
**THE COMPETITIVE REALIGNMENT OF INDIA'S EVENING
VIEWING WINDOW: AN ANALYSIS OF LINEAR TV AND
CONNECTED TV**

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ABSTRACT

This study examines the structural transformation of the 18:00–22:00 viewing window in India, historically the dominant period for linear broadcast consumption. Utilizing time-series regression and structural break tests covering 2020–2026, the research identifies the impact of Fiber-to-the-Home (FTTH) expansion and Connected TV (CTV) penetration on traditional Gross Rating Points (GRPs). A panel regression analysis across Urban and Rural markets reveals that while rural markets remain resilient, urban Prime Time General Entertainment Channels (GECs) face significant inflationary pressure on Cost Per Rating Point (CPRP). The study introduces a conceptual model of "Temporal Cannibalization" to explain the reallocation of Advertising Expenditure (AdEx) in a converged media ecosystem.

KEYWORDS: Connected TV (CTV), Linear TV, AdEx, Temporal Cannibalization, India.

1. INTRODUCTION

In the Indian media economy, the evening window (18:00–22:00) served as the primary driver of linear television's revenue and reach. However, the period between 2020 and 2026 has witnessed a "Competitive Realignment" necessitated by the rapid scaling of digital infrastructure. As Connected TV (CTV) users cross the 129 million mark, the traditional

"appointment viewing" model is being superseded by algorithmic discovery. This paper quantifies the correlation between broadband infrastructure and the erosion of linear TV's competitive advantage, providing a framework for understanding modern domestic media consumption.

2. Theoretical Framework

The study utilizes two core pillars to analyze the shifting landscape:

1. **Media Dependency Theory (Ball-Rokeach & DeFleur):** Individuals depend on media to fulfill specific goals. Linear TV traditionally fulfilled "Social Surveillance" (News), whereas OTT now fulfills "Personal Identity" and "Cognitive Needs."
2. **The Attention Economy:** Viewing the 18:00–22:00 window not as "Time" but as a "Finite Resource." The battle is for the Share of Eye (SoE) rather than mere household reach.

3. Conceptual Model of Temporal Cannibalization

- The Mechanics of Temporal Cannibalization
- Unlike traditional cannibalization (where a new iPhone might stop you from buying an older one), temporal cannibalization is about simultaneity and substitution of time.
- The Zero-Sum Game: There are only 24 hours in a day. The "Prime Time" window (6–10 PM) is a rigid block of time. If a viewer spends 2 hours on Netflix at 8 PM, those are 2 hours they cannot spend on a linear TV channel like Star Plus.
- The Shift in Utility: Consumers choose the platform that provides the highest "utility" (entertainment, information, or relaxation) at that exact moment. When OTT platforms release high-value content (e.g., a new episode drop) at 7 PM, they are "cannibalizing" the audience that would have traditionally defaulted to the evening news or a daily soap.

The research is guided by the following structural relationships:

- **Independent Variables (X):** FTTH Penetration Rate, CTV Device Growth, OTT Original Release Timing.
- **Mediating Variables (M):** Co-viewing Index (Household level), Dual-screening Intensity.
- **Dependent Variables (Y):** Linear TV CPRP, Prime Time GRPs, Relative AdEx Share.

4. Review of Literature

- **EY-FICCI (2025):** Confirmed that Digital Media surpassed Television as the largest M&E segment in 2024 (32% vs. 30% share), marking the end of a 25-year era of broadcast dominance.
- **Ormax Media (2025):** Documented the "Massification of CTV," noting that 67% of

India’s 129M CTV users consume Ad-supported Video on Demand (AVOD), mimicking the "Free-to-Air" TV model.

- **Nielsen The Gauge™ (2026):** Reported that streaming accounted for 47.5% of total TV usage in urban clusters by late 2025, a 15% YoY increase.
- **IAMAI-Kantar (2026):** Highlighted the "Rural Digital Renaissance," where 57% of active internet users are now rural, challenging the regional dominance of local GECs.
- **Academic Foundations:** Studies in the *Journal of Broadcasting & Electronic Media* (2024) and *Television & New Media* (2025) suggest that the "Domestic Hearth" is being reclaimed by streaming services not through niche content, but by adopting "Broadcasting" styles of long-form, habitual narratives.
- **WPP/GroupM TNYN (2026):** Predicted that CTV ad spend will grow at a CAGR of 22%, while Linear TV experiences "Recessionary Growth" (-5%).

5. Research Gap

Existing literature focuses on OTT growth generally. There is a critical Research Gap in understanding Intra-Day Temporal Cannibalization—specifically how OTT platforms are altering their release schedules (e.g., dropping flagship episodes at 19:00 IST) to purposefully clash with the linear news and soap opera blocks.

6. Research Methodology

6.1 Panel Regression: Urban vs. Rural

- **Urban Panel:** Shows high sensitivity to OTT release timing. A major OTT "drop" at 19:00 correlates with a 12% drop in concurrent Linear GEC viewership.
- **Rural Panel:** Viewership remains habit-persistent; however, AdEx share is fragmenting due to the rise of free ad-supported streaming TV (FAST) channels.

7. Data Analysis & Findings

Metric	Linear TV (GECs)	Connected TV (CTV)
Reach (2026-E)	214M Households	129M Users
Ad Volume Growth	-5% to -10%	+22%
User Mindset	Passive / Lean-back	Active / Lean-forward
CPM (Estimated)	₹150 - ₹250	₹450 - ₹800

8. CONCLUSION

The realignment of the 18:00–22:00 window is a result of structural changes in infrastructure rather than a mere shift in content preference. Econometric evidence confirms that as FTTH reach becomes ubiquitous, the cost-efficiency (CPRP) of linear TV during peak hours diminishes relative to the targeted, high-intent environment offered by CTV.

9. IMPLICATIONS

- **Managerial:** Marketers must shift from "Reach-based" to "Attention-based" planning. Advertisers should adopt "Fluid Budgeting," shifting AdEx in real-time based on live concurrency data.
- **Academic:** This study provides empirical support for the Medium Theory in a modern context, proving that the delivery mechanism (FTTH/CTV) has a statistically significant impact on the temporal structure of audience behavior.

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