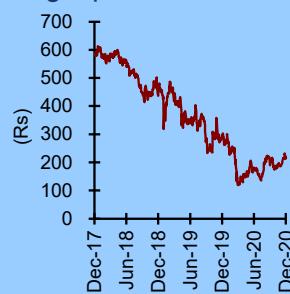


Media

Sector update

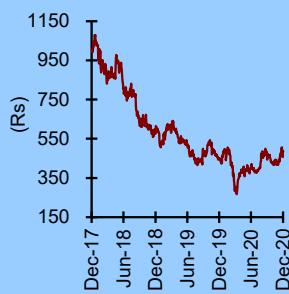
Zee Entertainment (BUY)

Target price: Rs208



Sun TV (ADD)

Target price: Rs462



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Media – BARC rating

Sun TV continues to lose share in Tamil GEC

BARC has released its viewership data for week 50 of CY20 (12-18th Dec). Dec has seen new show releases by Star Plus and Colors in Hindi primetime GEC, but Zee Entertainment (ZEEL) has held on its viewership share; expectation is completion of *KBC-12* should help drive its share higher from week 1 of CY21. Sun TV has launched four new shows since Nov'20 in Tamil primetime GEC, but its viewership share erosion continues with new low in week-50 at 33.8%, which is disappointing. Sun TV viewership share has been partially hurt by *Big Boss Tamil-4*. The moot question is how will Sun TV drive viewership share? Can movie premiers aid viewership share?

- ▶ **Hindi primetime GEC – Zee TV viewership share stable.** Zee TV's Hindi GEC primetime Q3FY21-TD viewership share stood at 18.2% (vs 17.6% in Q3FY20). Zee TV's top two shows *Kumkum Bhagya* and *Kundali Bhagya* has been hurt by *KBC-12*; and completion of *KBC-12* (probably on 1st Jan, 2021) should help Zee TV boost its viewership share. Star Plus continues to hold strong viewership share gain at 25.2% in Q3FY21-TD (up 470bps YoY). In Dec'20, Star Plus has released new show *Shaurya Aur Anokhi Ki Kahani* at 19:00-19:30hrs; and Colors launched two new shows *Namak Issk Ka* (21:00-21:30hrs) and *Molkki* (22:00-22:30hrs).
- ▶ **Tamil primetime GEC - Sun TV's viewership erosion continues.** Sun TV's impressions in Tamil GEC primetime for Q3FY21-TD dip 7% YoY. Its viewership share for Q3FY21-TD was 36% (down 980bps YoY), and for week-50 it was just 33.8%. Star Vijay's viewership share was 35.1% for Q3FY21-TD (up 800bps), and c39% in week-50. Star Vijay is partially benefiting from *Big Boss Tamil - 4*. Z Tamil viewership share is stable at 23.4% for Q3FY21-TD.

This is despite Sun TV's efforts to refresh shows, it has launched four new shows since Nov'20; however, it has not yielded any great result. We will wait to see if Sun TV can gain significant viewership share post the completion of *Big Boss*.

- ▶ **Telugu and Kannada all day GEC – Zee viewership rise in Telugu.** 1) Zee Telugu viewership share in Telugu all day GEC has grown to 26.5% in Q3FY20-TD (up 380bps YoY). This has come at a cost to Gemini TV (Sun TV) which has seen viewership share dip to 15.1% (down 440bps YoY). 2) Zee Kannada viewership share in H2FY20 was very strong, which has normalised to 34.3% in Q3FY21-TD (down 250bps YoY), while Star Suvarna has seen viewership share rise by 780bps YoY to 24.7% in Q3FY21-TD.
- ▶ **ZEEL struggle in Marathi and Bangla GEC continues.** 1) Zee Marathi's viewership share in Marathi all day GEC continues to remain low at 35.3% for Q3FY21-TD (down 19pps), and 31.1% in week-50. Its impression in Marathi primetime GEC dipped 31%. Star Pravah continues to gain viewership at 41.7% for Q3FY21-TD, was 44.8% in week-50. Its impression in primetime rose 180%; 2) Zee Bangla continues to hold more erosion, but its viewership share in Bangla all day GEC is still down 960bps YoY to 42.8% in Q3FY21-TD, and 43.8% in week-50. Star Jalsha viewership share was 46.7% in Q3FY21-TD.

Hindi GEC (Market: HSM Urban, Target: Universe)**Table 1: Hindi GEC primetime impressions**

Mn impressions	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
&TV	33	34	35	34	39	38	40	43	58	43	43	35
Zee TV	176	191	173	180	175	175	188	184	167	34	136	177
Star Plus	239	227	233	251	250	250	268	214	195	182	196	246
Life Ok / Star Bharat	29	28	29	29	31	35	36	82	79	37	51	31
Colors	206	202	188	195	211	207	219	203	210	96	162	206
Sony SAB	116	118	128	133	126	127	142	139	140	64	115	122
Sony PAL	42	43	42	42	48	37	34	32	34	29	54	43
Sony TV	109	119	118	114	121	113	125	145	95	70	76	115
Total	950	963	947	979	1,001	982	1,051	1,041	978	554	832	975

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 2: Hindi GEC primetime viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
&TV	3.5	3.6	3.7	3.5	3.9	3.9	3.8	4.1	5.9	7.8	5.1	3.6
Zee TV	18.5	19.8	18.3	18.4	17.5	17.8	17.9	17.6	17.1	6.1	16.4	18.2
Star Plus	25.1	23.5	24.7	25.7	24.9	25.5	25.5	20.5	19.9	32.8	23.5	25.2
Life Ok / Star Bharat	3.1	2.9	3.1	3.0	3.1	3.6	3.4	7.9	8.1	6.7	6.1	3.2
Colors	21.7	20.9	19.9	20.0	21.0	21.1	20.8	19.5	21.5	17.3	19.4	21.1
Sony SAB	12.2	12.3	13.5	13.6	12.6	12.9	13.5	13.3	14.3	11.6	13.8	12.5
Sony PAL	4.4	4.5	4.4	4.3	4.8	3.7	3.3	3.1	3.5	5.2	6.5	4.5
Sony TV	11.5	12.4	12.4	11.7	12.1	11.5	11.9	13.9	9.7	12.6	9.1	11.8
Total	100	100	100	100								

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 3: Hindi GEC all-day viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
&TV	3.6	3.7	3.9	3.6	4.0	4.0	4.0	4.4	5.1	6.8	4.8	3.8
Zee TV	13.8	14.3	14.4	14.2	13.5	14.0	14.2	14.3	13.0	7.1	11.9	13.8
Star Plus	25.6	24.7	23.0	24.2	23.7	24.0	23.8	18.5	17.3	23.1	25.2	24.7
Life Ok / Star Bharat	4.6	4.2	4.5	4.4	4.4	4.7	4.6	8.4	7.8	7.0	6.7	4.6
Colors	16.6	17.0	17.0	16.6	18.2	18.7	18.4	16.9	18.9	13.2	14.6	17.5
Sony SAB	16.2	16.7	17.5	17.7	16.6	16.2	16.5	17.9	19.8	23.9	17.8	16.5
Sony PAL	6.0	6.0	5.8	5.7	5.9	5.3	5.3	3.1	3.2	4.6	7.3	6.2
Sony TV	13.6	13.3	13.9	13.6	13.6	13.3	13.2	16.4	14.8	14.4	11.7	13.1
Total	100	100	100	100								

Source: BARC, I-Sec research; Note: *Quarter to date

Tamil GEC (Market: Tamil Nadu Urban, Target: Universe)**Table 4: Tamil GEC primetime impressions**

Mn impressions	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Sun TV	155	159	158	147	162	160	154	166	171	134	130	153
Sun Life	8	9	9	7	7	8	8	4	5	8	9	8
Star Vijay	142	146	143	136	150	162	178	98	91	54	93	150
Z Tamil	102	94	104	99	103	96	98	85	82	44	99	100
Colors Tamil	15	18	20	19	17	18	17	10	11	8	13	15
Total	422	426	435	408	438	444	455	362	359	248	344	426

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 5: Tamil GEC primetime viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Sun TV	36.7	37.2	36.4	36.1	36.9	36.2	33.8	45.7	47.6	54.1	37.8	36.0
Sun Life	2.0	2.2	2.1	1.7	1.7	1.8	1.9	1.0	1.3	3.1	2.6	2.0
Star Vijay	33.7	34.2	33.0	33.4	34.2	36.4	39.0	27.1	25.3	21.6	27.0	35.1
Z Tamil	24.2	22.1	23.9	24.3	23.4	21.6	21.6	23.4	22.9	17.7	28.7	23.4
Colors Tamil	3.5	4.3	4.6	4.6	3.8	4.1	3.7	2.8	2.9	3.4	3.9	3.5
Total	100											

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 6: Tamil GEC all-day viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Sun TV	39.8	41.0	43.2	40.6	40.8	40.4	38.3	46.4	49.4	53.0	45.9	40.6
Sun Life	4.2	4.0	4.0	3.9	4.0	4.0	4.2	3.7	3.4	5.2	4.9	4.2
Star Vijay	31.4	31.4	29.8	30.7	31.1	33.1	34.7	27.0	25.2	21.6	24.1	31.3
Z Tamil	21.4	20.1	19.5	21.0	20.6	18.9	19.4	19.7	18.6	15.8	21.2	20.8
Colors Tamil	3.2	3.5	3.5	3.8	3.5	3.6	3.5	3.2	3.4	4.4	3.9	3.2
Total	100											

Source: BARC, I-Sec research; Note: *Quarter to date

Telugu GEC (Market: AP/Telangana Urban, Target: Universe)**Table 7: Telugu GEC primetime impressions**

Mn impressions	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Eenadu TV	75	76	75	72	73	71	74	65	69	71	81	75
Gemini TV	28	30	29	29	31	32	34	40	47	35	28	29
Star Maa	136	144	144	133	141	134	136	129	115	60	121	138
Zee Telugu	93	96	96	93	97	105	108	65	74	37	103	96
Total	331	346	344	327	342	342	351	300	304	203	333	339

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 8: Telugu GEC primetime viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Eenadu TV	22.5	21.9	21.8	22.0	21.4	20.8	20.9	21.7	22.6	35.3	24.3	22.2
Gemini TV	8.3	8.8	8.5	8.7	9.0	9.3	9.7	13.5	15.4	17.2	8.3	8.7
Star Maa	41.0	41.5	41.9	40.8	41.2	39.0	38.6	43.1	37.9	29.4	36.2	40.8
Zee Telugu	28.2	27.8	27.8	28.5	28.4	30.8	30.7	21.7	24.2	18.2	31.1	28.4
Total	100											

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 9: Telugu GEC all-day viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Eenadu TV	22.1	21.1	21.7	21.0	20.7	19.9	19.9	20.8	21.6	25.2	22.9	21.6
Gemini TV	15.1	14.6	16.2	15.4	14.3	15.8	15.7	19.5	20.8	24.4	17.2	15.1
Star Maa	36.0	37.1	36.2	36.7	37.5	35.5	35.3	36.9	33.2	30.3	32.5	36.8
Zee Telugu	26.8	27.2	25.9	26.9	27.5	28.7	29.1	22.7	24.5	20.1	27.4	26.5
Total	100											

Source: BARC, I-Sec research; Note: *Quarter to date

Kannada GEC (Market: Karnataka Urban, Target: Universe)**Table 10: Kannada GEC primetime impressions**

Mn impressions	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Star Suvarna	46	56	50	49	46	48	51	47	46	31	56	50
Udaya TV	27	25	24	24	23	23	24	32	34	28	25	25
Zee Kannada	63	63	67	66	68	71	74	86	89	48	78	66
Colors Super	4	4	4	5	5	5	6	17	14	4	2	4
Colors Kannada	45	49	52	49	52	51	54	59	37	21	40	48
Total	184	197	198	193	195	200	209	240	220	132	201	193

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 11: Kannada GEC primetime share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Star Suvarna	24.7	28.3	25.3	25.3	23.8	24.2	24.4	19.4	20.8	23.8	27.7	26.1
Udaya TV	14.5	12.7	12.1	12.6	11.8	11.7	11.3	13.2	15.6	21.1	12.3	12.7
Zee Kannada	34.1	32.1	34.0	34.3	34.9	35.7	35.4	35.8	40.4	36.1	38.8	34.4
Colors Super	2.1	2.0	2.1	2.5	2.6	2.5	2.8	7.1	6.3	3.0	1.2	2.1
Colors Kannada	24.6	24.8	26.5	25.3	26.9	25.7	26.0	24.5	16.9	15.9	20.0	24.7
Total	100											

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 12: Kannada GEC all-day viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Star Suvarna	23.3	25.8	22.8	24.2	22.1	23.5	23.8	16.9	19.7	17.9	22.2	24.7
Udaya TV	16.5	15.6	14.9	15.0	14.3	15.0	14.2	14.8	17.0	28.8	20.9	15.8
Zee Kannada	35.9	33.6	35.1	34.5	35.7	34.0	34.2	36.9	39.0	32.8	34.9	34.3
Colors Super	3.1	3.1	3.0	3.5	4.3	3.7	3.4	7.4	6.5	5.1	3.0	3.1
Colors Kannada	21.2	21.9	24.2	22.7	23.6	23.9	24.5	24.1	17.8	15.4	19.0	22.0
Total	100											

Source: BARC, I-Sec research; Note: *Quarter to date

Malayalam GEC (Market: Kerala Urban, Target: Universe)**Table 13: Malayalam GEC primetime impressions**

Mn impressions	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Asianet	89	90	81	88	89	92	94	76	81	42	78	87
Kairali TV	3	3	3	4	5	4	5	4	5	5	3	4
Surya TV	6	6	6	6	5	4	4	5	6	16	8	6
Mazhavil Manorama	21	17	17	16	17	17	14	21	17	13	17	18
Flowers TV	17	18	19	19	18	18	18	21	20	16	18	19
Zee Keralam	15	19	19	17	18	16	17	12	12	9	15	16
Total	151	153	146	150	153	150	152	139	140	101	139	150

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 14: Malayalam GEC primetime share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Asianet	59.0	58.8	55.3	58.8	58.5	61.0	61.7	54.7	57.4	41.1	55.9	58.3
Kairali TV	2.1	2.0	2.4	2.4	3.2	2.6	3.0	2.9	3.3	5.1	2.3	2.5
Surya TV	4.0	3.7	4.5	3.9	3.2	2.8	2.7	3.9	4.4	16.2	5.6	3.8
Mazhavil Manorama	13.7	11.4	11.7	11.0	11.3	11.2	9.2	15.4	11.9	13.0	12.3	11.8
Flowers TV	11.3	11.9	13.2	12.7	11.9	12.0	12.0	14.9	14.5	15.3	12.8	12.7
Zee Keralam	9.9	12.1	13.0	11.2	12.0	10.4	11.4	8.3	8.6	9.2	11.0	11.0
Total	100	100	100	100	100	100	100	100	100	100	100	100

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 15: Malayalam GEC all-day viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Asianet	45.4	46.2	43.2	45.7	47.0	47.6	50.1	44.8	45.7	30.7	39.5	44.4
Kairali TV	5.7	6.0	6.4	7.0	5.5	6.1	5.3	5.8	6.6	8.1	6.2	6.0
Surya TV	9.2	8.1	11.0	8.2	7.9	8.1	7.6	10.1	11.0	20.2	13.0	9.6
Mazhavil Manorama	14.9	14.5	13.0	13.9	13.8	14.4	13.8	15.7	14.1	17.6	14.7	14.1
Flowers TV	14.2	13.6	14.7	13.8	13.2	12.8	11.7	13.3	12.2	14.0	15.1	14.5
Zee Keralam	10.6	11.7	11.7	11.5	12.6	11.0	11.6	10.2	10.4	9.4	11.4	11.3
Total	100											

Source: BARC, I-Sec research; Note: *Quarter to date

Marathi GEC (Market: Maharashtra/Goa Urban, Target: Universe)**Table 16: Marathi GEC primetime impressions**

Mn impressions	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Colors Marathi	31	31	31	33	33	38	35	46	47	9	27	33
Star Pravah	96	94	92	99	101	99	108	33	38	13	52	92
Zee Marathi	81	75	78	86	82	78	83	116	94	29	94	80
Zee Yuva	4	3	3	3	3	3	3	5	7	8	6	3
Sony Marathi	13	12	11	13	13	13	12	8	10	7	11	12
Total	224	215	215	233	233	231	241	208	195	66	191	220

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 17: Marathi GEC primetime share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Colors Marathi	14.0	14.6	14.4	14.0	14.1	16.4	14.6	22.2	24.0	14.1	14.3	15.0
Star Pravah	42.6	43.6	42.7	42.5	43.2	42.7	44.8	15.7	19.7	20.0	27.4	41.7
Zee Marathi	36.1	34.9	36.2	36.8	35.4	33.7	34.2	55.8	48.0	43.3	49.2	36.4
Zee Yuva	1.6	1.5	1.4	1.2	1.5	1.5	1.2	2.5	3.4	12.2	3.3	1.5
Sony Marathi	5.6	5.4	5.3	5.5	5.8	5.8	5.1	3.8	4.9	10.4	5.8	5.4
Total	100											

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 18: Marathi GEC all-day viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Colors Marathi	14.5	14.7	14.6	14.0	14.7	16.8	15.8	23.0	24.3	12.5	14.2	15.1
Star Pravah	40.5	41.3	41.7	42.5	42.4	41.2	43.1	16.7	20.7	17.9	28.1	39.7
Zee Marathi	35.6	33.9	33.0	33.1	32.5	30.9	31.1	50.1	42.4	42.2	44.5	35.3
Zee Yuva	2.8	2.7	2.9	2.7	2.7	3.0	2.7	4.4	5.1	11.9	4.9	2.8
Sony Marathi	6.6	7.3	7.8	7.7	7.7	8.1	7.3	5.7	7.5	15.6	8.4	7.1
Total	100											

Source: BARC, I-Sec research; Note: *Quarter to date

Bangla GEC (Market: West Bengal Urban, Target: Universe)**Table 19: Bangla GEC primetime impressions**

Mn impressions	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Colors Bangla	7	8	6	7	7	6	7	5	6	7	7	7
Star Jalsha	97	98	97	105	107	104	104	64	72	32	92	98
Zee Bangla	92	90	89	89	94	94	98	90	90	47	87	90
Sony Aath	6	6	6	7	7	7	7	8	8	10	8	6
Sun Bangla	8	9	9	9	8	9	8	5	6	3	8	9
Total	210	210	207	216	222	220	223	172	181	99	203	210

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 20: Bangla GEC primetime share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Colors Bangla	3.4	3.6	3.1	3.3	3.2	2.9	3.1	3.0	3.3	7.0	3.6	3.4
Star Jalsha	46.1	46.8	46.8	48.4	48.0	47.1	46.7	37.4	39.6	32.0	45.6	46.7
Zee Bangla	43.8	42.6	43.1	41.3	42.3	42.7	43.8	52.5	49.5	47.2	42.8	42.8
Sony Aath	2.7	2.8	2.9	3.0	3.0	3.2	3.0	4.4	4.5	10.3	4.1	2.9
Sun Bangla	4.0	4.2	4.2	3.9	3.5	4.2	3.5	2.8	3.1	3.4	3.8	4.1
Total	100											

Source: BARC, I-Sec research; Note: 1) *Quarter to date; and 2) primetime is from 18:00-24.00hrs

Table 21: Bangla GEC all-day viewership share

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21*
Colors Bangla	5.1	5.0	4.5	4.6	4.4	4.5	4.1	4.3	4.7	9.3	6.0	5.1
Star Jalsha	43.5	43.7	43.5	44.9	45.2	43.5	43.2	35.7	38.1	28.2	42.7	43.5
Zee Bangla	42.2	42.0	42.1	41.1	41.5	42.7	43.6	50.2	47.1	44.3	40.3	41.6
Sony Aath	5.2	5.1	5.7	5.4	5.3	5.4	5.3	6.9	6.9	14.5	6.9	5.5
Sun Bangla	3.9	4.2	4.2	4.0	3.6	3.9	3.7	2.9	3.3	3.7	4.1	4.3
Total	100											

Source: BARC, I-Sec research; Note: *Quarter to date

Slot-wise analysis

Table 22: Hindi GEC primetime viewership share (slot-wise analysis) (Market: HSM Urban, Target: Universe)

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21
19:00-19:30								24.0	15.0	12.0	14.7	25.7
Zee TV	24.6	28.0	25.6	28.7	29.3	27.4	27.8	19.6	18.9	31.6	23.9	23.2
Star Plus	24.7	20.1	22.0	21.5	19.1	19.6	20.4	30.7	33.7	29.1	38.8	32.0
Colors	31.5	33.1	31.7	30.4	32.1	32.9	31.2	25.7	32.3	27.3	22.6	19.1
Sony TV	19.2	18.8	20.7	19.4	19.6	20.2	20.6					
19:30-20:00								17.7	14.7	10.6	15.5	20.7
Zee TV	18.9	21.8	18.5	19.9	20.7	21.9	19.9	16.6	16.9	46.9	27.1	27.6
Star Plus	28.4	24.4	27.0	30.9	28.9	28.9	28.7	48.5	48.8	25.4	42.3	36.9
Colors	38.0	39.2	37.7	34.3	34.0	32.8	35.4	17.2	19.5	17.1	15.1	14.8
Sony TV	14.7	14.7	16.7	15.0	16.4	16.5	15.9					
20:00-20:30								27.2	23.6	7.6	23.1	23.3
Zee TV	25.4	26.8	25.9	26.7	22.7	22.1	21.6	29.2	29.7	56.3	27.5	34.7
Star Plus	32.7	30.8	32.8	32.4	34.8	38.6	39.2	33.7	36.5	21.2	38.3	31.5
Colors	31.5	31.9	29.5	30.0	31.0	28.0	28.7	10.0	10.2	14.9	11.1	10.5
Sony TV	10.4	10.5	11.8	11.0	11.5	11.3	10.5					
20:30-21:00								29.6	26.5	8.2	22.8	25.2
Zee TV	28.4	31.0	25.0	26.9	21.4	21.1	21.2	36.8	33.3	60.8	31.3	33.1
Star Plus	24.6	24.5	39.0	34.2	40.3	45.0	43.2	22.4	30.9	16.5	35.9	33.1
Colors	38.4	35.9	28.0	30.4	29.9	26.0	28.6	11.1	9.3	14.5	10.0	8.6
Sony TV	8.7	8.7	8.0	8.4	8.5	7.9	7.0					
21:00-21:30								38.0	39.6	7.7	36.4	33.7
Zee TV	34.2	35.3	34.6	33.6	31.9	31.1	32.4	25.4	26.5	60.9	24.2	23.2
Star Plus	21.1	19.6	23.7	24.7	25.9	25.1	27.4	16.4	26.3	19.4	28.0	26.5
Colors	30.1	28.1	24.0	24.8	24.7	27.8	23.0	20.2	7.6	12.1	11.4	16.6
Sony TV	14.6	17.0	17.8	16.9	17.5	15.9	17.2					
21:30-22:00								37.2	40.3	10.5	43.7	38.6
Zee TV	38.3	38.0	38.7	37.4	37.3	37.5	35.3	32.0	32.5	49.4	30.0	24.7
Star Plus	25.1	24.5	24.1	24.9	25.1	23.5	24.4	10.7	20.3	28.2	16.3	17.2
Colors	19.1	17.8	16.1	17.6	18.0	21.0	19.4	20.1	6.9	12.0	10.0	19.4
Sony TV	17.5	19.7	21.0	20.2	19.5	17.9	20.9					
22:00-22:30								23.7	29.9	10.9	24.8	18.8
Zee TV	19.9	20.8	17.7	17.6	17.1	18.7	15.4	33.7	38.0	39.9	51.8	48.5
Star Plus	51.6	47.0	47.4	49.6	47.1	45.5	45.5	15.1	19.6	35.0	13.6	11.9
Colors	7.9	7.9	13.2	13.2	15.1	16.9	17.4	27.5	12.5	14.2	9.9	20.8
Sony TV	20.6	24.3	21.8	19.5	20.7	18.9	21.8					
22:30-23:00								13.7	16.3	12.1	19.5	11.9
Zee TV	10.8	11.8	10.9	11.8	11.1	10.3	17.2	26.3	33.5	27.0	53.5	45.9
Star Plus	46.6	45.4	46.4	47.2	43.2	47.7	44.0	41.3	37.2	37.1	15.8	28.5
Colors	28.1	25.4	27.3	28.0	31.2	31.5	29.0	18.7	13.1	23.8	11.1	13.7
Sony TV	14.5	17.4	15.4	12.9	14.5	10.5	9.8					

Source: BARC, I-Sec research

Table 23: Tamil GEC primetime viewership share (slot-wise analysis) (Market: Tamil Nadu Urban, Target: Universe)

%	wk44	wk45	wk46	wk47	wk48	wk49	wk50	Q3FY20	Q4FY20	Q1FY21	Q2FY21	Q3FY21
19:00-19:30												
Sun TV	58.9	59.2	56.0	56.7	59.3	58.7	53.3	59.4	63.4	59.6	55.8	57.9
Star Vijay	19.6	24.7	24.8	25.3	23.8	24.4	31.5	25.3	23.5	25.6	20.8	23.2
Z Tamil	17.9	12.6	15.5	14.1	13.4	13.1	11.9	12.5	10.9	11.6	19.2	15.4
Colors Tamil	3.6	3.6	3.7	3.8	3.4	3.8	3.3	2.7	2.2	3.2	4.2	3.5
19:30-20:00												
Sun TV	42.9	45.3	43.2	42.0	53.0	45.8	41.5	48.6	51.3	52.8	43.2	45.8
Star Vijay	28.8	28.4	28.6	29.3	25.7	31.1	35.5	31.4	28.5	24.4	23.4	27.2
Z Tamil	24.1	20.9	22.4	23.0	16.9	18.0	17.9	16.9	17.8	19.8	29.7	22.5
Colors Tamil	4.2	5.4	5.7	5.7	4.3	5.1	5.1	3.1	2.3	3.0	3.7	4.5
20:00-20:30												
Sun TV	36.1	37.2	35.5	31.8	33.4	32.1	31.0	46.5	47.0	48.5	36.7	34.4
Star Vijay	34.9	34.4	35.0	35.4	39.8	44.1	46.4	34.7	32.7	23.8	32.0	38.2
Z Tamil	24.2	22.7	23.6	27.2	22.1	19.4	18.1	16.3	18.3	24.1	26.8	22.7
Colors Tamil	4.8	5.7	6.0	5.5	4.7	4.3	4.4	2.5	2.0	3.5	4.5	4.7
20:30-21:00												
Sun TV	33.7	34.5	33.2	31.3	32.3	33.0	29.2	40.9	42.8	44.4	31.3	31.1
Star Vijay	33.3	32.6	28.9	32.0	34.3	36.1	39.4	24.6	25.5	23.4	30.9	35.8
Z Tamil	28.9	27.6	32.0	30.7	28.7	26.2	27.0	32.5	28.3	27.4	32.3	28.9
Colors Tamil	4.1	5.3	5.9	6.0	4.7	4.6	4.4	2.0	3.4	4.8	5.6	4.2
21:00-21:30												
Sun TV	27.3	27.7	29.0	28.8	26.4	27.1	24.8	34.3	40.0	42.9	28.4	25.9
Star Vijay	43.7	42.3	40.8	40.2	42.6	44.6	45.3	18.9	17.4	23.5	27.5	43.8
Z Tamil	25.8	25.8	25.5	25.7	26.4	24.4	26.2	45.3	39.1	29.3	39.6	26.9
Colors Tamil	3.1	4.2	4.7	5.3	4.6	3.9	3.7	1.4	3.4	4.3	4.5	3.3
21:30-22:00												
Sun TV	29.5	28.5	30.5	29.9	27.8	28.5	27.5	44.0	44.3	47.3	35.5	28.8
Star Vijay	40.0	41.5	39.6	38.8	39.6	40.7	40.9	24.0	23.0	25.5	22.8	41.4
Z Tamil	28.7	26.9	27.1	29.1	30.3	28.5	29.3	29.1	29.6	23.0	37.5	27.7
Colors Tamil	1.9	3.1	2.8	2.2	2.3	2.3	2.4	2.9	3.1	4.2	4.1	2.1
22:00-22:30												
Sun TV	23.9	25.7	23.9	23.2	17.7	24.2	24.1	42.2	39.8	54.1	31.1	24.5
Star Vijay	41.6	41.2	42.3	41.3	42.5	42.6	42.2	23.6	24.1	24.8	23.3	42.2
Z Tamil	32.1	30.3	30.6	33.1	37.6	31.0	31.3	28.6	32.6	18.6	42.1	31.3
Colors Tamil	2.4	2.8	3.2	2.3	2.3	2.2	2.4	5.6	3.5	2.5	3.5	2.0
22:30-23:00												
Sun TV	22.7	20.5	18.8	18.4	16.9	17.6	19.5	45.5	43.9	59.8	36.7	21.8
Star Vijay	45.7	48.6	47.4	47.1	51.2	53.0	49.4	32.5	29.0	27.2	25.3	47.6
Z Tamil	28.8	28.2	31.0	32.0	30.3	26.7	28.9	18.3	22.5	9.6	34.1	28.3
Colors Tamil	2.8	2.7	2.9	2.6	1.6	2.6	2.2	3.7	4.6	3.4	3.9	2.2

Source: BARC, I-Sec research

TV show guide**Table 24: Hindi primetime GEC show guide**

Time slot (hrs)	Zee TV	Star Plus	Colors	Sony TV
19:00-19:30	Apna Time Bhi Aayega	Shaurya Aur Anokhi Ki Kahani	Ishq Mein Marjawa 2	Mere Sai (7:00-7:45)
19:30-20:00	Hamari Wali Good News	Shaadi Mubarak	Chhoti Sardarni	Vighnaharta Ganesh (7:45-8:30)
20:00-20:30	Guddan Tumse Na Ho Payega	Ghum Hai Kisise Pyaar Meiin	Shakti - Astitva Ke Ehsaas Ki	Vighnaharta Ganesh (7:45-8:30)
20:30-21:00	Tujhse Hai Raabta	Imlie	Barrister Bahu	Indiawali Maa
21:00-21:30	Kumkum Bhagya	Saath Nibhaana Saathiya 2	Namak Issk Ka	Kaun Banega Crorepati
21:30-22:00	Kundali Bhagya	Yeh Rishta Kya Kehlata Hai	Pinjara Khubhsurati Ka	Kaun Banega Crorepati
22:00-22:30	Kyu Rishton Mein Katti Batti	Anupama	Molkki	Kaun Banega Crorepati
22:30-23:00	Qurbaan hua	Yeh hai Chahatein	Bigg Boss	Crime patrol - Satark

Source: BARC, I-Sec research; Note: Shows marked in blue were premiered post lockdown

Table 25: Tamil primetime GEC show guide

Time slot (hrs)	Sun TV	Star Vijay	Z Tamil	Colors Tamil
19:00-19:30	Roja	Naam Iruvar Namakkku Iruvar	Suryavamsam	Maangalya Sandhosham
19:30-20:00	Vaanathai Pola	Senthooora Poove	Neethane Enthan Ponvansantham	Amman (1hr show)
20:00-20:30	Poove Unakkaga	Pandian Stores	Gokulathil Seethai	Amman
20:30-21:00	Kannana Kanne	Baagyalatchumi Illatharisiyin Kadhai	Yaaradi Nee Mohini	Idhayathai Thirudathey (1hr show)
21:00-21:30	Anbe Vaa	Bharathi Kannamma	Sembaruthi	Idhayathai Thirudathey
21:30-22:00	Chithi 2	Bigg Boss	Oru Oorula Oru Rajakumari	Uyire (1hr show)
22:00-22:30	Thirumagal	Bigg Boss	Sathya	Uyire
22:30-23:00	Paandavar Illam	Thenmozhi B.A. Uratchi Mandra Thalaivar	Iniya Iru Malargal	Chandrakanta

Source: BARC, I-Sec research; Note: Shows marked in blue were premiered post lockdown

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