

**Doordarshan : Cable And Satellite Television  
- A Status Report**

**By**

**B S Chandrasekhar**

Doordarshan  
Cable and Satellite Television  
- A Status Report.

TO S. R. JOSHI

8

B. S. Chandrasekhar  
Director, Audience Research,  
Directorate General  
Doordarshan  
New Delhi. 110001.

Television came to India in 1959 as an experimental service with an hour's programme telecast twice a week. The regular telecasting started in 1966 with a daily one hour programme with a news bulletin. The other cities had to wait longer for this medium and only after 1982 the expansion has been rapid.

As in October 1992 Doordarshan network includes 22 programme producing centres and 533 transmitters. The physical coverage is 82.5 percent of the population of the country.

There are about 33 million TV sets of which two thirds are in Urban areas. The National Readership survey has estimated that 77 percent of the Urban population and 30 percent of the rural population had access to television.

Doordarshan programmes are presently available for a total of 9 hours on weekdays, 10 hours on Saturdays and 16 hours on Sundays. There will be an increase by about 2 hours per day from January 1993. The viewers in the four metropolitan cities now get an additional three hours alternate programmes on the second channel. This channel is also likely to undergo a change in the near future.

#### Video-cable

As the television sets increased there was more and more demand for entertainment particularly in films in Hindi and Indian languages. Doordarshan could not cater to this increased demands as it had to fulfill its social commitments also. Watching video cassettes on hired VCRs became a popular pastime at weekends for many of the families. Enterprising people started linking the households in compact areas through cable and feeding the domestic sets the programmes from a centralised VCR and such cable networks mushroomed. With the advertising support this network could cater to more and more people at increasingly cheaper rates. The main content

of the local cable was films but it occasionally included old TV serials, music cassettes and some Pakistani plays.

### Satellite Television

The Gulf war and the high profile coverage of CNN straight from the fields of 'the mother of all battles', brought the Satellite TV for the first time to India. Star TV made its debut in 1991.

The aggressive promotion, the band-wagon effect it created, the support it got from the small but powerful vocal, English educated upper class all made it possible for Star to have a high profile debut.

Star could take advantage of the already existing local cable networks. Most of the cable operators started feeding the four channels of Star namely starplus MTV, prime sports and BBC, in addition to their own programmes to all their subscribers.

### The Study

Within months of Star's entry into the Indian skies the situation looked confusing. Claims made without evidence and repeated in different forums were accepted as truths by certain people.

In this situation the Audience Research Unit of Doordarshan conducted a major study to assess the status of cable and satellite television in relation to Doordarshan. The study had two major objectives:

1. to assess the extent of Cable and Satellite infiltration in selected cities and towns.
2. to find the differences in viewing habits between those who have cable and those who depend on Doordarshan only.

The study covered 10 cities and towns Delhi, Bombay, Madras, Calcutta, Hyderabad, Bangalore, Lucknow, Nagpur, Jaipur and Cuttack, which represent

1. Different sizes of population
2. Different levels of cable infiltration
3. Different levels of knowledge in English and Hindi

This paper presents, the findings of this study. Part II describes the level of cable infiltration and Part III the viewing habits.

PART - IIINFILTRATION OF CABLE/STVEARLIER STUDIES

A number of Market Research Organisations have estimated the infiltration of Cable TV. Among them the following two have been based on large samples.

- 1) A study by MRG in the four metro cities in October 1991.
- 2) NTS IV conducted by MRAS - Burke in December 1991 covering a large number of cities and towns.

These two studies are strictly not comparable as in MRG households with monthly income of Rs.1500/- and above have been covered and in NTS households with monthly income of Rs.500/- and above have been included. Even though Rs.500/- a month appears to be very small, the NTS estimates show that over 40% of the urban households do not have even an income of Rs.500/- per month.

Both MRG and NTS have estimated the total number of cable TV households from enumeration of households.

The following are the estimates of these two studies.

City	Population (Thousands)	TV Households (Thousands)	Cable Households			
			MRG		NTS	
Delhi	8375	1539	43000	6.5	51000	3.3
Bombay	12571	1851	230700	23.4	472000	25.5
Madras	5361	676	33100	7.2	36000	5.3
Calcutta	10916	1707	32500	3.2	23000	1.3
Hyderabad	4280	659			15400	2.3
Bangalore	4087	636			22400	3.5
Lucknow	1642	267			8700	3.2
Nagpur	1661	233			N.A.	
Jaipur	1514	183			500	2.7
Cuttack	439	61			500	8.2

- 4 -

**STATEWISE FIGURES**

Since NTS IV attempted to estimate the TV viewing habits for the entire country the statewise figures obtained from NTS are relevant and are given below.

According to NTS there is a clear pattern in Cable TV households.

- 1) In Western India, Maharashtra, Gujarat and parts of Madhya Pradesh the infiltration is high.
- 2) In non Hindi states like Tamil Nadu, Karnataka, Orissa it is moderate.
- 3) In Hindi states it is only marginal.

**NTS - IV**

<u>State</u>	<u>TV Households</u>	<u>Cable Households</u>	<u>%</u>
Andhra Pradesh	18,25,000	1,36,000	6.4
Bihár	9,89,000	---	--
Delhi.	15,39,000	51,000	3.2
Gujarat	15,38,000	5,80,000	29.6
Karnataka	14,43,000	23,000	1.3
Kerala.	5,74,000	8,000	0.9
Madhya Pradesh	14,38,000	2,03,000	11.3
Maharashtra	41,15,000	7,18,000	15.9
Bombay	18,51,000	4,72,000	24.1
Orissa	4,90,000	37,500	7.6
Rajasthan	8,50,000	8,000	0.7
Tamil Nadu	15,71,000	1,81,000	7.5
Uttar Pradesh	27,13,000	33,000	1.0
West Bengal	25,47,000	66,000	2.0

**PART - III**

**VIEWING HABITS**

For assessing whether there are great differences in the viewing habits, two sets of households were selected one with cable connection and the other without cable connection but belonging to the same socio economic group.

Since the programme pattern for weekdays and the other days differ, separate matching samples were selected for a Sunday, a Saturday and week day. The actual sample size for the study was 5992. distributed as:

	<b>Cable Households</b>	<b>Non-Cable Households</b>	<b>Total</b>
Weekday (Wednesday)	996	996	1992
Saturday	1000	1000	2000
Sunday	1000	1000	2000
	2996	2996	5992

**SAMPLE STRUCTURE**

The main features of the sample are:

Men, accounted for slightly more than half the sample with similar representation in the cable and non-cable households.

The different age groups were proportionally represented and in the same ratio in both the samples.

There were more educated people in both the samples.

Occupation wise the two samples were similar.

However, in the cable households, there was more representation from the higher income groups.

The sample structure is shown in the table on the <sup>next</sup> opposite page.

However, in the present study, information about the number of cable TV households were obtained from the operators. In each city/town the cable TV operators were identified and the number of connections they have given were ascertained.

The following table gives the extent of cable infiltration in the selected cities.

City	Cable Operators	CTV	STV	Total	Percentage
Delhi	800	9,000	85,000	94,000	6.1
Bombay	1,500	25,000	3,40,000	3,65,000	19.8
Madras	600	21,500	16,000	37,000	5.5
Calcutta	300	5000	40,000	45,000	2.7
Hyderabad	300	11,000	25,000	36,000	5.5
Bangalore	300	12,000	35,000	37,000	5.8
Lucknow	100	6,000	3,000	9,000	3.4
Nagpur	120	5,000	10,000	15,000	6.5
Jaipur	60	350	2,200	2,500	1.4
Cuttack	25	500	1,300	1,800	2.9

These figures show a general increase in STV connection since NTS, except in Bombay. In Bombay, the growth rate appears to have slackened. Also these figures are based on the connections through cable operators and it is learnt that in Bombay there are housing societies which arrange cable without the intervention of commercial operators. Two points about the above figures are note worthy:

- 1) There has been a big increase in the number of cable connections in the last six months but even with this increase, the cable is still limited to a small percentage of TV households even in urban areas.
- 2) The new connections mostly have Satellite link but in places like Madras still a large portion have only local cable presumably taken for watching the feature films in local languages.

PROFILE OF RESPONDENTS

Variable	Cable Household		Non-Cable Household		Total	
	N=2996 No.	%	N=2996 No.	%	N=5992 No.	%
<u>Sex</u>						
Male	1755	58.6	1708	57.0	3463	57.8
Female	1241	41.4	1288	43.0	2529	42.2
<u>Age</u>						
15 - 20 years	362	12.1	461	15.4	823	13.7
21 - 25 years	590	19.7	602	20.1	1192	19.9
26 - 35 years	932	31.1	847	28.6	1789	29.9
36 - 45 years	666	22.2	601	20.1	1267	21.1
46 + years	445	14.9	474	15.8	919	15.3
<u>Education</u>						
Graduate	1643	54.8	1389	46.4	3032	50.6
Under Graduate	1006	33.6	1134	37.9	2140	35.7
Below 10th	313	10.1	393	13.1	696	11.6
Illiterate	44	1.5	80	2.6	124	2.1
<u>Occupation</u>						
Service	856	28.6	923	30.8	1779	29.7
Housewife	801	26.7	778	26.0	1579	26.4
Student	546	18.2	654	21.8	1200	20.0
Retired	128	4.3	151	5.0	279	4.6
Others	665	22.2	490	16.3	1155	19.3
<u>Monthly Family Income</u>						
Upto Rs.1500/-	202	6.7	367	12.2	569	9.5
Rs.1501-3000	1011	33.7	1384	46.2	2395	40.0
Rs.3001-4500	1006	33.6	819	27.3	1825	30.5
Rs.4501/- +	777	25.9	426	14.2	1203	20.1

TYPE OF TV SET - VCR - OWNED

Still a substantial number of urban households have Black & White TV sets. However, 80 percent of cable households have colour TV sets. VCR/VCP is available in about 25 percent of the TV owning households.

	Cable Households	Non Cable Household	Total
Black & White	22.7	49.3	36.0
Colour	78.7	52.7	65.7
(Some have both Black & White and Colour TV)			
VCR/VCP	30.9	19.4	25.4

TYPES OF CABLE CONNECTIONS

Most of the cable households started with basic cable that is VCR programmes fed by the local operator.

However, with the advent of Satellite TV, majority of Cable operators feed Satellite programmes through their net work.

About 78 percent of the cable households get Star TV programmes. However, there are two type of cable connections:

- 1) A single channel getting both VCR and STV programmes as per the choice of the operator.
- 2) Multi channel connections where different STV channels are available and the viewer has the choice and can shift channels.

### REASONS FOR SUBSCRIBING

Reasons for subscribing or not subscribing to Cable TV are worth studying.

Those who have Cable connection said that their decision was prompted by:

Programme choice

More entertainment

Wider News coverage

Wider Sports Coverage

Doordarshan not interesting

Insistance of Children

Because others in their peer group have.

### REASONS FOR NOT SUBSCRIBING

Those who do not have cable have put forth the following reasons for not subscribing:

Affects Children's study

Too expensive

Have no time

Doordarshan is OK

Alien Culture

Alien language

~~More details are available in the appendix tables.~~

Viewership at Different Timings

Weekday

In this survey the details about the viewership to different channels at different timings were collected. Though information was collected for each half hour period for easy comprehension an hour is taken as the unit. The chart on the opposite page gives the trend of viewing from 6.00 am to midnight.

The following is a further summary, which gives the maximum viewership to different channels at different timings.

	----- W E D N E S D A Y -----			
	<u>Non Cable Households</u>	<u>Cable Households</u>		
	DD I (1000)	DD I (1000)	Basic (1000)	Star Plus (780)
Upto 9.00 am	20	15	03	04
9.00 am to 2.00 pm	--	--	13	05
2.00 pm to 3.00 pm	21	10	18	07
3.00 pm to 5.30 pm	--	--	18	06
5.30 pm to 8.00 pm	51	36	03	06
8.00 pm to 10.00 pm	68	53	19	06
10.00 pm to Midnight	10	05	22	08

The following points are worth noting for a Weekday:

- \* Basic cable has good audience in the afternoon when Doordarshan is off the air.
- \* Again Basic Cable, mostly feature films attract a sizeable number after the prime Doordarshan programmes of 9.30 pm.
- \* Satellite TV programmes have a small audience even in the household having this facility.
- \* Of the different star channels, Star Plus has the maximum viewership

--: 19:--

Saturday

The chart on the opposite page gives the viewing trend for a Saturday and the following is a summary giving the maximum viewership figures at select timings.

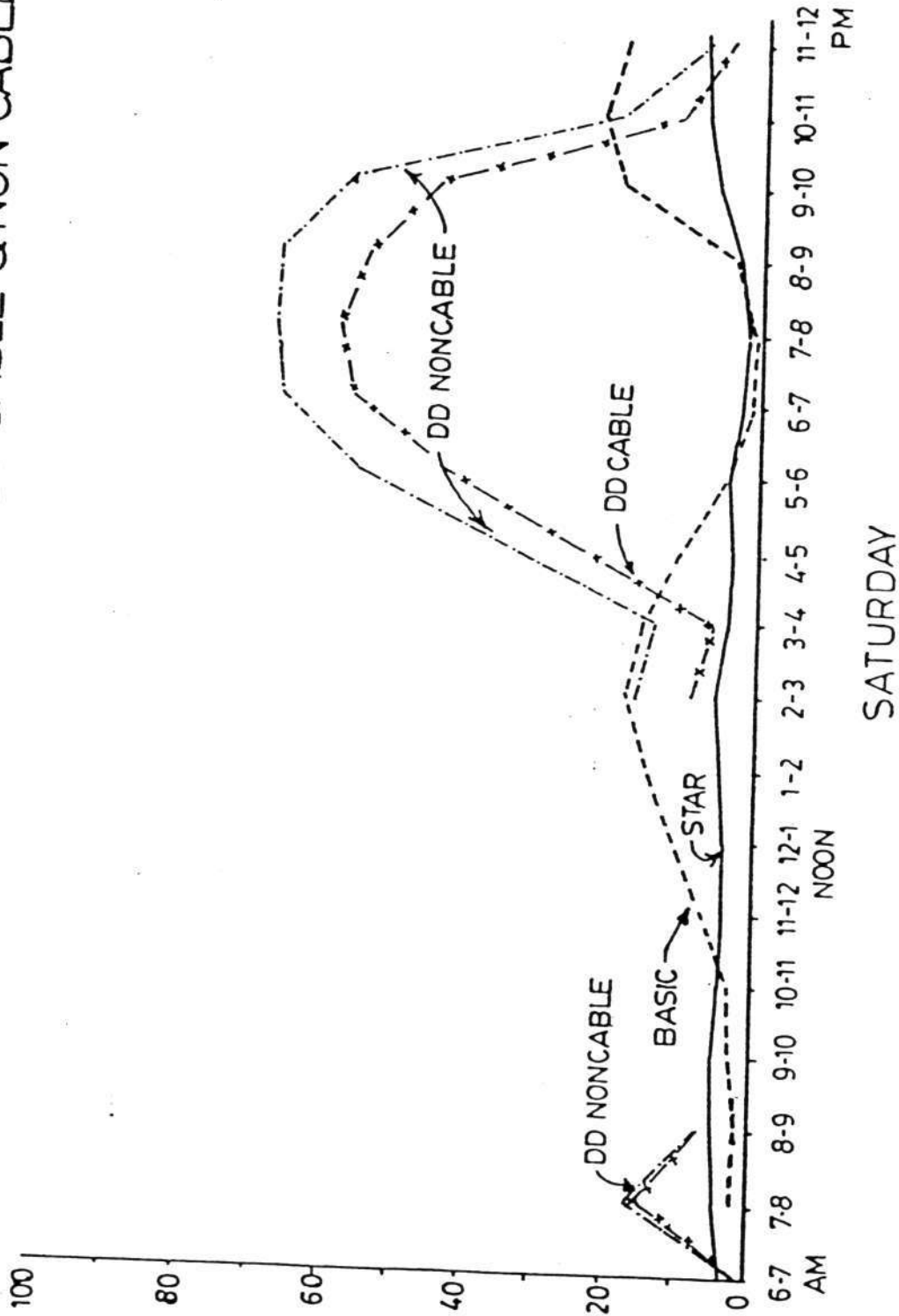
	S A T U R D A Y			
	Non Cable Households	Cable Households		
	DD	DD	Basic	Star Plus
Upto 9.00 am	17	16	3	5
9.00 am to 2.00 pm	--	--	15	5
2.00 pm to 5.30 pm	17	09	18	6
5.30 pm to 8.00 pm	68	60	5	4
8.00 pm to 10.00 pm	67	55	19	6
10.00 pm to Midnight	20	12	22	8

The following are the salient features:

- \* In the morning the trend is similar to any other weekday.
- \* Afternoon there is some viewing to Doordarshan Humlog.
- \* Evening and early night Doordarshan has the maximum viewing for the feature films.
- \* Basic Cable attracts a good audience after the Doordarshan 9 pm serials.
- \* The viewership to Star is like any other weekday.

11A

# VIEWERSHIP OF CABLE/DD PROGS IN DIFFERENT TIME SLOTS AMONGST CABLE & NON CABLE HH





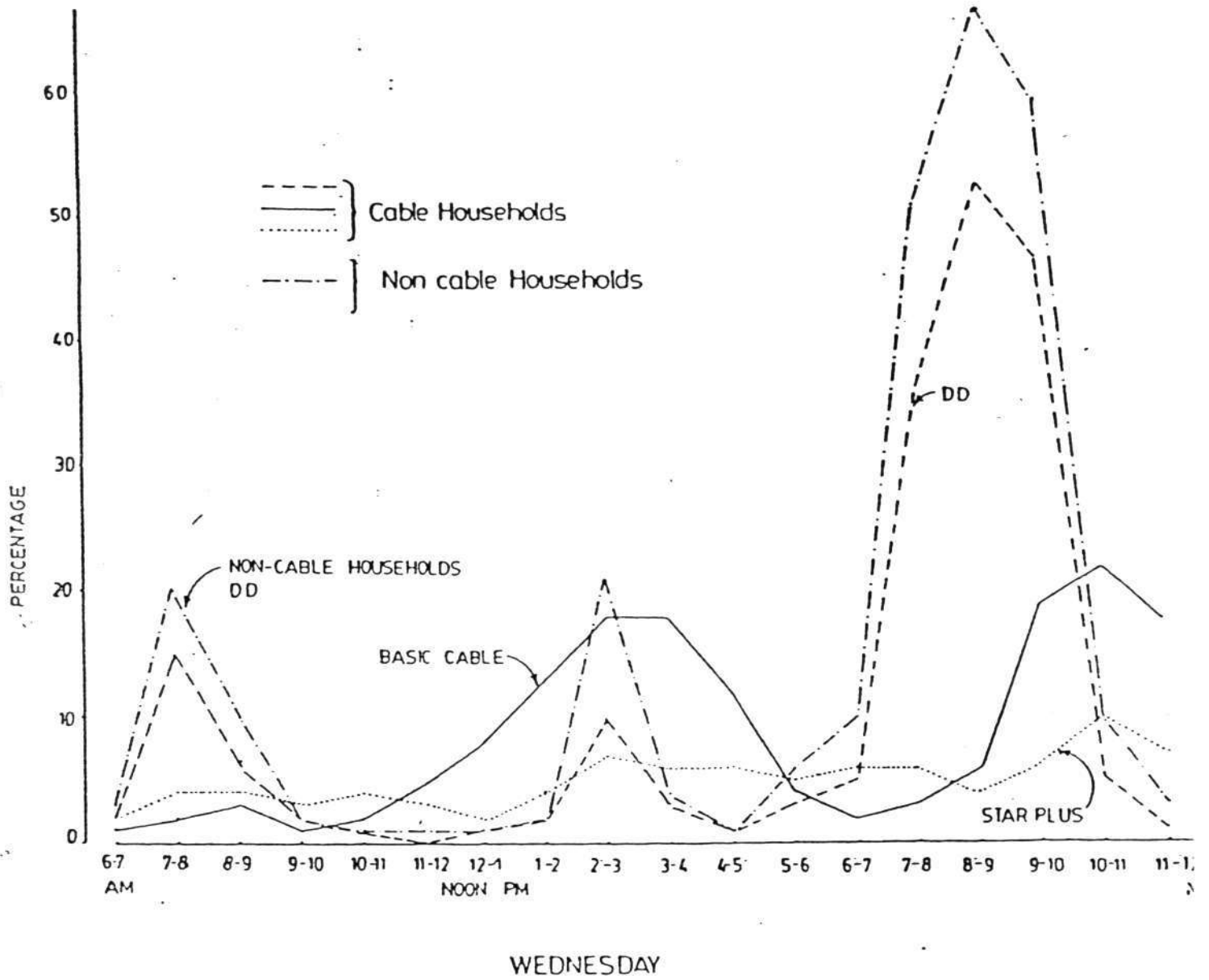
Sunday

On Sunday there are more programmes and Doordarshan is on the air almost throughout the day. The chart on the opposite page gives the viewing trend for Sunday. The following is a summary giving the maximum viewing at different timings.

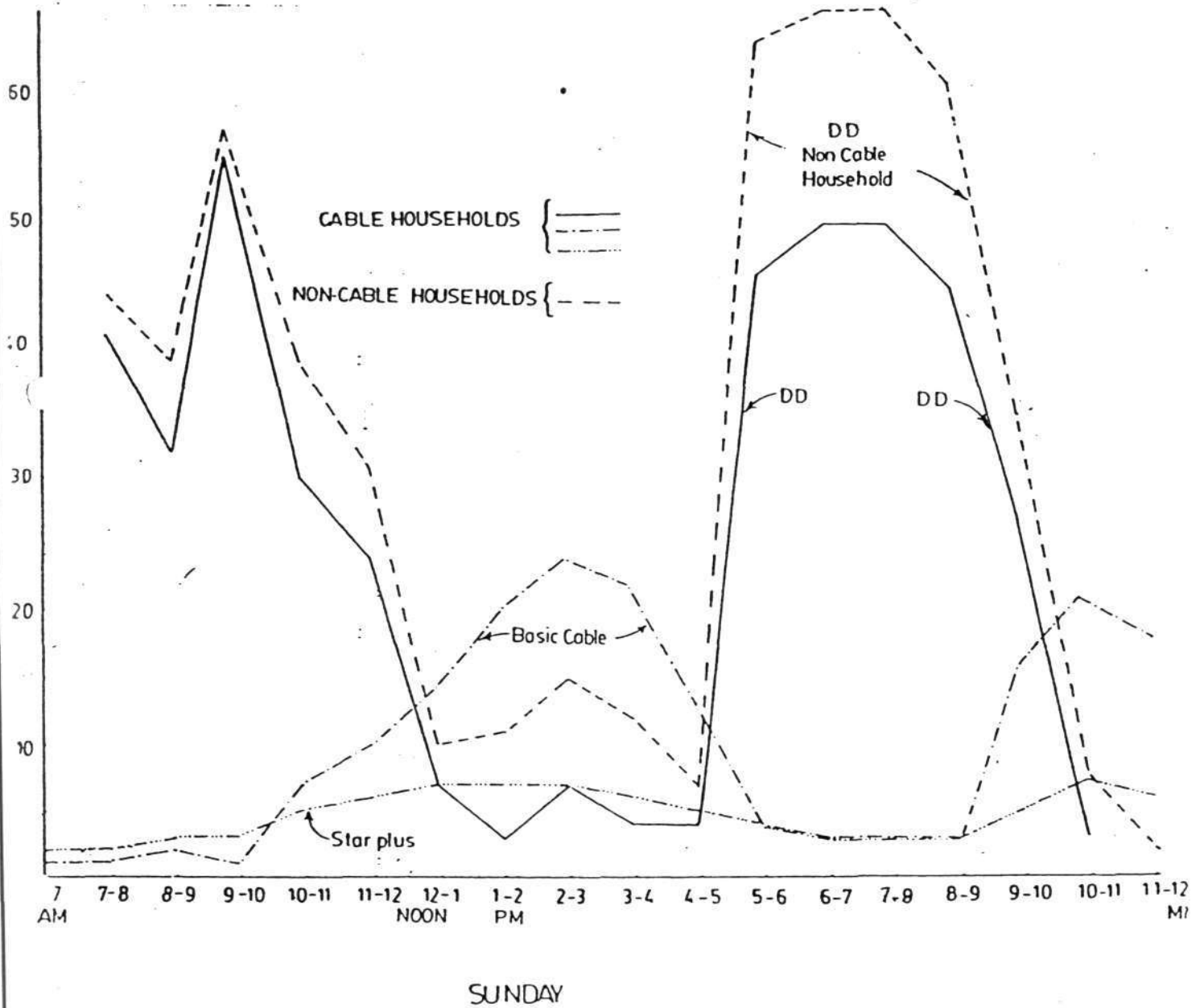
	S U N D A Y			
	Non Cable Households	Cable Households		
	DD	DD	Basic	Star Plus
Upto 9.00 am	44	41	--	3
9.00 am to 12 noon	57	55	10	6
12/noon to 3.00 pm	15	7	24	7
3.00 pm to 5.30 pm	12	4	23	6
5.30 pm to 8.00 pm	67	50	3	5
8.00 pm to 10.00 pm	61	45	16	4
10.00 pm to midnight	7	3	21	6

The following is the trend:

- \* Early morning there is good viewership to Doordarshan obviously for Rangoli.
- \* Chanakya time sees the morning peak for Doordarshan both in cable and non-cable households.
- \* Basic audience picks up after Chanakya.
- \* Evening feature films attract more from the non-cable households.
- \* Star viewership is like any other day.



12 H



HIGH - LOW VIEWING

The total time spent on viewing to TV programmes is an important aspect in a study on cable TV. The chart on the opposite page gives the viewing pattern for week days and week ends in for both the cable and non-cable households.

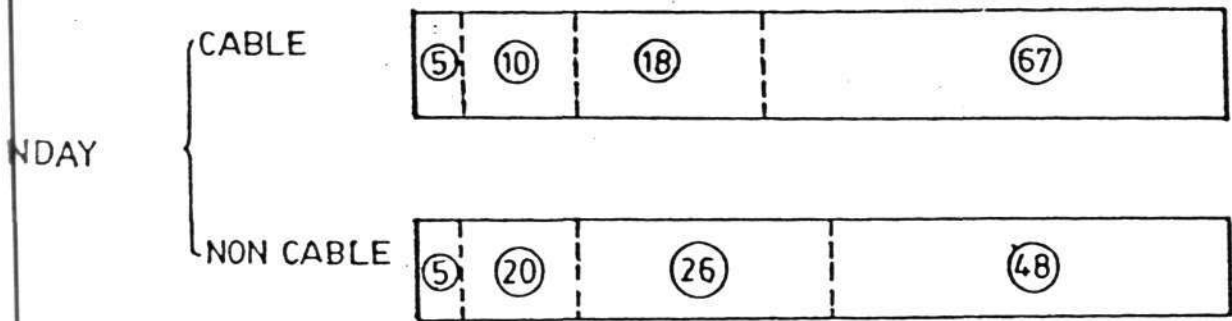
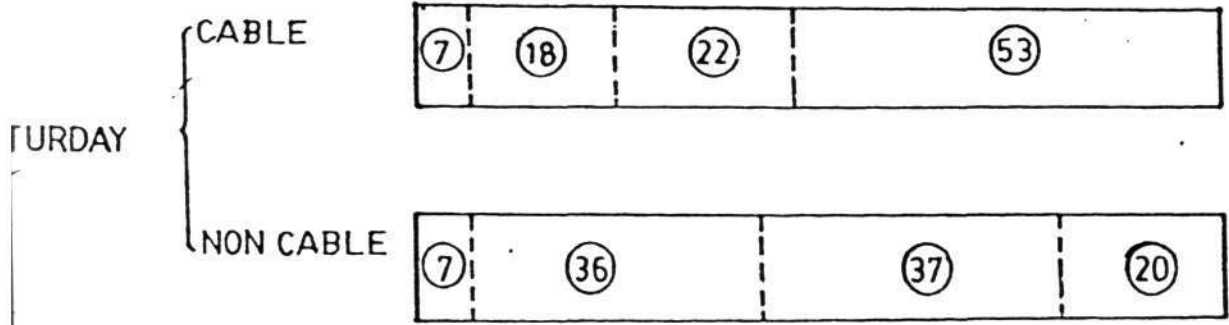
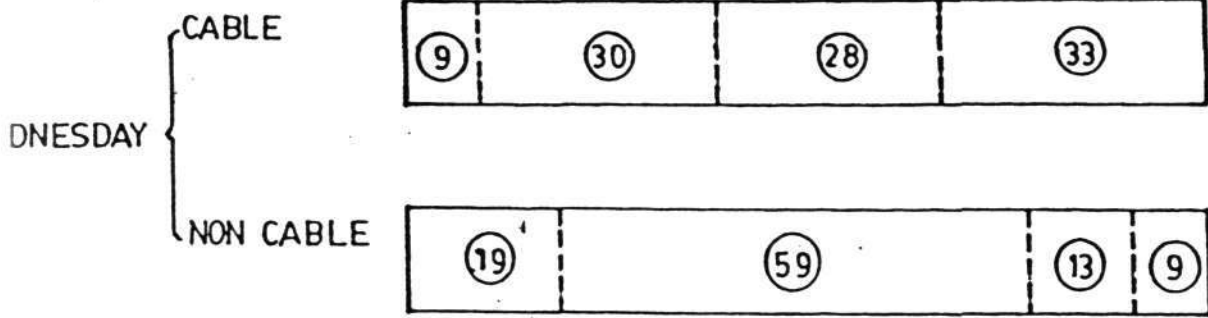
The following is a further summary of this data.


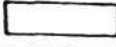


	<u>Wednesday</u>		<u>Saturday</u>		<u>Sunday</u>	
	<u>Cable</u>	<u>Non Cable</u>	<u>Cable</u>	<u>Non Cable</u>	<u>Cable</u>	<u>Non Cable</u>
Upto 2 hours	09	19	07	07	05	05
2 - 4 hours	30	59	18	36	10	20
4 - 6 hours	28	13	22	37	18	26
Above 6 hours	33	09	53	20	67	48

It is obvious that people with cable spend more time in viewing. It also appears that those who have to fall back on Doordarshan alone are interested in watching more programmes but for them the programmes of their interest are not available to the extent they want. In all 48% of them watch for more than 6 hours on Sunday whereas only 9% watch for this duration on week days.

It is clear from the above figure that there is a large audience which can be tapped by Doordarshan, if it puts out popular programmes. This untapped potential has been exploited by the local cable operators and now Satellite TV is also taking a piece of this pie.

# VIEWING PATTERN



-  UPTO 2 HOURS
-  2 4 HOURS
-  4 6 HOURS
-  ABOVE 6 HOURS

## PROGRAMMES VIEWERSHIP

After examining the time-wise pattern the type of programmes which have considerable viewership at different hours have to be considered.

Doordarshan over the years has built up a sizeable loyal audience for certain programmes and even with the alternate programmes available on the cable this audience appears to have remained with Doordarshan.

The peak hours on the viewing chart correspond to the following Doordarshan programmes.

News

9 PM Serials

Sunday Morning Serials

Saturday Afternoon programmes

Week-end Feature Films

and News magazines like World This Week

The audience for such programmes continue to be quite high in non-Cable households also.

The following types programmes from Regional Kendras continue to have high viewing and there is not much difference in the extent of viewing between the Cable and non-Cable households to these programmes

Serials

Films and Film Songs

News

Plays

The Four channels of Star TV are available for viewers all the 24 hours. The figures indicate that none of these programmes have more than 8% viewing and very few programmes reached even 5%. The programmes which had more than 5% viewing are mostly movies, Serials, Cartoons shows and News.

It appears that most of the viewing is chance viewing. The programmes are yet to build up a loyal audience. The reasons are obvious. The programmes are in English and even for a majority of English knowing people the accent in the Dramatic programmes is not easy to comprehend.

On the other hand the VCR programmes of the local operator has good viewing which goes up to 24 percent at times. These are mostly feature films, some new and other popular hits of yesteryears. Generally the local VCR peaks in the afternoons and after 10.00 PM when feature films in the local languages are put on the cable network.

### Conclusion

The media scene in India is fast changing and even the data based on a large size survey becomes dated fast. The findings presented refer to May 1992 and after that there has been more entrants to the sky. The ATV programmes are available and ZEE TV has started a three hours Hindi service.

Inspite of these developments the data has certain relevance and the following observations could be made on the basis of this study.

1. There is growing demand for entertainment and inspite of the encrease of Doordarshan programmes from about 25 hours perweek to 71 hours (92 in metros) per week over the decade there is still a wide gap between the demand and the availability.

2. People are already spending a lot of time in watching and they are prepared to spend even more time with TV.

3. The local cable network and the Satellite services are trying to cash on this situation.

4. The programmes in alien languages will not generate mass audiences.

5. The picture depicted about the 'invasion from the skies' in the media may not represent the ground realities.

6. As the choice increases the audience gets fragemented. But in the multi-lingual situation of India catering to identifiable segments is not easy and only the programmes at the level of least common Denominator will dominate the commercial media.

1 A REASONS FOR SUBSCRIBING TO CABLE TV

Reasons	All Adults N=2998		Monthly	Family	Income	
	No.	%	Below Rs.1500/- %	Rs.1501/- to Rs.3000/- %	Rs.3001/- to Rs.4500/- %	Rs.4500/- & above %
We could view programmes of choice at our convenience	928	66.4	45.0	59.5	69.0	77.3
For wider coverage of news, current affairs programme	1008	33.6	15.8	26.4	36.2	44.4
For wider coverage of Sports events	1023	34.1	19.8	29.4	36.4	41.2
For more entertainment programmes.	1574	52.5	53.0	52.1	52.1	53.5
Doordarshan Programmes not interesting/satisfactory.	424	14.2	12.9	14.4	13.2	15.3
Due to insistence of children	240	8.0	9.4	8.5	8.6	6.2
As many other people in our buildig area subscribe.	90	3.0	5.4	3.3	3.2	1.8
Others	76	2.5	2.5	3.4	2.8	1.2

**1 B REASONS FOR NOT SUBSCRIBING TO CABLE TV**

Reasons	All Adults N=2996		Below Rs.1500/- N=367	Rs.1501 to Rs.3000/- N=1384	Rs.3001/- to Rs.4500/- N=819	Rs.4500/- & above N=426
	No.	%	%	%	%	%
It is very expensive	918	30.6	46.9	33.3	24.7	19.5
Do not have time to watch	782	26.1	24.0	24.1	28.4	29.8
These programmes depict Western Culture	185	6.2	5.4	5.7	6.5	7.7
These programmes are in English	86	2.9	3.0	4.1	1.7	0.9
Such programmes will affect children's study	1499	50.0	40.9	49.5	53.1	53.8
Prefer watching Doordarshan	614	20.5	15.8	21.5	20.6	21.1
Others	184	6.1	6.0	6.6	5.5	6.1

**2 A GENERAL VIEWERSHIP TO SOME DOORDARSHAN PROGRAMMES**

	<u>National</u>	
	<u>Cable Households</u>	<u>Non-Cable Households</u>
	.....	
Chanakya	70	72
National Geographic	33	34
Cartoon Show	42	48
Tom & Jerry	30	32
Laurel & Hardy	42	44
Dr.B.R.Ambedkar	20	28
Manzil	25	31
Anmol Ratan	19	25
Humrahi	45	51
Sangarsh	45	54
Mashaal	35	44
Tana Bana	24	29
Feature Film (Saturday)	56	63
Feature Film (Sunday)	53	55
Feature Film (Sunday Afternoon)	15	22
Feature Film (Late Night)	14	16
Chitrahaar	63	70
World This Week	49	49
	.....	

GENERAL VIEWERSHIP TO SOME DOORDARSHAN PROGRAMMES

	<u>Regional</u>	
	<u>Cable Household</u>	<u>Non-Cable Households</u>
<u>Delhi.</u>		
Chitrahaar	34	50
Punjabi Darpan	20	21
<u>Bombay</u>		
Ganuraya (S)	22	22
Rama-O-Rama(S)	32	28
Saptahiki	29	29
<u>Madras</u>		
Oliyum Oliyum	96	98
Thirai Malar	91	95
Play	56	59
<u>Calcutta</u>		
Harano Soor (S)	31	34
Ghan Baire (F.F)	49	61
Bichitra Tadanta (S)	26	38
<u>Hyderabad</u>		
Chitralahari	83	88
Chirasudha	60	67
Saakshi	58	68
Sumanjali	44	60
<u>Baangalore</u>		
Guddada Bhoota (S)	66	75
Crazy Colonel (S)	58	24
Katheyadavaru(S)	42	49
Chitramanjari	64	62
<u>Lucknow</u>		
Hatimati (S)	36	48
Quiz	22	31
<u>Nagpur</u>		
Marathi Play	34	41
Rama-O-Rama (S)	29	40
Guinea Pig	24	33
<u>Jaipur</u>		
Gazroo	32	49
Sub ke liye	37	52