

TV VIEWERSHIP PATTERN OF YOUTH IN TAMIL NADU (INDIA)

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1. ABSTRACT

The study was conducted to identify the various television-viewing habits among youth of Tamil Nadu (India) and to analyse the content that is preferred by youth. It also helps to understand the mix of programmes that youth of Tamil Nadu like especially with the changing current trends. The effect of western cultural invasion and globalisation has brought about lot of changes in the socio-cultural scene with consequences on the entertainment industry. Sampling was done among 200 youth (age group 18 to 30). The results shows that youth are more interested in music, movies and comedy related programmes. It is proved that female youth are interested in daily soaps and lifestyle shows whereas male youth like watching knowledge based programmes and foreign content. And there is a good scope for launching an exclusive channel for youth in Tamil Nadu (India). This study is important as it is a feasibility study for launching a youth general entertainment channel.

KEYWORDS: Social, Cultural, Youth, Foreign, Knowledge, Exclusive, Entertainment, Channel

2. INTRODUCTION

India is famous for its historical heritages and richness in traditions. India is said to be a synthesis of diverse social and cultural elements. A grand synthesis of cultures, religions and language of the people who belong to different castes and communities has upheld the country's unity and cohesiveness. India has had a plethora of entertainment modes from times immemorial. Some of them like classical art forms dance & music forms have emanated right from the cultural milieu of the land. Modernisation has brought about a lot of changes in the entertainment modes and television has become now the staple form of entertainment for people across the land. Indian Television Industry is existing for nearly four decades. Initially for the first 17 years, the transmission was mainly in black & white. The ignition for Indian Television Industry came in the early nineties with the broadcast of satellite TV by foreign programmers like CNN followed by Star TV and a little later by domestic channels such as Zee TV and Sun TV in the Indian household. The burst of cable TV channels in the Indian scene over shadowed the government owned TV channel Doordharshan which was till then the only television channel across India. Competition became rampant among the different TV channels which resulted in commercialisation of electronic media. Television has ruled our lives and brought significant changes in lifestyle, attitude, behaviour. The liberalisation of television in association with the development of new broadcasting technologies led to a multitude of competing TV stations and to a diversity of available programmes. Television is an adaptive medium and can follow different approaches when efficiently used will definitely contribute to development. Today's youth are growing up in a media-rich environment. Many TV programmes were targeting specific audience and these channels designed their entire themes upon the tastes, needs, likes and preferences of their particular target audience. These were known as special audience programmes like children's programmes, women's programmes, youth programmes and

educational/school telecasts. Value addition to the target group was fulfilled by catering to the specific entertainment needs of that particular section targeted. India is a young country with 356 million people between the age of 10 to 24. So a very lucrative and important section of the television viewing audience is the youth. TV programmes targeting the youth became prevalent and an important section for all channels. Youth programme had a separate format with reality shows and discussion platforms on the problems, desires and requirements of the youth, generally presented by young anchors for the young audience.

3. REVIEW OF LITERATURE

A lot of research has been carried out to understand the behavioural pattern of TV viewers in India. Most of the research papers were based on children and family viewership pattern as Indian TV viewership is considered to be a family centered activity. Mira Aghi (1987) stated in her book "Television and the Indian Child" that television viewing for children mainly remained a "family activity" under the parental supervision and shadow. Studies of television viewing have indicated that adults and children prefer to watch television programmes in their mother tongue and sometimes in another language taught in the school. Buckingham (1996) & Livingstone (2002) stated that many parents often see media, particularly for young children, as an important educational tool that can assist children's intellectual development. Television is perceived as a means of passing time, passive pleasure and recreation by adults (Agrawal 1997, Mathiyalagan 1995). E. R. Kanwal Gurleen & Dr. Sukhmani (2011) found in their study which highlights the various reasons for Indian youth to watch television as generation of knowledge and learning, medium of relaxation and to pass time. The post-liberalization era in India has been marked not only by the rise of a qualified form of youth culture in the context of music television broadcasters such as MTV and Channel V but also by a broader shift in television content that journalist Amrita Shah (1997) characterized as a move from "worshiping senility" to "worshiping juvenility." The globalization of Indian television audiences since the rise of satellite television broadcasting has been marked by the rise of a music television culture that is neither anti-elder in its youth appeal nor anti-national in its global outlook. (Vamsee Juluri, 2002). According to a study done by Vijayalakshmi (2005), young male viewers of television showed a greater degree of preference for western music than young female viewers.

4. INTRODUCTION TO TAMIL NADU (INDIA)

India has 29 states and 7 union territories. Tamil Nadu as the name suggests, is a land of Tamilians located in the southern most part of the country. It is the eleventh largest state by area and sixth most populous state in India. It was ranked sixth among states in India according to the Human Development Index in 2011. Since 2012, it is the second largest state economy in India with \$160 billion in gross domestic product. The state has the highest number (10.56%) of business enterprises and stands 2nd in total employment (9.97%) in India, compared to the population share of about 6%. According to Raghuram Rajan panel's report (2013), Tamil Nadu was ranked as the third most developed states in India based on a "Multidimensional Development Index". Its official language is Tamil, which is considered as the oldest written language in the Dravidian language family. Tamil Nadu is home to many natural resources, classical arts, classical music, classical literature, Hindu Temples of Dravidian architecture, hill stations, beach resorts, multi-religious pilgrimage sites, and eight UNESCO World Heritage Sites. Tamil Nadu is one of the most literate states in India. Tamil Nadu has performed reasonably well in terms of literacy growth during the decade 2001–2011. A survey conducted by the Industry body Assoc ham ranks Tamil Nadu tops among Indian states with about 100 per cent Gross Enrolment Ratio (GER) in primary and upper primary education. The literacy rate as of 2011 census is 80.33 %.

5. MEDIA MARKET STRUCTURE & GROWTH RATE

5.1. Indian Media & Entertainment Industry

With 168 million television households in 2014, India stood as the third largest television market with USD 7.9 billion revenue in 2014. India has one of the largest broadcasting industries in the world with approximately 800 satellite television channels, 242 FM channels and more than 100 operational community radio networks.

5.2. South Indian Media & Entertainment Industry

The Media & Entertainment industry in South India was estimated at Rs. 23,900 crore in FY 2013. The industry is poised to grow at a CAGR of 16% till FY 2017. The size of Media and Entertainment industry in South India is expected to almost double to Rs 43,600 crore by 2017 from around Rs 23,900 crore (2013), according to a joint study by Deloitte and FICCI. South India has a prolific movie industry. 70% of the annual production of approximately 1000 movies in India is produced in South Indian languages. Among the South Indian states Tamil Nadu Media & Entertainment market contributes for 36% followed by Andhra Pradesh (including Telangana) 31%, Karnataka 19% and Kerala 14%.

5.3. South Indian – Television Industry

South Indian states have always had the highest penetration of cable & satellite homes in India. There are three national networks which have forayed into the regional space which include ZEEL (Zee Entertainment Enterprises Limited), Star India and Viacom18. The South Indian Media and Entertainment market is dominated by **Television (56%)** followed by Print (28%), Films (11%), Radio (2%) and New Media (3%). Media and Entertainment industry in South India is expected to garner business worth Rs 36,005 crore by 2015-16, constituting 36% of the industry size nationwide- FICCI-Deloitte report (2012).

Table 5.3: South Indian Media & Entertainment market 2013-17 – Media wise, E: Estimated (INR Crore)

	2013*	2014E	2015E	2016E	2017E	CAGR (2013-2017)
Film	2,680	3,010	3,370	3,780	4,220	12%
Television	13,470	16,540	20,180	24,090	27,960	20%
Print	6,680	6,950	7,540	8,260	9,020	8%
Radio	420	460	560	690	830	19%
New Media	690	850	1,050	1,290	1,600	23%
Total	23,900	27,800	32,700	38,100	43,600	16%

(Source: Deloitte Oct 2013)

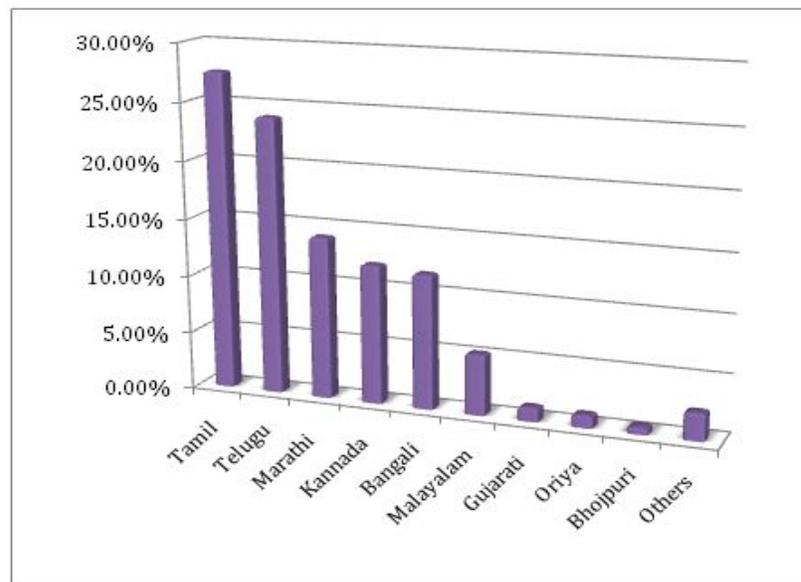
5.4. Tamil Nadu – Television Industry

Among the 5 South Indian states, Tamil Nadu constitutes over one-third of the South Indian Media and Entertainment industry. Tamil Nadu has the most number of TV households at 6.6 million. By 2016, the Tamil Nadu

Media & Entertainment market is expected to touch Rs 12,995 crore. According to Deloitte report (Oct 2013), the television medium of Tamil Nadu is expected to grow at a CAGR of 20% over the next four years due to benefits of digitization being realized. The TV advertisement market in Tamil Nadu is estimated to grow at Rs.27 billion in 2017 according to Deloitte-FICCI, PL Research (2014).

6. VIEWERSHIP SHARE OF REGIONAL CHANNELS IN INDIA

Based on KPMG report 2015, Tamil General Entertainment channels occupies the biggest share with **27.6 %** viewership among all the regional entertainment channels in India. Regional advertisers contributed almost **40%** of the TV industry's advertisement revenues in states such as Tamil Nadu and Kerala (2013). Sun Network is a leading entertainment company in the southern region with presence in television broadcasting, radio and direct-to-home (DTH) services. BBC World Service is the first international broadcaster to offer Tamil-language TV content. Peppers TV, a Tamil entertainment channel launched its offerings on mobile platforms - the first regional channel in India to do so.



(Source: KPMG 2015)

Chart 6.1: Viewership Share of Regional Channels in India

7. RATIONALE

India is a country where a majority of the geographical section understand and speak the national language Hindi. Tamil Nadu, a southern state with a limited geographical area has come into focus as a huge market where opportunity exists for launching youth entertainment channel. Sun TV being a regional channel and having viewers from a single state has been ranked number one in overall Indian television ranking. This shows that Tamil TV industry has more viewership and TV households than other parts of the country. The leading infotainment channel Discovery started its exclusive Tamil channel named Discovery Tamil and other foreign channels with Tamil feed like Cartoon Network, Pogo, Hungama, Fox Traveller, History TV18, NGC shows that there is a huge potential in Tamil TV industry. In short, it's clear that India even though has majority of Hindi speaking audiences, Tamil regional space has more opportunities and maximum viewership which dominates the TV industry. Hence a study to understand the viewership pattern and preferences of Tamil youth

would be interesting.

8. RESEARCH OBJECTIVES

8.1. Main Objective

- To understand the TV viewership pattern of youth (age group 18 to 30) in Tamil Nadu

8.2. Sub Objectives:

- To understand the values, attitudes, lifestyle and behavioural preferences based upon their channel choice, type of content, shows watched and time spent on TV
- To find their preferences towards other Indian & foreign language music, films, shows and dubbed programs
- To understand the different preferences among male and female youth

9. RESEARCH METHOD AND DATA COLLECTION

The research method adopted is the descriptive research where in the current market of the TV industry in Tamil Nadu has been analysed. Sampling was done through online as well as offline method among youth (age group between 18 to 30) in different places of Tamil Nadu. The method of sampling is quota sampling with total sample of 200 youth of which 100 were males 100 and 100 were females.

10. DATA ANALYSIS & INTERPRETATION

10.1. Hours spent on TV

The average amount of time spent on TV by youth is around 1 to 3 hours. And the time they watch TV is mostly **night** as per the results(67% of respondents said that they watch TV in night).So the prime time for youth should be considered in between 7 pm to 11 pm.

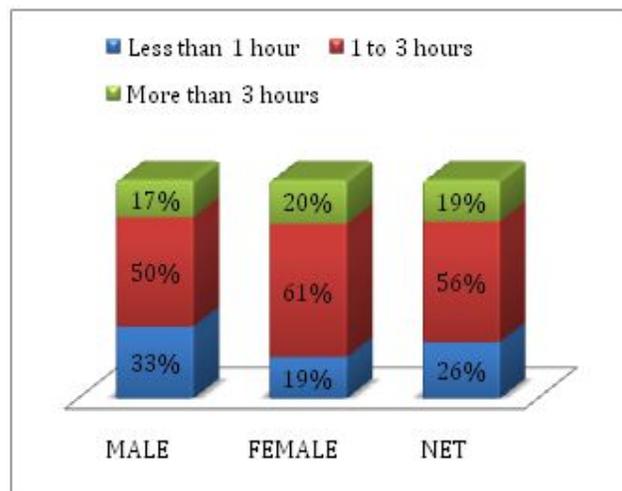


Chart 10.1.A: Hours Spent on TV:

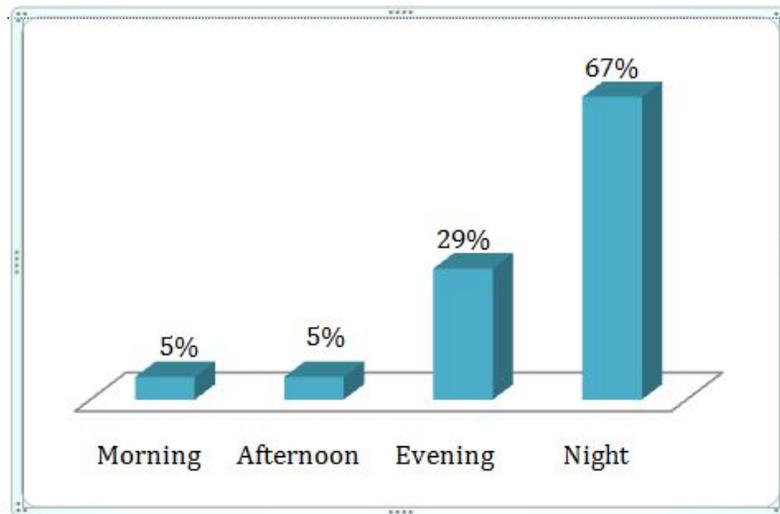


Chart 10.1.B: Prime Time for Youth

10.2. Choice of Entertainment

The most preferred type of channel is Music category. Music (68%) & comedy (51%) being the lightly consumed content, it is most preferred by youth. Movies (41%) has been all time favourite among youth being ranked third by the survey results. With respect to males, they also prefer to watch news (52%) which shows that they are more interested in current happenings and updates. Among female youth, Music category is mostly preferred than any other category. General Entertainment (30%) and infotainment (12%) has been less preferred by the youth.

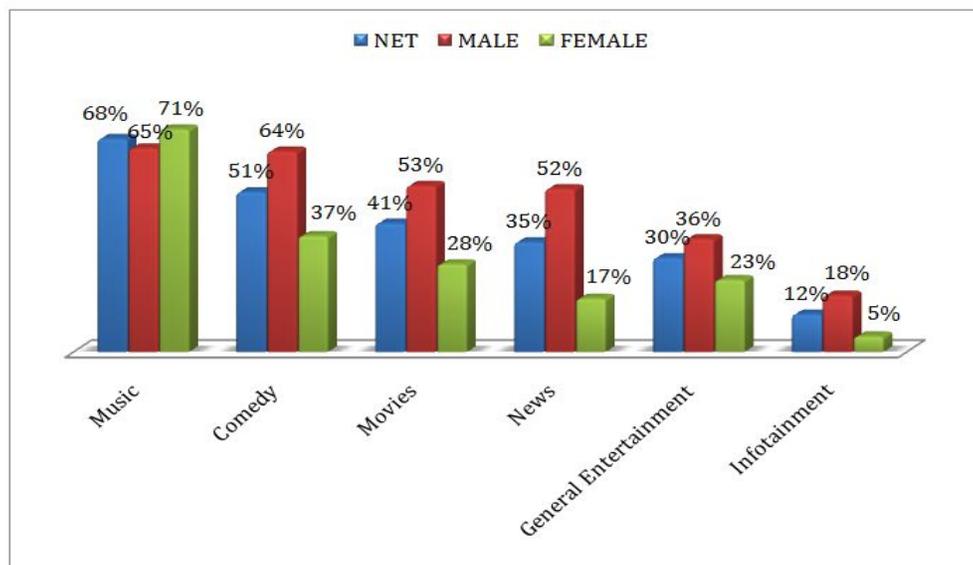


Chart 10.2: Choice of Entertainment

10.3. Type of Content Preferred

The most preferred content of entertainment is stand-up comedy which was voted by 48% of the respondents. To sum up, male youth have defined their likeness of content as stand up comedy, current happenings & social media gags and

talk shows. It shows that they are more interested in shows which make them stress relief, and update about the current happenings in and around the media industry. But female youth also prefer to watch serials which they would like to follow at least for a span of 6 months to 1 year.

Table 10.3: Type of Content Preferred

TYPE	NET	MALE	FEMALE
Standup comedy	48%	55%	41%
Current happenings & social media gags	36%	55%	17%
Game shows	34%	37%	31%
Adventure based reality shows	31%	38%	24%
Talk / Interactive shows	29%	40%	18%
Daily Tv serials	17%	7%	27%
Mythological / Biopic drama	7%	9%	5%

10.4. Music & Media News

10.4.1. Preferred Music Apart From Tamil Music

Apart from Tamil music, youth prefer listening to **any kind of music** (40%) irrespective of the language. Hindi is first choice for male youth (44%) as bolly wood being a glamour industry, it dominates among the male youth crowd. English music also has good scope with 33% of respondents opted for it. And other south Indian language music is less preferred which contributes to only 20% of the respondents.

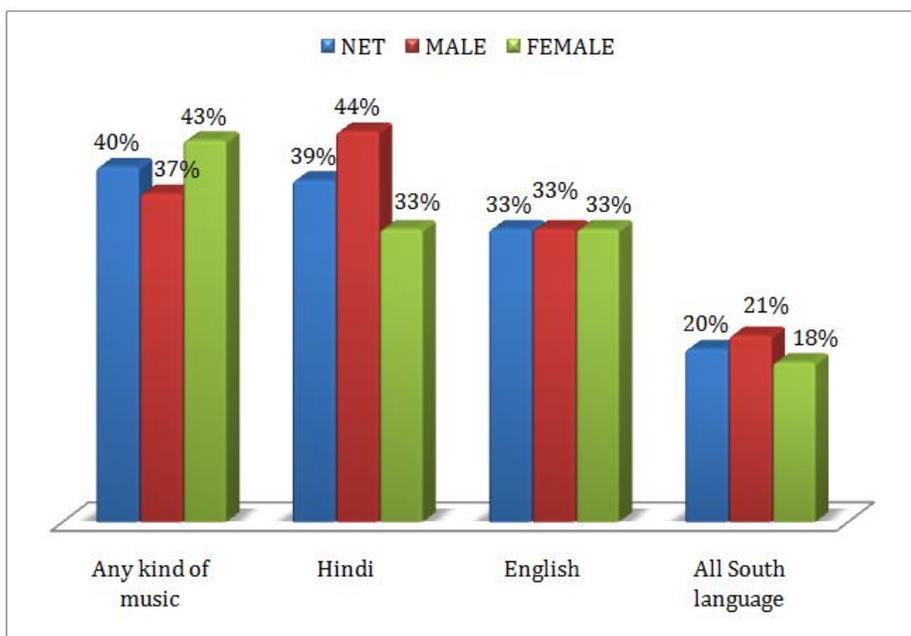


Chart 10.4.1: Preferred Music Apart from Tamil Music

10.4.2. Type of Music Show Preferred

The most preferred music show is a show based on random latest hits which was opted by 56% of the respondents. Unplugged music preferred by 15%, show with VJ/anchor 14%, orchestra 5% and 10% of the respondents have said that they do not watch music shows on TV.

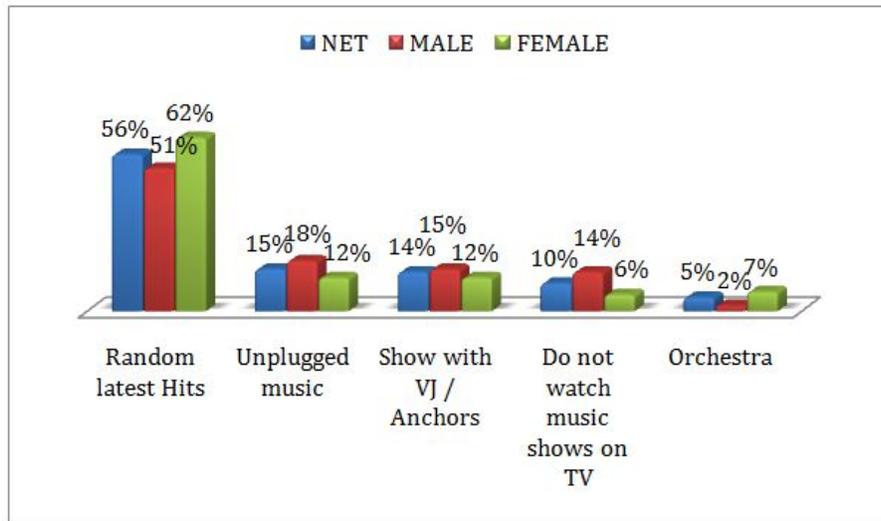


Chart 10.4.2: Type of Music Show Preferred

10.5. Movies

10.5.1. Movies and Actors

When it comes to movies, youth have more likings towards their favourite actor/actress ‘films. But it is true that they like watching any kind of movies irrespective of the actor / actress based on the survey results (67%).It means that movies with good stories, message, talented actors, and innovation are also preferred by them. And 33% of youth prefer to watch movies only if it has their favourite actors.

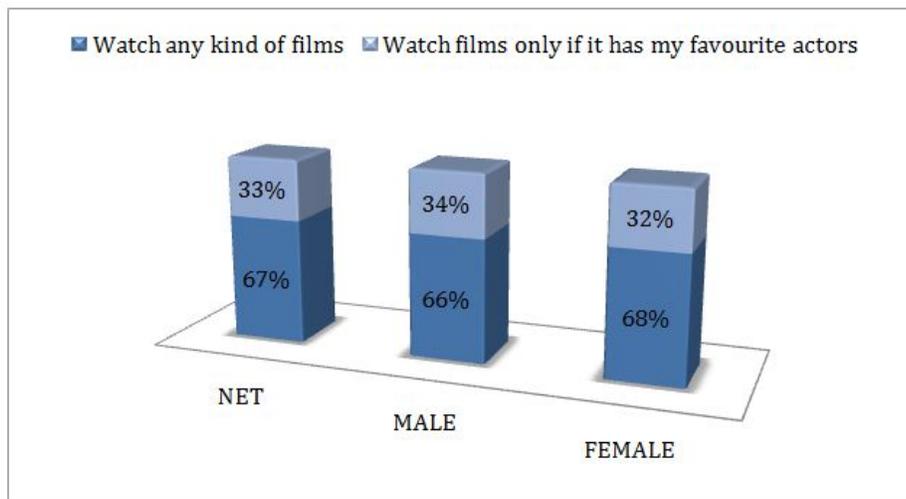


Chart 10.5.1: Movies and Actors

10.6. Serials:

10.6.1. Type of Serials Preferred

Family drama ruling General Entertainment Channels also have good viewership among female youth(38%).With respect to males, college love stories(52%) are widely preferred. And Tamil Nadu being a state where people have more

spirit for their “Tamil culture”, serials based on Tamil culture (32%) are also preferred by most of the youth

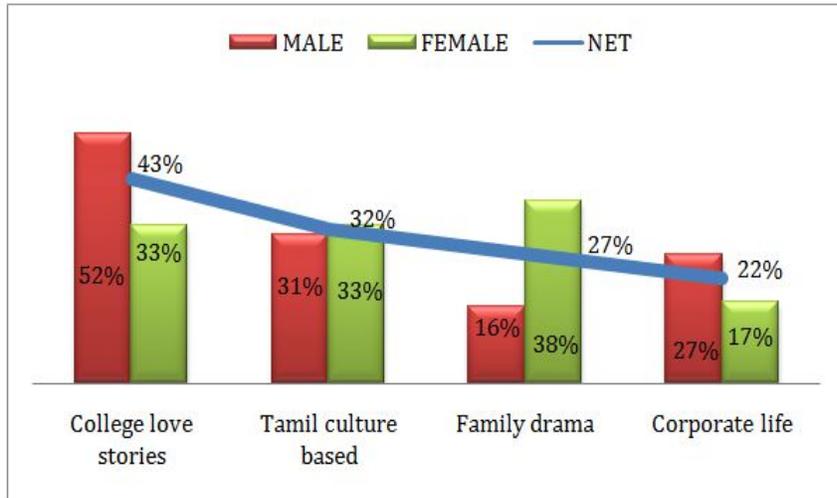


Chart 10.6.1: Type of Serials Preferred

10.6.2. Preferred Length of any Fiction Show

The major point to be noted for programming any serial is number of episodes or seasons. 35% of respondents have given their preferences for 3 to 6 months followed by 28% have answered for 1 to 2 months. And 24 % of respondents have said that they like to watch a fiction show for 6 months to 1 year. Finally only 14 % have interest for watching a fiction show for more than a year.

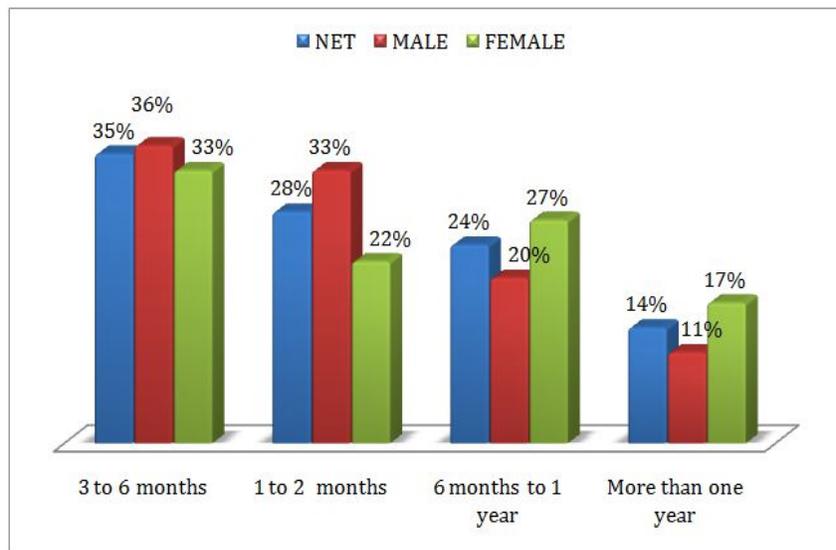


Chart 10.6.2: Preferred Length of Any Fiction Show

10.7. Dubbed & Foreign Content

10.7.1. Preferred Dubbed Movies

Among dubbed movies, **Hollywood** movies top the chart with **63%** of the respondents opting for it. Other south

Indian language movies are preferred by 33% of the respondents followed by Bollywood (24%) and 7% for Chinese /Korean. 14% of the respondents have said that they do not watch dubbed movies. Indian youth have greater affinity to Hollywood industry as it gives them more exposure to the high end technology, foreign culture and has a variety of genre like sci-fi, thriller, suspense, fantasy, comedy, adventure, horror, mythological and so on.

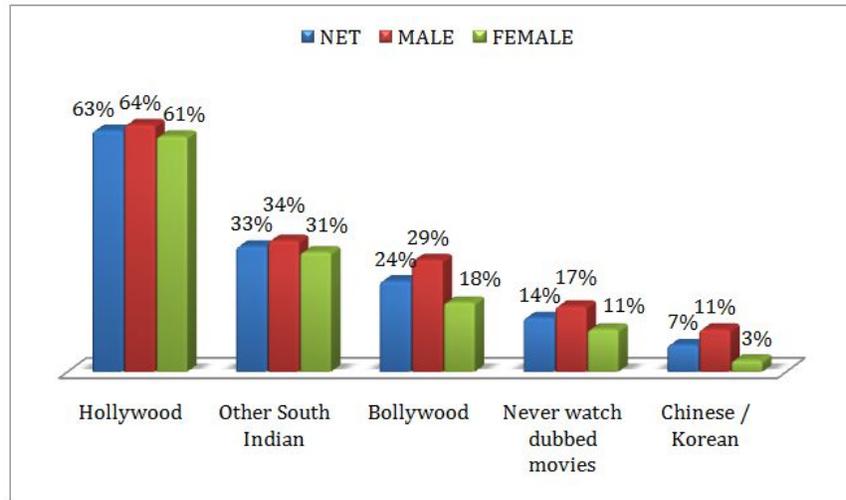


Chart 10.7.1: Preferred dubbed movies

10.7.2. Preferred Dubbed Serials

As we know, serials being widely preferred by female crowd, there is a good scope for Hindi dubbed serials among female youth (44%) whereas male youth (41%) do not like watching dubbed serials. 20% of respondents like watching English dubbed serials followed by other foreign language serials (Korean, Chinese) preferred by 6% of the respondents.

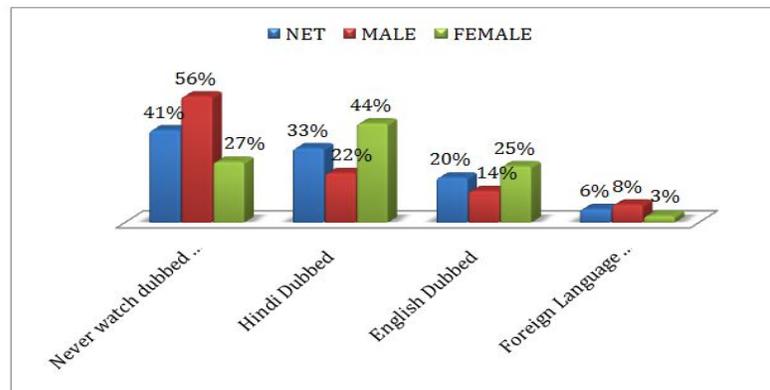


Chart 10.7.2 Preferred Dubbed Serials

10.7.3 Preferences for Stories Based on Foreign Culture & Lifestyle:

67% of the respondents have told that they like watching stories based on lifestyle and culture of overseas countries. 75% of female have said that they like watching stories based on foreign content.

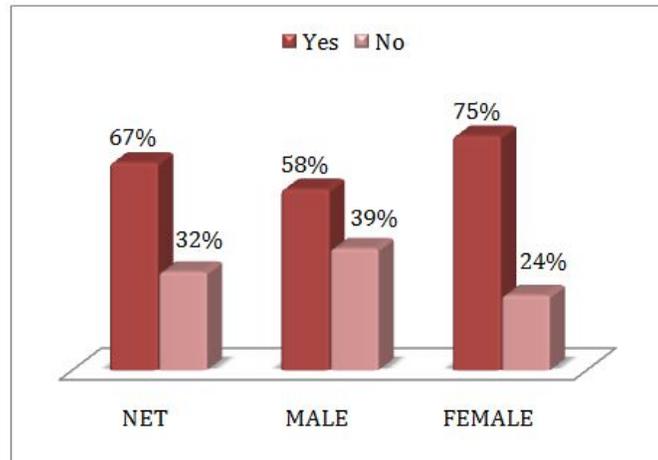


Chart 10.7.3 Preferences for Stories based on Foreign Culture & Lifestyle

10.7.4. Continent Preferred for Shows on Overseas Culture / Lifestyle

Male youth prefer to watch any content which is based on American (50%), European (43%) or Asian (38%). Other continents preferred by male youth are very less contributing 22% for British, 17% for African and 19% for Middle east. But with respect to female youth American (71%) is the most preferred continent as Indian women are getting more westernized in recent day’s. And hence they like to watch American content more to keep them updated about the latest style and trends. Female youth have less preference for other continents British (21%), Asian (16%), European (13%), African 13%, and Middle East (12%).

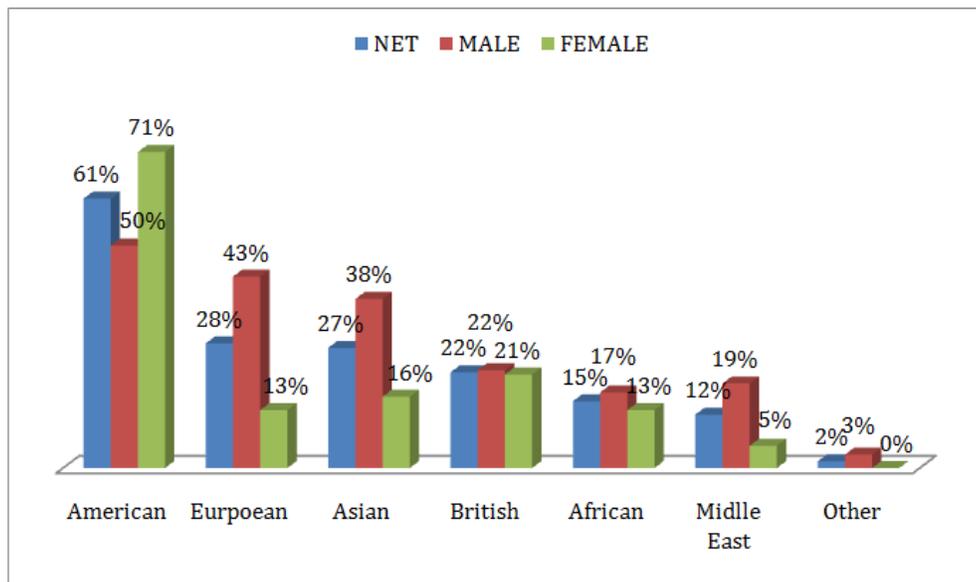


Chart 10.7.4. Continent Preferred for shows on Overseas Culture / Lifestyle

10.8: Reality Shows

Tamil girls have always love for dance(50%) & singing(49%) traditionally, which shows that they like watching a reality show based on that. But guys prefer comedy based reality shows(55%) the most compared to singing(34%) &

dance(36%). Game shows are preferred by 22% of the respondents and 13% have said that they do not like watching reality shows.

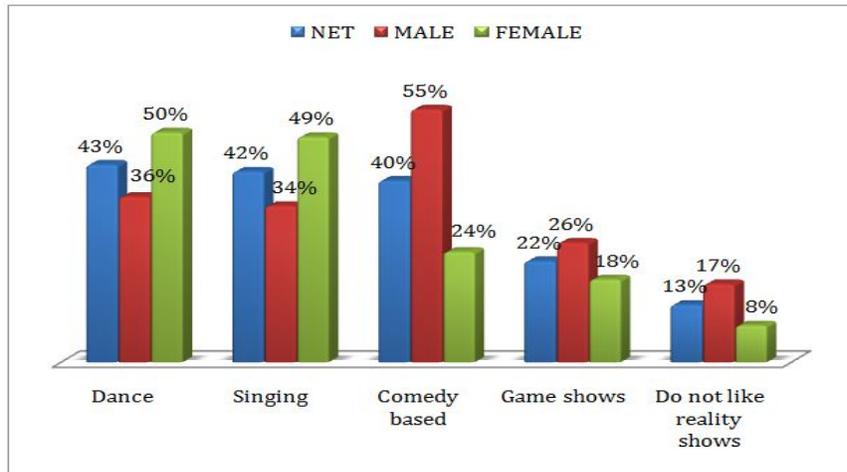


Chart: 10.8: Reality shows

10.9. Lifestyle

10.9.1. Preferred Lifestyle Shows

Male youth being more passionate about bikes, mobiles and technology which is confirmed by the survey that they like shows based on automobiles (55%) & gadgets / technology(51%).38% of the male respondents have preferences for watching travel & food based shows followed by fitness & health (32%) f ashion related (14%).And female youth prefer shows on fitness(32%), travel(32%) & food and fashion related(31%) which is true that they are more concerned about their fitness and fashion stuffs.14% of the respondents have given option that they do not watch lifestyle shows.

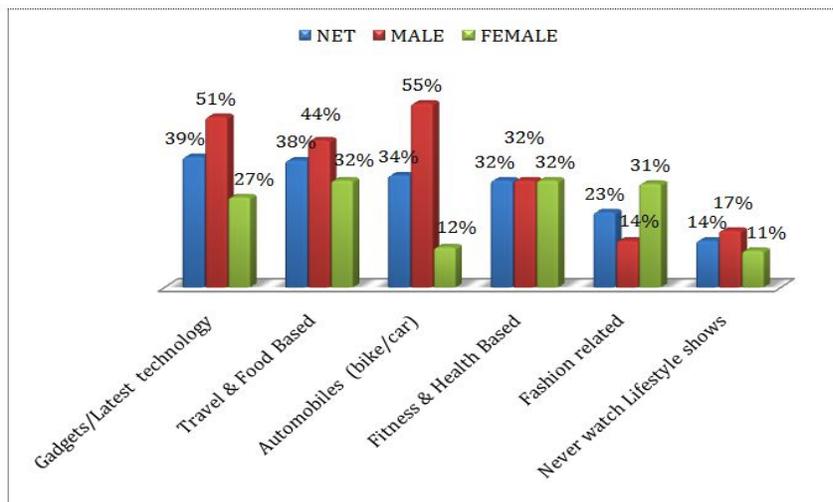


Chart 10.9.1.Preferred Lifestyle Shows

10.10 Expectations from Existing TV Channels

Female youth are satisfied with the content and programs currently being played by the existing channels as 75 %

of the female respondents have answered in favour of the question. But male youth are not satisfied with the current content being played by the existing channels with 55% of the male respondents have selected the option that they are not satisfied with the existing content of the TV channels.

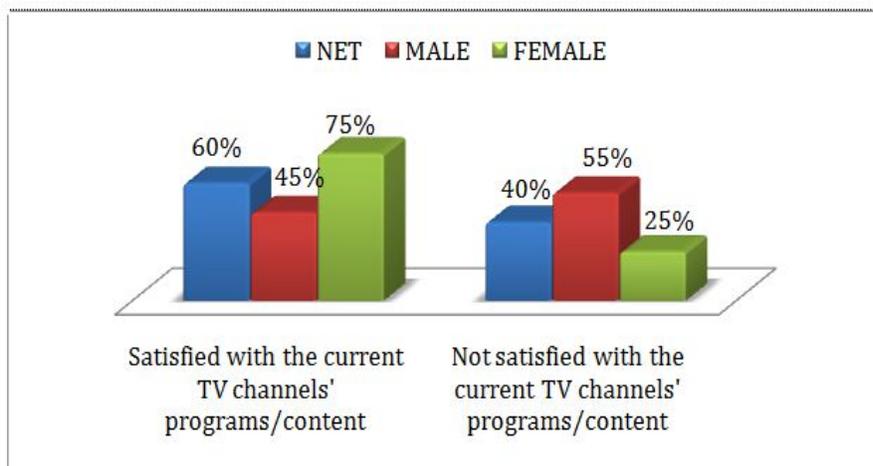


Chart 10.10: Expectations from Existing TV Channels

11. VALUES, ATTITUDES, LIFESTYLE AND BEHAVIOURAL PREFERENCES INTERPRETED

The study proves that music is the all time favourite category of entertainment for youth, especially random latest hit songs because young people like to keep up with the trends. The latest hit songs give them an idea about all changes in the music sector. Apart from Tamil music, male youth prefer bollywood music the most because of the glamour associated with the industry. Another important aspect is the connect between the bollywood and the Tamil film industry which have heroines mostly from the north. This adds to the interest of the young males in bollywood music.

Because of the exposure to technology and films from the west, there is a marked shift in the way in which young people appreciate films as compared to the older Tamil generation. Movies with good stories, hi-tech animations, and innovations are popular among the youth. Tamil Nadu is a state where previously heroes from the film industry have become larger than life figures and are very prominent in the public arena. Though they like films by their favourite actors or actresses, education and outward looking attitude has made them more discerning.

Young males prefer watching college stories because they are able to relate to the college stories. And young females like to watch more of family soaps as they have been conditioned right from childhood, about their roles and responsibilities as part of a larger familial social setup. Tamil being the oldest Dravidian language, movements in Tamil Nadu have always stressed upon the value and significance of the language. Hence serials with content that are based on Tamil culture is preferred most by the youth. In changing times when young people are becoming more influenced by western culture and way of life, the study shows that in Tamil Nadu there is still a feeling of patriotic loyalty towards the mother tongue. The preferred length of these 'daily soaps' are for those that last for duration of 3 to 6 months. This again reflects the impatience and the desire for immediate outcomes that today's young generation has. The young Tamil youth is desirous for a fast flexible and lived on the go life. Young females on the other hand like to watch the dubbed Hindi serials because though different, they are able to relate to the socio- cultural milieu shown. At the same time they feel that they are able to keep up with the current trends in style and fashion. The richness of the visuals further attracts these young

girls. Young men do not like to watch dubbed serials as already mentioned their interests do not lie in family sagas and tales.

Even among the dubbed movies, the preference is more for Hollywood movies amongst both the genders. This is because of the great interest that youth have in technology and Tamil Nadu is a state where, in primary levels of education, a lot of emphasis is placed on English and technical knowledge. The young audience is becoming more demanding and the rising currency of visual and experiential entertainment makes the Hollywood movies more attractive. A state with many institutes of higher education, Tamil Nadu has young people who are highly qualified and are looking and seeking opportunities on the world stage. Most of them desire to go abroad and especially the western countries and hence Hollywood movies become a vicarious experience for them.

There is a lot of preference for TV content based on foreign culture and lifestyle with predominant preference for American, European and Asian cultures. The reason probably could be that young aspirational Tamilians who want to explore opportunities abroad are trying to understand and experience the lifestyles of these cultures. Women particularly are more interested in the American and European culture and lifestyle. The reason being western trends and fashion attract them. They are style conscious, love to flaunt the latest and love to experiment with clothes and latest trends. To be appreciated by friends, stand out in a crowd and to keep looking young is the need of the young female. Watching shows with European and western lifestyles fulfils these needs. The concept of beauty in India is strongly linked to the colour complexion – fairness being considered beautiful. Young women, when they watch these American & European shows, where the protagonists are fair complexioned, use them as role models and fashion icons.

Reality shows in Tamil language are based on music, dance and comedy. Tamil Nadu has a rich culture of traditional dance forms like Bharatnatyam that are of ethnic origin. It is also abode of the south Indian classical music. Youth still carry forward the tradition of the love for dancing and music.

Main preference of the male youth is shows based on gadgets, technology and automobiles (bikes/cars). Fashion related shows are very much down in their list of preferences. Interestingly young females in the sample responded in the reverse manner having higher preferences for fitness, travel, food and fashion related shows.

The gap between the expectations of the young viewers and the existing channel content is also a very interesting area to note. Females are fairly happy and satisfied with the existing content because the television shows focus on music, fashion dance and daily soaps. But the young male population in the sample felt that the gap between the expectations and the existing TV content was great as they desired for programmes that would be more technology, gadget, general information and foreign based.

12. LIMITATIONS

A larger sample could be collected which would give a more comprehensive picture. Further, it is a common knowledge that young males prefer sports programmes and it is considered as a separate TV category. So this study has not taken that option into account. Future studies can also take that into account.

13. CONCLUSIONS

This study is important in as much as it focuses upon the feasibility of launching youth entertainment channels for one of the most prominent south Indian states. BARC (Broadcast Audience Research Council) rating of week 42 as shown

in chart 13 proves that amongst all the Indian TV channels, Sun TV which is a Tamil channel has the highest rating even above the popular private Hindi channels. This is commendable because Hindi is the most popular Indian language along with it being the official language of the country. The scope for TV channels in Tamil Nadu is thus self – explanatory.

Week 42: Saturday, 17th October 2015 to Friday, 23rd October 2015

Across Genres Top 10 Channels

Rank	Channel Name	Weekly Rat (000s) sum
		Week 42
1	Sun TV	1151458
2	STAR Plus	804448
3	Colors	682422
4	Zee Anmol	652737
5	Zee TV	649798
6	DD National	567433
7	Sony MAX	525073
8	Life Ok	513149
9	STAR Utsav	475386
10	Asianet	448820

TOP 10 Channels *Across Genre : All India : Individuals : BARC India base - All India (U+R)

Chart 13: Top 10 Channels across Genre in India

Tamil content is most popular among the four South Indian languages and sees a lot of traction with the international audiences. Tamil Nadu having a youth population of more than 1.26 crore has a huge potential for launching a Youth General Entertainment Channel. There lies a gap between the male youth and the existing TV channels. So a strong need exists for launching a new channel exclusively for male youth. Programs with new content that matches youth trends and needs will have a great reach among the target audience. The programme timings with repeat telecasts need to be planned effectively to attract the young audience. A lot of emphasis has to be put on music and musical programmes during the planning stage.

From the survey results, we can conclude that the preference for male youth include programs based on music, comedy, movies and knowledge based programs. But with respect to women it includes music, daily soaps, fitness /fashion, dance/singing shows and also dubbed content (American/Hindi). There is natural curiosity of audiences to understand North Indian cultures, traditions & weddings. Adaptation and dubbing of successful fiction and non-fiction shows from Hindi General Entertainment Channel to regional languages continue to have reasonable success both in terms of viewership and cost optimization. It has been observed that youth have started exploring more diverse content like Hindi music, English series/films. It is proved that they like watching programs that suits their age, emotions, lifestyle and trend. Regional markets continue to be a key revenue driver for the national broadcasters and there exists a big scope for expanding their regional language offerings.

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