



AND THE REMOTE GOES TO...

Television Remote Control Dynamics in
Urban Indian Households

An Ormax Media Report | March 2021



Background



Television ratings indicate **how many** viewers watched a particular channel at a particular time

However, ratings do not identify **who** in the family decided what should be watched at that time

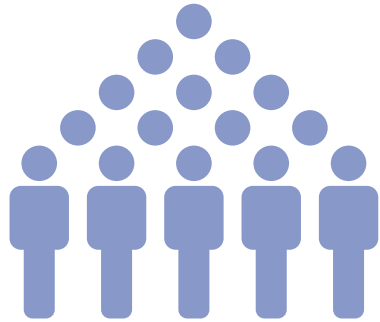


This research was conducted to profile the **primary influencer** of TV channel selection for different dayparts





Research Design



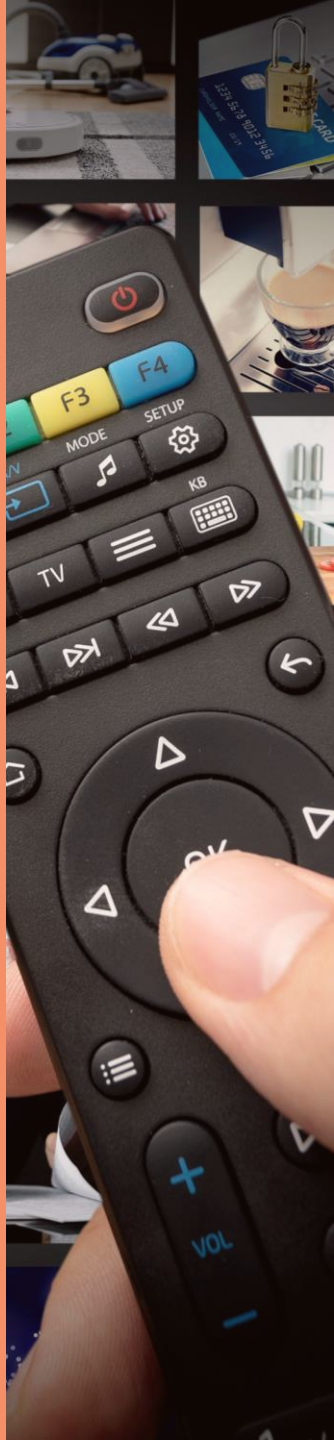
Sample Size: 5,000
NCCS: A-E



**Computer Assisted
Telephonic Interviews
(CATI) in Oct-Dec 2020**



**Regular TV viewers (15+ years) in
29 states & UTs in India**





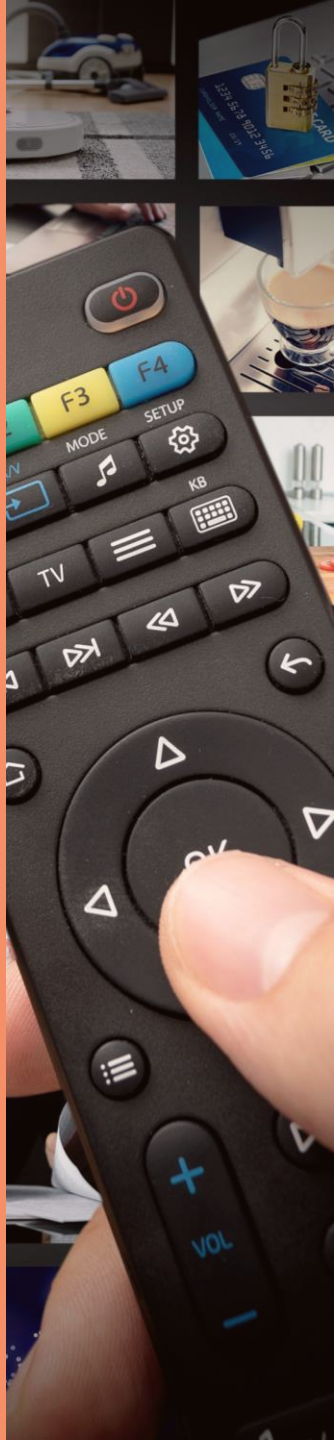
Methodology

Remote control ownership for various dayparts was obtained through the following two questions, each asked separately for weekdays and Sundays*

1 In your family, **who decides** which TV channel or program should be watched at this time?

2 What is the **gender** and **age** of this person?

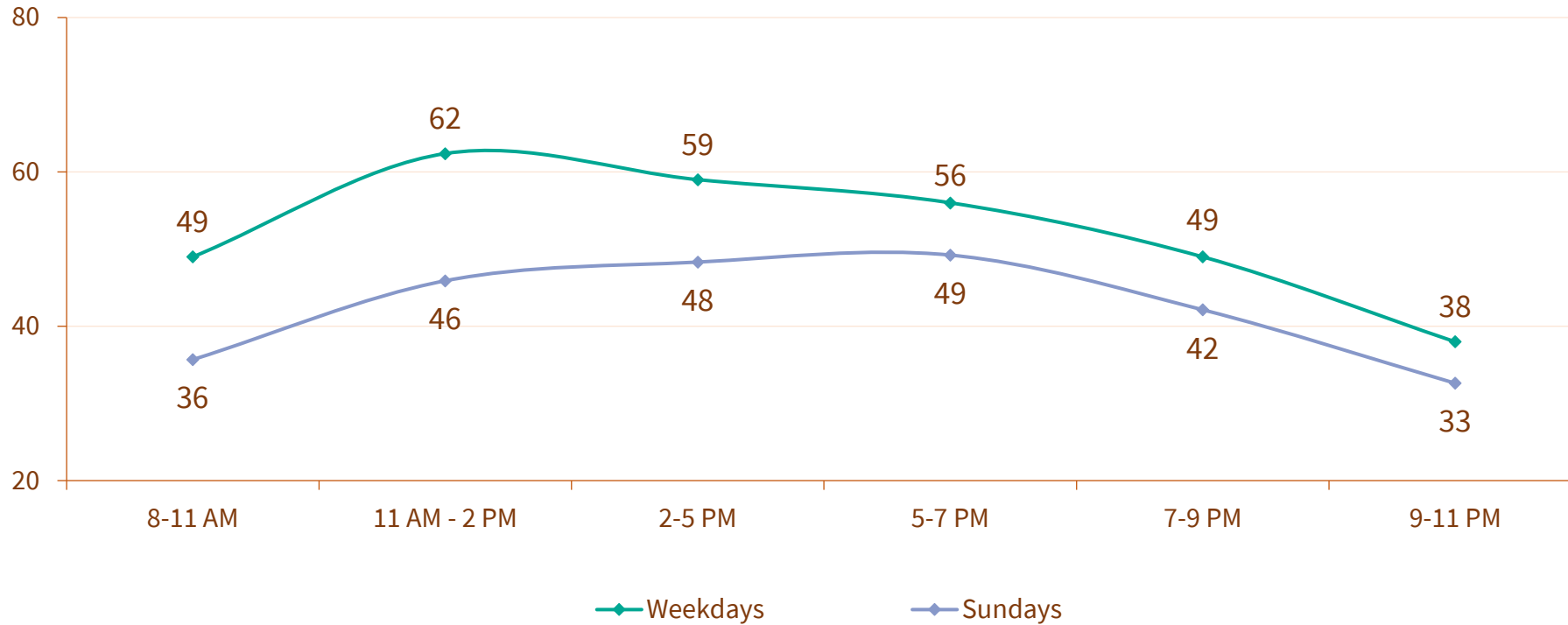
**Saturday's non prime-time behaviour will be somewhere between these two, while Saturday's prime-time behaviour will largely mirror that of Sunday prime-time*





Gender Profile of Remote Incharge

% Females



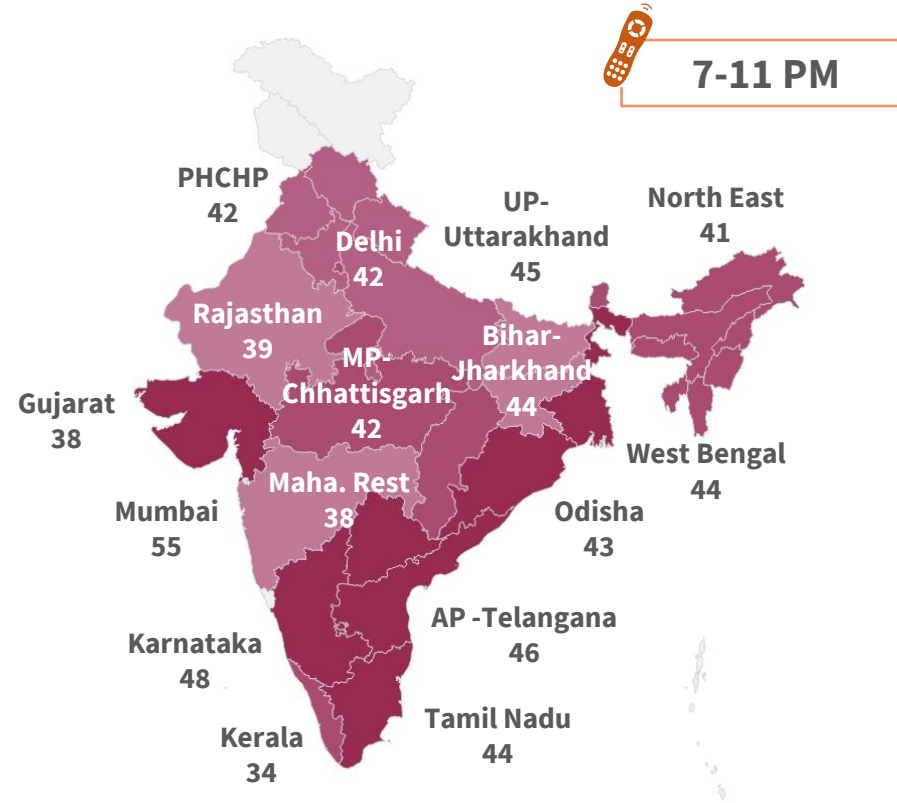
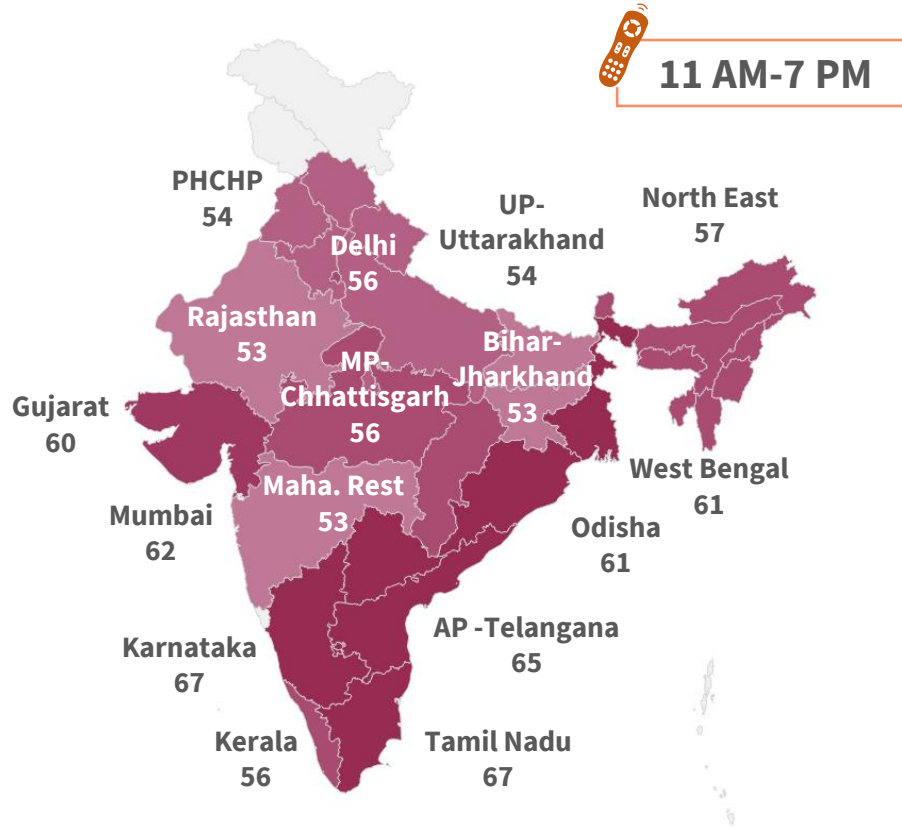
On weekdays, women primarily control the household television during afternoons & early evenings, with 7 PM marking the beginning of the change of hands. On Sundays, however, men enjoy higher control through the day.





Gender Profile of Remote Incharge

% Females on Weekdays



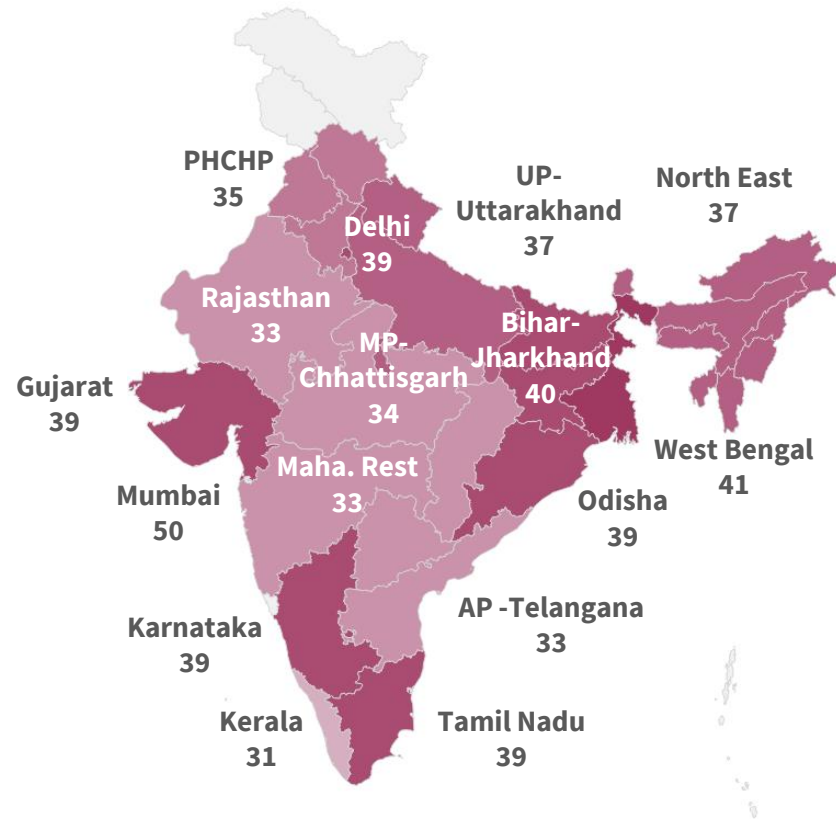
Post 7 PM, female control over the remote drops across markets, with the dip being more pronounced in the four South markets compared to the core Hindi markets





Gender Profile of Remote Incharge

% Females on Sundays Prime-Time (7-11 PM)

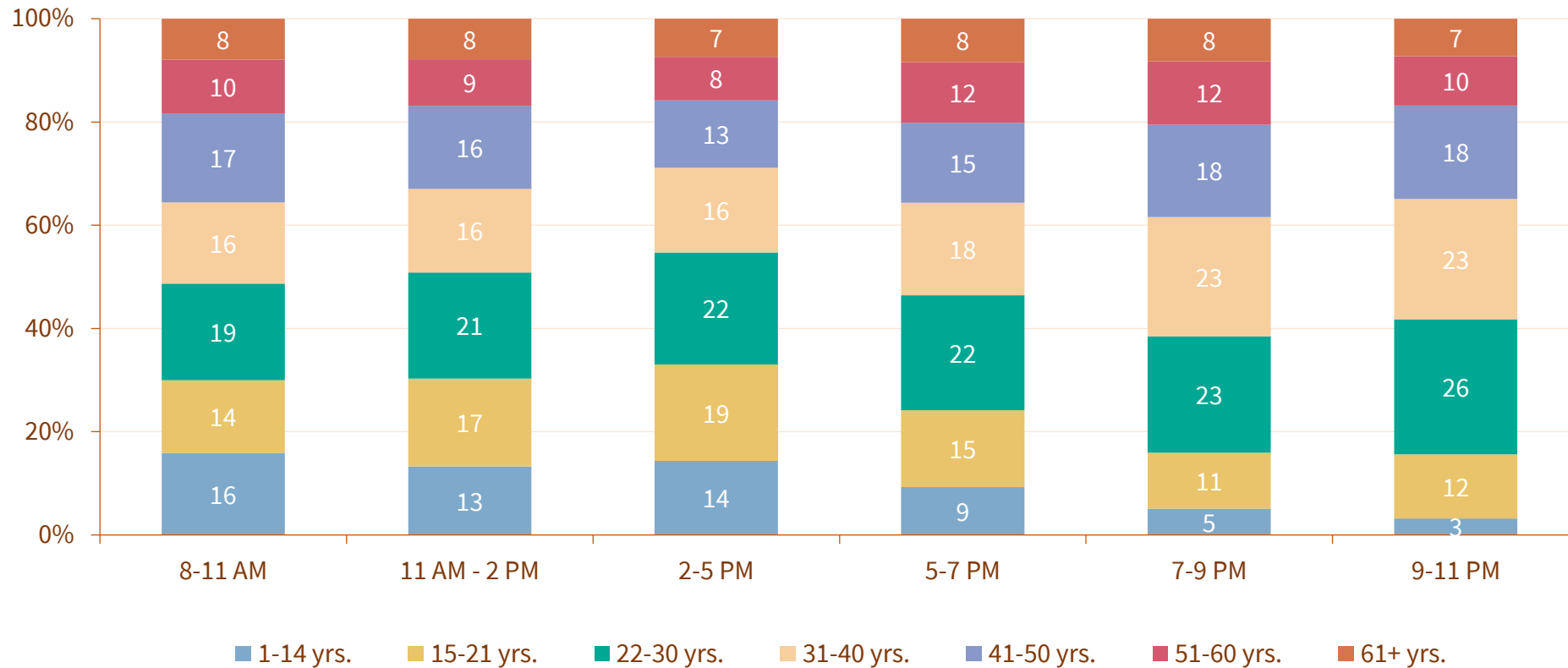


Mumbai is the only market where female remote ownership touches the 50% mark during the prime-time on Sundays.





Age Profile of Remote Incharge Weekdays

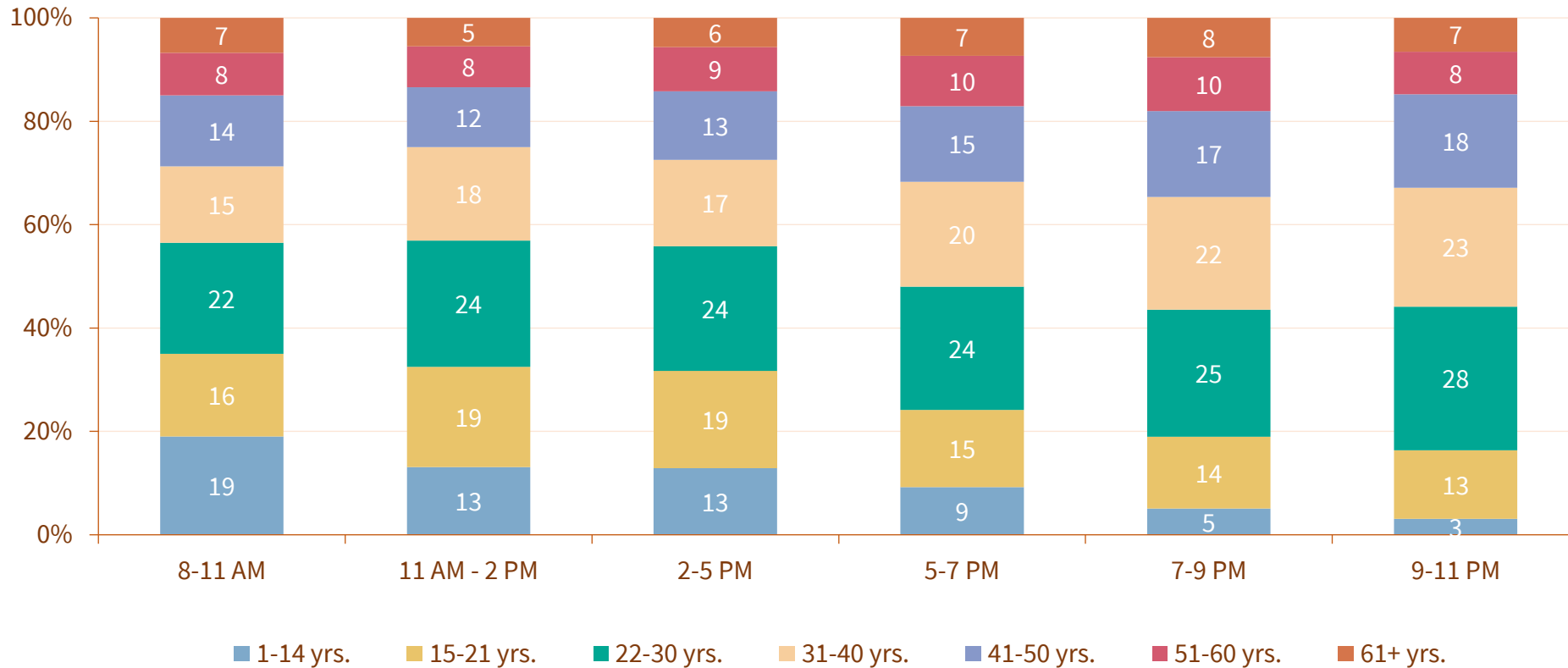


Younger viewers (<21 yrs.) have a 30%+ share of remote ownership till 5 PM on weekdays, post which their control weakens consistently, moving to older age groups.





Age Profile of Remote Incharge Sundays



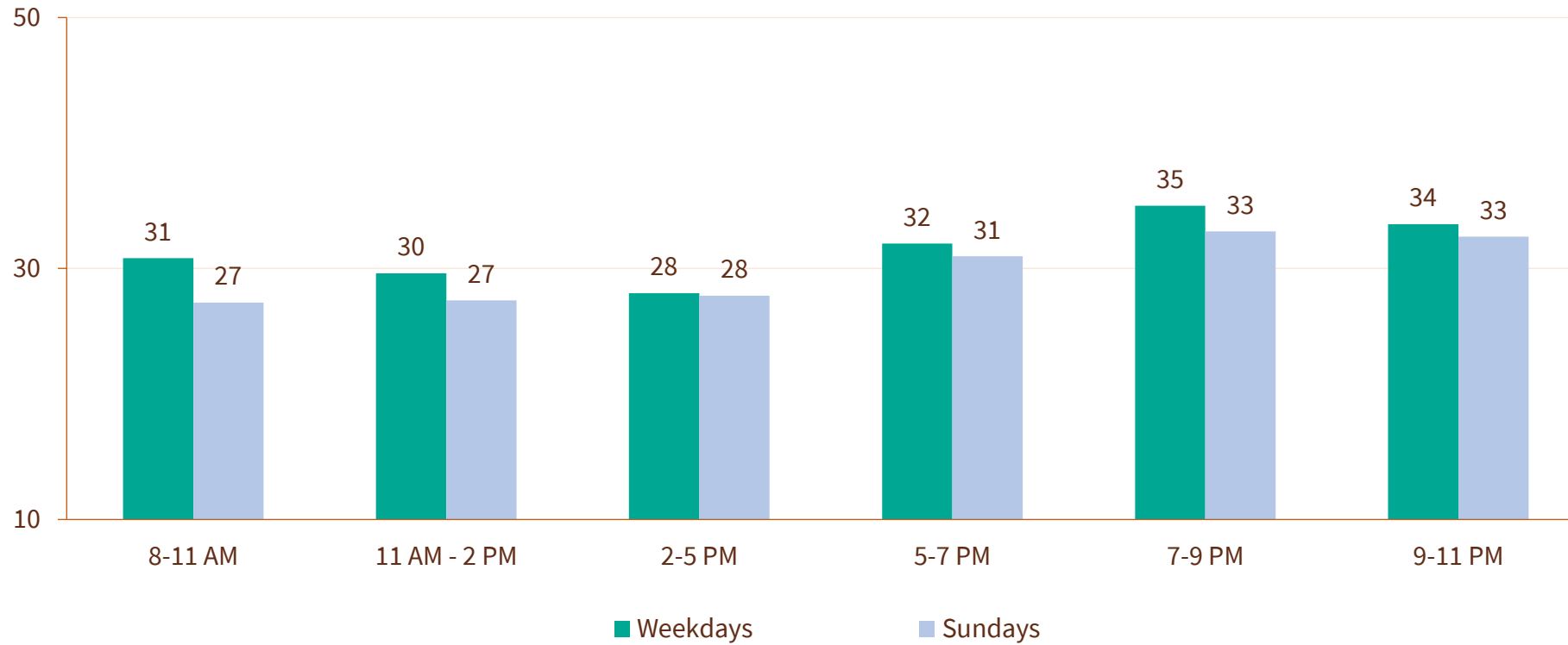
Remote control ownership on Sundays follows a trend similar to weekdays, making the remote incharge age profile similar through the week.





Median Age of Remote Incharge

Age (in years)



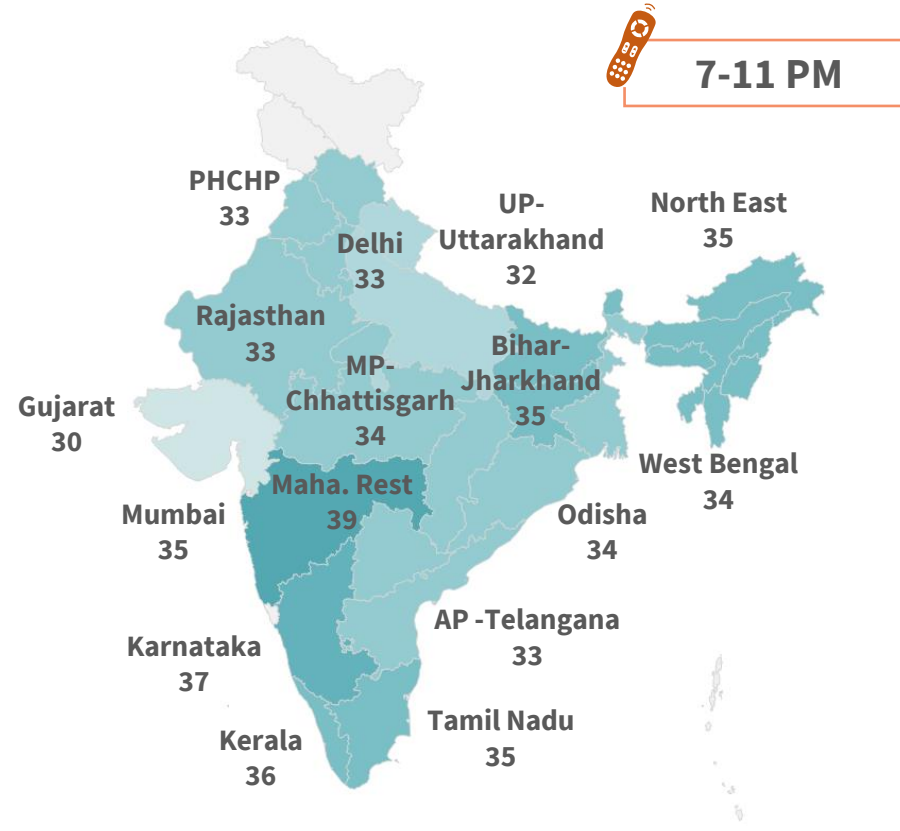
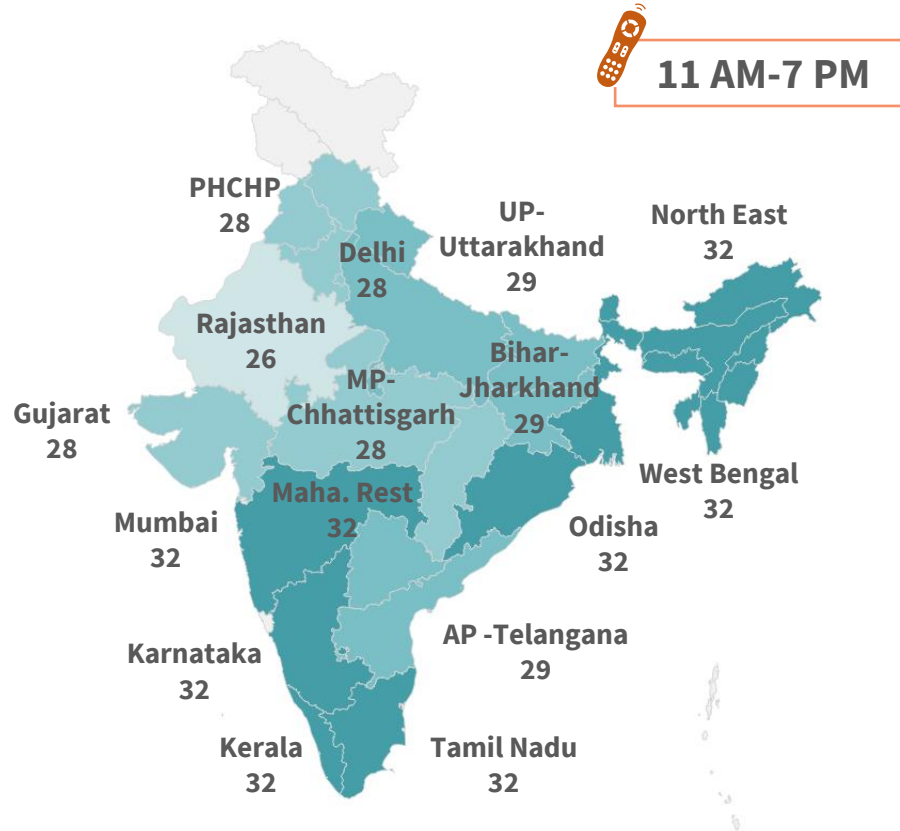
Median age of the remote incharge across various dayparts indicates that the youth have limited influence on what to watch, especially during the prime-time.





Median Age of Remote Incharge

Age (in years) on Weekdays



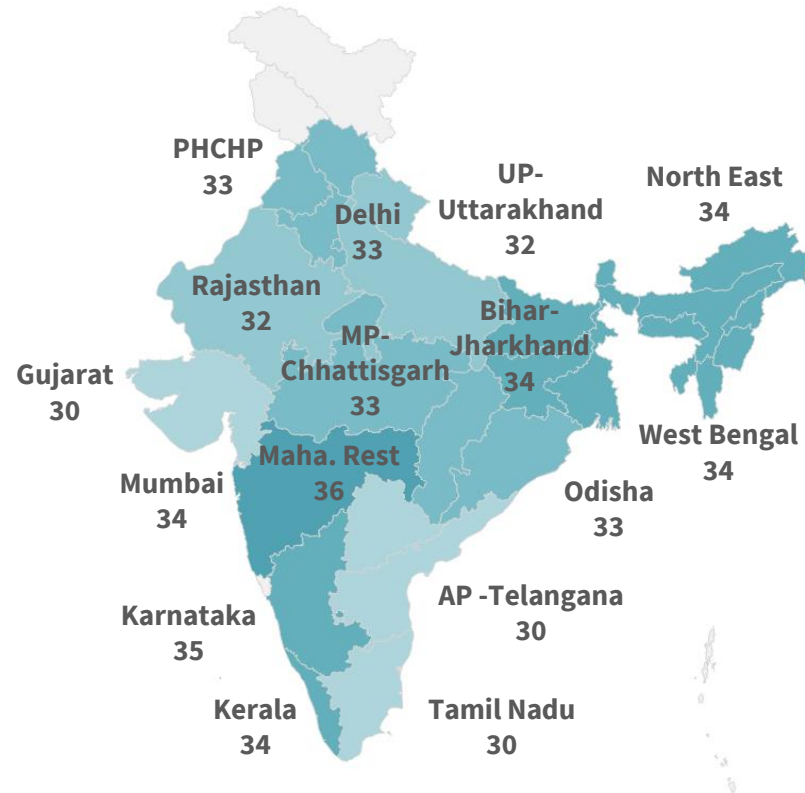
The South markets are older in their age profile compared to the Hindi markets by about 3-5 years.





Median Age of Remote Incharge

Age (in years) on Sundays Prime-Time (7-11 PM)



All markets except Maharashtra Rest (36 yrs.) & Karnataka (35 yrs.) operate in the 30-34 yrs. bracket on Sundays prime-time.





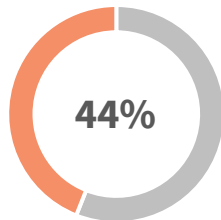
Shift in Remote Control Dynamics

In 2012, Ormax Media released the first edition of the ‘And The Remote Goes To...’ report, which covered only the prime-time (7-11 PM)

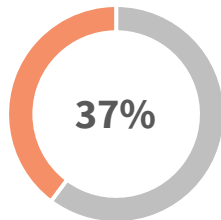
The following pages in this report will help us understand if there have been any major shifts over these eight years. How different was 2012 compared to how 2020 looks?



Gender Profile 2020 (% Females)



Weekdays



Sundays



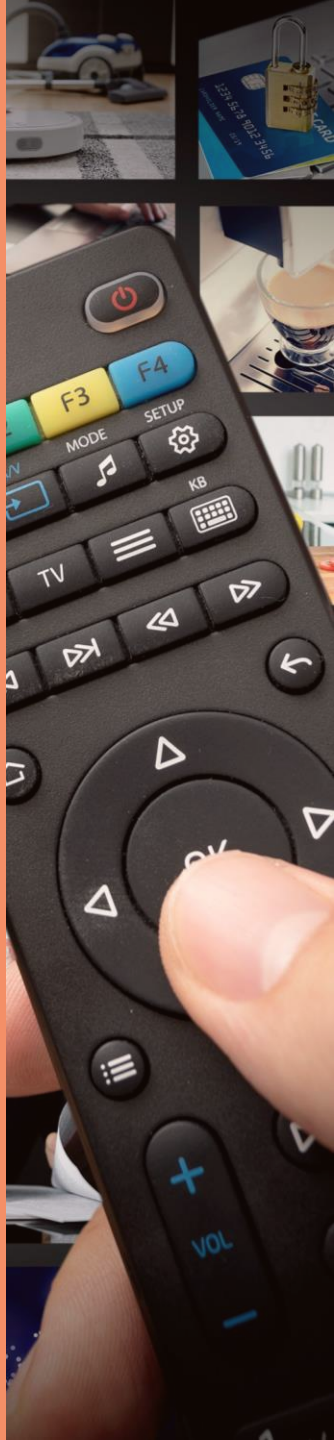
Median Age 2020 (Years)



Weekdays



Sundays



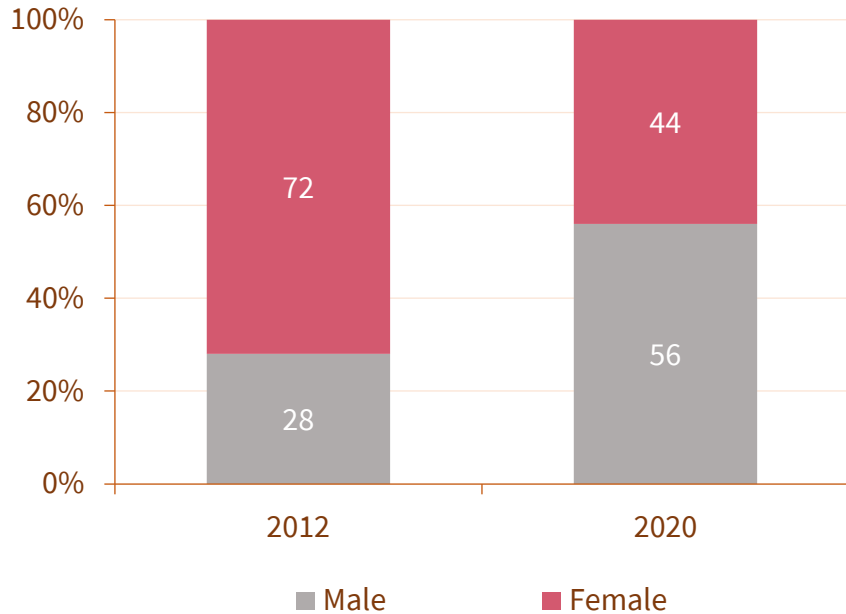


Shift in Gender Profile of Remote Incharge

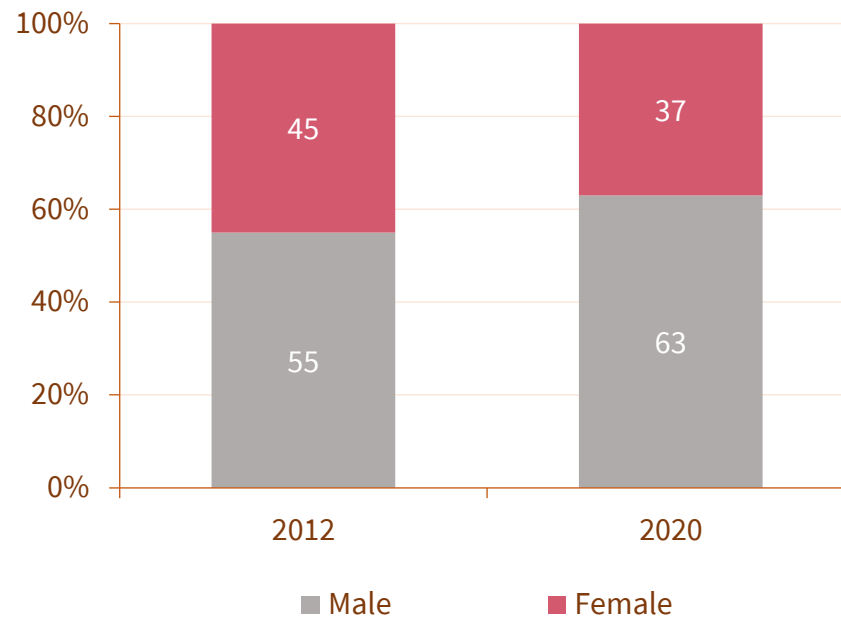
2012 vs. 2020



Weekdays



Sundays



Within less than a decade, ownership of the remote control has shifted dramatically, with men doubling their weekdays prime-time share from 28% to 56%, in what can be called a category-defining shift.



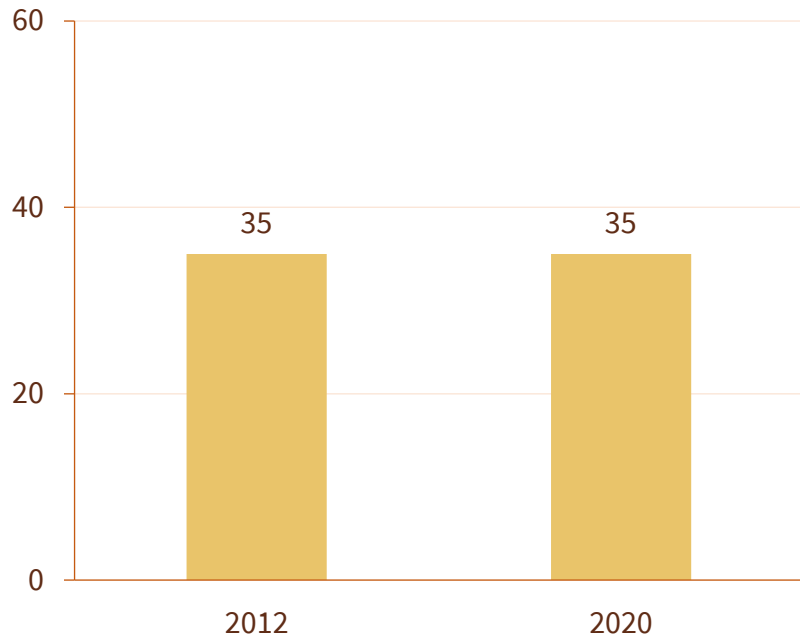


Shift in Median Age of Remote Incharge

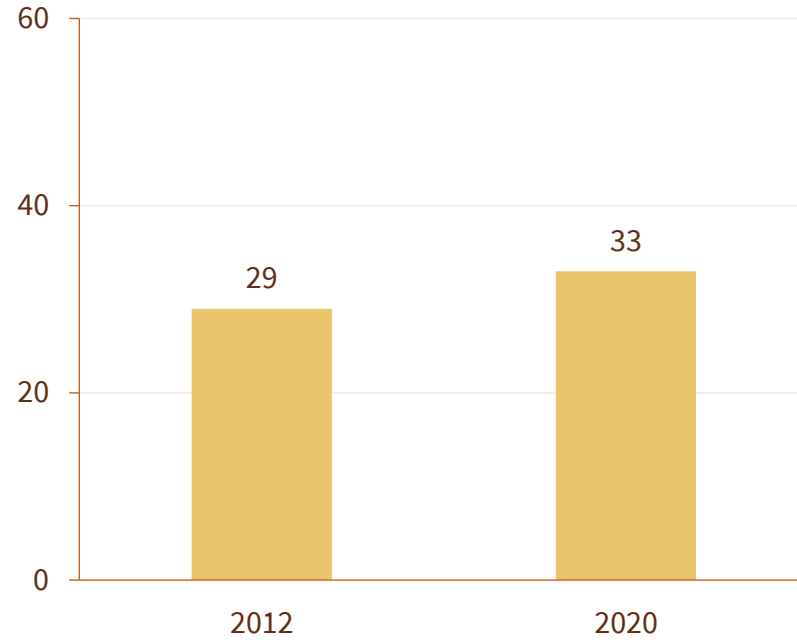
2012 vs. 2020: Age (in years)



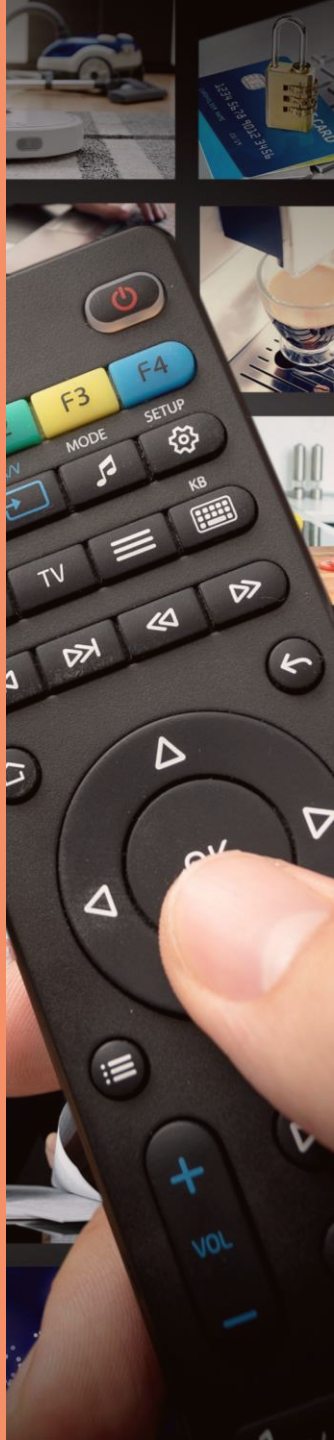
Weekdays



Sundays



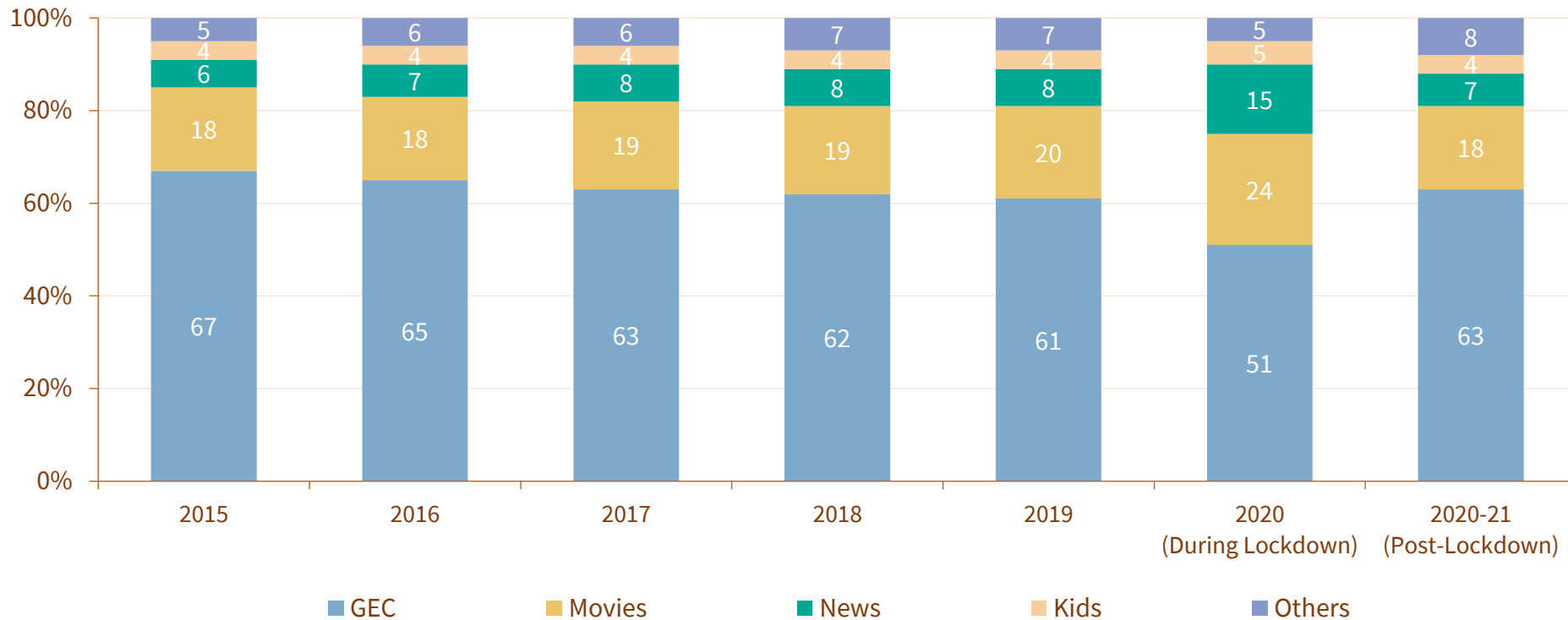
While the median age during weekdays prime-time remains unchanged, it has seen a marginal increase on Sundays.



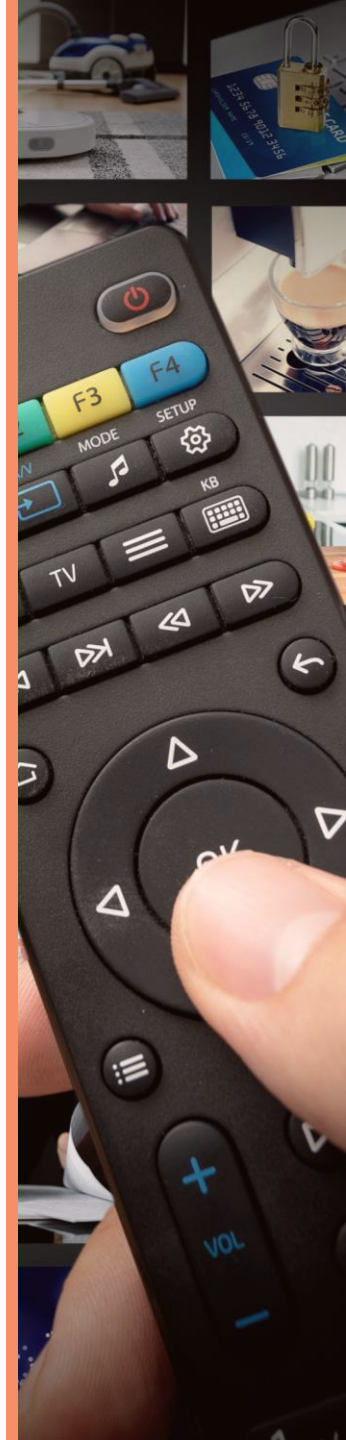


Genre Viewership Shifts

Weekday Prime-time Genre Share



Weaker control over the remote among female viewers correlates with the steady drop in viewership share for GECs. Fueled by the absence of original programming, this trend was more pronounced during the lockdown.





Epilogue

The extreme nature of the shift in TV remote dynamics in urban India is a subject of more detailed analysis and research. A range of social and television-related factors, ranging from higher smartphone penetration, more entertainment options in smaller towns, increase in non-fiction content on GECs, consumer dissatisfaction with Hindi GEC content, the resultant growth of movies and news genres, etc., are contributors to this shift.

But the most significant reason, perhaps, is that women empowerment is not the main television theme anymore. TV has served the cause of women empowerment well for almost two decades. But over the last few years, it has emerged as a collective medium catering to the larger family taste. Men are not passive viewers today, like they used to be earlier. They are actively influencing the family's decision to select channels and shows to watch.

Many TV advertisers targeting men will be glad to know about this gender-balancing shift. However, the concern over youth being passive TV audience, especially during the prime-time, is a pressing one. With the rapid rise in digital media options, the TV industry must guard against its median age nearing 40 years. That will be too high for what is truly a 'mass' medium.





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