



MAJOR TRENDS IN INDIAN TELEVISION CONTENT: FROM TRANSNATIONAL BORDERS TO RURAL HEARTLAND

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ABSTRACT

Television content in India has come a long way from public broadcaster Doordarshan controlled social and developmental programs to modern day entertainment shows. The article traces the major trends witnessed in the Indian television content, Hindi and other regional languages, and attempts to analyze the factors behind the nature of such programming. The article provides a critical analysis of the television soap operas (fiction) and the reality shows (non-fiction) aired in General Entertainment Channels (GECs). Some of the key trends witnessed in the content industry includes remakes, adaptations and dubbed content from transnational programs and concepts; remakes among Indian languages- from Hindi to regional language and vice versa; and a clear tilt towards the rural content, dictated by the ever expanding rural viewership for television channels. Importantly, the article establishes the fact that, though the content seems Indian in terms of production values, the origin of some of these popular programs are undoubtedly from the transnational borders.

KEYWORDS: Content industry, fiction, Indian language channels, Indian television, non-fiction, rural television market, South Indian language channels, transnational content.

INTRODUCTION

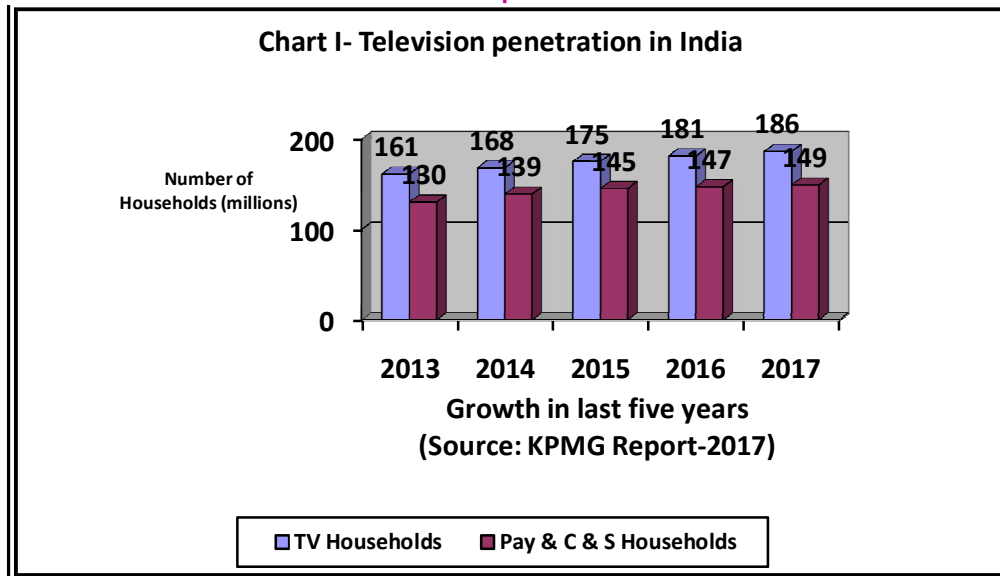
Television in India has always been looked up to as a platform which plays a constructive role in national integration, economic development and in nurturing cultural identity. Television was entrusted with the responsibility of promoting developmental and social issues. It has never been considered as major entertainment medium till private broadcasters changed the entire scenario post 1990s. Television was introduced in India in 1959, but for over 30 years we had only one national channel. But post 1992, the television industry has witnessed a phenomenal growth, overtaking even Bollywood, the Hindi film industry, to become a leading player in the Indian entertainment and media industry. DD no longer holds monopoly in the television market, as it is compelled to compete with private cable and satellite channels (C&S channels), both Indian and foreign. According to KPMG television homes in India has grown from 1.2 million in 1992 to 149 million C&S television homes in 2016.

The number of television households in India increased to 181 million in 2016, resulting in a television penetration of 63 percent. The television reach in terms of cable and satellite TV subscribers' base stood at 149 million at the end of 2016 financial year which is roughly around 81 percent of the total number of television households in India (See Chart-1). By 2021 television households are estimated to reach 203 million, implying a total TV penetration of 67 percent. In 2016 television industry in India stood at Rs. 588 billion and is projected to reach Rs.



166 billion in 2021. (KPMG, 2017). Analog Cable, Digital Cable, Pay DTH and Free Dish platforms are touted to be the driving forces behind this growth.

Chart I- Television penetration in India



Television has become one of the major platforms where India is experiencing the influences of global culture. The easy availability of international television channels through satellite since the beginning of the 1990s forced the liberalization of a television market, which was until then closely shielded as a national monopoly by the state broadcaster *Doordarshan*. This opening up of the market led to a profusion of satellite channels. Although some of the early international services such as *STAR TV* still remain prominent in the cultural market, the most successful networks are from India. In addition, there has been a strong growth of Indian language television channels other than Hindi, such as Tamil, Telugu, Kannada, Bengali, Marathi and so on. Although DD has improved its production quality and extended its services in response to the competition from the private broadcasters, the Indian television market has now become much more diverse and open to global influences in its content (Sinclair, Harrison 2004).

Throughout the 1990's, along with a number of Hindi and regional language television channels, several regional and English language channels made their entry into the Indian television landscape. By 2001, international channels like HBO and History Channel had started their operations. From 1999 to 2003, other international channels like *Nickelodeon*, *Cartoon Network*, *VH1*, and *Disney* made foray into the Indian market. Post 2003, there has been an explosion of news channels in various Indian languages. NDTV, CNN IBN, Aaj Tak, TV9 and Times Now are some of the most notable news channels that were launched during this period. In recent years Indian viewers have seen the birth of more channels such as *UTV Movies*, *UTV Bindass*, *Zoom*, *Colors*, *9X*, and others.

REGIONAL TELEVISION MARKET

Although transnational television channels have been blamed for ‘cultural invasion’ over the past decade, their impact in stimulating growth of Indian channels cannot be overlooked. In fact Zee Corporation was one of the greatest beneficiaries in the initial years of evolving satellite television in India. Launched in 1992, Zee TV is one of the most popular Indian television brands now. Zee Corporation produces programs for Zee group of channels. It also has a cable distribution arm, Siticable, which is also one of India’s largest multi system operators (MSOs); it also has internet service provision. At the international level, Zee has developed services for Indian communities residing in UK, US, Africa, and other places. Zee presently has

over 35 channels across genres in different Indian languages such as general entertainment, movies, music, news, life style, education, food, comedy, sports etc.

Regional television market also witnessed a rapid growth with new television channels coming up in languages like Tamil, Malayalam, Telugu, Bangla, Kannada, Marathi, Oriya among others. Of the new channels transmitting in the regional languages, Sun TV network is the leading network with its service spread in the entire South India. Established in 1993, Sun TV Network, is one of India's largest media conglomerate holding a bouquet of thirty two leading channels in four South Indian languages; Tamil, Telugu, Malayalam, and Kannada. Collectively, Sun TV Network claims, that their channels reach more than 95 million households in India. Sun TV group of channels can also be viewed in 27 countries across the world including US, Canada, Europe, Singapore, Malaysia, Sri Lanka, South Africa, Australia and New Zealand. Armed with these channels Sun TV Network has been able to connect to the Southern Diaspora erasing geographical distances. It has been named as Asia's most profitable media corporations.

The regional channel growth trend which started in 1992 with the launch of Zee TV and Sun TV continues to this day. According to Indian Media and Entertainment report (2017), the four southern language markets continue to account for 2/3rd of the regional viewership in 2016. The advertising potential is also estimated highly with Rs. 45-50 billion advertising revenue in the same year. This is exactly why all major players in the market have launched new channels in regional languages in recent years.

Table I- List of select regional channels permitted by I&B Ministry in the last five years

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Sl. No.	Channel Name	Name of the Company	Language	Date of Permission
1.	Colors Super	Viacom 18	Kannada	19-01-2016
2.	Sarathi	KCB Builders & Developers	Punjabi	16-08-2016
3.	Xclusive TV	Angel Admark Pvt. Ltd.	Malayalam	01-02-2013
4.	Star Suvarna HD	Asianet Communications	Kannada/ Bengali/ Malayalam	06-01-2017
5.	SAB Tamil	Sony Pictures	Tamil	19-02-2016
6.	Sony BBC Earth	Discovery Communications	Regional Indian languag	13-02-2017
7.	ETV Plus	Eenadu Television Pvt. Ltd.	Telugu	19-01-2015
8.	Sangeet Marathi	Media Worldwide Ltd.	Marathi	10-08-2015
9.	Maa HD	Star India	Telugu	01-03-2016
10.	Bangla Talkies	Media Worldwide Ltd.	Bengali	10-08-2017

Source: Compiled from the Master List of Permitted Private Satellite Channels as on 31-12-2017, Ministry of I&B

Colors Kannada launched its new channel named Colors Super with HD variant in 2016. Colors also launched HD versions for Marathi, Bangla and Oriya language channels. Sarala Jeevan is another Kannada infotainment channel launched in 2016. Star Suvarna has also launched another channel named Star Suvarna Plus in Kannada. Recently launched Star Vijay, Zee Tamil, Star Vijay Super, Star Maa, Zee Telugu, ETV, Gemini TV etc., and the channels listed in the above table (Table 1) clearly indicates towards the trend that regional television market will witness further expansion in the days to come.

Broadcast Audience Research Council (BARC) of India measured television impressions and average time spent in rural India in 2016 and came out with revealing data. A comparison with previous year, in which BARC began the measurement for the first time, revealed a rise in television impression and average time spent by 30 percent and 26 percent respectively in rural India. Serials with 40 percent and films with 37 percent were hit among the rural audiences in terms of average time spent on them. Sports content, especially indigenous sports leagues like Indian Premier League (IPL), Pro Kabaddi are also popular among

the rural viewers. According to BARC, with the stagnation of urban TV penetration the next wave of growth in television consumption is expected to come from rural India. And more importantly a significant amount of rural television audience falls in the age group of 15-30 years. This has resulted in advertisers looking into regional television channels focusing on rural audiences.

LITERATURE REVIEW

In *Satellites over South Asia*, William Crawley and David Page (2001) study the impact of the satellite revolution as a regional phenomenon. Their book not only charts broadcasting culture in South Asia from its colonial beginnings, but it also taps into public opinion and provides the views of a range of experts in the five main countries of the region -India, Pakistan, Bangladesh, Nepal and Sri Lanka. Their analysis is contextualized in the complex political history of the subcontinent wherein “each nation state has tended to define itself in contradistinction to its neighbors”, and wherein the broadcasting culture that served this politics of identity has been transformed by satellite programs that now transmit across the national boundaries in the South Asian subcontinent.

Page and Crawley states that three important developments underpin the media revolution which has changed the way south Asians see the world - the demise of communism, the increasing integration of world markets and very rapid advances in communications technology . In the aftermath of the collapse of the Soviet bloc, free trade and the free flow of information became the dominant philosophies of the late twentieth century, with the United States as the chief protagonist of both.

Sukomal Sen (2000) observes technological and economic changes have been accompanied by waves of political and legal deregulation in almost every Western and many developing states. In the process of globalization, it has taken the form of commercialization or privatization of existing territorial channels, the establishment of loose regulatory frame-works for the provision of satellite and cable services; the abandonment of regulations which restricted television company ownership to home nationals. The combination of technological change and deregulation has fuelled the global market for programming and made possible the cross-border ownership of television stations and the global dissemination of some television channels. This deregulated television regime has enabled the Western TV channels to penetrate the markets of the developing countries and as a consequence the Western capitalist values and its degenerated version are also powerfully affecting the value system and morale of these developing countries. He says, India is a glaring example in this case.

Writing on media culture in India and the South Asian Diaspora, Marie Gillespie and Tom Cheesman (2002) says that “media production, circulation and consumption in South Asia are increasingly central to national and transnational, political and cultural processes-religious re-nationalization and diasporisation in particular.” They observe that the new forms and flows of media serve to legitimate, as well as to contest, economic liberalization, globalization, and nuclearisation. “Media discourses on cosmopolitanism and communalism are no longer necessarily oppositional, but are increasingly found to be mutually constitutive. Such trends may be explained, in part, as a defensive response to fears of ‘cultural invasion’ and loss of ‘traditional values’ associated with the advent of economic liberalization and satellite television.”

In another important article Sujata Moorti (2008) calls for an understanding of Indian television as a transnationally mediated apparatus, rather than examining it as a national enterprise. She observes that the contemporary Indian television is enmeshed in an interconnected network; its storylines, rhetorical strategies are shaped by the transnational traffic of programming, and the national cultural identity it articulates is transnational in nature.

These studies establish the idea of transnational television, both in structure and form, influencing the indigenous television content. In fact, Indian language channels have failed to overcome the western capitalist values transmitted through the programs. Indian channels partnering with foreign corporations are not new to the television industry. Even in the content segment, Indian television channels are generously buying rights of popular show formats of American, British, Mexican, and Dutch television. Adaptations,

remakes and dubbed foreign shows in regional languages are other ways in which transnational content sneaking into our drawing rooms.

OBJECTIVES

Broadly, the study was intended to look into the following objectives:

- I. To examine the trends of Indian television content industry.
- II. To examine the factors affecting the trends witnessed in the Indian television content industry.

METHODOLOGY

This study has analyzed the content of mainstream Hindi general entertainment television channels like Star Plus, Sony TV, Colors along with major regional language channels like Sun TV, Udaya TV, ETV Telugu & Bangla, Maa TV, Sangeet Marathi among others. Programs aired in these channels were processed for analysis. Some of the popular shows broadcast in recent years formed the primary data. Research documents, articles and reports about the Indian content industry provided the secondary data. Since the time frame of the study has spanned more than a decade, select popular television shows- both fiction as well as nonfiction- were acted as a basis for drawing inferences with regard to identifying the trends.

This study employs a qualitative content analysis method for analyzing the content. In order to explore the stated objectives, television content spread across 2001 to 2017, taken from Hindi, Tamil, Kannada, Telugu, Marathi, Punjabi, English and Bengali were analyzed. Land mark television shows like Kaun Banega Crorepati, Balika Vadhu, Uttaran, Metti Oli, Kummkum Bhagya, Kundali Bhagya and others were analyzed on the basis of their overriding theme or concept, storyline or show structure, plot, characterization, and production values to identify the trend. Shows were selected on the basis of their popularity, longevity and in the case of nonfiction, number of seasons the show has got along with previously mentioned factors.

Analysis

The following part presents the analysis of post satellite television content industry. Content on Indian television has indeed come a long way from the days of imported foreign soap operas. During the initial stages the Star TV used to air tried and tested English series like *Bold and the Beautiful*, *Baywatch*, *X-Files* etc., changed its course of action and came out with a new Hindi channel named Star Plus with the focus on 'Indian content.' The trend started by Zee TV with productions like *Saregamapa*, *Hum Paanch*, *Banegi Apni Baat* etc. But the satellite television penetration in the late nineties and the early 2000 led to television fiction moving away from bold urban dramas like *Tara*, *Hasratein* (1994) or *Saans* (1998) to Saas-Bahu dramas.

Major trends in Indian television content

With the influx of Saas-bahu dramas like *Kyunki Saas Bhi Kabhi Bahu Thi*, *Kahaani Ghar Ghar Ki*, *Kasauti Zindagi Ki*, all aired in Star Plus, Balaji Telefilms' formulaic "televised Indian values" started dominating the airwaves. This also paved way for social and rural dramas like *Balika Vadhu*, and *Uttaran* aired in Colors in 2008, *Agle Janam Mohe Bitiya Hi Ki Jo*, aired in Zee TV in 2009, *Udaan*, aired in Colors in 2014.

Just like fiction, non-fiction genre also witnessed a clear tilt towards 'Indian content.' But, these contents were not truly Indian, as most of them were adaptations from foreign content. So, the trend can be termed as Indianization of transnational content. In the year 2000, Star Plus launched a reality based game show *Kaun Banega Crorepati*, which changed the television content market in India forever. Star Plus brought on board Mr. Amitabh Bachchan, superstar of the Indian film industry, to host the money game show inspired by *Who Wants to be a Millionaire*. Helped by the overwhelming response from the public, the show went on to become one of the most watched program on private satellite television and also placed Star Plus at the top of the table.

Localization of transnational content

Although it seems that content on Indian general entertainment channels (GECs) are becoming more regional specific and reflect 'Indian values' through rooted 'Indian stories,' the facts speak otherwise. *Kaun Banega Crorepati* (KBC), one of the iconic shows on Indian television, is based on British program *Who wants to be a millionaire* and not the original content from India. KBC also had Kannada, Telugu, Tamil and Malayalam versions in respective regional language channels, hosted by popular film stars from South India like Puneeth Rajkumar, Nagarjuna, Surya, Suresh Gopi. *Bigg Boss* is another popular reality show hosted by actor Salman Khan, based on Dutch show *Big brother*. The show format was originally developed by Endemol from Netherlands and licensed to Indian television channels. *Bigg Boss* also has regional variants in Kannada, Tamil, and Telugu, with actors Sudeep, Kamal Hassan and Junior NTR as hosts respectively.

Some of the leading reality shows of Indian television are either inspired or based on popular shows or formats from other parts of the world, especially, United States and Europe. *Indian Idol* was based on *American Idol*, *24* was based on the popular show carrying the same name, *Katron Ke Khiladi*, *Master Chef India* hosted by actor Akshay Kumar were based on shows *Fear Factor* and *Master Chef Australia* respectively. Popular show *Comedy Nights with Kapil* is based on the very popular British show *The Kumars at No. 42*. *Dus Ka Dum* show aired in Zee TV was based on the Drew Carey hosted American game show *Power of Ten*. The list is quite big. *Minute to Win It*, *So You Think You Can Dance Hindi*, *India's Got Talent* (British Got Talent), *MTV Splitsvilla* (American show Flavour of Love) and many more are either inspired from foreign content or conceptualized by foreign production houses.

Remakes of transnational content in fiction

Similar trend can be witnessed in fictional content also. Some of the most popular Hindi serials are inspired or remade from the transnational content. *Hello friends*, a serial aired in Zee TV was a remake of the popular sitcom *Friends*. *Jassi Jaise Koi Nahin*, a popular series aired in Sony TV was a remake of American series *Ugly Betty*. *Everybody loves Raymond* was made into *Sumit Sambhal Lega*. Jane Austen's TV miniseries *Sense and Sensibility* is adapted as the very popular *Kumkum Bhagya*, which is still ruling the television ratings in India. Some of these contents are remade in other Indian languages also. For example; *Kumkum Bhagya* has Kannada, Telugu and Tamil remakes in regional channels.

Homogenization of content in GECs

Content on Indian GECs is witnessing two important trends in recent years. On the one hand South Indian language serials are being remade in Hindi on a larger scale and on the other hand Hindi serials are also remade in South Indian languages. Just like films, in some cases a regional language serial is remade in Hindi and comes back to another regional language. For example popular Tamil serial *Metti Oli* is remade as *Shubh Vivah* in Hindi and comes back as *Shubha Vivaha* in Kannada. This is a clear case of homogenization of content. All language channels are broadcasting more or less same or similar content in their respective channels. There is not much of a difference in terms of production design, narrative techniques or look of these serials.

Remakes from Southern languages to Hindi

Content on Hindi GECs is also witnessing another important trend where popular regional language serials are remade in Hindi language. *Pavithra Rishta*, one of the most popular shows in recent years is a remake of *Tirumathi Selvam* from Tamil. *Dil Se Diya Vachan* is remake of Tamil serial *Idayam* aired on Sun TV. *Rakt Sambhand* is a remake of Telugu serial *Ratha Sapthami*. Tamil serial *Kolangal* was remade as *Mayke Se Bandhi Dor*, *Choti Maa* was a remake of Telugu serial *Chitti Pinni*. *Shubh Vivah* is a remake of the very popular *Metti Oli*, aired in Sun TV. Telugu soap *Sravanti* is remade as *Dil Se De Dua... Saubhagyavathibhava*. Industry insiders are of the opinion that the trend is all set to grow.

Remakes from Hindi to Southern languages

Remakes are quite common in the film industry. In recent years television content has also succumbed to the lure of remakes. Lot of Hindi serials are either remade or dubbed in other Indian languages, especially South Indian languages. Reasons could range from lack of original idea to same production house producing the serial in all languages. Popular Hindi serial *Nagin* has Kannada remake and Telugu and Tamil dubbed versions. *Saath Nibhana Sathiya* has a Kannada remake in *Amruthavarshini*. *Balika Vadhu* has Kannada remake in *Putta Gowri Maduve* and Telugu dubbed version. *Ganga* has a Kannada remake. *Kumkum Bhagya* has Kannada remake and Telugu dubbed version. *Bhabi Ji Ghar Par Hai* has a Kannada remake in *Sreeman Srimathi*. *Detective Didi* has a Kannada remake in *Pattedari Pratibha*. *Yaradi Mohini*, originally a Tamil serial has a Kannada remake in *Yare Ni Mohini* and Telugu remake in *Evvuru Nuvvu Mohini*.

Market driven rural content

In order to cater to the growing rural viewership as discussed in the early part of this paper, content on Indian television is also moving away from stories set in urban milieu to stories set in rural heartland. Colors, Zee TV realized this trend much before others could. *Balika Vadhu*, *Uttaran* from Colors and *Agle Janama Mohe Bitiya Hi Ki Jo* from Zee TV were early indicators of this trend. Now most of the leading GECs in Hindi and other regional language channels have soap operas depicting stories reflecting rural values and ethos both in visuals and spirit. *Udaan*, *Meri Durga*, *Belan Wali Bahu*, *Diya Aur Baati Hum* are some of the examples to prove this point. In regional language the tilt is clearly towards rural content. *Putta Gowri Maduve*, *Ganga*, *Jodi Hakki* in Kannada, *Kalyana Parisu*, *Metti Oli*, *Saravanan Meenatchi*, *Chinna Tambi*, *Yaradi Mohini* in Tamil, *Krishna Tulasi*, *Karuthamuthu* in Malayalam are indicating towards rural content.

Quality content

KPMG report states that the quality and breadth of regional content has expanded in recent years both in fiction and non-fiction. But fiction still continues to be the main driving force and the content is also tailor made for regional audiences. Channels are increasingly looking at regional stories or tweaking the pan India story for regional sensibilities. As a result content production cost has also gone up reflecting on the improved production quality in regional language television content.

CONCLUSION

Content on Indian television has indeed come a long way from *Hum Log* and *Buniyad* to Balaji Telefilms' *Kyunki Saas Bhi Kabhi Bahu Thi* to present day *Kumkum Bhagya* and *Kundali Bhagya*. Early Indian soaps like *Hum Log*, *Buniyad*, *Nukkad*, and *Mungerilal Ke Haseen Sapne* narrated the stories of the Indian middle class, their struggles, and other pressing social issues of the time. They were also the landmark depictions of the great Indian family. These were the shows which not only entertained the audiences but also educated them. Other shows like *Ramayan* and *Mahabharat*, two televised epics, Shankar Nag's *Malgudi Days*, based on R K Narayan's short stories, Shayam Benagal's *Bharat Ek Khoj*, television adaptation of Rudyard Kipling's *Jungle Book* were other gems from this era, which entertained as well as educated the audiences of the time.

With the emergence of C&S television, content on TV channels also underwent a sea change with Star TV broadcasting shows like *Baywatch*, *The Bold and the Beautiful*, which depicted themes like adultery and incest. Twenty first century heralded a new era in Indian television with the influx of the reality game show *Kaun Banega Crorepati*, and 'K' series soaps depicting Saas-Bahu dramas, produced by Balaji Telefilms. Colors TV channel offered an alternative to the tedious Saas-Bahu sagas aired in leading GECs at that time. In the fiction the channel offered refreshing serials like *Balika Vadhu* and *Uttaran* and in the non-fiction; it introduced a number of unique reality shows like *Khatron Ke Khiladi* and *Bigg Boss* (Sathyaprakash, B K Ravi, 2011).

With television market expanding in terms of viewership, subscription and revenue generation in the rural heartland of the country, the contents on GECs are being scripted keeping the rural values and ethos in mind. Hence the trend is pointing towards more shows depicting rural stories in Hindi and other Indian languages. Apart from this, as explained earlier, remakes and dubbed versions of shows across genres are broadcasted among all Indian languages, clearly indicating towards homogenization of the content, albeit at the surface level. Remakes and adaptations in both fiction and non-fiction are generously shared among Hindi and regional language channels. This is also because big production houses and channels like Sri Balaji Telefilms, UTV, Sri Adhikari Brothers, Viacom, Zee TV, Star TV, Sony TV are running shows and channels in both Hindi and regional languages. Rural and regional content, original as well as dubbed, would continue to grow in the Indian television, as the market is all set to expand more in rural areas than in the urban centers of the country. Although the content seems rural and pretty much Indian in terms of visual appeal and the production values, one cannot discount the fact that the origin of some of these popular shows are undoubtedly from the transnational borders.

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