

## Study on Digitalization of TV: DTH in India

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### ABSTRACT

Television plays a vital role not only to entertain but also to educate people. In the digital era the Direct to home created much more familiarity and created a space in the market thru getting day by day entry in the Indian Family compare to cable channels. DTH provides subscribers a benefits of geographical mobility with sound and picture quality. In simple word DTH means receiving satellite programme with the help of a personal dish at individual home. It also provides internet access, movie on demand, video conferencing and email. If a subscriber wants to record a favorite programme thru free DVR receiver. Due to New entrance in this Industry customer will get more competitive advantage.

### 1. Introduction

The launching of Doordarshan in 1959 created revolution in the Indian television History. At that time the programme was transmitted in only black and white color. The color tv broadcasting held in 1982 when the 9<sup>th</sup> Asian games organised in Delhi. In 1991, Due to LPG the Indian economy was got freedom from the License Raj and the Indian economy open the door for the foreign direct investments, deregulation of domestic business emerged. Which created an opportunity to for the foreign channel to get easy entry in India. As a result many foreign channels like Star TV and creation of domestic satellite channels like Sun TV and Zee TV. This removed the monopoly of doordarshan. The cable tv concept was emerged in 1992, which lead to revolution in entertainment. Every city as well as town in the India had a complex web of co-axial cables running through the streets with a new concept to be an entrepreneurs called as cablewallahs or Local Cable Operators (LCO) plays as role as channel distribution. The film industry was negatively affected with the surprising growth of cable network and there were even organized assure for calling off the Cable TV industry. There were large number of cable operators in the country and the channels facing quite difficult time in getting its returns because of the existing system was a non-addressable. The operators could simply give a reduced number of subscribers to amass profit. This can crated an opportunity for a new breed of firms known as Multi System Operators (MSO), which required more finance to make capital investments. . The MSO industry became more monopolistic day by day so, for the Competition government involvement is prime requisite. As a result the United Front Government had declared a prohibition for the use of ku band transmission. In 1996 The Direct-To-Home (DTH) Services were first proposed, But due to some security and cultural aspects it did not approved at that time, Further TRAI issue the guidelines for operating DTH. The India's first private DTH license was awarded to Dish TV in the year of 2003 which actually started operations in 2004. Prasar Bharati was also started its product named as DD-Direct+. DTH Digital TV have a proper system to receives signals directly from the satellite with the help of a dish installed on the Roof, The received signals are decoded by the Set-Top Box and then sends confound as a clear picture

and sound to Television, which is the business under taken by some well known companies thru the observation of growth rate and scope for business opportunity in the Indian market which has 120 million viewers of TV. The Indian economy growing with the GDP growth rate of 7.4%, it was create a sense that the growth is available everywhere. At the same time the Indian's disposable income and purchasing power of Indian customer was increased too. The entertainment and media industry of India is booming too. It is currently forecasted Rs.450 billion with a CAGR of 18% for the next coming 5 years. Terms which were alien to Indian's like capital DTH, digital cables, IPTV are suddenly finding their active availability in the country's journals. TRAI announced a new initiative by name "Head end-In-The-Sky (HITS)" in the year 2007. HITS Model as a one of the best option for the existing cable distribution. Instead of the MSO's offering the bundle, there will be single HITS operator can facilitate a bundle of channels and beam to the Headed in the satellite. The LCO's can receive this digitalized bundle and transfer it to the individual channel subscribers. The wide implementation of CAS becomes spontaneous and cost-effective thru HITS. It is significant to both the broadcasters as well as the customers by ensuring Addressability, Good picture as well as voice quality. As a result increase in more number of channels. Another emerging trend is the IPTV which is still under the controlled and one can expect large number of action in this sector. According to a report on Direct to home (DTH) service, it estimates that India would overtake Japan as Asia's largest DTH by 2010 and become the Asia's one of leading cable market in 2010 and the most profitable pay-TV market in 2015.

The Direct-to-home (DTH) industry growth in India has exceed all expectations by growing at an unpredictable pace. Recently, the market has outpaced the analogue cables market in the country due to a rapidly increasing number of televisions in households, due to the introduction of high definition (HD) services and various government interventions. This recent momentum has made way for a possibility that Indian DTH industry may growing fast compare to other global DTH markets in terms of the number of subscribers in near future. On the beyond of all the above factors, the Indian DTH

market is expected to grow with a CAGR of nearby 16% estimate for the year of 2016 to 2020.

## 2. Objective

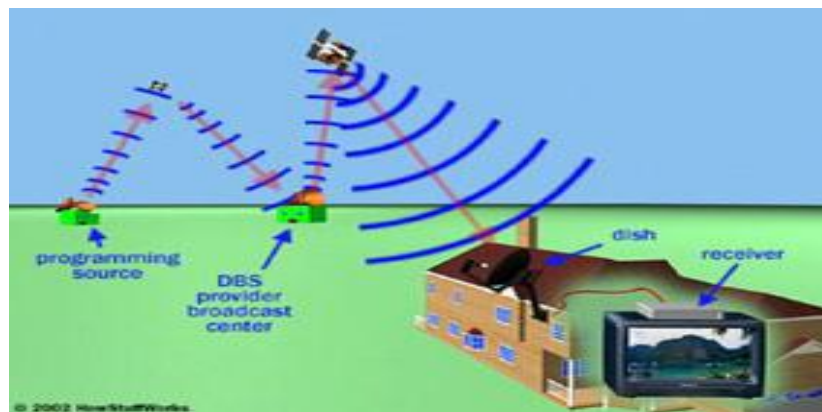
- To study the Digitalization of TV -DTH service growth in India
- To list out the DTH service providers in India Market.

## 3. Research Method

The research is based on descriptive and analytical study. The data collected for this study from books and websites.

## 4. WHAT IS DTH?

DTH is a short form of Direct-To-Home television. DTH is defined as the receiving the satellite programmers with the help of a personal dish installed on the individual home roof. DTH can provide the broadcasted programme directly to the DTH subscribers which can differentiate it from the local cable



### Programming source:

Generally Satellite TV provider have two major sources of Programming International well popular channels turn around channels like- HBO, ESPN & CNN, STAR TV, SET, B4U etc and several local channels such as Sahara TV, Doordarshan etc.. Mostly the turnaround channels also facilitate programming for cable television, so sometimes some of the DTH platforms will add in some special Exclusive channels itself to attract more number of subscriptions. Generally Turn around channels have a distribution center that beams their programming to a geostationary satellite. A big satellite dishes used by the broadcast centers to receive the analog and digital signals from various sources.

### Broadcast Center:

The Broadcast center is the center hub of the system. Here, television provider pickup signals from the programming sources. The DTH service provider have to pay other companies such as – HBO, Sony Max, ESPN for the right to broadcast their channel to the DTH subscriber through satellite. The DTH providers play an important role as a mediator between the consumer and the programme channels.

### Satellite:

Satellites receive signals send by the Broadcast center and compress the signals and make them suitable for re transmission to the ground.

operator. The cable operators can receive satellite programmers and they then distribute them to individual homes. While the DTH can facilitate directly to the individual.

## 5. DTH – how it works

In the History, C-band - radio in the 3.4-gigahertz (GHz) to 7-GHz frequency range used to broadcast the satellite television. While the Digital broadcast satellite transmits its programme in the Ku frequency ranges 10 GHz to 14GHz.

There are five main important elements required in a direct to home (DTH) satellite system:

1. Programming source
2. Broadcast center
3. Satellite
4. Dish
5. Receiver

### Dish:

A dish is one type of antenna designed in such a way to focus on a particular source of broadcast. It has a parabolic means bowl shaped surface and in the center feed horn. The dish works as a receiving end cannot transmit information. It works as a transmitter. When a beam hits the dish, the bowl shape reflects the radio signal inward on to a particular point. A dish can help viewer to receive the signal through satellite. There may be more than one satellite that sends signals at the same time. The receiver receives signal and forward it toward the Set Top Box (STB) receiver to the subscriber's household.

### Receiver:

Receiver is the ending but an important part of satellite system. It perform the major functions like- de-scrambles the encrypted signal: to lockout the signal the receiver is a require decoder chip for the package of programme. It converts received MPEG-2 or MPEG-4 in to the format as analog format which was a standard that can recognized by television. It Lock out the individual channels from the signals received thru satellite. Along with this it also include Parental lock- out options and digital Video recorders (DVRs) which helps to record and pause the TV programme.

## 6. Features of DTH

- DTH offers Better Picture as well as sound quality.

- Customer gets theater enjoyment at their home
- It allows paying only for subscribed channel
- Customer gets enhanced services such as Internet access, Movies on demand etc.
- DTH operators facilitates such as games, video-on-demand quizzes & puzzles, paid Shows etc.
- It offers HD Channels

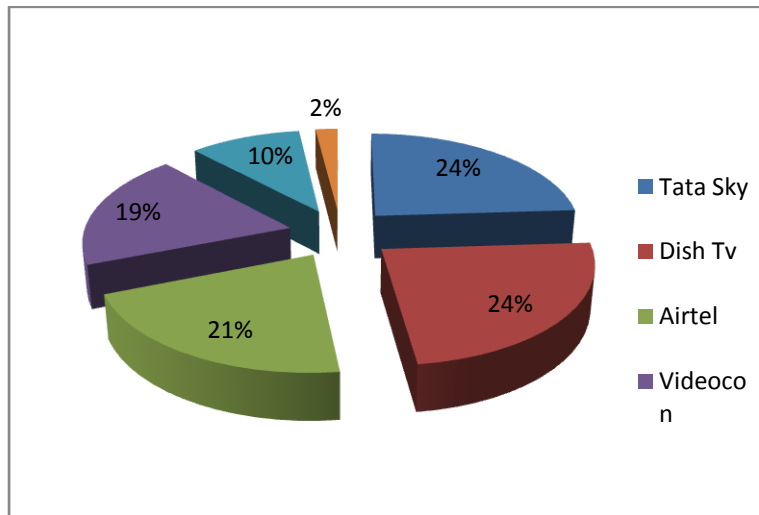
Along with the above discussed features DTH facilitate to their subscribers for selecting their convenient mode of payments. The subscribers have a choice of buying the

recharge coupon, getting a recharge done from a local dealer or they can go for the online payments too. While in the case of cable operators, the mode of payment is generally limited up to cash payments made to the operator directly. On the other side, in the case of DTH, the power of choosing the mode of payment is in the hands of the subscribers.

**7. Categorization of players in the industry:**

1. Government owned player : DD Direct+.
2. Private players : Dish TV, Tata Sky, Sun direct, Big TV, Airtel digital TV, Videocon d2h

**8. Market share of Dth Service providers:**



(Source: Telecom Regulatory Authority of India)

**Dish TV:**

Dish TV is a part of Zee Network enterprise entered in the DTH Market in October 2003. It is one of the largest DTH service providers in India DTH market. It has 24% market share. It provides latest innovations such as guideline for electronic programme, Channel lock, Movie on demand, games and 400 plus channel.

**Tata Sky:**

It was started in 2004 as a joint venture between TATA Group as a 21<sup>st</sup> Century Fox. The service air 281 channels along with HD Channels & One 3D C DTH service provider facilitate various features like- video-on-demand, games, quizzes, puzzles, paid shows etc. It has 24 % market share subscribers. The achievement of Tata Sky is that it was first DTH operator in the country broadcasting live telecast of FIFA world Cup the year 2014.

**Airtel Digital TV:**

In 2009, Bharti Airtel was started operating in Indian DTH market. The Service offer 383 plus channel including 25 HD channel. It has 21 % market share.

**Sun Direct:**

Sun Direct is a DTH service provider in India, it was registered in 16<sup>th</sup> February, 2005 having head quarter in Chennai, Tamilnadu. It was finally launched in 2007 based in Chennai. It is one of the largest DTH service providers in south India. It had 10% market share in India. Sun India is the first

DTH service providers which was provided the Regional channel.

**DD Direct +:**

It is well popular as a DD Free Dish. It is one and only free digital service in the India. It is operated by Prasar Bharati. It broadcast 59 channels in all & having 18 Million customer all over the country.

**Videocon d2h:**

It's a venture of Videocon group entered in Market 2009. It has 19%Market share.

**Reliance Digital TV:**

Reliance Digital TV is also one of the Popular DTH operator in India. It was launched by reliance group in 2002. They offer better picture & sound quality. They have 2% Market share.

**9. Recent Innovation in DTH**

**1. HDTV:**

HDTV (High Definition Television) is a high-quality video standard developed as a change of the older video formats often referred to as SDTV (standard definition television). While HDTV's video quality is quite improved than SDTV.

**2. Pause/Record/Rewind live TV:**

One of the most important feature of the Advanced HDPVR is that the subscribers can pause and rewind live TV. It really makes the unique viewing experience for viewers. The subscribers can have option to record at any time and if the subscribers have been watching from the starting, the complete program will be added to the PVR list.

### 3. 3D TV:

The 3D TV applying some advance techniques like; multi-view display, 2D-plus-depth, stereoscopic display and various other types of 3D display.

### 4. Internet through DTH:

Satellite Internet is the most famous and popular way not only in the US but also some parts of European country and

mountain areas where cable line is not only expensive but time consuming too. It could be a blessing for India if it carry out properly.

## 10. Conclusion

This paper shows how innovation can generate the need of DTH. It can help to boost up digitalization in Television. DTH is not only an entertainment instrument but it will helps to provide internet service too. Due to cut throat competition subscribers will get competitive advantage and get more benefits also. India has a large market for the DTH operators in the world because of high population can increase number of viewers, the low cost of DTH compare to cable operator is also create an opportunity for an Indian DTH industry.

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