Show me the buzz: Awareness concerns for Hindi GECs

2013 and 2016 saw dramatic drop in average Unaided Awareness (UA) levels of top Hindi GEC shows in their week of launch, highlighting a larger category concern
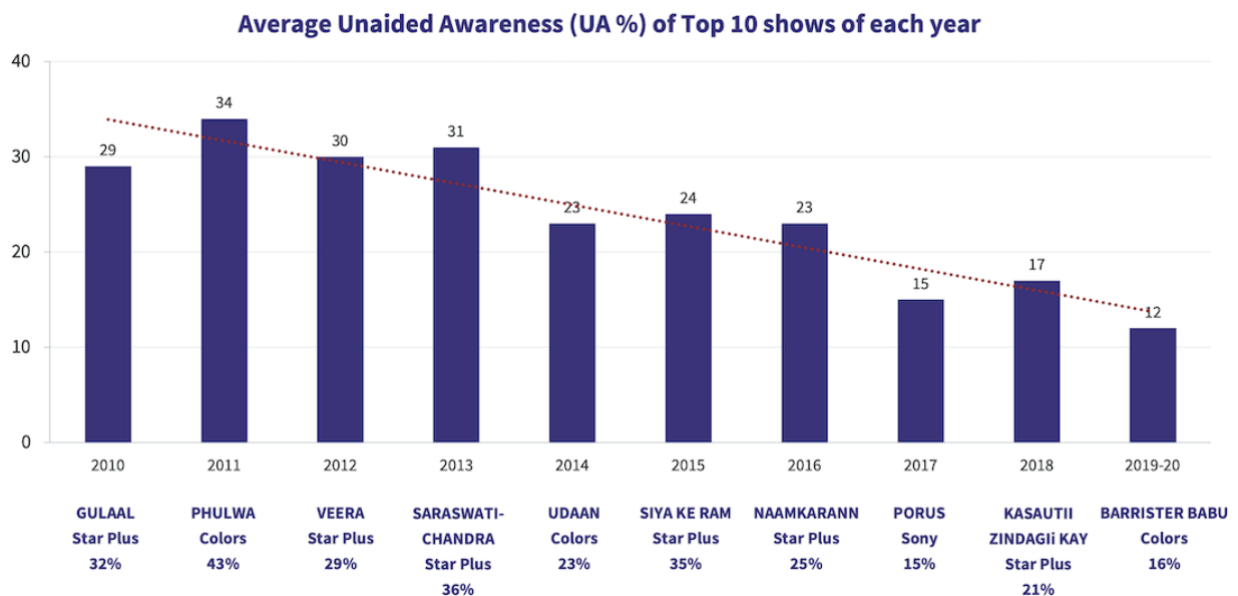
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Summary

- Unaided Awareness (UA) of top Hindi GEC shows in their launch week has dropped by more than 50% over the last decade
- From 30%+ UA levels, even the biggest launches are now struggling to touch the 15% mark
- This drop in awareness is a symptom of larger concerns related to viewer dissatisfaction in the Hindi GEC category

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Awareness is a popular metric among marketeers, given its proven impact on product purchase or consumption. A drop in awareness levels of a brand can send alarm bells ringing within the marketing department, since it's seen as a pre-cursor to drop in sales. While the awareness-to-sales relationship may not be as direct in an advertiser-funded industry like television in India, the importance of awareness, both at brand and program level, is well understood in the industry, at least among the mainline channels, like the GECs.

The Hindi GEC category has faced an 'awareness drop' problem that's highly unusual and alarming, in equal measure. The chart below is based on the average **Unaided Awareness (UA)** of the top 10 Hindi GEC fiction launches each year in their week of launch, using data from our program awareness tracking and forecasting tool **Ormax Showbuzz.** UA is a percentage measure of audience who could name the show when asked to name new shows that are launching or have recently launched. The show names at the bottom of the chart are the record-holders for each year.

Average Unaided Awareness (UA %) of Top 10 shows of each year

Year	UA %	Show	Channel	%
2010	29	GULAAL	Star Plus	32%
2011	34	PHULWA	Colors	43%
2012	30	VEERA	Star Plus	29%
2013	31	SARASWATI-CHANDRA	Star Plus	36%
2014	23	UDAAN	Colors	23%
2015	24	SIYA KE RAM	Star Plus	35%
2016	23	NAAMKARANN	Star Plus	25%
2017	15	PORUS	Sony	15%
2018	17	KASAUTII ZINDAGII KAY	Star Plus	21%
2019-20	12	BARRISTER BABU	Colors	16%

The chart tells a story of its own. Since 2013, and especially since 2016, there has been a sharp drop in the unaided awareness levels of top Hindi GEC launches. The average operating level currently is less than 40% of what it was till 2013.

In January 2011, Colors' *Phulwa* scored an all-time high UA of 43%, a record that's unlikely to be broken anytime soon. The four-year period from 2010 to 2013 was characterised by high satisfaction levels in the core audience base of the category. Many hit shows like *Saath Nibhaana Saathiya* (Star Plus), *Balika Vadhu* (Colors) and *Jodha Akbar* (Zee TV) ensured that the viewer was spoilt for options. It was a case of 'too much to watch in such little time'. High UA levels of new launches in this period reflect this sentiment of satisfaction.

It's 2016 onwards that this sentiment began to change, and this reflects in how the UA numbers have nosedived since then. With little content innovation and a perception of dragging serials that look like each other's clones, satisfaction started dipping. Unrealistic plot twists, and introduction of supernatural elements to serve those twists, took away from the purposefulness and the emotional connect that was established since 2000, when daily soaps first came on the scene.

This degradation was accompanied by the rise of non-fiction content, which was short-tenured and more family-friendly, than the plot-heavy, tension-inducing family soaps. It was also the period that saw widening of the popularity base of a one-of-its-kind fiction show: *Taarak Mehta Ka Ooltah Chashmah* (SAB) began to find loyal viewers outside its core markets of Gujarat and Maharashtra.

One can be tempted to put the trend of dropping awareness levels to the increase in media clutter, especially because of the arrival of digital platforms, such as social media and streaming apps. But that will only be a red-herring argument to deflect attention from a genuine concern the Hindi GEC category faces: That of reduced viewer excitement because of half a decade of under-delivery vis-à-vis expectations. A quick comparison to theatrical data tells us that UA for Hindi films dropped only 8% in the same time period (2010-15 vs. 2016 onwards).

If audience are not excited about new launches in a category, it becomes a category-level problem that no one channel can solve on its own. No surprise then that the Hindi GEC category has lost share 2015-16 onwards, with a sizeable prime-time audience shift to genres like news and movies.

Let's hope a recovery is round the corner. But we will need a lot more Taarak Mehtas and Anupamaas for that to happen.