

PROJECT REPORT

**“A COMPARATIVE STUDY OF MARKETING STRATEGIES OF
TATA SKY & DISH TV”**

Submitted to

G. S. College of Commerce & Economics, Nagpur

Affiliated to

Rashtrasant Tukadoji Maharaj Nagpur University, Nagpur

In partial fulfillment for the award of the degree of

Bachelor of Business Administration

Submitted by

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Under the Guidance of

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G.S. College Of Commerce & Economics, Nagpur

Academic Year 2022 – 23



G.S. College Of Commerce & Economics , Nagpur

Academic Year 2022 – 23



CERTIFICATE

This is to certify that “TUSHAR PANDYA“ has submitted the project report titled “(A COMPARATIVE STUDY OF MARKETING STRATEGIES OF TATA SKY & DISH TV)”, towards partial fulfillment of BACHELOR OF BUSINESS ADMINISTRATION degree examination. This has not been submitted for any other examination and does not form part of any other course undergone by the candidate.

It is further certified that he has ingeniously completed his project as prescribed by Rashtrasant Tukadoji Maharaj Nagpur University, Nagpur.

Name of Project Guide
Prof. Leena Kapse

Name of Coordinator
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Place : Nagpur

Date :

G.S. College Of Commerce & Economics, Nagpur

Academic Year 2022 – 23



DECLARATION

I here-by declare that the project with title "A COMPARATIVE STUDY OF MARKETING STRATEGIES OF TATA SKY & DISH TV " has been completed by me in partial fulfillment of BACHELOR OF BUSINESS ADMINISTRATION degree examination as prescribed by Rashtrasant Tukadoji Maharaj Nagpur University, Nagpur and this has not been submitted for any other examination and does not form the part of any other course undertaken by me.

TUSHAR PANDYA

Place: Nagpur

Date:

G.S. College Of Commerce & Economics , Nagpur

Academic Year 2022 – 23



ACKNOWLEDGEMENT

With immense pride and sense of gratitude, I take this golden opportunity to express my sincere regards to Dr Swati Kathaley, Principal, G.S. College of Commerce & Economics, Nagpur.

I am extremely thankful to my Project Guide Prof. Leena Kapse for her guideline throughout the project. I tender my sincere regards to Co-ordinator, Dr. Afsar Sheikh for giving me outstanding guidance, enthusiastic suggestions and invaluable encouragement which helped me in the completion of the project.

I will fail in my duty if I do not thank the Non-Teaching staff of the college for their Co-operation.

I would like to thank all those who helped me in making this project complete and successful.

TUSHAR PANDYA

Place: Nagpur

Date:

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INTRODUCTION

DTH services were first proposed in India in 1996. But they did not pass approval there were concern over national security and a cultural invasion. In 1997, the government even imposed a ban when the Rupert Murdoch-owned Indian sky broadcasting (ISkyB) was about to launch its DTH services in India. Finally in 2000, DTH was allowed. The new policy required all operators to set up earth station in India within 12 month of getting a licence. DTH licences in INDIA cost \$2.14 million and will be valid for 10 years.

The companies offering DTH services will have to have an India chief and foreign equity has-been capped at 49%. Today, broadcasters believe that the market is ripe for DTH. The prices of the dish and set -top box have come down significantly. overall investment required in putting up a DTH infrastructure has dropped and customers are also reaping the benefit of more attractive tariffs. The major thing that DTH operators are betting on is that the service is coming at a time when the government is pushing for CAS (conditional access system), which will make cable television more expensive, narrowing the tariff gap between DTH and cable. Some of the features of DTH services are as following:

- DTH offers better quality picture than cable TV.
- DTH can reach remote areas where terrestrial transmission and cable TV have failed to penetrate.
- DTH has also allows for interactive TV service such as movie on demand internet access, video conferencing and e-mail.

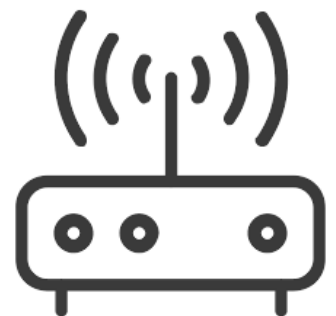
India currently has 6 major DTH service providers and a total of over 5 million subscriber households.

Out of these dish TV and Tata sky are the main market holders.

Dish TV is India's first private Indian company to start direct to home DTH satellite broadcast operations in the country. Dish TV's DTH services was hard launched in may 2005. It provides multi-channel subscription television service and interactive services. Its state of the art broadcasting infrastructure is located at its facility in noida, near Delhi. which is the nerve centre of DTH operations. Dish TV has robust operating infrastructure.

strong content tie-up, established brand salience and backing of a strong group.ASC Enterprises limited, now renamed Dish TV India limited dish acquired the first private sector license to operate DTH services in India

Where in the year 2004 Tata sky was incorporated but was launched only in 2006. It is a joint venture between the Tata group, that owns 80% and star group that owns a 20% stake it currently offers close to 196 channels as of December 2010 and some interactive ones this count includes some numbers off HD channels offered by Tata sky (as Tata sky-HD) and interactive services also.



COMPANY PROFILE



DISH TV (HD)

Dish TV launched the first DTH service in India on 2 October 2003. The company decided not to compete against entrenched cable operators in metros and urban areas, and instead focused on providing services to rural areas and regions not serviced by cable television. Jawahar Goel, who led the launch, recalled 10 years later, "We hardly had four transponders and could offer only 48 channels, compared to analog cable that was giving 60 and was much cheaper. And, STAR refused to give its channels. So, we decided to go slow and concentrate in cable-dry and cable-frustrated markets, rather than cable-rich markets and build the market step by step." Dish TV acquired 350,000 subscribers within 2 years of the launch.

Dish TV is India's first private Indian company to start direct to home [DTH] satellite broadcast operations in the country. Dish TV's DTH services were hard launched in May 2005. It provides multi-channel subscription television service And interactive services Its state of the art broadcasting infrastructure is located at its facility in noida, near delhi, which is the nerve centre of DTH operations. Dish TV has robust operating in infrastructure, strong content tie-up, established brand salience and backing of a strong group.

ASC enterprises limited, now renamed dish TV India limited [dish] acquired the first private sectors license to operate DTH services in India. Dish was a wholly owned company of Mr.Subhash Chandra and family, promoters of zee entertainment enterprises limited [zee], formerly known as zee telefilms limited. Under a scheme of restructuring approved by shareholders of zee,all DTH related assets in zee have been transferred to dish and in return. zee shareholders will get 37. Ownership of dish. Restructuring initiated to integrate operations in dish and to overcome regulatory restrictions, which prevents zee from owning the DTH license.

Shareholders can now participate in the growth of DTH business. Move will unlock shareholder value. As part of this scheme of arrangement, dish would get listed in India. Demerger is completed and listing expected by end of mar-2007.

DTH service was launched back in 2004 by launching of Dish TV by essel group's zee Entertainment enterprises. Dish tv is on the same satellite where DD direct+ is. Dish TVwas only DTH operator in India to carry the two turner channels turner classic movies and Boomerang. Both the channels were removed from the platform due to unknown reasons in march 2009.

Dish TV is a DTH satellite television provider in India, using MPEG-2 digital compression technology, transmitting using NSS satellite at 95.0. Dish TV's managing director and Head of Business is Jawahar Goel who is also the promoter of Essel Group and is also the president of Indian Broadcasting Foundation. July 19, 2010 - Dish TV India Limited [Dish TV] today announced the appointment of Mr. R.C. Venkatesh as the CEO of the company.

SATELLITE LINK

Dish TV uses NSS-6 to broadcast its programmes. NSS-6 was launched on 17 December, 2002 by European-based satellite provider, NewSkies. Dish TV hopped on to NSS-6 from an INSAT satellite in July 2004. The change in the satellite was to increase the channel offering as NSS 6 offered more transponder capacity.

NSS-6 is a communications satellite owned by SES WORLD SKIES. NSS-6 covers the whole of Asia with six high-performance, band beams, which can deliver broadband media to small businesses, ISPs or domestic

rooftop antennas in those markets. The satellite delivers Direct-TO-Home power and performance, as well as significant inter-regional connectivity. High-gain uplink performance (i.e. high receiver G/T figures) allows the use of small uplink antennas and/or amplifiers.

Dish TV uses NSS -6 to broadcast its programme. NSS-6 was launched on 17th December, 2002 by European-based satellite provider, New Skies (one of the only four satellite communications companies with truly global satellite coverage)

Dish TV - India's first KU-band DTH entertainment service, hopped on to NSS-6 from an INSAT satellite in July 2004. The change in the satellite was to increase the channel offering as NSS 6 offered more transponder capacity.

Salient features of NSS-6

1. Versatile ku-band and ka- beams can easily cross-strapped or interconnected, offering enhanced connectivity throughout Asia with complete access to Europe and the United States through new skies' global network.
2. Higher transmission power enables customers to use smaller antennas (75-90cm) or obtain higher throughput with existing antennas.
3. NSS-6 is also equipped with extra on-board redundancy for critical units, minimizing risk of single-point failure the projected 14-year operational life of the satellite.
4. Ideally suited for DTH and emerging broadband applications.

TRANSPONDER AND CAPACITY

Satellite TV and radio channels are transmitted back to earth via a transponder on a satellite. NSS-6 dish TV's service satellite has more than 60 high-power 36 MHz equivalent Ku-band transponders that are tailored towards direct to home (DTH) and multimedia services. Additionally, up to 15 highly linearized transponders can be assigned to each of the six beams to respond to changing market demand. Each ku band is formed by an independent high gain antenna system, offering 51-53 dbW in key markets.

TECHNOLOGY USED

(Moving pictures experts group) MPEG-2 is standard for the generic coding of moving pictures and associated audio information". It describes a combination of lossy video compression and lossy audio data compression method which permit storage and transmission of movie using currently available storage media and transmission bandwidth.

MPEG-2 is widely used as the format of digital television signals that are broad cast by terrestrial (over the air). cable and direct broadcast satellite TV systems. It also specific the format of movie and other programme that are distributed on DVD and similar discs. As such, TV stations, TV receivers, DVD players, and other equipment are often designed to this standard.MPEG-2 was

The second of several standards developed by the moving pictures export group (MPEG) and is an international standard (ISO/IC 13818). Parts I and 2 of MPEG-2 were developed in a joint collaborative team with ITU-T, and they have a respective catalogue number in the ITU-T recommendation series.

While MPEG-2 is the core of most digital television and DVD formats, it does not completely specify them. Regional institutions can adapt it to their needs by restricting and augmenting aspects of the standard. See profile and levels.

TARIFF OF DISH TV

All new and improved Dish TV packages are here to give you best entertainment at unmatched prices! Keeping in mind the varied needs of our diverse subscribers we have redesigned our packages for a joyous and wholesome viewing experience.

Packages in North and south of India have the right mix of Hindi ,English, International and Regional channels so that your entertainment gets complete, in true sense.

Plans for Rest of India		Plans for South		Plans for Punjab
Bharat Pack ₹100	Swagat Pack ₹169	Joy Pack ₹100	Jumbo Family Pack ₹190	Punjabi Tadka Pack ₹85
Super Family Pack ₹250	Maxi Sports pack ₹290	Family Sports Pack ₹215	All Sports pack ₹240	
All Sports Pack ₹330	World Pack ₹380	World Pack ₹325	Platinum Sports Pack ₹415	
South Platinum Sports pack ₹490	Titanium Pack ₹475	South Titanium pack ₹100		

DISH TV ON COMPUTER

DISH TV bring to you get yet another first in its bouquet of service-DISH TV on computer.

DISH TV on computer is the first of its kind in India by making your computer double up as a television it gives you "LIVE DIGITAL TV" right on your workstation. You also get an added benefit, the set top box comes with a dual advantage - it works with your computer AND your TV.

Yes! With this magical product, up to 100+ channels will now also be available on computer. bringing to you Live News . Live sports . live business news along with active services, movie on demand gaming EPG etc. Whatever dish TV offers on Television; now also on computer.

GAMING

With DISH TV's 24x7 gaming portal, games active don't just watch TV start playing on it.

<https://www.dishtv.in/Pages/Services/Games-Action>

turns your remote into joystick, your Dish TV into a gaming console and discover new adventures with new exciting games on your TV. To order, give a missed call on 1800 274 9522 from your registered mobile number. T&C for Games active special offer.

SHAADI ACTIVE

Find your matrimonial match tv !

Contents partner-shaadi.com India's largest matrimonial service

Search from thousands of profile, updated every week

Profile search based on age, religion and mother tongue

JOB ACTIVE

Find the right job for you TV!

Content partner -monster.com, the world's largest job portal

Search from thousands of jobs. updated every week

Profile search based on functional area, experience and location

TRAVEL ACTIVE

Content partner -yatra .com India's leading travel portal

Search from the best holiday packages and hotels across the country refreshed regularly

Search holiday package from 10 destinations per Indian zone, and hotels from 14 select cities across the country.

suits all budgets and all price points.

BHAKTI ACTIVE

Watch live Gurbani from Bangla sahib, Sai baba aarti from Shirdi & Ganesh aarti from siddhi Vinayak, seva from Tirupati Balaji, ganga aarti from Haridwar and Bhasma aarti of Mahakal from Ujjain.

CINEMA ACTIVE

Content partner- fun cinemas, indias leading multiplex chain provides a listing of the complete movie schedule of all run cinemas screens - nation wide. A handy tele -booking number and online booking id, for instant booking. The data will be updated every week, with the change of schedule on cinemas.

JOINING OF CEO IN DISH TV

MR. ANIL KUMAR DUA SAYS,

Welcome to the 34th Annual General Meeting of Dish TV India Limited. It is my pleasure to connect with you and place before you the Annual Report of the Company for the Financial Year ended March 31, 2022.

The fiscal started with a renewed sense of optimism after a COVID-19 impacted taxing FY21. The optimism however was short-lived as the first quarter itself witnessed the worst of the pandemic attack bringing, once again, life to a grinding standstill, both for businesses and individuals.

Fortunately, learnings from the first curve of the pandemic kept the business organized and we were determined to serve the community, not only by fulfilling our obligation to entertain but in every other manner we could. Dish TV extended its support to encourage vaccination amongst individuals by offering a day worth of complimentary television viewing for anyone who got vaccinated and uploaded their vaccination certificate. A day of extra subscription was also credited to all hospitals and medical facilities with a DTH connection as a mark of gratitude and support.

As post pandemic normalisation dawned in the later part of the second quarter, consumerism picked up though rural demand remained largely depressed. The third quarter witnessed higher marketing spends in anticipation of higher demand but consumer spending went below par once the pent up demand was exhausted. Overall, the cloud of COVID-19 obstructed any meaningful increase in consumer confidence and spending.

With the worst of Covid behind us and normalcy expected, India is set to remain one of the fastest-growing economies in the world in FY 2022-23. Strong fiscal, monetary and budgetary interventions initiated by the Government are expected to keep the country on track to become a USD 5 trillion economy. The government is focused on making India a digital economy with technology-enabled development, energy transition, and climate action for a more sustainable future.

Though India continues to tread the growth path, inflationary pressures led by global supply chain bottlenecks and the ongoing geopolitical conflict, pose a challenge to this forward march. Mounting inflationary pressures have necessitated a gradual and controlled rate hike that could be mildly recessive in the medium term but will certainly have longer term progressive upside for the economy

INDUSTRY DEVELOPMENT

The media and entertainment space in India is witnessing a change in landscape with growing number of content delivery platforms and viewing options available to consumers. Consumers have been spoilt for choice with over 850 channels in the linear space and 40+ big and small OTT platforms laden with movies, TV shows, web-series, time-shifted content etc. Entertainment watching has spiked to almost 4.5 hours per day per user as against 3.6 hours in 2018. Competition has also increased from free-to-air government run distribution platform and telcos. Fall in subscriber numbers is due to top-end subscribers alternating between DTH and streaming content and bottom-end subscribers often choosing free-to-air DTH over pay DTH.

However, the bigger picture remains intact. The popularity of DTH as an all-encompassing, budget friendly option is well maintained despite the many emerging alternatives in the market.

Dish TV appreciates the changing tastes and preferences of consumers and is on track to leverage these emerging trends considering that technology driven evolution and related growth of the sector is inevitable.

PERFORMANCE OVERVIEW

The pioneer of digital entertainment in India, Dish TV, has been a significant contributor in changing the Indian television landscape with the use of DTH technology. Dish TV is the only media Company which is CMMI certified. Our Company has constantly strived to take television viewing to the next level as it supports various futuristic features providing consumers with easy accessibility and a wide variety of digital content. Its vast distribution network is spread across the length and breadth of the country. Our Company enjoys a strong brand equity with a large number of SD and HD channels, value-added services and multiple offerings spanning across price points. Customer centricity being at the heart of its operations, the Company strives to offer superior quality at competitive prices.

The home-grown OTT platform of Dish TV India has been steadily growing its reach and crossed the 50 million downloads mark at the end of the fiscal, doubling its subscribers during the year. The platform debuted several new web series to gain strength as an OTT platform with a strong semi urban presence in addition to a meaningful tier-1 visibility. The platform is poised to become the medium to carry Dish TV India to the next level, by being a critical connect between the Company and younger audience.

During the fiscal, subscription revenues were lower as compared to the last fiscal primarily due to volatile viewing habits, emergence of the second and third wave of the pandemic in the country, high inflation and conservative spending. The resultant average revenues per user (ARPU) declined as well. Operating revenues for the year were 28,025 million. EBITDA for the year stood at 16,442 million while EBITDA margin was 58.7 per cent. Financial expenses continued to decline due to repayment of borrowings. PBT before exceptional items grew from 823 million to 2,727 million in FY2021-22. The Company reported exceptional losses of 26,539 million leading to a net loss for the full year of 18,672 million. The Company stayed focused on deleveraging its balance sheet for the fourth year in a row and paid-off 4,343 million during the year thus reducing its overall debt to 3,756 million at the end of fiscal 2022 as compared to 8,099 million at the close of fiscal 2021.

LOOKING AHEAD

The fiscal 2022 was certainly not the smoothest year for Dish TV. Challenges, both on the corporate and business front, kept us engaged but never to the extent of losing focus on business.

Notwithstanding difficulties, the Company continued to keep up with the times and remains optimistic about its capabilities to stay as one of the most relevant player in the content delivery space in India. The Company is actively looking beyond its contemporary offerings of Hybrid Boxes and OTT platform and is exploring newer possibilities that would make its service bouquet more appealing to an even wider set of audience.

Our Company is expected to be one of the biggest beneficiaries of Government's strong focus on vaccination, rural electrification, rural income, make in India, road and highway construction and housing for all, all of which are expected to be instrumental in increasing the share of pay television viewers by helping create overall rural infrastructure and employment in the days to come.

At the end, I would like to express my gratitude to all our stakeholders including our subscribers, investors, business associates, Central and State Governments, Ministry of Information and Broadcasting, TRAI and other Regulatory authorities for their support and trust in Dish TV India Limited. I would also like to thank the Board for their valuable contribution and all employees of the Company for their dedication and hard work.

ADVERTISING & MARKETING STRATEGY DISH TV

Segmentation, Targeting and Positioning

Dish TV has a wide range of products and services which caters to different customers according to their needs and demands. basically, their customers of them are the audience with family.

The company decided not to compete against entrenched cable operators in metros and urban areas and instead focused on providing services to rural areas and regions not serviced by cable television.

Dish TV made its position by being one of the most preferred brands in the country when it comes to entertainment. It became the first brand to provide services in rural areas which made it stand in the market with a large number of subscribers.

MARKETING CAMPAIGN



SET- TOP – BOX Matlab Dish TV campaign most of the campaign dish TV mainly depends on TV advertisement and the campaign was also done through the same medium and the response was outstanding.

The major reason for the success of the Company is that it has the calibre of providing maximum entertainment at the minimum cost which makes it unique in its way.

The price of DTH value packs starts at Rs 85 which is very much low compared to the analogue cable services. Thus, the viewers get to enjoy maximum entertainment at the lowest possible price. And the goal of the campaign was achieved as a huge number of people bought the setup box.



(Dish TV tells you the easy way to win hearts) – a campaign which won the heart of many people and the main aim of the objective of campaign was again telling to people that they have come up with a new service.

Even in this campaign Dish TV was able enough to communicate with its audience and made sure that the campaign works great for them as many people purchased the product.

(‘Life Masala Maar Key) – The campaign is aimed at further strengthening its bond with the Indian consumer. The campaign showcases varied people from across the country enjoying entertainment in their unique way, which every Indian does – with a little masala, with a little extra emotion.

The campaign brought a lot of engagement and the audience loved the campaign.

SOCIAL MEDIA MARKETING

Dish TV is active on social media such as Instagram, Facebook and LinkedIn etc.

Instagram – 47.3k

Facebook – 83.43k followers

LinkedIn - 17.1k followers.

Most of the post on Instagram and Facebook is fun and engaging.



SEO STRATEGY



According to the SEO Standards organic keywords below 500 are bad, above 1000 are good and above 10000 are amazing as seen above dishtv.in has 157,672 keywords which are great.

Monthly visits above 20000 are amazing, dishtv.in has 702k monthly traffic which is impressive.

TATA SKY



Tata sky HD was launched on June 14, 2010, and has channels in their native resolution of 1080 or 720p. The STB is compatible with 5.1CH surround sound as well. The service currently offers four HD channels - National Geographic channel HD, Discovery HD, showcase HD (Pay Per view), star plus HD (upscale SD channel) and Neo Cricket HD (Event Based). More channels such as star Movies HD and other popular sports channels in HD format are expected to be added soon.

The Tata Group is an Indian multinational conglomerate company headquartered in Mumbai India. In terms of market capitalization and revenues, Tata Group is the largest private corporate group in India. It has interest in steel, automobiles, information technology, communication, power, tea and hospitality. The Tata Group has operations in more than 80 countries across six continents and its companies export products and services to 80 nations. The Tata Group comprises 114 companies and subsidiaries in seven business sectors.

In the year 2004 Tata sky was incorporated but was launched only in 2006. It is a joint venture between the Tata Group, that owns 80% and STAR Group that owns a 20% stake. It currently offers close to 196 channels (as of December 2010) and some interactive ones; this count includes some numbers of HD channels offered by Tata sky (as Tata sky-HD) and interactive services also. The company uses the brand owned by British sky Broadcasting

In October 2008, Tata sky announced launching of DVR services Tata sky+ (Tata sky+ is a premium set -top box-cum-personal video Recorder or even known as DVR Digital video Recorder that allows recording up to 130 hours of live TV, recording one program while watching another, pause, fast-forward and rewind a live telecast and review a TV program . Also Tata sky+ provides service using MPEG-4 digital compression technology .) which allowed 90 hours of recording in a MPEG-4 compatible Set Top box. The remote is provided with playback control keys and is being sold with special offers for existing subscribers.

Tata Play Limited (formerly known as Tata Sky Limited), Incorporated in 2001 and initiating services in the year 2006, Tata Play is one of India's leading content distribution platform providing Pay TV and OTT services.

Staying true to its commitment of making tomorrow better than today, Tata Play's growth over the years has been cemented by many innovations and enhancements. Tata Sky+, now renamed as Tata Play+ was launched introducing PVR (Personal Video Recorder) technology that enabled Pause, Record & Rewind of content on linear channels in Set-top boxes. This was followed by the launch of 4K Set-top Boxes in addition to Hindi programming Guide, Video-On-Demand, DIY video library and the very recent Smart Guide feature that personalizes content recommendations on TV. Subscribers also have access to titles from the Tata Play VOD library where they can access their favorite episodes of the past 7 days. The Tata Play mobile app enables subscribers to experience content from linear channels as they would have watched it on their TV sets, along with services such as On-Demand, Remote Recording etc.

Tata Play forayed into the OTT aggregation space with the introduction of Tata Play Binge - a unique platform that brings diverse OTT apps like Amazon Prime Video, Disney+ Hotstar, SonyLIV, Zee5, Voot Select, Voot Kids, ShemarooMe, SunNxt, Hungama Play, Eros Now, CuriosityStream, EpicOn & Docubay onto a single user interface while offering the flexibility of single subscription and single payment. Tata Play Binge can be accessed through the Amazon Fire TV Stick- Tata Play Edition, Tata Play Binge+ Smart Set Top box powered by Android TV and Tata Play Binge mobile app.

Tata Play has made entertainment further convenient and consumer friendly, with the introduction of Tata Play Binge Combos – an inventive bundled offering that brings the best of broadcast channels and OTT apps in one integrated pack for the subscribers.

In a first of its kind proposition, Netflix on Tata Play offers multiple bundles for users to enjoy the leading of broadcast channels along with Netflix's bouquet of offerings through Tata Play's wallet.

The brand also keeps adding new channels and platform services for the television viewing audiences across various genres and languages.

The company has invested in advanced digital infrastructure, partnered with global leaders to provide superior technology and set-up high-end 24x7 call centers in 12 languages across the country manned by multi-lingual customer service associates to offer professional and efficient customer service.

TATA and TATA PLAY are trademarks of Tata Sons Private Limited.

TATA SKY IS NOW TATA PLAY

Tata Play (stylised as **TATA PLAY**) is an Indian direct broadcast satellite (DTH) service provider using MPEG-4 digital compression technology, transmitting using INSAT-4A and GSAT-10 satellite.^[2] Incorporated in 2005; it currently offers a total of 601 channels, 495 SD channels and 99 HD channels and services, along with many other value added services. As of March 2020, according to TRAI Tata Play serves 22 million subscribers which is 33.37% of total DTH users in India. Tata Play is the largest DTH service provider in India.

Tata Play entered into an agreement with French firm Technicolor to supply 4K set top boxes from early 2015.^[3] The company was formerly known as Tata sky.

HISTORY

Tata Sky was an equity strategic alliance in the nature of a joint venture between the Tata Group and News Corporation, which owned 80% and 20% stakes respectively until 2008, when Singapore-based Temasek Holdings picked up a 10% stake in Tata Play from the Tata Group. Tata Sky was incorporated in 2001, but launched services on 8 August 2006.

Tata Sky's parent company, 21st Century Fox, formerly owned an international group of DTH businesses that include Sky Italia in Italy and Sky UK in the United Kingdom. The company uses the Sky brand under a licence from Sky Group.

Tata Sky partnered with Ericsson to launch the first Video on Demand (VOD) services in India in 2012.

On 9 January 2015, Tata Sky became the first Indian DTH operator to offer 4K set-top-boxes to its consumers.

On 20 March 2019, The Walt Disney Company completed acquisition of 21st Century Fox, making them their new 30% stakeholder, replacing 21st Century Fox.

On 26 January 2022, Tata Sky was rebranded into Tata Play as the company decided to drop the 'Sky' brand name after 18 years.

On 4 September 2022, Tata Sons and the Walt Disney Company India finally agreed to launch an initial public offering (IPO) for the company after multiple failed attempts in 2013, 2016 and 2019. It has been reported that Disney may sell 10% of its current 30% share in order to abide by media cross-holding regulations, which limit broadcasters' equity in DTH companies to 20%. However, in December 2022, reports came of Disney completely exiting the company. Tata Sky is an Indian direct-to-home (DTH) television company, which offers over 600 channels and services.



SATELLITES

Tata Play was the second operator to launch DTH or direct-to-home services in 2006. At that time, the company decided to use an ISRO satellite. In 2005, Tata Play signed a contract with ISRO for provision of satellite space on the INSAT-4A satellite. In 2007, one year after the launch of the DTH player, Tata Play asked for more space to increase the number of channels they telecast. The extra space was promised in 2009 on the GSAT-10 satellite, a then to be launched satellite inducted into the INSAT system. The GSAT-10 was launched in September 2012, Tata Play has started utilising those transponders in March 2015. The mission of INSAT-4A was over on 21 October 2019. Tata Play is using ISRO's GSAT-30 satellite which is a replacement satellite of INSAT-4A.

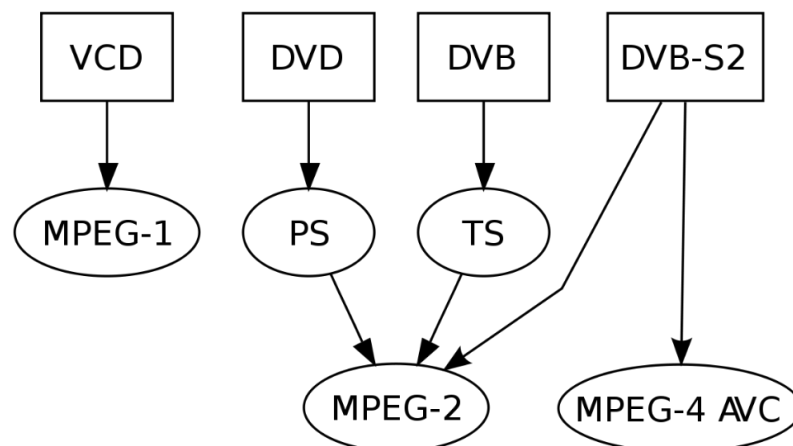
TECHNOLOGY USED

(Moving Picture Experts Group) MPEG-2 is a standard for "the generic coding of moving pictures and associated audio information ."It describes a combination of lossy video compression and lossy audio data compression methods which permit storage media and transmission bandwidth.

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AWARDS

In March 2009, Tata Play became the first Indian DTH service provider to be awarded the ISO 27001: 2005 accreditation, the benchmark for information security. ISO 27001:2005 is an international standard that provides specifications and guidance for the establishment and proper maintenance of an Information Security Management System (ISMS).

Year	Award	Category
2013	Yahoo Big Idea Chair Award	Best use of Mobile Advertising
2013	ET Brand Equity	Product of the Year – Tata Sky + HD
2012	ET Brand Equity	Best DTH brand
2009–2010	Super brands Council	Super brand

HYPOTHESIS

- **ALTERNATIVE HYPOTHESIS –**

There is a positive relationship between marketing Strategy with consumer Satisfaction.

- **NULL HYPOTHESIS –**

There is no positive relationship between marketing Strategy with consumer Satisfaction.

- The marketing strategies of Tata-sky & Dish Tv are highly effective in maintaining maximum market share.
- Tata Sky & Dish tv are in the top list of DTH service market.

OBJECTIVE OF STUDY

The objective of this study is to find out the various tactics deployed by the company and also to study the various product offerings it makes to its customers. This will be done with reference to the following

- To study the marketing strategies of Tata Sky & Dish tv.
- SWOT Analysis of Tata sky & Dish tv
- To analyze and suggest for improvement.
- To comparative of marketing mix of Tata Sky & Dish tv

LIMITATIONS OF THE STUDY

Limitations of this study include the following:

- This study is based on marketing aspect of Tata sky & Dish TV.
- Only four year data i.e. from 2019-2022 has been taken into consideration.

SCOPE OF THE STUDY

The scope of this study is limited to Marketing mix, Growth strategy, Challenges and SWOT analysis of Tata sky & Dish TV.

This project report has been prepared in order to do a comparative study between two leading DTH service providers, that what all strategies they follow for.

- Brand promotion.
 - Capturing market value
 - To face healthy competition
 - To be best at there services
 - Status of the company
-
- It also opens the various factors which can affect the purchase decision.
 - The main purpose of the study is to aware the customers about the DTH service.
 - The scope of the report include the information about DTH , company profile of Dish TV & Tata sky.
 - A brief knowledge about their competitors
 - Market position of the company has been include in scope.

RESEARCH METHODOLOGY

The methodology adopted for eliciting the data required for the study was survey method. It is the overall pattern or framework of the project that will dictate as to what information is to be collected, from which sources and by what procedures.

Descriptive research includes surveys and fact – finding enquiries of different kinds. The major purpose of descriptive research is description of the state of affairs, as it exists at present.

The research conducted for this project is of ‘Descriptive’ type.

It is the way or a manner in which the project is carried out. Research is considered as a way to arrive at answer to intellectual and practical problem through application of scientific methods of the knowable universe. It is the movement from the known to unknown research, which can be defined as “defining and redefining problems, formulating hypothesis or suggested solution, organizing and evaluating data, making deductions and reaching conclusions and at last carefully testing the conclusions to determine whether they fit formulating hypothesis”.

OR

“Careful investigation or enquiry especially through new facts in any branch of knowledge”.

DATA COLLECTION

The primary as well as secondary source of data collection has been in this project.

There are two types of data:

- Primary data
- Secondary data

PRIMARY DATA:

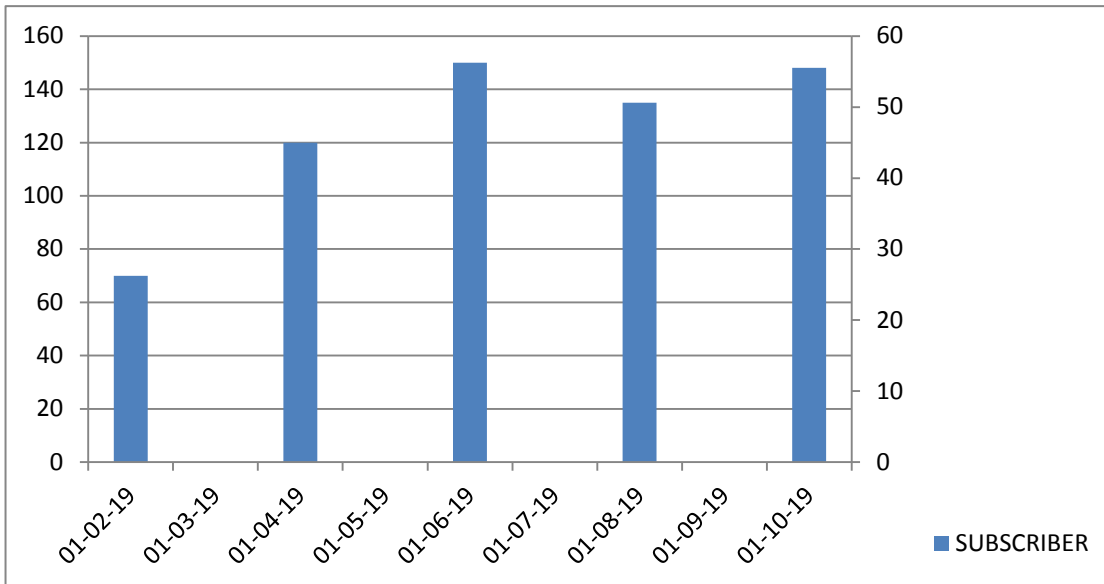
Primary data consist of information collected for the specific purpose at hand for the purpose of collecting primary data, survey research was used and all the retail outlets sellers using different brands and their competitors were connected survey research is the approach best suited gathering description.

They are the original observation collected by the researchers or his agent for the first time and used their analysis. Once the primary data has been used, it eases to be primary data becomes secondary.

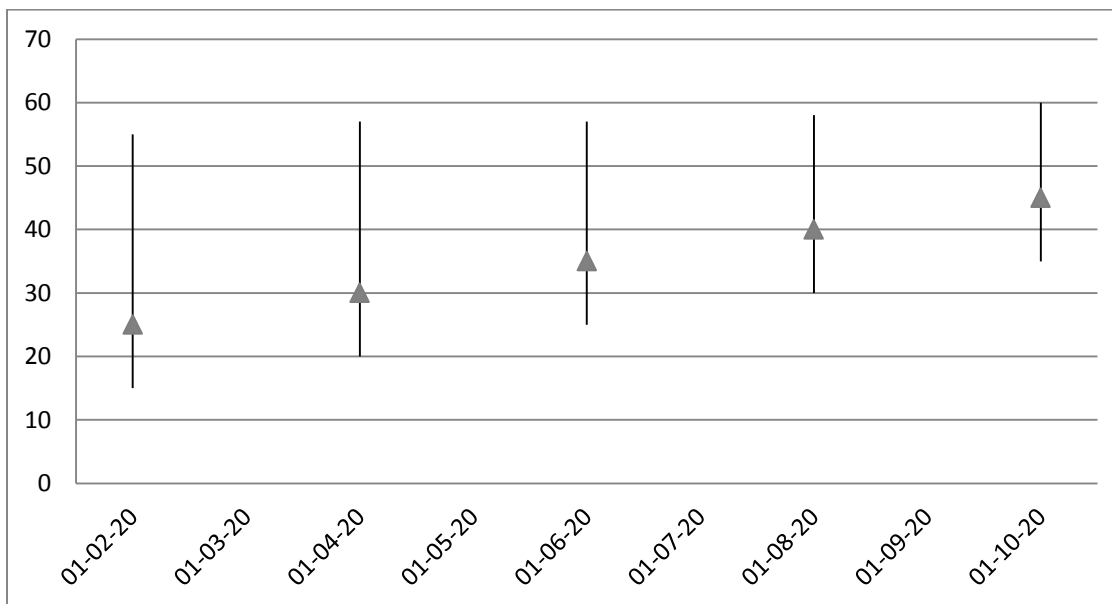
SECONDARY DATA:

The secondary data consist of information that already exists somewhere, having been collected for another purposes. Any researcher begins the research work by first going through the secondary data. Secondary data includes the information available with company. It may be the finding of research previously done in the field. Secondary data can also be collected from magazines, newspapers, other surveys conducted by known research agencies etc.

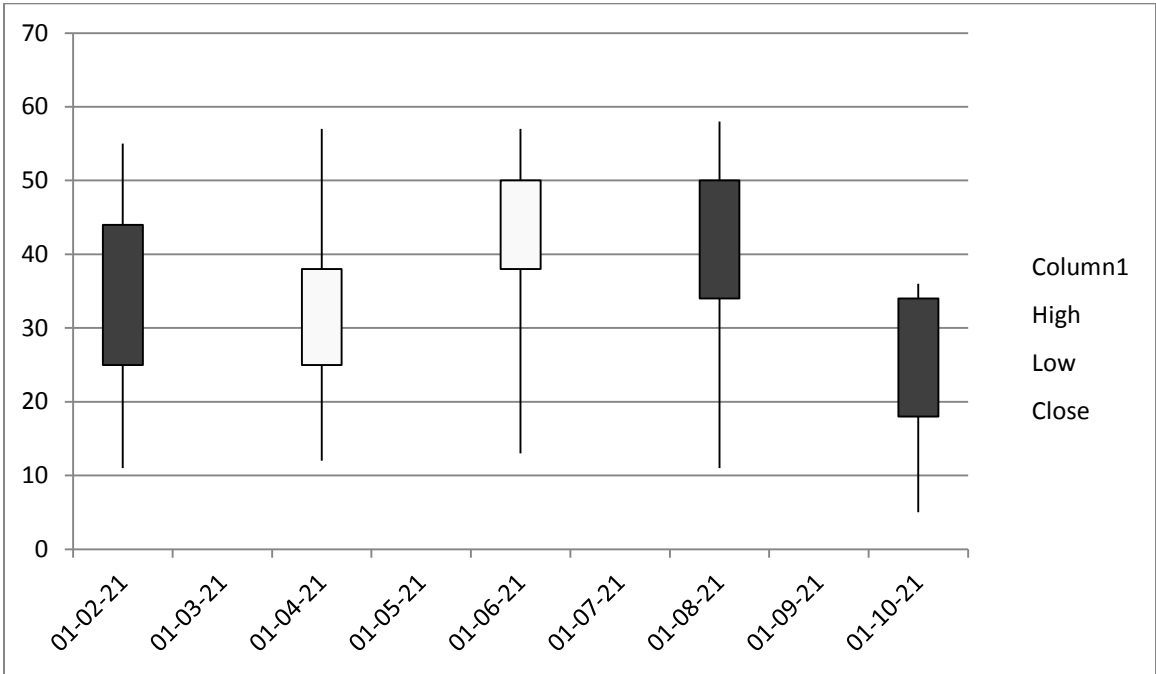
DATA ANALYSING OF DISH TV



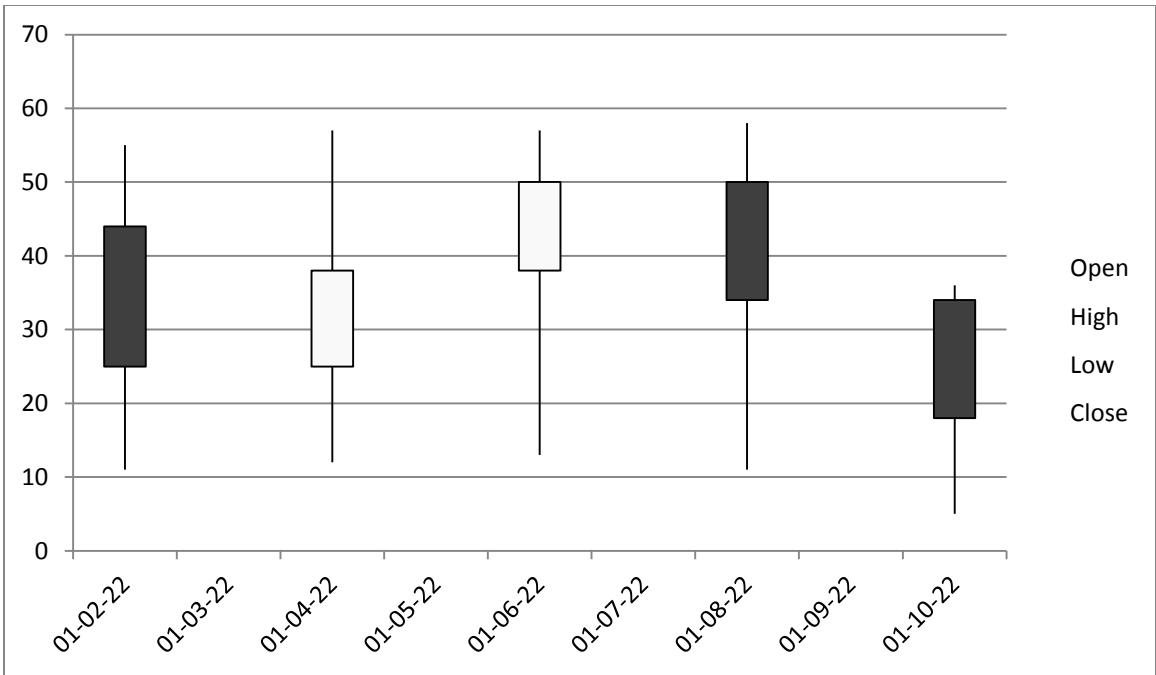
YEAR - 2019



YEAR - 2020



YEAR - 2021



YEAR - 2022

IN DETAIL

Direct to home (DTH) operator Dish TV's subscription revenue for the quarter ended 30th September has dropped 16% to Rs 645 crore from Rs 766 crore in the same quarter of the previous fiscal. Operating revenue declined 15.1% to Rs 718 crore from Rs 846 crore.

Revenue from additional marketing, promotional fee and bandwidth charges dropped 11% to Rs 45 crore from Rs 50 crore. Advertisement income was up 39.2% to Rs 12 crore from Rs 8.3 crore.

Expenditure dropped 9.3% to Rs 291 crore from Rs 321 crore. EBITDA for the quarter was down 19% to Rs 427 crore from Rs 525 crore. Net profit fell 45% to Rs 35.4 crore from Rs 65 crore. The company repaid debt of Rs 70 crore during the quarter to arrive at a closing debt of Rs 557 crore.

The DTH operator added more than 600,000 subscribers at the gross level. At a net level, though, the company recorded negative additions, prioritizing repayment of debt over adding fresh subscribers.

In line with the objective of increasing the lifetime value of subscribers, the company remained concentrated on retention and upgradation campaigns. Further, to increase stickiness, 'Watcho' — the in-house OTT app of the company was loaded with fresh curated content.

The platform debuted several new web series to further enhance the complimentary bouquet of offerings for Dish TV India subscribers. 'Watcho' continued to gain strength as an OTT platform with a strong semi urban presence in addition to a significant tier-1 visibility. The app has recorded total cumulative downloads of 36 million so far.

Dish TV India Group CEO Anil Dua said, “We remain focused in our efforts to drive business performance using tools that enhance the viewing experience of subscribers on both, the traditional and the OTT offering. We remain sensitive to changing consumer needs and look forward to new launches and a wider audience base.”

During the quarter, Dish TV India Limited announced the launch of its ‘QR Scan Feature.’ The scan to pay feature aims at giving customers a hassle-free single click payment experience when it comes to recharging their Dish TV account or paying utility bills.

Dish TV and d2h subscribers will now be able to pay their bills in a few simple steps by scanning the QR code on the company’s websites, dishtv.in and d2h.com, using any UPI app or wallet. UPI is currently the easiest and the most secure way of digital payments owing to its multifactor authentication which requires the users to verify themselves via multiple sources.

The company noted that the onset of the festival period towards the end of the second quarter along with some normalization in consumer spending post the second wave of the pandemic encouraged the launch of customized new offerings for existing as well as new subscribers.

Dish TV India launched a special ‘Get 1 for 5 Recharge Offer’ as per which a complimentary month of subscription was provided for every five months of recharge. In addition, a ‘Lucky Recharge Offer’ wherein customers could avail up to 100% cashback on recharge of Rs. 501 was also launched.

The DTH operator noted that household spending did not fully recover during the quarter and despite a fairly extensive sports calendar, recharges were not in line with earlier years. “Both, streaming platforms and Free Dish, continued to give competition to conventional distributors, with some DTH subscribers at the upper end exploring OTT services while those at the lower end sampling Free Dish services.”

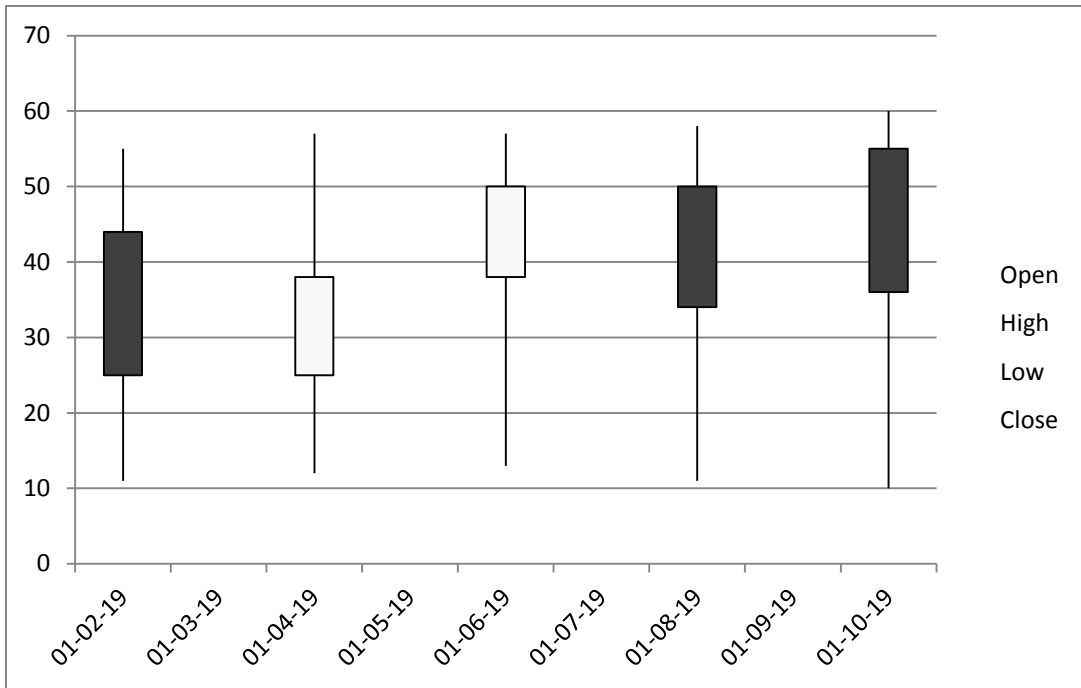
Consumers typically tend to step up spending during festivals, and the festive season traditionally accounts for the majority of the annual revenues of the Company. Upbeat consumer spending is expected during the festival quarter this year compared to the same quarter last year.

On NTO 2.0 implementation, Dish TV CMD Jawahar Goel said, “We would be watching the developments on the litigation front for now while simultaneously acting towards implementation of the order.”

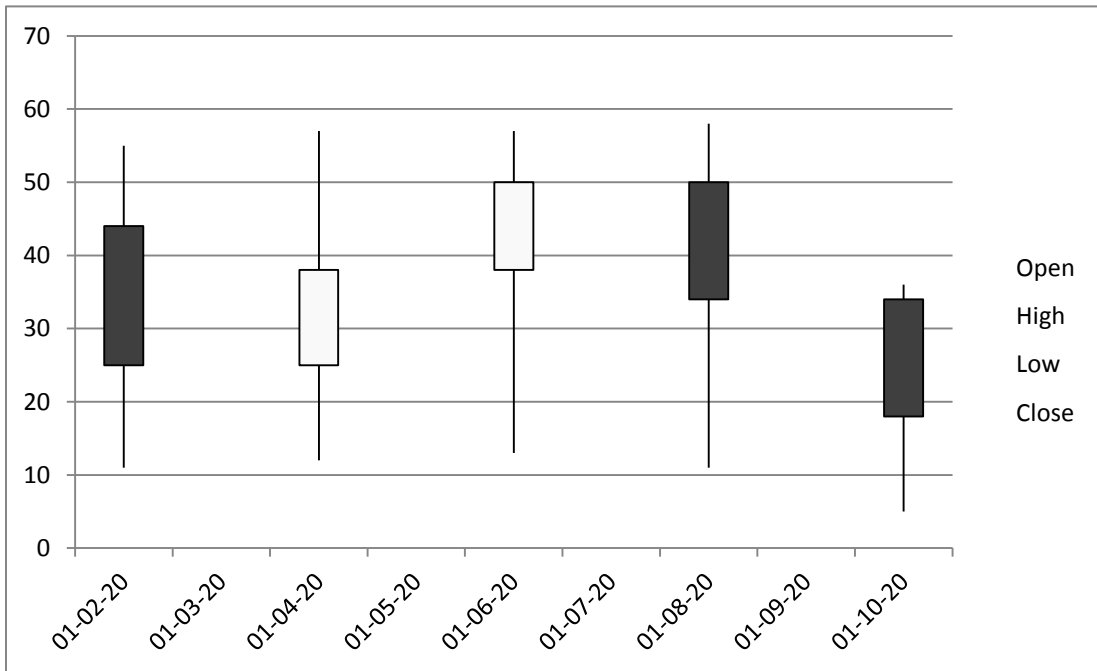
The Telecom Regulatory Authority of India (TRAI) recently extended the deadline for enforcing the New Tariff Order (NTO) 2.0 by announcing an execution plan for migrating subscribers to the new regime. TRAI directed distribution platforms to ensure that subscribers avail pay-tv services as per NTO 2.0 norms with effect from 1st April 2022, moving the earlier December 1, 2021 deadline. While distribution platforms like DTH and cable will have to seek subscriber choice till March 31, 2022, broadcasters will have to submit the required information to TRAI by December 31, 2021.

Several broadcasters had earlier challenged the NTO 2.0 in various High Courts. However, in an order passed on June 30, 2021, the Bombay High Court had upheld the validity of NTO 2.0, except the second proviso to the twin conditions which stated that the a-la-carte rates of each pay channel (MRP) forming part of a bouquet shall in no case exceed three times the average rate of a pay channel of the bouquet of which such pay channel is a part.

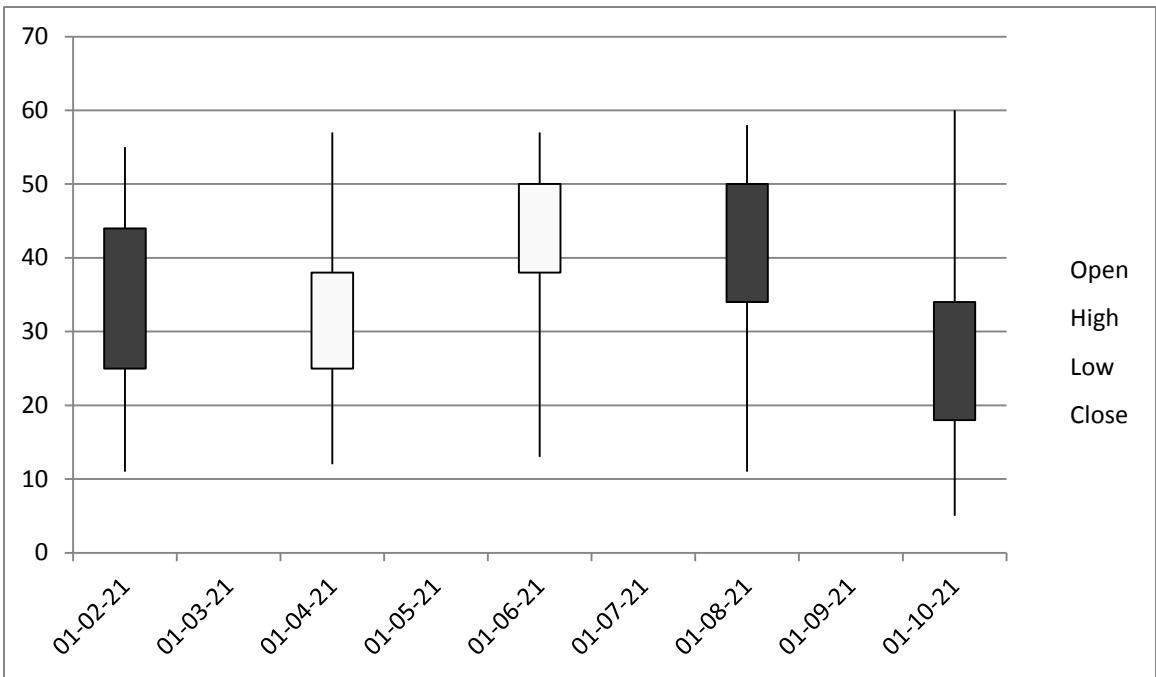
DATA ANALYSING OF TATA SKY



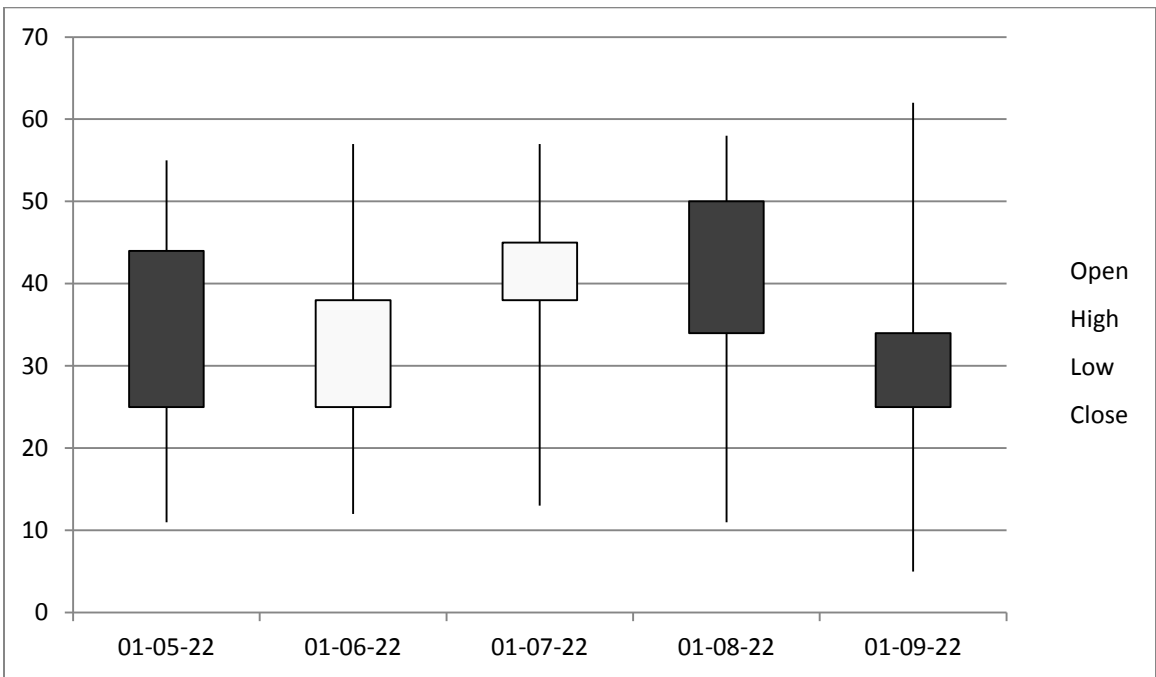
YEAR-2019



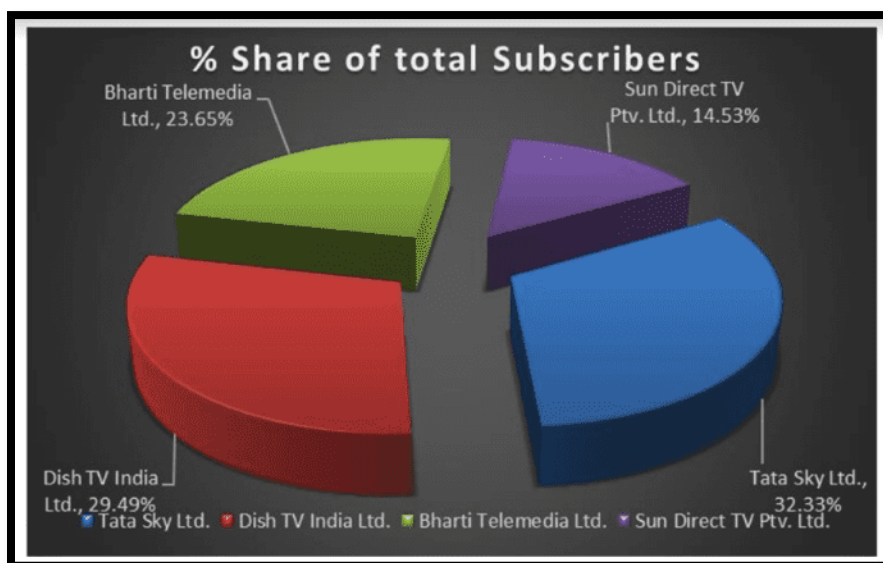
YEAR - 2020



YEAR – 2021



YEAR – 2022



The Telecom Regulatory Authority of India (TRAI) today released ‘The Indian Telecom Services Performance Indicators’ data for the January- March’20 quarter. Sustaining its growth pace for three quarters in a row, Tata Sky has solidified its lead yet again in the DTH and Pay TV category clocking in a market share of 32.33% and a growth of 2.1% in the quarter ending March’20. According to the report, the Indian DTH service has displayed phenomenal growth since its launch in 2003. The total number of active subscribers with pay DTH operators (Tata Sky, Airtel, Dish TV, Sun Direct) in India in the quarter ending March 20 is 70.26 million.

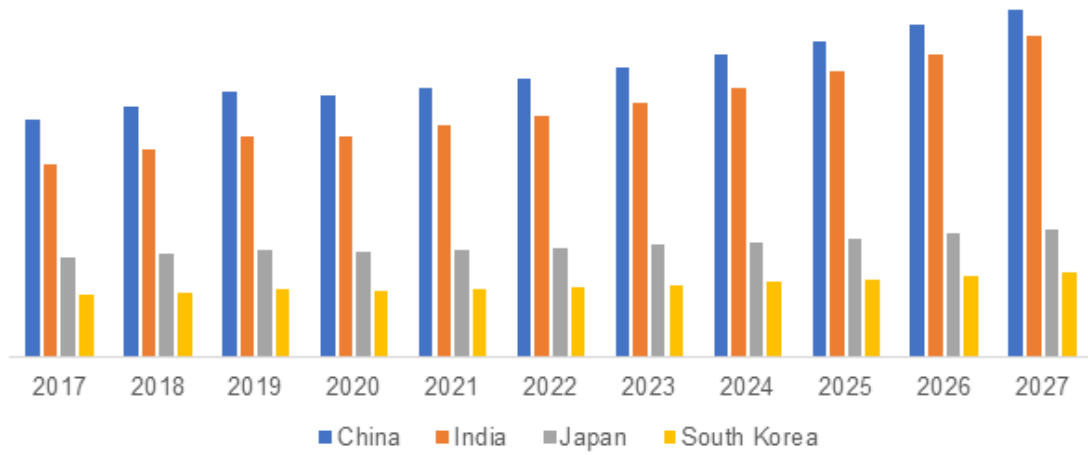
Market Share (%)

DTH Operator	QE Sep'19	QE Dec'19	QE Mar'20
Tata Sky	31.61%	31.80%	32.33%
Dish-D2H	31.23%	30.55%	29.49%
Airtel	23.39%	23.31%	23.65%

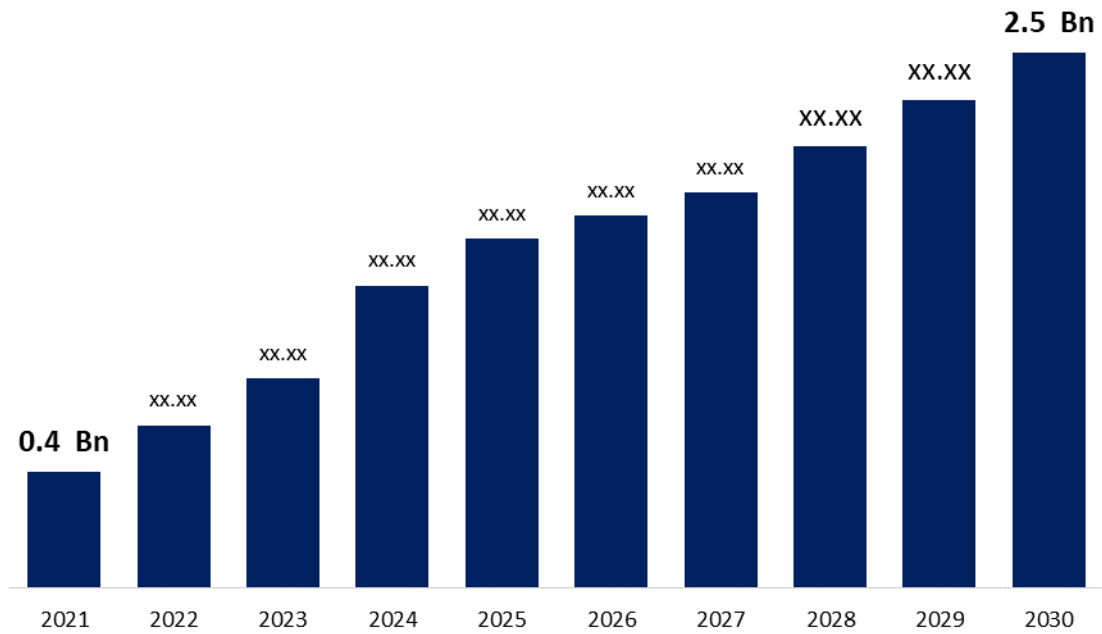
Commented a Tata Sky spokesperson on the report, “The TRAI report shows that Tata Sky has been consistently gaining market share and subscribers at a pace that is faster than any other platform. We believe this can be attributed to our customer centric outlook. The overall increase in DTH subscribers is also a great sign for the M&E sector.”

Quarter ending	Growth (millions)			Growth (%)			
	Sep' 2019	Dec' 2019	Mar' 2020	Q3 vs Q2	Q4 vs Q3	Q3 vs Q2	Q4 vs Q3
Tata Sky	21.91	22.25	22.72	0.34	0.47	1.6%	2.1%
Dish-D2H	21.64	21.38	20.72	-0.26	-0.66	-1.2%	-3.1%
Airtel	16.20	16.31	16.61	0.11	0.3	0.7%	1.8%
Sun Direct	9.55	10.04	10.21	0.49	0.17	5.1%	1.7%
Total DTH	69.30	69.98	70.26	0.68	0.28	1.0%	0.4%

Asia Pacific Set-top Box Market, By Region, 2017 - 2027 (USD Million)



INDIA POSITION IN ASIA PACIFIC SET-TOP BOX MARKET
2017-2027



SET-TOP BOX MARKET IS IN BOOM IN FUTURE.

SWOT ANALYSIS

SWOT analysis can help the brand focus on building upon its strengths and opportunities while addressing its weaknesses as well as threats to improve its market position.

For Both :

- Tata sky
- Dish tv

S - STRENGTH

TATA SKY

The strengths of TATA Sky looks at the key aspects of its business which gives it competitive advantage in the market. Some important factors in a brand's strengths include its financial position, experienced workforce, product uniqueness & intangible assets like brand value. Below are the Strengths in the SWOT Analysis of TATA Sky :

- Leverage on brand TATA and high brand recall
- Partnered with SKY Brand in the space of digital technology to bring a state-of-the-art satellite television service to India
- Leader in introducing new packages and services
- Rural penetration through ITC E-Chaupal and Godrej Aadhar
- Innovative product offering TATA Sky plus
- Adopted 360 degree marketing campaign that encapsulates television, print, radio and outdoor digital platforms
- Tie ups with Sony Pictures, Fox for content – Pay per view service for exclusive events
- DVD Quality picture and CD Quality sound
- 24*7 customer service support in multiple languages

DISH TV

A company's strength is a competitive advantage that allows a company to win, generate value and gain efficiency. Dish TV's strengths are as follow:

- **Change in Business Model:** 10 years ago, the person who led Dish TV decided to change the business model of Dish Tv by deciding not to compete with entrenched cable operators in metros and urban areas, and instead focused on providing services to rural areas and regions not serviced by cable television. From this decision to change the business model, Dish TV acquired more than 350,000 subscribers within 2 years.
- **Merger with Videocon d2h:** In 2018, Dish TV merged with another satellite service provider named Videocon d2h making Dish TV the largest DTH provider in India at the time of the merger.
- **Stakeholders:** Yes bank is the biggest stakeholder at Dish TV where the bank owns about a 25.6 per cent stake in Dish TV and has been pushing for a change in the management.
- **Skilled Workforce:** Staff is very skilled through effective training and learning programs. Dish TV is investing heavily in the training and development of its staff which results in the availability of not only highly skilled workers but also those who are encouraged to achieve more.
- **Reliable Distribution Network:** Over the years Dish TV has built a strong distribution network that can reach most potential markets.
- **Great Performance in New Markets:** Dish TV builds the expertise to enter new markets and make them successful. The expansion has helped the organisation to build a new revenue stream and spread the risks of the economic cycle in the markets in which it operates.

W – WEAKNESS

TATA SKY

The weaknesses of a brand are certain aspects of its business which are it can improve to increase its position further. Certain weaknesses can be defined as attributes which the company is lacking or in which the competitors are better. Here are the weaknesses in the TATA Sky SWOT Analysis:

1. Not having first mover advantage as Dish TV captured market share
2. Dependency on broadcaster
3. Cannot match free service provided by DD
4. Customer service are usually busy and waiting period is usually very long
5. High initial cost of DTH equipment

DISH TV

Weaknesses are obstacles to a company's success in some areas of strategy – in other words, what a company does not do well. Dish TV's weaknesses are as follow:

- **Improper Financial Planning:** Financial planning is not done properly and efficiently. The current level of assets and prices of liquid assets suggests that the company can spend more money than it currently does.
- **Poor Product Forecasting:** It is not very good at predicting product demand which leads to a higher level of lost opportunities compared to competitors. One of the reasons why the calculation of dates is high compared to its competitors is that Dish TV is not very good at predicting forecasts and therefore ends up maintaining high prices inside the house and at the station.

- **Limited Expansion:** The organisational structure is only compatible with the current business model and therefore limits expansion to nearby product categories.
- **Dependency On The Latest Technology:** It depends heavily on technology, including major costs that include using the latest technology. There is a risk that it may go down or have errors, which could stop all business activities immediately.
- **Decreasing Revenue:** There is a constant decrease in annual revenue year on year which is causing Dish TV to suffer in the market. The reason for decreasing annual revenue could be the decreasing sales of its products.

O - OPPORTUNITY

TATA SKY

The opportunities for any brand can include areas of improvement to increase its business. A brand's opportunities can lie in geographic expansion, product improvements, better communication etc. Following are the opportunities in TATA Sky SWOT Analysis:

- Focus on segmentation and differentiated product offerings to expand its clients and spread its reach outside Tier-I cities across the country
- Expand distribution network through exclusive stores
- Growing demand for quality of service in the form of DTH over Cable
- Increase in number of TVs sold
- Penetrate market by competitively priced services, superior technologies, interactive services and customer support
- Provide option of installments and other promotional schemes to the new user

DISH TV

Opportunities are focused on positive external factors that can give an organisation a competitive advantage. Opportunities for Dish TV are as follow:

- **Customers Acquired Through the Web Channel:** Dish TV has gained access to a new sales channel as a result of its big investment in the internet platform. In the coming years, the corporation can diversify on this opportunity by understanding their clients and meeting their demands through big data analytics.
- **Innovation:** Advanced technology integration can help businesses save money, increase productivity, and provide new products faster.
- **New Trends in Consumer Behaviour:** New styles of consumer behaviour can open up a new market for Dish TV. It provides an excellent opportunity for an organisation to build revenue streams and split new product categories as well.
- **New Customers From Online Channels:** Over the past few years, the company has invested heavily in the online platform. This investment has opened up a new marketing channel for Dish TV. Over the next few years, the company can take advantage of this opportunity to get to know its customers better and provide for their needs using big data analytics.
- **Strategic Alliance:** Dish TV should think of a strategic exclusive alliance with Bollywood and sports events like IPL in India or broadcasting type-ups with Bollywood film producers. The move will increase the recognition of the company and will ultimately help to increase its sales.

T – THREATS

TATA SKY

The threats for any business can be factors which can negatively impact its business. Some factors like increased competitor activity, changing government policies, alternate products or services etc. can be threats. The threats in the SWOT Analysis of TATA Sky are as mentioned:

- 1. Interoperability regulations
- 2. Cables set top boxes provide easy switching due to negligible switching costs
- 3. Increasing competition
- Dependency on broadcasters for their channel content and thus increase in cost
- No Exclusivity in Content and Rule of ‘Must Carry’
- Cap on foreign investment

DISH TV

Threats include anything that could disrupt your business externally. Dish TV’s threats are as follow:

- **Heavy Competition:** There are companies like Tata Sky, DEN TV, Airtel, etc which are an endless challenge in the broadcast industry. Not only that but the growing power of local distributors also poses a threat to other markets as the competition pays higher margins to local distributors.
- **External Conflicts:** Dish TV is facing conflicts with its biggest stakeholder – Yes Bank in which the group Essel is also taking interest to buy back Dish TV shares from Yes Bank. The dispute is hurting Dish TV’s growth prospects where Yes Bank wants to be a controlling shareholder.

- **Quality Issues:** Dish TV is facing picture quality issues as compared to its competitors like Tata Sky and Airtel who are using high-quality digital IPTV players to broadcast the shows.
- **New Technology Development:** New technologies developed by a competitor or market disruptor could be a major threat to the industry in the future for the long term.
- **Heavily Regulated Industry:** Making changes is difficult as it is a heavily regulated industry with a lot of restrictions and policies.

CONCLUSION OF THE STUDY

The conclusion of this research on the basic of objectives and study and analysis are as follows-

- The marketing tactics of Tata Sky are next to perfect for maintaining the first position in market share.
- And Dish TV holds second position.
- The offerings made by company towards its consumers are fulfilled properly and due to that Tata Sky is said to be a reliable company maintaining satisfied consumers.
- Tata Sky hold first position in DTH market share as per of latest survey by govt. & Dish TV hold second position.
- Tata sky is much better then Dish TV.
- Tata sky & Dish TV have much more scope in future in DTH market.
- Tata sky is now Tata Play .

RECOMMENDATION & SUGGESTION

- The marketing of Tata Sky & Dish TV apart from TV/Newspaper are bit low compared to other DTH service provider.
- To tackle that problem Tata Sky & Dish TV should promote their product more on local and divisional level to make them as effective as other aspects of marketing.
- The user interface Dish TV is bit laggy and slow for daily usage considering the price point and competition. Dish TV should develop their interface and make it more user-friendly.
- Tata Sky has relatively good customer service as compared to Dish TV .
- Tata sky packages are a bit costly. Consumers should do a good research of the packages and it's pricing so they can appropriately choose according to their needs.
- As of the disclaimer I would say there has rarely been a case of such drop in packages also if the channels are moved to a base pack consumers are still likely to view the channel provided we are in the base pack it is moved to.
- Increase in the length of cable- the 12 meters cable should be long enough to reach from the Antenna to TV as they have mentioned if additional requirements it'll be charged.

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- <https://www.dishtv.in/>

DATA COLLECTION SOURCE

TATA SKY & DISH TV - <https://groww.in>

DATA COLLECTION (FINANCIALS)

REVENUE OF TATA SKY



REVENUE OF DISH TV



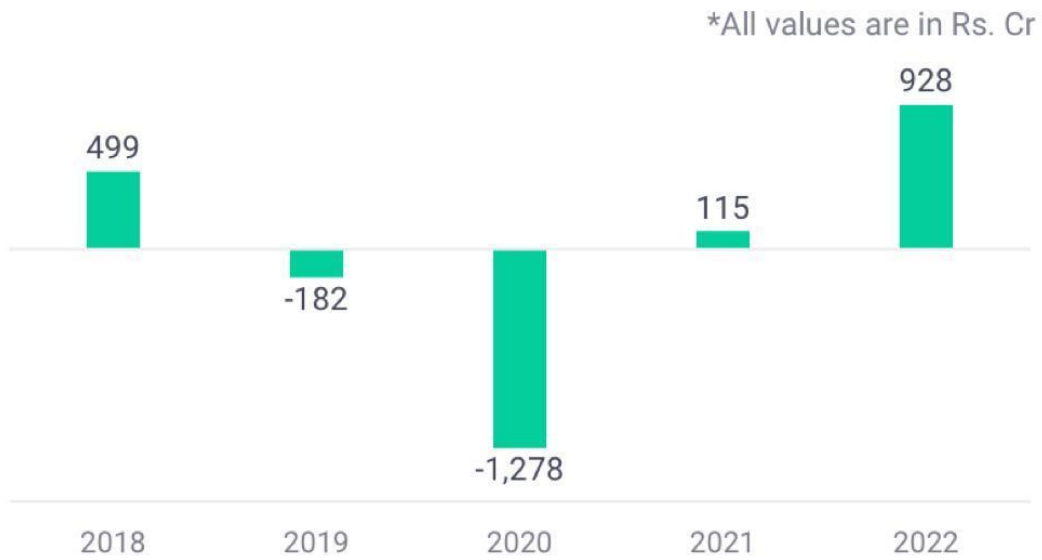
PROFIT OF TATA SKY



PROFIT OF DISH TV



NET WORTH OF TATA SKY



NET WORTH OF DISH TV

