

Television Broadcasting in India - Empirical Growth analysis since 1959

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Abstract

Television content consumption has become daily activity for human beings like consumption of food, sleeping and talking. Like our food tastes vary according to age and gender, content consumption also vary according to age and gender. An old aged couple is glued to spiritual channels and young kids to cartoon networks. Young housewife need dose of family soaps and on the other hand office going males are intoxicated to news and current affairs channels. India has witnessed sharp growth of TV broadcasting during the last two decades. This industry has grown fast as compared to other industries which took time to evolve. One objective of the study was to enumerate and analyze growth of TV broadcast industry in India starting from 1959. During the study all the sectors of the industry like TV channels, content production, content delivery platforms, advertising and regulator were thoroughly studied and demonstrated.

Results have reflected that people like viewing content in their own language and culture. This has given rise to growth of regional TV channels. The regional TV channels have increased in Tamil, Kannad, Marathi, Punjabi, Malayalam and Telgu languages. The second finding is that there is churn out of analogue cable subscribers towards direct to home platforms. Another finding is that among all the assets owned by middle class families, ownership of TV is highest and is above 91%.

Another objective was to unearth growth contributors; and perhaps this is first time that our study surfaced eleven main contributors for the sharp growth of TV broadcast industry in India. During the study it was analyzed that population, households, economic development, technological innovation, democracy, regulatory freedom, regionalization and culture, consumer life style, globalization of television, business Investments and value proposition are main contributors for the growth of this industry.

This research papers establishes foundation for further research aspirants. Each contributor out of eleven may become separate research area in future for research aspirants given their vast dimensions and importance.

Keywords: Television broadcasting, Content production, Advertising content, Regional channels, Cable subscribers, DTH

1. Introduction

Television first came to India by incident, not by planning. In September 1959, All India Radio (the only entertainer till then) used some equipment left by Philips Company during exhibition to broadcast two one hour transmission a week. In 1965 with the help of West German Government daily news bulletins and few agriculture based programs were broadcasted. The real expansion of TV broadcasting started during the emergency. Under the leadership of the then Indian space research organization chief Vikram Sarabhai; India became the first country in the world to use direct broadcast satellite to reach remote villages directly with educational information. The next historical milestone was added during Asian games in the year 1982. It was during this period color television sets were introduced and Satellites like INSAT -1A and 1B were launched. The first color transmission started on Independence Day in 1982.

It was just after economic reforms initiated in 1991 that the graph of this industry started growing. Growth of the television broadcasting industry, which comprises of television channels, content and programming, content delivery platforms, content consumers, advertisers and technology as enabler has been

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remarkable. This industry has grown sharply during the last two decades. Television in India and other Asian countries changed dramatically in the early 1990s with the use of satellite technology by commercial media. The Indian television was transformed from two government owned and controlled channels to a multi channel global media market. Until 1991, Indian audiences received a controlled, sometimes development oriented like (agriculture and education) and at other times, propaganda induced television programming. Since 2009 audiences are being subjected to a cacophony of nearly 450 commercially driven broadcasters, which caters to more than 50 % population of India (more than 510.43 million population) compared to 30 million viewers in 1984-85.

At the start of twenty first century television started undergoing technological and institutional transmutation, so thorough as to baffle or confound its own surviving pioneers and founders. Between 1950s and the 1990s television was organized as a regulated and essentially national medium dependent on the scarce resource of electromagnetic frequencies. At the end of the era it is becoming a medium of abundance, with hundreds of satellite and cable channels becoming available to living rooms.

The inventors of televisions from 1890s until the 1950s thought of it as an additional means for delivering information and entertainment, as an extension of telephone, radio, theatre, cinema; but it has now gathered to itself a range of functions beyond the entertaining and informing audiences. What the inventors never quite realized was that television would become normative, that so much of what we see on the screen would contrive to suggest how things ought or ought not to be. Television is becoming, at its roots, international, prolific, regulated lightly if at all.

Television once provided the concentrated essence of a nationally authorized culture; now it is inextricably part of an international industry, increasingly beyond the daily control of the Government who have formal jurisdiction over it. Indian television's pace of change has been so fast that scholarship on the subject has failed to keep pace with it. Much of it predates the rise of satellite TV and almost all the major works on the subject have focused either on the period before the rise of satellite television or when it was still in its infancy. Much water has flown down the Ganga since Indian viewers first encountered 'illegal' images of CNN (Cable News Network) during the first Gulf war in the early nineties.

Indian television has grown from two channels till 1992 to 604 channels registered with Ministry of Information and Broadcasting Government of India (604 channels till Dec 2010 TRAI report released on 29th April 2011). Doordarshan was the only broadcaster beaming in India up to 1992. Over two decades back our only source of entertainment was some specific programs on the national TV network and All India Radio. From the 1950s to early 1980s, cinema theatres managed to pack audiences all through this film crazy country. Initially television sets were provided to Gram Panchayats and people would gather at community centers to watch programs on Doordarshan. Only few rich families owned television sets initially and friends, neighbors would watch television together with that family. Now almost every middle class family owns a

television set and many families own more than one television set.

Television broadcasting would not have developed so fast without the delivery platforms like cable television and direct to home television. Terrestrial television had its own limitations.

The cable TV industry exploded in the early 1990s when the broadcast industry was liberalized, and saw the entry of many foreign players like Rupert Murdoch's Star TV Network in 1991, MTV, and others. The emergence and notification of the HDVSL standard as a home grown Indian digital cable standard is likely to open an era of interactivity on cable networks.

The second spark 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 into Indian homes. Prior to this, Indian viewers had to make do with DD's chosen fare which was dull, non-commercial in nature, directed towards only education and socio-economic development. Entertainment programmes were few and far between. And when the solitary few soaps like Hum Log (1984), and mythological dramas: Ramayan (1987-88) and Mahabharat (1988-89) were televised, millions of viewers stayed glued to their sets. Soaps and serials like *Saas Bhi Kabhi Bahu Thi* and *Ghar Ghar Ki Kahani* rocked Indian families for several years. These family soaps connected well with joint families and mostly with modern empowered females. Favorite games like cricket and football is reaching to every cable and satellite Indian home. The trend of reality shows like Kaun Banega Karorepati, Indian Idol, Little Champs, Dance India Dance, Big Boss etc. is on increase and these programs are connecting well with the viewers.

Many contributors are responsible for the growth of the TV Broadcasting industry in India. During the study on "The Growth of TV Broadcasting Industry in India" we have observed that eleven main contributors are responsible for the growth of this industry in India. These contributors are population, households, economic development, technological innovation, democracy, regulatory freedom, regionalization and culture, consumer life style, globalization of television, business Investments and value proposition.

This research paper throws light on the overall growth of television broadcast industry in India. Sector wise growth of the industry has been thoroughly covered in the study. The study analyses empirical growth of television channels, television content, and content delivery platforms.

Purpose and research Gaps of the Study

Growth of the television broadcast industry in generalized terms is evident from the fact that half of the population has access to television entertainment in India, the other half knows about it and a good unmapped percentage perhaps watch television in neighbors house. Since television broadcasting has become integral part of our daily life in addition to eating, sleeping, working and socializing; its accessibility to common man in itself is testimony of growth. But research studies are not based on generalized notions and common senses. Perhaps this empirical study covers first time in India, historical background, growth of television channels, cable television, direct to home,

The main purpose of this research study is to come out with research findings, useful to the stakeholders of the television broadcasting industry. Very less text books are available in the market on TV Broadcasting. Not much research has been done in this direction so far. Media educational institutions are focusing on mass communication and journalism and research on overall TV Broadcasting is not taken up. Vanitha Kohli Khandelkar has done research on over all entertainment and media industry. Nalin Mehta has come up with findings on news channels only with a brief back ground on evolution of the industry. Companies like pricewaterhouse coopers and KPMG have focused on entertainment and media industry. The biggest gap is that till date Government of India has not recognized television broadcasting and cable television as a copious industry.

During the past two decades not much research has been done on this industry. There is not even a single measurement company or agency that is authorized by the law to measure television audience or other areas of the industry. TAM (television audience measurement) and aMAP are the two companies into television measurements but both are under fire from the Government and even television channels and advertising agencies have less faith in them. Their research methods have been questioned time and again.

The biggest gap is that Economic survey of India does not carry television broadcasting industry as a separate sector. Like other sectors, agriculture, forestry, fishing, banking, manufacturing, construction, hotels and restaurants, transport and telecommunication etc television broadcasting is still to be included as a separate sector despite of its sharp growth and contribution to the growth of Indian economy.

Purpose of this study is to first enumerate sector wise growth of the television broadcasting industry in detail and demonstrate the contributors of the growth. The third objective is to unearth possible researchable topics for research aspirants for further research.

Scope of the Study

Television broadcasting resembles with census in the sense that entire population and households can be covered during the study. Television broadcasting has swelled to 604 television channels. It reaches to around 115 million households. There are around sixty eight teleports providing service and thousands of cable operators are distributing television signals to the end consumer. There are hundreds of advertising agencies and advertisers. Hence scope becomes big. Research scope is big and is unlimited considering expanding trend of the television broadcasting.

Scope for research is vast. The research could be conducted on topics like impact of television content on the audience, penetration of direct to home in particular markets. Effectiveness of advertisement on the viewer, efficacy of television on the viewer considering their age, sex, income etc, television viewership for a particular program for a particular time slot, impact of FDI on the television broadcasting industry etc. As is evident from the past that research studies move ahead from the point where the previous researcher leaves it, but in this case not much previous research endeavors were found out. As a researcher we had to establish foundation for the growth of

television industry and then do analysis part. The scope of this study is limited to growth contributors and growth of various broadcasting sectors.

Contribution of the Study

Given the sharp and tremendous growth of TV Broadcasting industry in India as compared to other industries which has grown over a larger time period; study on the Growth of TV Broadcasting in India Since 1959 will contribute to industries like, TV channel promoters and decision makers, content producers, content delivery platforms like MSOs, DTH players, IPTV players, mobile TV players, HITS operators, foreign broadcasters, telecommunication players, advertising agencies, Ministry of Information and Broadcasting Government of India, Telecom Regulatory authority of India, advertisers, media institutions, Tele consumer audience, upcoming TV channels and other players, research aspirants, upcoming television channels

2. Theoretical Framework and literature review

TV Broadcasting comprises of various sectors like TV channels, content and programming, content delivery, audience as consumers, technology as enabler, advertising, and regulator. Like any other Industry, media business covers commercial functions such as production, consumption, distribution, marketing, sales, finance, and talent pool. For comparison purposes it may be explained that content production is like producing pens, tea, soaps, cars, refrigerators, and several hundred other products available in the market.

Content becomes a product for sale to the end consumer. Some people consume it as news, some as soaps and serials, some as music, some as devotional, some as adventure, some as sports and some as movie entertainment. The consumption varies from person to person and depends upon his / her choice. Like other products content has cost also. Once the product is produced which is content in this case, the second activity becomes delivery of the product to the end user. The delivery of the content happens through four platforms in India. One is cable, second is DTH, third is IPTV and fourth is Web. These are explained below in detail. Marketing and sales is done in the same pattern as in the case of other industries. The relationship diagram is mentioned in fig. 1.

Every other industry has finance department which handles company finances. It is regulated by certain laws and regulations. The last but not least is the Talent pool which is responsible for the operational part of a TV channel. Talent pool is an important aspect of the television broadcasting industry globally. These are creative assets of a TV channel. Their contribution is right from the production part as cameramen, lights men, sound recording experts, online editors to final editing of the programs. Talent is involved in delivering the final product to the end consumer. Secondly technology has enabled process implementation whether it is production, or post production or play out or delivery technologies; it has changed the way entertainment was watched in India. Within seconds content is delivered to the end consumer. It may be mentioned here that perhaps delivery mechanism are the fastest in TV broadcasting as compared to other industries. With the help of technology, content can be gathered and delivered to the end

consumer within seconds from any corner of the world. A cricket match is played in South Africa and is delivered to Indian viewer within seconds. Gulf war, Tsunami, terrorist attacks and what not is delivered to the end user through latest technologies globally. The following diagram depicts relationship between various sectors of the Indian television broadcasting industry.

Television Channels

Fig. 1: Relationship of TV Broadcasting Sectors



Source research study 2010

According to Dictionary of media and communications channel is defined as a physical system used in the transmission of signals (such as the air in sparking); Television in India has been in existence for four decades. For the first 17 years, it spread haltingly and transmission was mainly in black & white. The thinkers and policy makers of the country, which had just been liberated from centuries of colonial rule, frowned upon television, looking on at it as a luxury Indians could do without (Mehta, Nalin 2008). Till 1992 India had only State owned two channels which have increased to 604 TV channels. There are around 423 TV channels on air in India (Report till 16th July 2011). The major media business groups operational in India are ZEE Network, Star India, Sony, NDTV, TV Today, CNBC, CNN IBN, BBC, Turner International, UTV, Sahara, Times group etc. these media groups own several number of TV channels. On the other hand media houses which own regional channels are SUN network, ETV, PTC, NE TV, and several other stand alone TV channel owners.

Television is now delivered to end consumer in major Indian languages and genres. Not only national television but regional television has grown in India during the last one decade. Even the national players have expanded into potential regional markets of Punjab, Maharashtra, Gujarat, Kerala, Tamil Nadu, Andhra Pradesh, Karnataka, Bengal, North East etc.

Classification of active Channels in India

TV channels are classified on the basis of genres. Ministry of information and broadcasting Government of India is issuing two types of licenses. One is news and current affairs and another is non news. TV channels which obtain News license can telecast news and current affairs related content only. But it is not defined which type of news content can be telecasted on the channel. Like channels such as Aaj Tak, NDTV, Star News, Zee News is telecasting hard and soft news related to politics, social issues and crime. Whereas channels like NDTV profit, CNBC Awaz, Zee Business telecast business related news only. Channels like Discovery, Animal Planet, History channel telecast adventure and animal kingdom related news. Channels like ESPN, Star sports, Zee sports and Ten sports telecast Sports related content. Similarly non news is not defined. Few channels telecast movies, some telecast music and some spiritual content, some telecast comedy and some channels are dedicated to cartoon content.

In India TV channels telecast program in many languages like Hindi, English, Punjabi, Urdu, Telgu, Kannad, Marathi, Bengali, Malayalam, Oriyya, Gujarati, and Bhojpuri etc. Doordarshan is telecasting channels in almost all the regional languages.

Growth Contributors

During the study we have observed that eleven contributors are responsible for the growth of the TV broadcasting industry in India. The eleven contributors are; growing Indian population, large size of households, economic development, technological innovation, regulatory freedom, democracy, business investment, consumer life style, globalization of television, regionalization and culture, and value proposition. These are described in detail as under.

First-Population

Rise in population contributes to rise in television viewership. Television has become such a magic which entertains all age groups of the society. At single click of the remote control button hundreds hours of diverse content is available. Population of India is on increasing trend and this trend has contributed a lot for the growth of the industry. According to Registrar General and Census Commissioner, Ministry of Home Affairs Government of India, Census 2011, 1028.73 million people live in India. Out of total Population around 532.2 million are males and 496.5 million are females. Though according to the figures released 72.2% of the total population lives in rural areas and 27.8% live in urban areas; the growth of television is seen equally well in rural areas. Population growth figures are encouraging for the growth of television channels. On analysis of the TV Broadcasting growth trend, currently more than half of the Indian population has access to television in India. Hence 514.365 people (cable and satellite universe) out of the total population can be treated as target group (TG) for satellite channels. It has created huge opportunity for the TV channels in terms of program viewership, subscription revenues and advertisement business.

Second – Households

The second contributor is large size of households which is estimated at 102.87 million (50% of the television population live in a ratio of 5:1 i.e. on an average 5 persons live in one household). Television households are those households which have access to television either through analogue or digital cable or through

direct to home DTH. Secondly, availability of color television set at affordable rates has added boon to the industry. A telephonic study was conducted for ascertaining penetration of television sets in selected market places of Delhi, Kolkata, Jammu, Ludhiana, Mumbai, Chandigarh, Jalandhar, Rohtak, Jaipur, Kanpur and Bhopal. It was observed that 95% households of the sample owned TV. Comparatively the percentage of TV ownership is the highest as compared to any phone was owned by 87%, 25% had internet connection, 65% owned any automobile, 78% owned any debit/credit card, 7% owned any camera, 15% owned any computer, 33% any financial investment assets and 5% none of these.

Third – Economic Development

New vistas for the growth of communication in general and advertising as an industry in particular have been opened by the new economic policy adopted in (1990-1991) with a view to liberalize and globalize Indian business and economy. This was done in order to accelerate growth and fill up the gaps in the structure of business and economy in general and industry in particular. A new milieu encompasses entire macro policy environment which is invigorating to private enterprise free from public interventions. The economy has moved away from the protected and restricted policy frame of excessive controls and regulations pertaining to business, (Prakash, Shree, 2010).

Post economic reforms India has emerged as a best choice for investment in South Asia. Since then there is a paradigm shift in consumption behavior in India. Consumer choice has moved ahead from Roti, Kapda and Makan, to the purchase of costly i-phones, blackberries, ipods, Mac Machines, HD and 3D Plasmas, WiFi, high powered automobiles, designer wear and fashionable costumes, Multiplex cultures and last but not least Using 3G technologies for watching media and entertainment content.

According to (Stevens, Sherwood, Dunn, Loudon, 2008). The impact of economic growth influenced spending habit across SECs (Socio economic classes). Spending habits are different for people belonging to different sections of society. The twenty-first century has ushered in an era of business that is perhaps one of the most challenging in history. Planning is the key for beating competition. One of the components of planning is market segmentation which involves geographic and demographic variables to segment markets. Geographic segmentation involves use of census tracts, cities, trade areas, countries, states and regions as the basis of segmentation. Demographic segmentation involves using variables such as gender, age, income, educational level etc.

Analysis of consumer spending in the past 10 years reveals that the average consumer has been spending on increasing number of different goods. There are number of factors affecting the consumer spending pattern in India. These include growing income levels resulting in more disposable income changing attitudes towards consumption, changes in prices, introduction of new products, availability of credit such as loans, mortgages, and credit cards, rising aspiration levels, increased literacy, growing brand consciousness and rapid urbanization. Consumption as an economic activity emerged with the birth of human beings on earth. The very physical existence of humans is contingent upon the consumption of food, air, and water. It may, therefore, be safely surmised that man cannot live without bread,

though man does not live with bread alone. He needs sex and ideology along with bread (Joan, Robinson, 1969). Television viewing is one of the consumption needs of a person. Ideology of a person drives him/her towards the type of program and it ultimately satisfies his/her entertainment thirst. According to study people are now spending around 12% of their disposable income on leisure and entertainment. Projected percentage spent will be 20% in the next two to three years of time period.

Fourth – Technological Innovation

The essence of business growth is technological innovation and successful management lies in skillful allocation of resources to bring about the technological change. The increasing importance of technological innovation and strategy guarding the acquisition and deployment of technological resources for competitive growth has changed market dynamics of television broadcast industry. With the introduction of innovative technologies television broadcasting industry has grown in India sharply. From black and white television to high definition color plasmas, new opportunities for entertainment viewing have been given to tele consumers.

According to (Whalen, 2007), the current dynamic environment demands all organizations to change both radically and incrementally. Sustainable development cannot happen without innovation. It is very essential for an organization to change the way it operates and also change the products and services it provides. Growth through innovations might not necessarily take place through breakthrough innovations. Rather it involves innovative ways of integrating existing, or developing technologies into high value solutions. These innovative ways span across the entire value chain and require integration across internal and external business boundaries.

One of the major requirements for sustainable and inclusive economic growth is an extensive and efficient infrastructure network. It is critical for the effective functioning of the economy and industry. The key to global competitiveness of the Indian economy lies in building a high class infrastructure. Creating effective and efficient broadcast infrastructure is the key for competition within the Industry and on international front (Economic Survey 2010-2011).

Technological advancement has added boon to the growing TV Broadcasting not only in India but World over. It was with the introduction of color television during Asian Games in 1982 that the channel band width increased along with quality of reception from receiving end. Just merely from 10-12 channels the capacity of color television increased and now is accommodating more than 200 channels to display. On the transmission end terrestrial reception was replaced by INSAT technology. It gave wide reception scope. Content was beamed on the satellite at one place and received across different locations at the same time. Indian Space Research organization is the authority for launching Satellites in India and so far INSAT series has made it possible to uplink and Downlink more than 400 channels in India.

Television broadcast services improved with technological advancements with the passage of time. (Fitzsimmons, Fitzsimmons, 2006) adds that services lie at the very hub of economic activity in any society. Infrastructure services such as transportation and communications are the essential links

among all sectors of the economy, including the final consumer. In a complex economy, both infrastructure and distribution services function as intermediaries and as the channel of distribution to the final consumer. Thus it is imperative to recognize that services are not peripheral activities but rather integral parts of society. They are central to the functioning of healthy economy.

Production and Post Production technologies improved favorably for television. From Video camera recording to Beta tapes and now mini digital video tapes and memory chips; shooting mechanism not only improved in storage but quality and cost also. The latest post production technologies which are in use are Apple Mac editing tables. Earlier Canopus and velocities were in use. There was a paradigm shift in transmission and play out technologies also. Video servers and title box has been great advancement to help play out. Introduction of Fiber optic cables made remote master control room concept possible.

Fifth – Regulatory Freedom

It may not be wrong to mention here that regulatory freedom has shaped television industry in India. Gone are the days when Government of India would think that airwaves are the property of the Government and telecast of news their sole right. Government started issuing license at nominal rates to private broadcasters in early nineties. Till that time only Doordarshan had the sole right to telecast news and programs in India. Since 1991 Government not only issued licenses but allowed Global broadcasters like Star, Cable news network 'CNN', Sony, British broadcasting corporation and hundreds of others to downlink in India. Most of the foreign channels were up linking from other countries but would downlink in India.

Sixth – Democracy

Abraham Lincoln the past President of America has defined democracy as "the government of the people, by the people and for the people". One of the fundamental rights of an Indian citizen is Right to Freedom (Articles 19 to 22 of constitution). Right to freedom is a cluster of several rights. The most important right is "Right to Freedom of Speech and Expression". This right allows the citizens to discuss freely all matters concerning public as well as national well being orally or through the press (Kundra, D, N.2001). Hence Right to Freedom of Speech and Expression allowed TV channels to run any type of program for the audience may it be covering Godhera riots, Ram Janambhoomi issue, Mumbai terrorist attacks or militancy in Kashmir. It allowed news and current affairs channels to telecast crime related programs which increased their viewership ratings. News against Government and cracking of high profile political stories like common wealth, Adharsh, Boforos, 2 G scam, or show casing arrests of murderers, rapists, and the victims irrespective of their profile or influence contributed in the growth of news and current affairs channels.

Secondly showcasing of all types of movies adult, UG, and music content helped in the growth of General entertainment channels. Telecast language freedom contributed towards the growth of regional and international channels also. Based on cultural diversity television channels are on air in almost all major Indian languages like Hindi, English, Punjabi, Kashmiri, Rajasthani, Telgu, Malayalam, Kannad, Bhjopuri.

Seventh – Business Investment

Nominal capital investment in modern times helps not only in opening ventures but also plays vital role in the expansion of the industry. License for news channels can be obtained by paying rupees one million only. The company should have paid up capital of 30 million for obtaining news and current affairs license and rupees 10 million for non news license. Less initial investment attracted many players to invest in television broadcasting business. On the other hand investments in distribution or content delivery mechanism were not too much as returns for cable operators. This huge industry is delivered through unorganized and unstructured cables put on electrical and telephone poles, roof tops and trees. Thus keeping infrastructural investments minimum.

Investments by powerful global media companies like News Corporation, Turner International, British Broadcasting Corporation, Cable news network and Time Warner group has pushed up the scale of television business in India. The major contribution of economic development has been infrastructure development like roads, power, housing and buildings, employment, FDI in services sector like IT, ITES, and Broadcasting industry. Overall economic development in India motivated many businessmen to invest in TV broadcasting. Business houses like Subhash Chandra's Essel group invested in Zee network, cable television, direct to home and other allied ventures. TATA group has investments in direct to home, Reliance Anil Dhirubhai Group has invested in direct to home, television channels, Bharti Airtel has invested in direct to home and internet protocol television. Videocon indirect to home. Many prominent businessmen from various Indian states have made considerable investments in television broadcasting industry so far. Prominent among regional players are Kalanidhi Maran promoted Sun network, Enadu Group of companies, Pearl group promoted news channel. Many politicians and real estate companies have ventured out in television broadcasting. Many powerful businessmen have invested in television broadcasting in order to garner favors from Government of the day and make their group value more powerful.

Eight – Life Style

With the increase in transportation, communication, cooling facilities in offices and home, food habits and information seeking facilities; life style of the people has changed. On the other hand rising competition among businesses and employees has resulted in mechanization of the life. People are in the rat race of earning more and more. This has resulted in tight time schedules. The combined effect of all these is that modern Indian is under heavy stress and strain. For relaxation one needs entertainment dose whether in the form of music or video. Kids over stressed by studies and heavy school bags spent few hrs in watching cartoon channels and advertisers play ads focused on kids on these channels. Office going male wants some dose of news and current affairs to keep him updated about the current happenings. House wife after hectic kitchen and home activities wants entertainment in the form of soaps and serials. Old aged so much over stressed from diseases, isolation pressures are hooked to spiritual channels. Cricket is the most watched game in India and most of the people watch this game as an entertainment. Hence increase in stress and pressures attract people to television watching. They find it as a friend to interact without any conflict.

India has remained under colonial rule for centuries. Invasions by foreign rulers, loots, murderers, in human atrocities created fear among Indians. This suppression got transferred from one generation to another. After freedom people restarted their lives a fresh thus was born modern India with new food habits, free dressing and costumes. The real tonic for suppression is entertainment. This is another reason for the growth of this industry.

Ninth - Globalization of TV

The globalization era, which has reached the Indian economy via competition and investment from overseas in the media industry, seems to have transformed the media industry in India. Not only technology but content syndication has also helped in the growth of the television industry in India (Ranganathan, Maya and Rodrigues, M, Usha, 2010). Due to globalization many foreign television channels started channels in India like Star, Sony, BBC, CNN, Turner international and Time Warner. Investments of these companies contributed in the growth of the industry.

Tenth – Regionalization and Culture

India is a diverse country having many cultures, religions and languages to speak. This country is integrated together because of bonding of human values. A study was conducted across India and it was found that people generally feel comfortable in their own culture and language. People want to live within their own family roots. Television grew in regional markets very fast. Initially it started with national television in two languages Hindi and English. Hindi language content catered to Northern and central Indian states like Jammu and Kashmir, Punjab, Himachal Pradesh, Haryana, Rajasthan, Uttar Pradesh, Madhya Pradesh, Bihar, Orissa, Maharashtra and Gujarat. English channels catered to south Indian States like Karnataka, Kerala, Tamil Nadu, Andhra Pradesh etc. Hindi channels were launched by Zee, Star, CNBC, Aaj Tak and English by Star, BBC, CNN, NDTV etc. Due to distribution issues and emergence of regional markets SUN launched many Tamil and Telgu Channels, ETV launched channels in almost all major languages like Urdu, Marathi, Oriya, Kannad, Telgu, Tamil, Bengali etc. Many channels were launched in Punjabi language like Lashkara, PTC, ECT, Zee Punjabi. These channels connected well with the audience and recorded highest market share in India. Regional markets added growth value to the overall TV broadcasting industry in India.

Eleventh – Value proposition

Television consumption is also a consumer activity like consumption of other products and services. The history of mankind is characterized by the exchange of ideas, emotions, goods and services. Since the early days of human existence activities to ensure daily survivals have been split between people. The exchange of goods and services has increasingly taken place in the form of trade between businesses and other organizations from an increasing number of countries. From the early days of barter between neighboring communities to today's large scale international trade, the result of these exchanges has been the same: customers have been provided with more and different goods at lower prices than would have been possible if the trade had not occurred, (Muhlbacher, Dahringer, Leih, 1999).

Content Delivery

The important constituent of the broadcast industry is the content delivery or distribution of the content through various platforms. This could be cable TV, DTH, IPTV or web. Delivery through cable was mostly used in India till 2004. Direct to home technology was introduced by Zee network. Dish TV DTH was launched as a first private DTH operator in India. Emergence of IPTV has also created challenges for the cable operators. The emerging technologies through which content will be delivered to the end user are HITS, and mobile television. Introduction of digital cable mechanism has created vast space for accommodating and carrying more TV channels. Conditional access has made it possible for the end viewer to watch the content on the basis of pay per view. Direct to home has added value to high quality viewing experiences, and options to record the content. The content delivery platforms are demonstrated as under.

Growth of Cable TV

Cable TV has shown tremendous growth during the last five years. With the introduction of digital headends; this sector is growing fast. As of now there are around 85 million cable households in India. This includes Analogue and Digital cable. Graphical representation of the growth is mentioned in the figure 2 below. Cable TV is managed and run by various business houses in India. TV signals are received directly from satellite by a multi service operator (MSO). MSO distributes received signals to the local cable operators (LCO) and LCO provided feed to the end consumer through cable. The major MSOs in India are SITI cable, WIN cable, IN cable, DEN cable, and DIGI cable.

According to (Kohli, Khanderkar, Vanita, 2010), the precise date of the appearance of cable television is difficult to arrive at, it is clear that it began in the early 1980s in Mumbai. According to satellite and cable TV, the cable television took off with the introduction of color television and the hosting of the Asian Games in New Delhi in 1982. The cable took off with the Los Angeles Olympics in 1984 which kicked off a second spurt in the sale of color TV sets. It is likely that both these events contributed toward the phenomenon cable years can be divided into the following three phases.

Direct to Home

The second content delivery platform is DTH. DTH is defined as the reception of satellite programmes with a personal dish in an individual home. DTH does not compete with CAS. Cable TV and DTH are two methods of delivery of television content. CAS is integral to both the systems in delivering pay channels.

Cable TV is through cable networks and DTH is wireless, reaching direct to the consumer through a small dish and a set-top box. Although the government has ensured that free-to-air channels on cable are delivered to the consumer without a set-top box, DTH signals cannot be received without the set-top box.

India currently has 7 major DTH service providers and a total of over 34 million subscriber households in August 2011. The direct to home players are DD Direct owned by Prasar Bharati and is Free to Air, Dish TV owned by Zee Group, SUN Direct owned by Kalanidhi Maran Tamil Nadu, TATA SKY is a joint venture between TATA and B SKY B, D2h is owned by Videocon Group, Airtel Digital owned by Bharati Airtel, Big TV is owned by Anil Dhirubhai Ambani.

3. Methodology

Objectives of the Study

- Demonstrate Growth of TV Broadcasting industry in India.
- To identify and describe growth contributors of the TV broadcast industry.
- To enumerate Sector wise growth of the Indian TV Broadcast industry.

Research in electronic media has been a staple management tool for successful managers for several decades because managers need to know what their target audience wants. As (Phi, LoCasci, 2004), Director of Rock Millennium Broadcasting, New Jersey says: Research is the only way to find out about a target audience and what they want from a TV station. Research helps us determine when we must adjust our business to meet new demands. This is important because changes in broadcasting can happen in a matter of minutes. We have no factories to retool and no raw materials to order and we must have accurate information very quickly.

Broadcast research developed rapidly in sophistication and volume since its beginnings in the 1920s. In the early years of broadcasting, the broadcasters were experimenters and hobbyists who were interested mainly in making sure that their signal was being sent and received. The popularity of radio was unknown, and there was no reason to be concerned with audience size at that time.

Two types of data sets have been collected and analyzed for this study. One set of data pertains to sectors of television broadcasting like growth of TV channels, Cable Television, direct to home platforms, internet protocol television, programming genres, entertainment and media industry, advertising, industry revenues. This set of data has been collected from secondary external and internal data sources. The secondary external data has been collected from Government departments and non Government Publications. Our study has used internal secondary data sources also.

Data has been collected from various TV channels and its sectors. According to (Sharma, K, J, 2004). Secondary data refers to those data which have been collected earlier for some purpose other than the analysis currently being undertaken.

Hence empirical study of the above mentioned data covers objective-I and II of the topic under study. Relevant data for the growth was taken from various secondary sources. The sources from which data has been collected are Indian Entertainment and Media Outlook 2006 & 2010 conducted by Pricewaterhouse Coopers and FICCI, Indian entertainment and media CEO survey by Price Waterhouse Coopers and aidem, TAM media research India, KPMG Surveys, Prasar Bharati, Telecom regulatory authority of India 'TRAI', Ministry of Information and Broadcasting Government of India, Economic Survey 2008-2009, 2009 -2010, Registrar General and census commissioner of India, Ministry of Home affairs Government of India, Various television channels, advertising agencies, The Indian media Book, India on Cable Book, other text books, various libraries, interviews, and personal observations. Various years of growth have been taken into consideration.

The second set of data was collected from primary sources. Interview methods were used for this purpose. In our study we formulated a panel and took three samples during the study.

Panel studies are one of the types of longitudinal studies. In contrast to cross sectional research, data are collected from a representative sample at only one point in time. Longitudinal, studies in contrast, involves the collection of data at different points in time. Although longitudinal investigations are relatively rare in mass communication research, several longitudinal studies have been among the most influential and proactive in the field.

In mass communication area, the first major longitudinal study was done by (Lazarsfeld, Berelson, and Gaudet, 1944) during the presidential elections. Lazarsfeld pioneered the use of the panel technique in which the same individuals are interviewed several times. Television networks, advertising agencies, and marketing research firms use panel studies to track changes in consumer behavior.

Methods

Since the study is about Growth of TV Broadcast industry therefore it can't be focused on a particular sector of the industry. This study covers all the sectors of the TV Broadcasting Industry. The methods which are used in the study are mentioned below.

- Content Analysis.
- Interview method
- Panel Studies

4. Results and Discussions

Result for population growth

On observing population data of India which is based on the observation and random interview basis, it is concluded that the cartoon TV channels will have a huge market of 81 million kids in the age group of 0-6 years (all kids have been taken into consideration though the kids start watching TV at the age of 1.5 years onwards).

There is great opportunity to produce content for 99.8 million people which fall in the age group of 7-14 years. This age group likes sports, cartoon, action movies, life style, music, investigative and adventure content. Again content can be produced keeping gender in mind also. Population of male boys is estimated at 52 million and girls 45 million.

General entertainment, sports, news and current affairs, music channels, spiritual channels will have huge market of 292 million people to focus on. This amounts to 28.45 % of the total cable and satellite universe. Half of the total population falls within the age limit of 15 - 59 years. This age group like serials, soaps, sports, reality shows, movies, devotional content etc. Out of this population woman based programs can be focused on 141 million female population and programs can be targeted on 151.7 million male population. Spiritual and devotional channels will have abundant opportunity to tap age group of 60 years and above whose population is around 38.3 million. Percentage share of this population is 3.75 % of the total TV population. Out of this 18.8 million are males and 19.4 million are female. This age group likes devotional content, regional content, news and current affairs and few of them sports.

Results for Households

On observation of the figures .000021 million TV households in the year 1959, by 1992 it swelled to 34.9 million TV households and by 2004 size of TV households was 100 million. The size of TV households in 2008 was 134 million. Cost factor of color television set has mattered a lot. The price band of color TV in 1990s was between 25000 – 35000, now Plasma and LCDs are available in the price tag of 15000- 30000. Due to high competition between TV manufacturers and entry of multinational companies like LG, Samsung, Thomson etc. are responsible for such dream pricing and features. Introduction of larger band widths made it possible for cable and DTH operators to carry and accommodate more TV channels. Electrification in rural and urban areas increased time spent by viewers on any program. It has also contributed to the mushrooming of regional TV channels. Overall infrastructural development in rural and urban areas helped in the growth of this industry.

The figures for cable and satellite homes were nil up to 1989. In the year 1992 the size of cable and satellite homes reached to 1.2 million. In the year 2002 40.49 millions households were connected to cable and the figures for 2008 were 83 million. There has been sharp increase in the revenue from advertisement and subscription. It has grown from 61.6 million in the year 1979 to 68470 million in the year 1998. The total revenues were rupees 144140 million in the year 2003 and had reached 294973 million by 2008.

Results for Economic Development

Increase in per capita income and GDP has pushed growth of TV broadcasting further year on year basis. The per capita income in 2008-2009, measured in terms of gross domestic product at constant 1999-2000 market price, was Rs. 31,278. The projected per capita income for 2010-2011 is estimated to be Rs. 54527. The overall growth of GDP at factor cost at constant prices in 2008-2009, as per revised estimates released by the central statistical organization was 6.7 per cent.

The Indian economy has emerged with remarkable rapidity from the slow down caused by the global financial crisis of 2007-2008. With growth in 2009-10 now estimated at 8.0 per cent by the quick estimates released on 31st January 2011 and 8.6 percent in 2010-2011 as per the advance estimates of the central statistics office released on 7th Feb 2011, the turnaround has been fast and strong.

The overall growth of GDP at factor cost at constant prices as per advanced estimates was 8.6 percent in 2010-2011. Exports increased by 43.8 percent and Imports by 17.3 percent during March 2011. Foreign currency assets stood at USD 282.3 billion at end April 2011. The total FDI inflow between April – Feb 2010-2011 stood at USD 25.9 billion. These developments have given tremendous impetus to the overall economic development of our country. Employment opportunities have increased so has business opportunities.

Results for Technological Innovation

In addition to advancement in broadcasting technology, there has been growth in convergence technologies also. Growth in telecommunications has opened new vistas for convergence technologies. With a total subscriber base of 787.28 million which includes wire line and wireless consumers, options for television content delivery has also increased. As on 31st Dec 2010 there

were 10.99 million broadband subscribers. This creates huge market for Internet protocol television. Out of total subscriber base of 787.28 million subscribers, 752.19 million subscribers are wireless subscribers thereby opening huge space for mobile television in future. Fiber optic networks and introduction of 3G services brightened opportunities for content transmission and delivery not only from one city to another but from one country to another unbound by distances across globe.

Results for Regulatory freedom

FDI inflows in Cable, TV channels, DTH, content production helped in diversification and creation of world class infrastructure in our country. The current FDI cap for teleport services is 49%. FDI limit for down linking of TV channels is 100 % and for up linking of news and current affairs channels 26%. Unlike few countries Government of India has given regulatory freedom. It has helped a lot for television broadcasting industry to grow faster.

Results for Democracy

Showcasing of all types of movies adult, UG, and music content helped in the growth of General entertainment channels. Telecast language freedom contributed towards the growth of regional and international channels also. Based on cultural diversity television channels are on air in almost all major Indian languages like Hindi, English, Punjabi, Kashmiri, Rajasthani, Telgu, Malayalam, Kannad, Bhjopuri.

Results for Business Investment

Investments by powerful global media companies like News Corporation, Turner International, British Broadcasting Corporation, Cable News Network and Time Warner group has pushed up the scale of television business in India. The major contribution of economic development has been infrastructure development like roads, power, housing and buildings, employment, FDI in services sector like IT, ITES, and Broadcasting industry. Overall economic development in India motivated many businessmen to invest in TV broadcasting. Business houses like Subhash Chandra's Essel group invested in Zee network, cable television, direct to home and other allied ventures. TATA group has investments in direct to home, Reliance Anil Dhirubhai Group has invested in direct to home, television channels, Bharti Airtel has invested in direct to home and internet protocol television. Videocon indirect to home. Many prominent businessmen from various Indian states have made considerable investments in television broadcasting industry so far. Prominent among regional players are Kalanidhi Maran promoted Sun network, Enadu Group of companies, Pearl group promoted news channel. Many politicians and real estate companies have ventured out in television broadcasting. Many powerful businessmen have invested in television broadcasting in order to garner favors from Government of the day and make their group value more powerful.

Results of Life Style

With the increase in transportation, communication, cooling facilities in offices and home, food habits and information seeking facilities; life style of the people has changed. On the other hand rising competition among businesses and employees has resulted in mechanization of the life. People are in the rat race of earning more and more. This has resulted in tight time schedules. The combined effect of all these is that modern Indian

is under heavy stress and strain. For relaxation one needs entertainment dose whether in the form of music or video. Kids over stressed by studies and heavy school bags spent few hrs in watching cartoon channels and advertisers play ads focused on kids on these channels. Office going male wants some dose of news and current affairs to keep him updated about the current happenings. House wife after hectic kitchen and home activities wants entertainment in the form of soaps and serials. Old aged so much over stressed from diseases, isolation pressures are hooked to spiritual channels. Cricket is the most watched game in India and most of the people watch this game as an entertainment. Hence increase in stress and pressures attract people to television watching. They find it as a friend to interact without any conflict.

India has remained under colonial rule for centuries. Invasions by foreign rulers, loots, murderers, in human atrocities created fear among Indians. This suppression got transferred from one generation to another. After freedom people restarted their lives a fresh thus was born modern India with new food habits, free dressing and costumes. The real tonic for suppression is entertainment. This is another reason for the growth of this industry.

Results for Globalization of TV

The globalization era, which has reached the Indian economy via competition and investment from overseas in the media industry, seems to have transformed the media industry in India. Not only technology but content syndication has also helped in the growth of the television industry in India. Due to globalization many foreign television channels started channels in India like Star, Sony, BBC, CNN, Turner international and Time warner. Investments of these companies contributed in the growth of the industry.

Results for regionalization and Culture

India is a diverse country having many cultures, religions and languages to speak. This country is integrated together because of bonding of human values. A study was conducted across India and it was found that people generally feel comfortable in their own culture and language. People want to live within their own family roots. Television grew in regional markets very fast. Initially it started with national television in two Languages Hindi and English. Hindi language content catered to Northern and central Indian states like Jammu and Kashmir, Punjab, Himachal Pradesh, Haryana, Rajasthan, Uttar Pradesh, Madhya Pradesh, Bihar, Orissa, Maharashtra and Gujarat. English channels catered to south Indian States like Karnataka, Kerala, Tamil Nadu, Andhra Pradesh etc. Hindi channels were launched by Zee, Star, CNBC, Aaj Tak and English by Star, BBC, CNN, NDTV etc. Due to distribution issues and emergence of regional markets SUN launched many Tamil and Telgu Channels, ETV launched channels in almost all major languages like Urdu, Marathi, Oriya, Kannad, Telgu, Tamil, Bengali etc. Many channels were launched in Punjabi language like Lashkara, PTC, ECT, Zee Punjabi. These channels connected well with the audience and recorded highest market share in India. Regional markets added growth value to the overall TV broadcasting industry in India.

Refer to Annexure – II share of channels at All India level is highest for regional general entertainment channels. The All

India share for regional GEC 28.8 percent in the year 2004. The figures for 2005, 2006, 2007, 2008, were 28.0, 26.6, 25.6, 24.8 and 22 as on August 2009. All India share for regional movies was 4.6 in the year 2004 and 4.6 in 2008.

Results for value proposition

Television consumers are receiving diverse content at low price. On an average a cable TV operator charges between Rs. 150-200 for 150 and more channels. This has been possible due to huge competition among TV channels in India and also due to globalization of the television industry. The average rate of direct to home operator is around Rs. 200 for 150 and more channels. Nominal monthly subscription rates coupled with high class audio and video quality has provided real value for money to end consumer. Hundreds of hours of diverse content is available for a monthly pay out of Rs. 150-200 a month. Viewers has choice to select and watch any program from news and current affairs, movies, music, sports, spiritual, cartoon, life style, adventure, serials and soaps. Viewers have option to watch above mentioned content in their own spoken language. Finding of our study is that if a household watches eight hours of content a day. This includes serial and soaps, News, Movie, cartoon, spiritual, life style, adventure and music. Sports are being watch according to season. The monthly payout for receiving 150 plus channels through digital mode is approximately Rs.150 -200 per month. That means 240 hrs of content is available for rupees one hundred fifty only. On an average a subscriber (four to five people make on subscriber) pays rupees five per movie (if a subscriber watches thirty movies a month).

Another value proposition is that for rupees one hundred fifty thirty six thousand hours of the content is available in a month. Here we have taken eight hours of fresh content per day into consideration. One hundred fifty channels will provide eight hours of fresh content per day which makes it thirty six thousand hrs of content per month.

Hence we may conclude that given the above growth figures of various contributors the null hypothesis can be accepted and we may say population, households, economic development, technological innovation, regulatory freedom, democracy, business investments, life style, globalization of TV, regionalization and culture, and value proposition have contributed towards the growth process of TV broadcast industry in India.

4. Conclusions and Limitations

Eleven main contributors have shaped TV broadcast industry in India. These contributors are population, households, economic development, technological innovation, democracy, regulatory freedom, regionalization and culture, consumer life style, globalization of television, business Investments and value proposition there has been sharp and consistent growth of the TV channels since 2004. In the year 1992 India had only two TV channels that too were owned by Government of India. In the year 2004 on 15th Feb there were 175 TV channels and on 16th Dec number of TV channels went to 195. On 15th Feb 2005 number of channels was 203 which swelled to 247 till 16th Dec 2005. The figures for 2006 were on 15th Feb 251 TV channels and on 16th Dec 301 TV channels. In the year 2007 on 15th Feb number of TV channels was 271 and on 16th Dec the number

went to 292. In the year 2008 India had 297 TV channels on 15th Feb and on 16th Dec the number went to 361 TV channels. In the year 2009 on 15th Feb there were 369 TV channels and on 16th Dec 398 TV channels were operational in India. On 15th Feb there were 395 TV channels and on 15th August 399 TV channels operated in India. As of now there are 423 TV channels on air and 604 have received license so far.

Content delivery platforms have shown growth during the last decade. Cable TV has grown from 1.2 million homes to 83 million homes till 2008 and is estimated at 110 million as on date. Similarly DTH has grown from 3.75 million homes in the year 2005 to 15 million in 2008. The current figures are 34.2 million DTH homes. There has been sharp increase in IPTV also. Though the analogue cable is on decline growth and digital on increasing growth the future of the industry seems very bright.

- TV broadcast industry is on growing trend in India. It contributes highest as compared to filmed entertainment, music and animation, gaming in terms of revenues to the Media and Entertainment business.
- Number of TV channels is on increasing trend. As on 29th April 2011 there were 604 licensed TV channels and out of that 423 were on air as on 16th July 2011.
- Regional TV channels have mushroomed more than national TV channels and in almost all the major languages TV channels are on air. The major markets are Telgu, Kanand, Malayalam, and Tamil.
- Half of the Population has access to television in India i.e. more than 510 million people watch television which was just 30 million in 1984–1985.
- There are eleven major factors that have contributed to the growth of the industry these are Population, households, economic development, technological innovation, regulatory freedom, democracy, business investments, life style, globalization of TV, regionalization and culture, and value proposition.
- Among the TV genres the All India share analysis demonstrates that the trend for Hindi general entertainment is on increasing trend. The All India share of the Hindi GEC was 24.2 % in the year 2004 which has increased to 26.2 % till August 2009. That means that Hindi general entertainment is watched by majority of the viewers as compared to other genres like business news, cable, English entertainment, English movies, English news, Hindi movies, Hindi news, kids, music, regional GEC, regional movies, regional news, infotainment, sports and others. The next highest share is maintained by regional general entertainment which stands at 22.9%. The lowest share is maintained by English entertainment which stands at 0.1 percent followed by 0.4 % by English news.
- Analogue cable is on decreasing trend and digital cable is on increasing trend. The study has revealed that India had only .000021 million TV homes in the year 1959. The number of TV sets increased to 52.3 million in 1995 and to 81.57 million in 2002. As on 2008 there were 134 million TV homes in India. The trend of cable and satellite homes has been that 1.2 million homes out of 34.9 million TV homes had connected to cable television in 1992. In the year 1998 29 million homes had opted for cable connection out of 69.1 million TV homes. In 2008 out of 134 million TV homes, 83 million homes had opted for cable connection and 15 million

for DTH connection. Out of 108 million TV homes 61 million got connected to cable and 3.75 to DTH.

- The study has revealed that 95% households own TV which is the highest ownership as compared to other assets. Any phone is owned by 87%, 25% own internet connection, 65% any automobile, 78.5 own debit/credit card, 7% own camera, 15% own computer, 33% have financial investment and 5% do not own any thing out of the above list.
- On the basis of five people residing in a single house, the study highlights that there are 102.87 million Television homes in India and those who have access to either cable TV or DTH or IPTV.
- With the increase in per capita income the people are spending 12% of their disposable income on leisure and entertainment. The projected spent for next two years will be 20%.
- Right to freedom of speech and expression has contributed largely for the growth of all genres of TV channels may it be news, crime based programs or movies. This trend is not prevalent in other developed nations of the globe.
- Low business investments have attracted more business houses to invest in TV broadcasting business. Some of India's non media business houses like TATA, Bharti, Videocon, and prominent real-estate business houses are investing in media business.
- There is a rising trend among office going people and kids to watch TV to kill stress. House wives are watching for entertainment.
- In our study it was found out that national TV channels are expanding TV broadcasting business in regional areas. The most explored regions are Tamil Nadu, Kerala, Karnataka, Andhra Pradesh, Maharashtra and Punjab.
- 240 hrs of content is available for rupees one hundred and fifty only to a cable and satellite home. A subscriber pays Rs. 5 per movie and in case five people are watching the movie it amounts to Rupee one per person per movie. For rupees one hundred and fifty thirty six thousand hours of content is available to a house hold per month.
- Hence in priority wise language, culture and interest are important factors in the reach of a TV channel. It plays important role in developing viewership of a TV station or for a particular program.

Limitations of the Study

Time and resources have been major limitations to carry vast research on the study. Since the size of the industry sectors like TV channels, cable TV operators, multi system operators, direct to home operators, audience, new media are on increasing trend therefore covering such a huge industry requires time and resources to accomplish the task. India is second largest populous country of the world and seventh largest in area. Covering all growth sectors in 28 States and 7 union territories was not possible. Again coverage of 115 million cable and DTH households, 604 satellite channels, seven direct to home operators, hundreds of technology providers, telecommunication operators and more than 500 million consumers is again a big challenge. Being in Job which amounts to lots of travelling poses time limitations for the researcher to do exhaustive research on the topic. The day I am provided with a corner free from anxieties, family pulls and pressures, social obligations and balance of payments; I promise to change the way research is done on television broadcasting globally.

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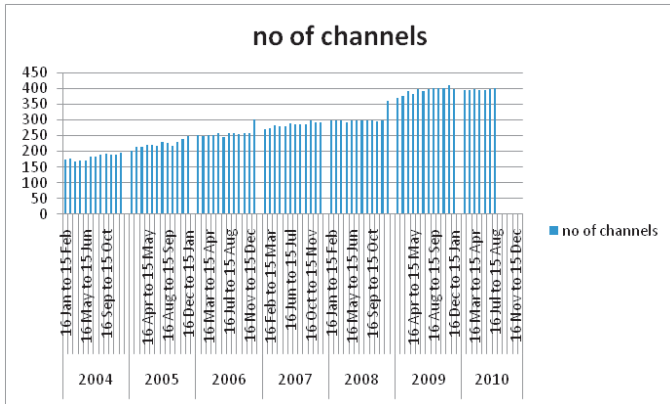
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Web portals and internet Resource

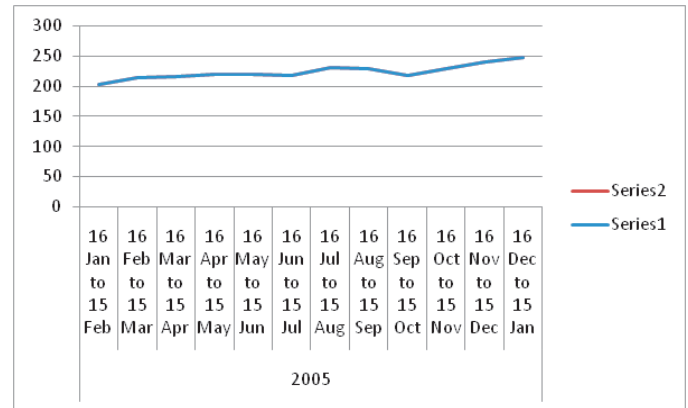
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5. Annexure

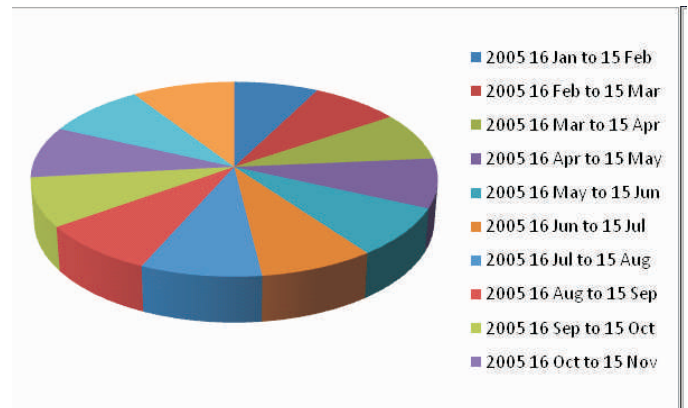
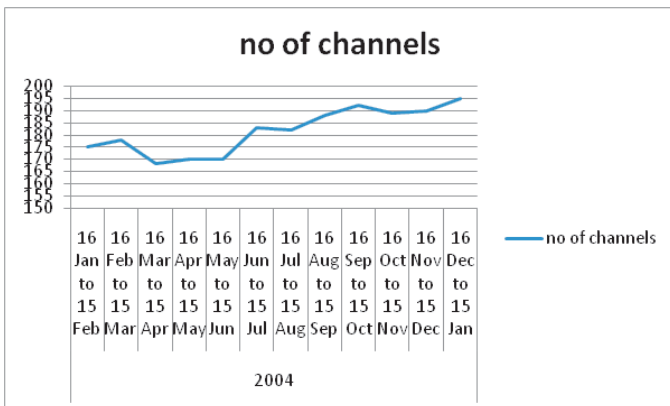
Growth of TV channels from the year 2004 to 2010 in India



Month wise Growth of the TV channels in the year 2005 (Fig. 5)

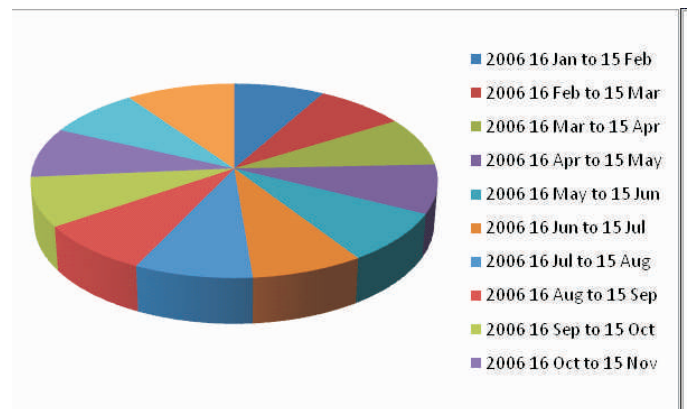
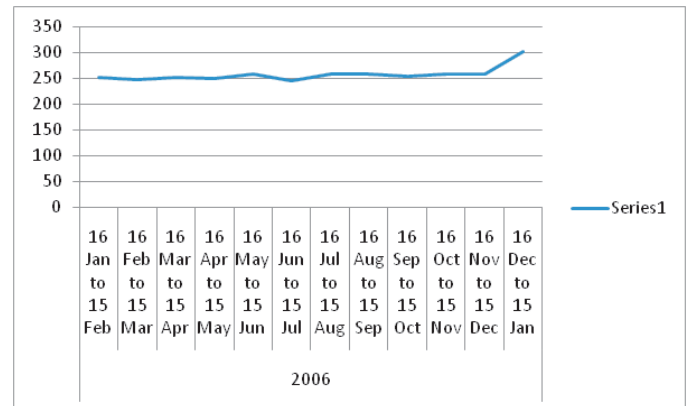


Month wise Growth of the TV channels in the year 2004 (Fig-4)



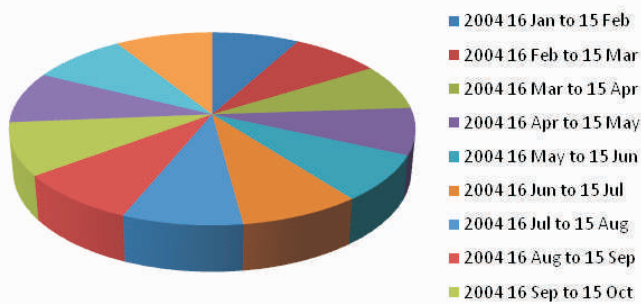
Source: research study 2010

Month wise Growth of the TV channels in the year 2006 (Fig.6)



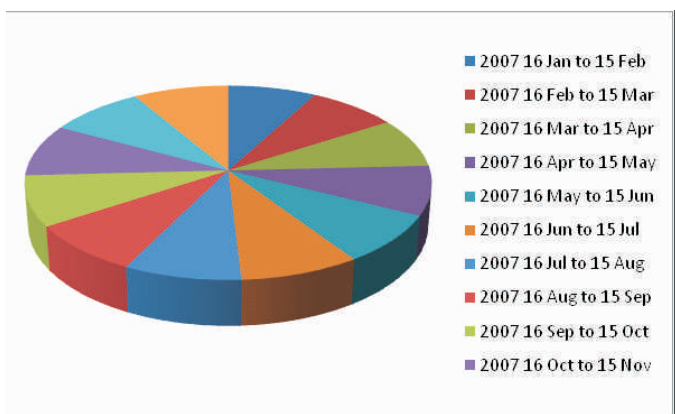
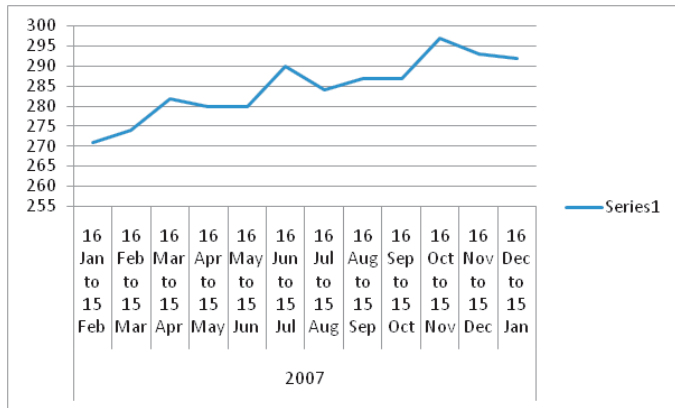
Source: research study 2010

no of channels



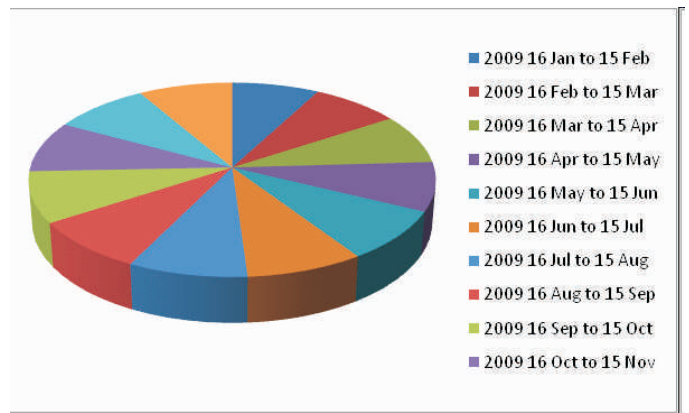
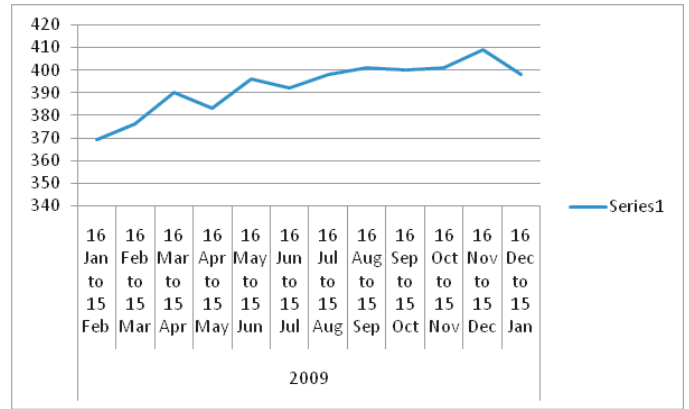
Source: research study 2010

Month wise Growth of the TV channels in the year 2007 (Fig.7)



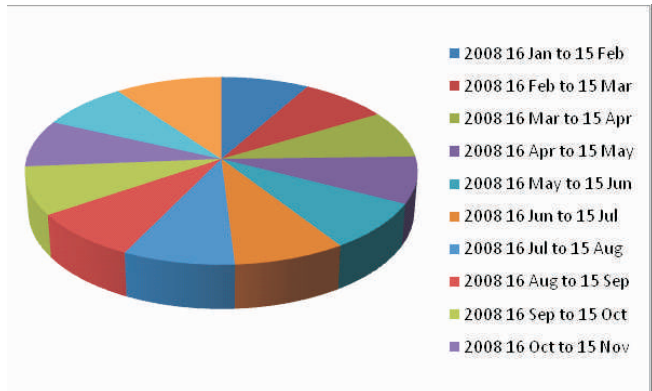
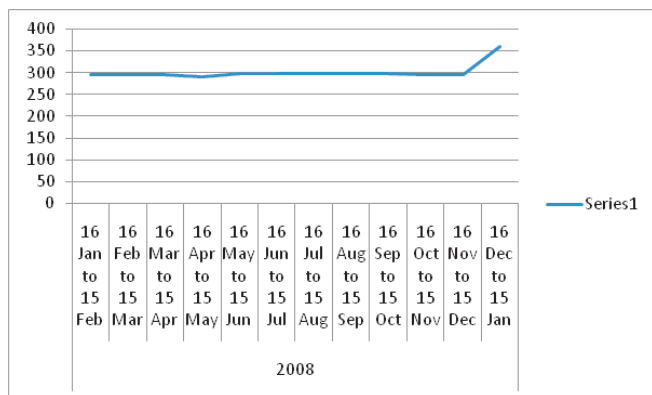
Source: research study 2010

Month wise Growth of the TV channels in the year 2009 (Fig. 10)



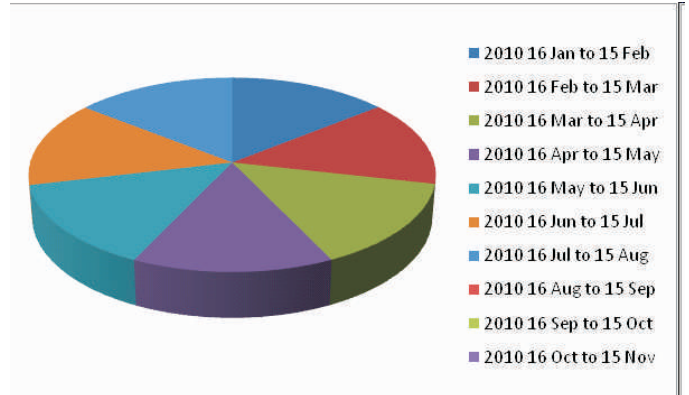
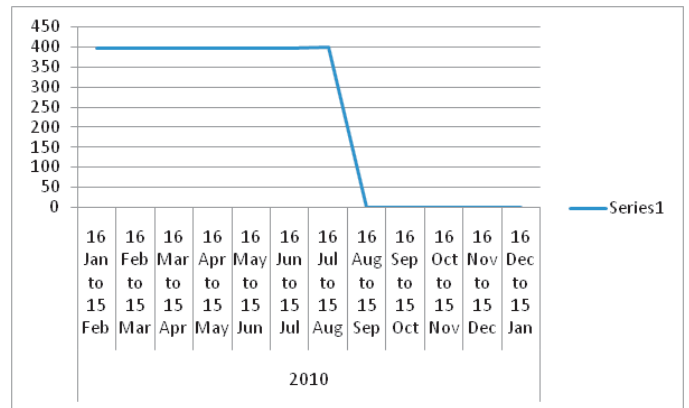
Source: research study 2010

Month wise Growth of the TV channels in the year 2008 (Fig. 8)



Source: research study 2010

Month wise Growth of the TV channels in the year 2010 (Fig 11)



Source: research study 2010

Glossary of Technical words:

- TV – Television
- CNN – Cable news network broadcaster from USA
- TRAI – Telecom regulatory authority of India
- E & M – Entertainment and Media
- DTH - Direct to home
- TG – Target Group
- C&S – Cable and satellite
- SEC – Socio economic class
- LCD – Liquid display
- GDP – Gross domestic product
- FDI – Foreign direct investment
- IT – Information Technology
- ITES – Information technology enabled services
- IPTV – Internet protocol television
- LCO – Local cable operators
- INSAT – Indian National Satellite
- ISRO – Indian space research organization
- MIB – Ministry of information and Broadcasting
- MSO – Multi system operator
- UNESCO – United Nations educational, scientific and cultural org
- HDVSL - High Definition Video over Subscriber Line.
- PHCHP – Punjab , Haryana , Chandigarh , Himachal Pradesh

