content. Let us take a closer look at it's composition in terms of channel language.

GEC - Channel Language	Share of Feature Film Content (%)
TAMIL	21%
TELUGU	18%
MALAYALAM	14%
KANNADA	12%
BHOJPURI	11%
ORIYA	8%
HINDI	7%
BANGLA	6%
URDU	1%
MARATHI	1%
PUNJABI	1%
ASSAMESE	0%
GUJARATI	0%
ENGLISH	0%

* % share by Language of Feature Films content on GEC channels;% contribution of Sum of Length (sec)

If we look at the language split within GEC channels, it is clear that South region channels drive the content availability. Even within these, Tamil & Telugu language channels have a substantial lead over the others.

It is important to keep these differences in mind as content availability will have a direct implication on viewership.



**Who is the
Audience?**

Target Group	Total TV	Feature Films	Difference
Gender			
Male	50%	52%	2%
Female	50%	48%	-2%
Age Group			
04-14 years	17%	17%	0%
15-21 years	14%	15%	1%
22-30 years	19%	20%	1%
31-40 years	19%	19%	0%
41-50 years	15%	15%	0%
51+ years	15%	14%	-1%
NCCS			
NCCS: A	21%	18%	-3%
NCCS: B	25%	24%	-1%
NCCS: C	42%	44%	2%
NCCS: D/E	12%	14%	2%

* % share of Avg. Impressions'000

At an All India level, Movie audiences are skewed towards Males, age group of 15-30 years and for NCCS C, D/E, as compared to Total TV viewership.

However, is this a comprehensive target group keeping the differences among channel genres in mind? Let us look at how the profile for Feature Film viewers changes across channel genres.





Target Group	GEC	Movies	Kids	Music	News	Others	Youth	Infotainment	Devotional
Gender									
Male	49%	53%	53%	50%	53%	54%	52%	55%	47%
Female	51%	47%	47%	50%	47%	46%	48%	45%	53%
Age Group									
04-14 yrs	18%	17%	33%	14%	16%	17%	18%	18%	8%
15-21 yrs	15%	16%	8%	13%	17%	16%	22%	15%	6%
22-30 yrs	19%	21%	19%	21%	19%	21%	18%	20%	22%
31-40 yrs	19%	19%	19%	19%	17%	20%	18%	21%	15%
41-50 yrs	15%	15%	9%	17%	15%	14%	13%	14%	23%
51+ yrs	14%	12%	12%	16%	16%	12%	11%	12%	26%
NCCS									
NCCS: A	20%	18%	24%	19%	14%	18%	24%	16%	16%
NCCS: B	23%	24%	25%	21%	20%	25%	29%	29%	38%
NCCS: C	45%	44%	40%	46%	62%	43%	37%	43%	34%
NCCS: D/E	12%	14%	11%	14%	4%	14%	10%	12%	12%

* % share of Avg. Impressions'000



The Male skew of this program genre becomes more apparent when we look at channel genre differences. The Female viewership is driven entirely by just two genres – GEC and Devotional.

Additionally, since this is at an All India level, the Female skew is higher due to presence of high content on Regional channels. If we exclude Regional channels, Males have comparable viewership of feature films on GEC channels as well.

In terms of Age groups, we can see that majority of the viewership comes from Millennials (22-40 years), with the exception of Kids & Youth genres.

Viewership of feature films on Kids genres is limited to the young viewers (04-14 years). Another point worth noting about the younger age-group (04-14 years) is that due to co-viewing, it has substantial viewership across most channel genres.

Over 80% of the total viewership of all other Genres, excluding Kids, is spread across other age groups (15+ years).

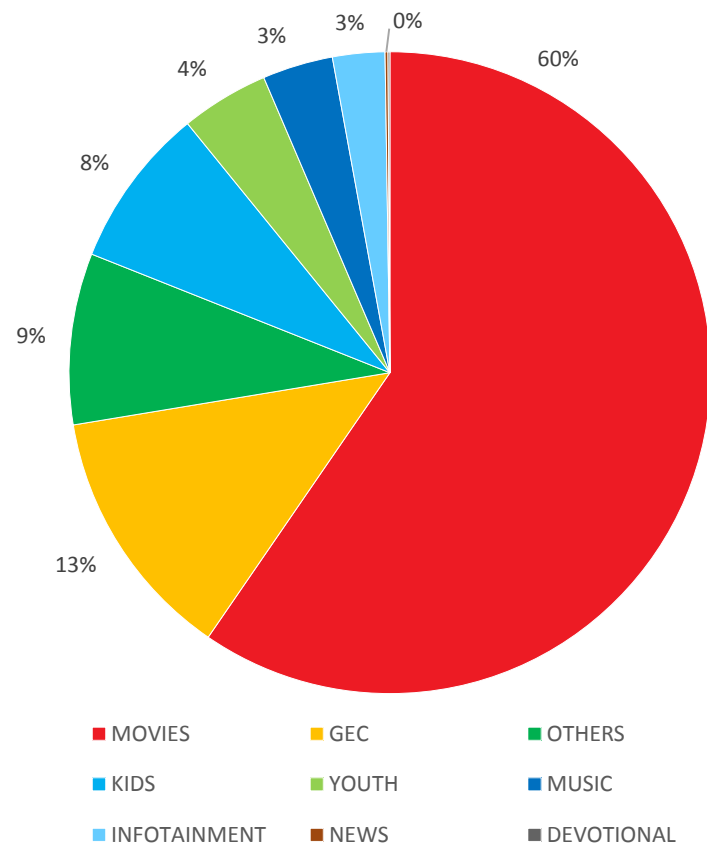
NCCS C has the maximum share of viewership by virtue of being the largest NCCS group in the Universe. On the other hand, the share of NCCS D/E is the least across all genres.

For the purpose of this Newsletter, all further analysis will therefore be done for the Target Group of **Males, 15+ years, NCCS ABC.**



Performance Across Channel Genre





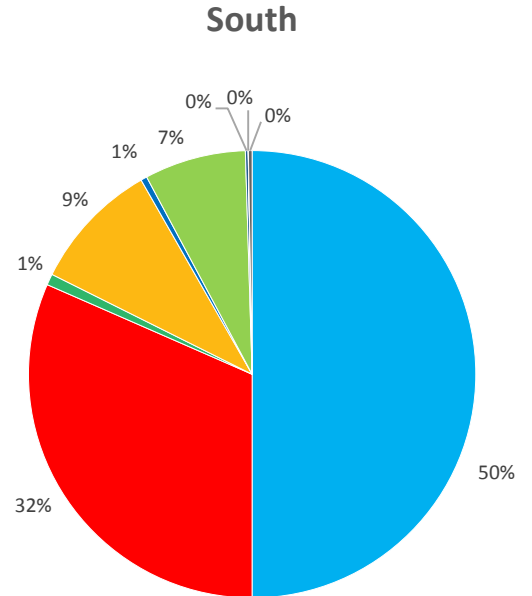
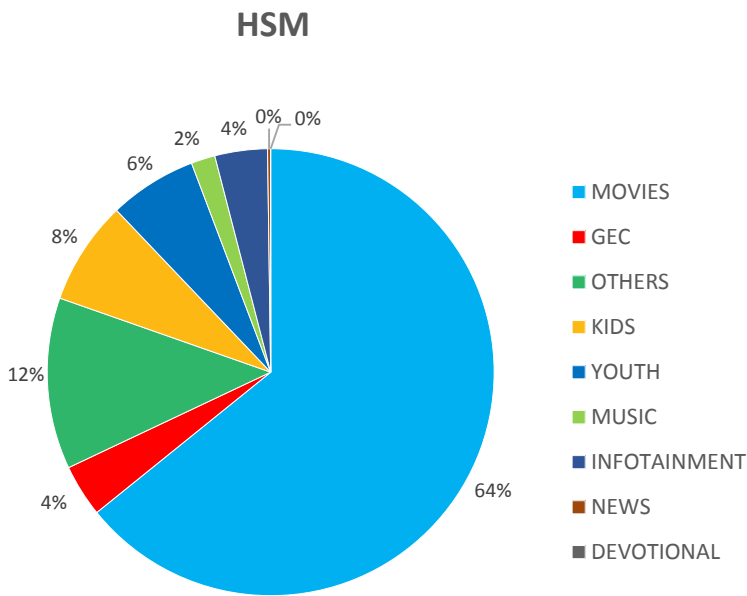
As expected, Movie channels have the maximum contribution to viewership of Feature Films, followed by GEC channels. It is interesting to note that the pattern across genres is in line with the content availability shown previously.

The only exceptions are Kids genre & Youth genre, where the performance is better vis-à-vis the content availability. This could be a result of these being targeted at specific age-groups among which they have extremely high viewership.

This is corroborated by the profile of these genres above – unlike other genres, Kids & Youth genres have high viewership in their core age-groups – 04-14 years for Kids & 15-21 years for Youth.

* % share of Avg. Normalised Impressions'000





* % share of Avg. Normalised Impressions'000; Market: HSM & South

It is also interesting to note that South market is less fragmented than HSM. Over 90% of the viewership is concentrated in only 3 genres – Movies, GEC & Kids.

Also, the differing viewership in HSM & South can also be explained by content availability.

Regional channels have higher content available on GEC and Music channels. Additionally, unlike HSM which has no content on Kids genre channel, Regional channels have feature film content on Kids genre.

We can see this reflects in the viewership data as well, where South has a higher share for GEC, Kids & Music genre as compared to HSM.

Is this an indication of a latent need in the market for Feature Films? Is higher content availability likely to translate to higher viewership?



Influencers of Performance



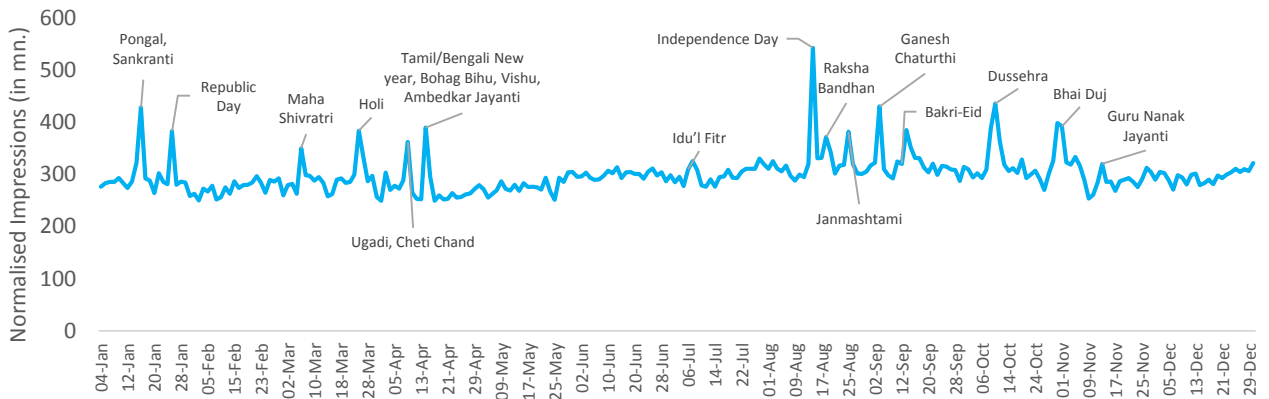
Effect of Holidays

We can look at the effect of holidays in two ways,

Weekly holidays (Mon-Fri vs. Sat-Sun)

Annual public holidays

We already know that Feature films perform better on weekends. Let us therefore look at the less explored option.



* Sum of Normalised Impressions (in million) for Weekdays (Mon-Fri) only

All the spikes we have seen in 2016, have occurred due to some public holiday.

The biggest peak in the year occurred on Independence day (15-Aug) followed by Dussehra (11-Oct), Ganesh Chaturthi (05-Sep) and Pongal/Sankranti (15-Jan).

It must be noted that all of these top holidays, with the exception of Dussehra, were either on a Monday or a Friday. We can see that while public holidays lead to a spike in viewership, the ones that fall on a long weekend show a bigger spike.

It is also worth noting that these spikes are further compounded due to special programming - the airing of a WTP or popular movies.



Language as an influencer

HSM channels rely heavily on Dubbed content. To give you a perspective, dubbed content on Regional channels constitutes 1% of its total content. In comparison to that, 22% of the content on HSM channels is Dubbed.

While Dubbed content does not perform as well as Hindi content when aggregated at a channel level in HSM market - Dubbed movies deliver only 356 mn. Impressions as opposed to 684 mn. Impressions for Hindi movies, it's popularity may be higher in certain markets.

Let us see if the popularity of Dubbed content is driven by certain markets.

Market	DUBBED-HINDI	HINDI	Difference
Pun / Har / Cha / HP / J&K	11%	12%	0%
UP/Uttarakhand	13%	18%	-5%
Rajasthan	7%	8%	-1%
Delhi	5%	6%	-1%
Assam / North East / Sikkim	3%	3%	1%
Bihar	3%	4%	-1%
Jharkhand	2%	2%	0%
Odisha	4%	2%	2%
West Bengal	5%	4%	1%
Madhya Pradesh	7%	8%	-1%
Chhattisgarh	3%	4%	0%
Guj / D&D / DNH	11%	9%	2%
Mah / Goa	24%	21%	3%

- % contribution of markets to Avg. Normalised Impressions'000; Only channels for HSM market considered.



If we consider the contribution of markets to Hindi content viewership as a benchmark, we can see that different HSM markets have varying preferences for Dubbed content.

Mah/Goa has the maximum increase in contribution to overall viewership for Dubbed content, followed by Guj/D&D/DNH market. Conversely, UP shows the highest drop followed by Madhya Pradesh.

If we look at the overall trend, we can see a zonal preference emerge in viewership of Dubbed content. The Eastern & Western states see a higher share for viewership of Dubbed content while the Northern & Central states show a decline.

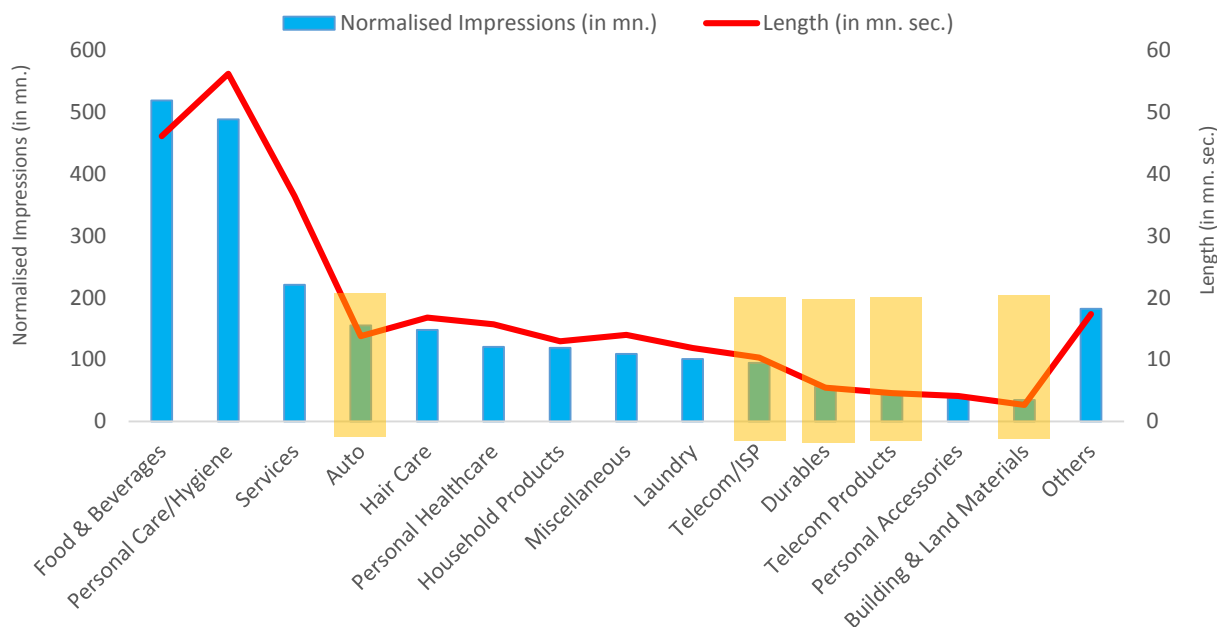
This could perhaps be an indication of the fact that for core Hindi speaking regions the appeal of Dubbed content is lower. For zones where Hindi is not the primary language, Dubbed content has high viewership.





**Ad sector
performance**

Effectiveness of an ad sector can be determined by looking at its Impressions to Duration ratio as it shows the conversion of TV presence into viewership. Keeping this metric in mind, let us look at the Top 15 Ad sectors active on Feature Films as a program genre.



* Sum of Length (in mn. sec.); Sum of Normalised Impressions (in mn.)

The maximum Impressions are garnered by the Food & Beverages ad sector, despite not being the most advertised ad sector on Feature Films.

However, in terms of the best Impressions to Duration ratio, Food & Beverages sector is second to Building, Industrial & Land Material/Equipment. Auto sector comes in at the third position.

On the other hand, Services has the lowest conversion of Duration to Impressions, followed by Personal Healthcare.

If we classify these ad sectors by their target group gender, we can see that most of the effective categories are Male targeted viz. Auto, Telecom/Internet Service Providers, Durables, Telecom Products and Building, Industrial & Land Material/Equipment.

This further reiterates the fact that Movies as a genre is skewed to Males.





Summary

GEC holds 17% of Feature Film content, second only to the Movies genre. However, content availability on GEC channels is mainly driven by Regional channels.

As compared to total TV viewership, audience for the Feature Films are skewed towards young (15-30 yrs.) male audiences specially from lower social grades (NCCS CDE).

Viewership of Feature films is skewed to Female only in case of two genres – GEC and Devotional.

Feature Films on Kids channels have substantial co-viewership driven by parents (22-40 yrs.).

Movie themed content is more effective on Youth genre channels than any other genre in attracting audiences from all social grades.

Viewership across genres is in line with content availability across genres.

Extended weekends with public holidays/festivals generate better viewership than mid-week holidays.

On a zonal level, Eastern & Western states see a higher preference for viewership of Dubbed content.

Audiences for movies in southern market are spread across Movies, GEC and Kids genre channels. However, in HSM it is heavily skewed towards Movies Genre.

Though Movies are skew towards male audience, advertising categories such as Food & Beverages, Personal care/Hygiene perform much better than Durables, Telecom products, etc. This indicates the perception of male consumers increasing for female oriented advertising categories.



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