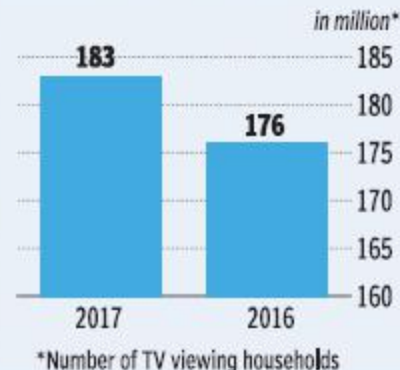


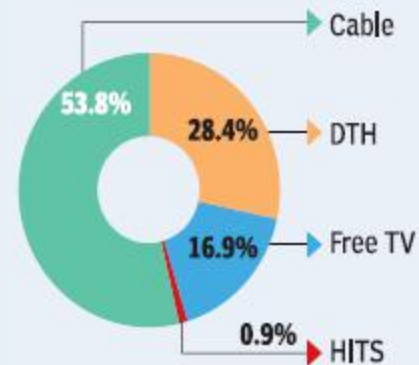
The dynamics of the Indian television industry



The number of TV viewing households increased by 3.5 per cent in 2017 over 2016



Cable continues to dominate the distribution mode; DTH is catching up



Urban areas have very high TV reach, while rural zones are still under-penetrated

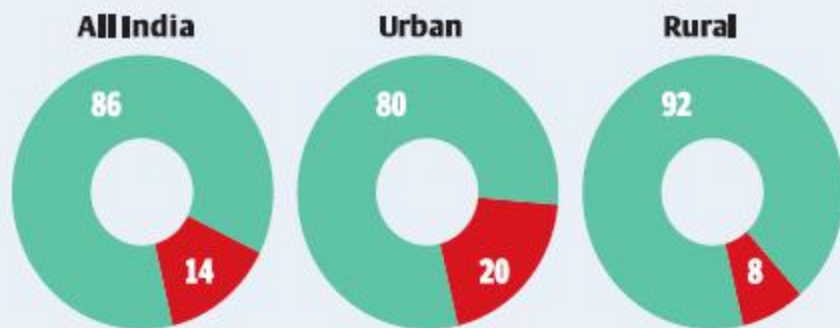
TV penetration based on population

Category	in %
All India	64
7.5 million+ towns	94
1-7.5 million+ towns	91
0.1-1 million+ towns	87
<0.1 million+ towns	79
Rural	52

A huge proportion of Indians (86 per cent) have only CRT television sets; LED/LCD/Plasma TVs are a lot fewer

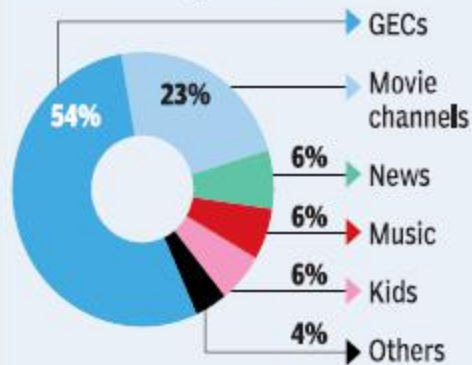
Type of television sets

CRT (%) LED/LCD/Plasma (%)



General entertainment channels (GEC) and movie channels dominate viewership

Indians love their television soap operas, movies and mega serials



The television industry is set to grow at a compounded annual rate of 9.8 per cent over CY16-20

There is a healthy mix (60:40) of distribution and advertising in the industry's revenues

