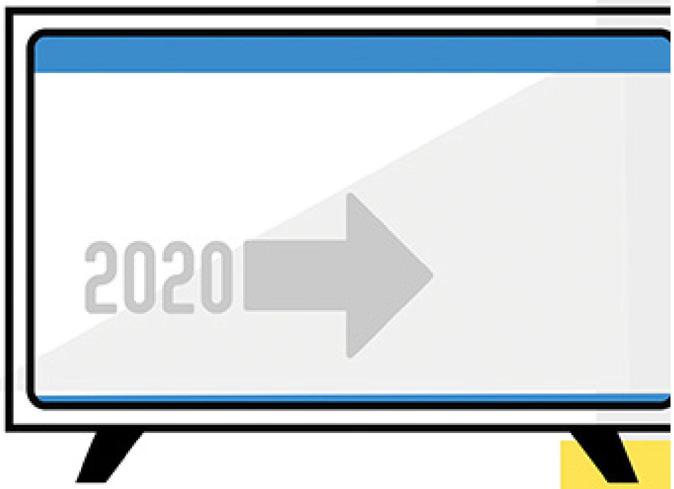
BROADCAST AUDIENCE RESEARCH COUNCIL INDIA
What India Watches™

THE YEAR AFTER TWO THOUSAND & NINETEEN

WHAT INDIA WATCHED

3RD EDITION



Indian Broadcasting Foundation | Advertising Agencies Association of India | The Indian Society of Advertisers

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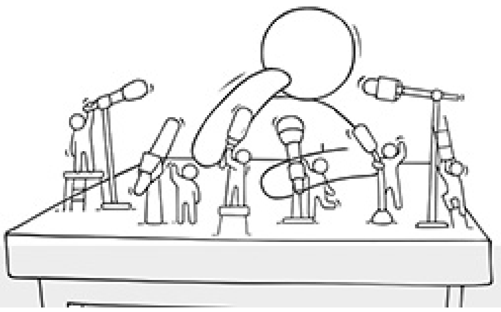
Audience Estimates are derived from survey samples and as such are subject to variation.

Figures for Viewership and Advertising Volumes have been rounded off to whole numbers. Growth/Decline, where represented are derived from the actual YUMI data outputs.



2021 – A TIME TO REBOOT – FROM THE YEAR AFTER 2019

The year 2019 (+1) is how many of us would remember the year gone by!

The virus was nature's way of saying enough is enough. We experienced its fury, lives were lost and so were livelihoods. Climate change came into focus especially when nature's true beauty and bounty surfaced sporadically, and expressions of awe were heard around the globe. It was a loud wake-up call!

The world came to a near standstill. But by and large, people learned to cope.

There is, however, one lasting memory.

"Families bonding together and relying on each other".

News and Entertainment played a significant role during this time. People gathered around their TV sets, spending quality time reliving the mythological classics which resurfaced along with the reintroduction of other memorable content from yesteryears.

Television viewership was at its peak in March, breaking all TV viewership records as Ramayan and Mahabharat made a comeback on our TV screens and in our lives. Ramayan now holds the record of the most watched TV program in the world!

The year 2019 (+1), was a consolidation and reaffirmation year for Television in India. The 'Janata Curfew' ensured that everyone stayed at home and that in turn fuelled TV viewership. A considerable spike of 23% in viewership was recorded between mid-March to June compared to January to early March, clocking an average of over 1 trillion viewing minutes weekly!

As India stepped into the unlock mode in July, broadcasters too unlocked their original programming of big-ticket properties and live coverage of on-ground sports, returned to Television. Advertising bounced back in the second half, with a 34% volume growth compared to the first half of the year.

BARC India seamlessly served its subscribers with the weekly release of data, responding to queries and needs, enrolling new subscribers et al, while much of the workplace around us, was WFH.

On behalf of all of us at BARC India, I would like to take this opportunity to express my heartfelt sympathies to those who may have lost their near and dear ones during these troubled times and also to those who have suffered untold hardships.

As we prepare for new beginnings and the challenges awaiting us, I would like to reiterate that we have taken this time to set ourselves individual and professional goals and continue to work towards our vision: **To always be the trusted source of authentic measurement and reporting of 'What India Watches™', enabling value enhancement for BARC's stakeholders, enshrined within our values of always Acting with Integrity, Delivering Excellence, Collaborating Consistently and Cherishing the Spirit of Life.**

After an extremely transformative year at BARC India, we have stepped out into the new year with a confidence supported by a completely reassured belief in the exacting standards we have set for ourselves.

May 2021 bring peace, vitality and prosperity to all.

It is a year to reboot.

Sunil Lulla
Chief Executive Officer
BROADCAST AUDIENCE RESEARCH COUNCIL

MESSAGE FROM OUR CHAIRMAN

PUNIT GOENKA
Chairman, BARC India

"It was a game changing year for the Media & Entertainment industry, as the consumption patterns evolved at a rapid pace and viewership of content across all platforms surged to newer levels. The year also presented a unique set of challenges and opportunities. It was encouraging to note that the team at BARC India continued to maintain an undeterred positive approach, with a sharp focus on offering value, to all the stakeholders. 2021 will be a significant year. A year to rise up against all odds. On behalf of all members of the Board, I wish the team at BARC India, all the very best."

MESSAGES FROM OUR STAKEHOLDERS

"The M&E sector is poised for 4x growth over the next decade, and we have already got a glimpse of that potential in a very challenging year. With just about 66% penetration, television will continue to drive expansion of the M&E industry. While there were many points of instability for broadcasters in 2020, I feel proud to say that BARC India provided the much-needed solidity and steadiness with its weekly data and insights into television viewing habits of Indians. The IBF will continue to provide support to BARC India and ensure that our measurement system is at par with global standards."

MADHAVAN K.
President,
Indian Broadcasting Foundation (IBF)

ANUPRIYA ACHARYA
President, Advertising Agencies Association of India (AAAI)

"In the fast paced and dynamic industry that we operate in, success is defined by reliable data and strong research. That's what enables brands and markets to keep in touch with evolving consumer tastes and preferences. In this context, BARC India has done an outstanding job, the limitations of the pandemic induced disruptions in 2020 notwithstanding! Wearing the twin hats of an end-user of BARC India data and that of a member of its Board now, I hope to contribute to the next phase of the organisation's growth."

"I have said this earlier – the best way to serve your customer is to innovate for them. From fortifying its technology and processes, ensuring timely data release during lockdown, to moving the engagement with its stakeholders online, BARC India kept in pace with the new normal. The pandemic has fast-forwarded India's digital journey and going forward its critical to build a robust digital measurement currency. As a member of the BARC Board, I certainly hope to catalyse that journey."

SUNIL KATARIA
Chairman, The Indian Society of Advertisers (ISA)

THROUGH THE LOOKING GLASS

2020 was a year marked by a substantial increase in television viewership.

Total TV Viewership grew by 9%, driven by ATS (Average Time Spent) clocking 4 hours 2 minutes daily in 2020 from 3 hours 42 minutes in 2019. Viewership for General Entertainment Channels (GEC), News, Movies and Kids genres grew, largely due to the COVID-19 lockdown, when families were homebound for an extended period. An overwhelming majority of Indians turned to their TV screens – which served as a window to the outside world, even as it retained its status as the pre-eminent destination for the 'daily dose of entertainment' for the entire family.

Simultaneously, with the pandemic putting the brakes on live sports events, sports viewership dipped for most of the year, although IPL-13 did inject some cheer back in the Sports genre towards the end of the year.

With a clutch of free-to-air (FTA) Hindi GECs returning to the DD FREE DISH platform in 2020 after about a year's gap, viewers transitioned from Music / Youth genre. This, followed by a few Music / Youth channels going off-air, led to the viewership decline in the genre.

Weekly Viewing Minutes (Bn)

Genres	2019	2020	Change %	Genre share in 2020
GEC	456	498	09%	50%
MOVIES	217	238	10%	24%
NEWS/ BUSINESS NEWS	82	104	27%	10%
KIDS	58	74	27%	07%
MUSIC/ YOUTH	56	50	-11%	05%
SPORTS	29	19	-35%	02%
MISC*	14	16	12%	02%
TOTAL	914	999	09%	100%

All India, 2+ / Week 1-53 2019 & Week 1-52 2020|All channels
Misc: Infotainment, Lifestyle, Teleshopping, Devotional, Others*

Viewership Split by Geography

Viewership rose across geographies and markets, with a slightly higher growth observed in Urban over Rural India, and in Hindi Speaking Markets (HSM) over the South Markets.

● Weekly Viewing Minutes (Bn)

	01 INDIA	02 URBAN	03 RURAL	04 HSM	05 SOUTH
2019	914	444	470	570	344
2020	999	494	505	627	372
Growth vs 2019	09%	11%	08%	10%	08%
Share (2020)	100%	49%	51%	63%	37%

Viewership Split By Sex

Television viewing in India has always been a "family affair", with a high volume of "co-viewing". With families at home, Male and Female viewership grew in parallel.

● Weekly Viewing Minutes (Bn)

	01 INDIA	02 MALE	03 FEMALE
2019	914	457	457
2020	999	496	502
Growth vs 2019	09%	09%	10%
Share (2020)	100%	49.7%	50.3%

Respective Markets, 2+| Week 1-53 2019 & Week 1-52 2020|All channels

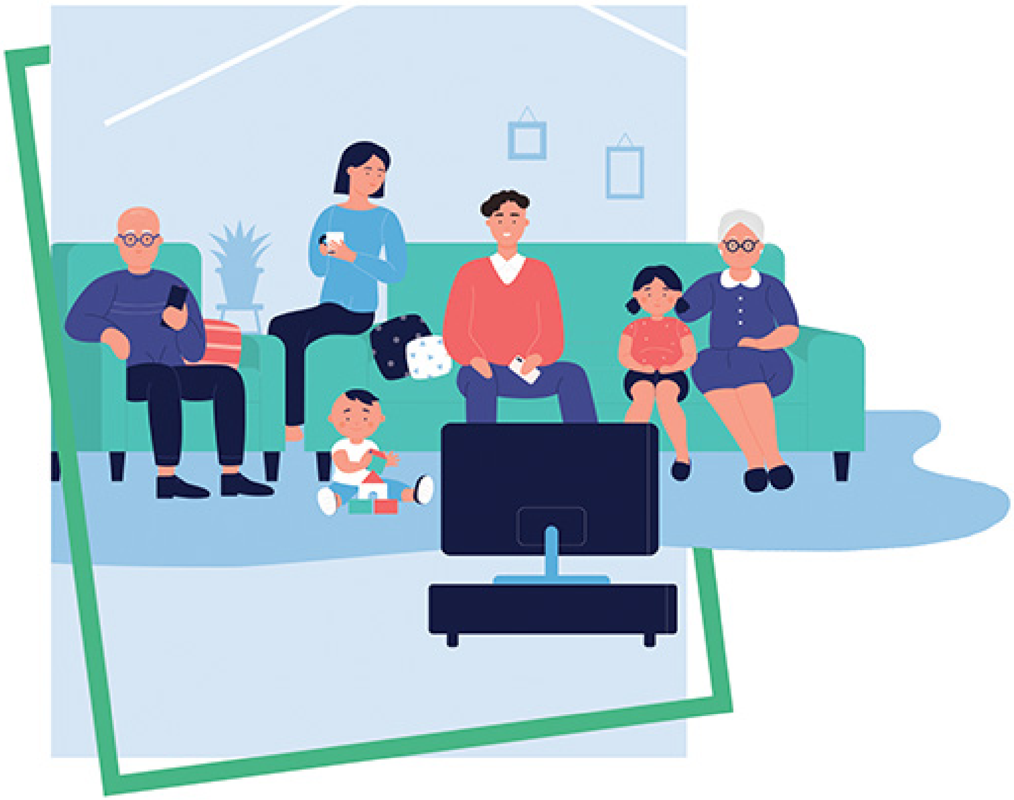
ADVERTISING VOLUMES (MN SECS)

All genres experienced a decline in Ad Volumes with the exception of Movies which grew by **09%**

The Ad Volume trend differs from viewership trend where the fall was observed only in Music / Youth & Sports genres

Genres	2019	**2020**	Change %	Genre share in 2020
GEC	381	377	-01%	25%
MOVIES	322	350	09%	23%
NEWS/ BUSINESS NEWS	490	485	-01%	32%
KIDS	50	47	-06%	03%
MUSIC/ YOUTH	209	165	-21%	11%
SPORTS	19	15	-19%	01%
MISC*	70	57	-18%	04%
TOTAL	1542	1497	-03%	100%

Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories
Jan to Dec 2019 & 2020|All channels
Misc*: Infotainment, Lifestyle, Teleshopping, Devotional, Others



NON-PRIME-TIME: THE NEW PRIME-TIME

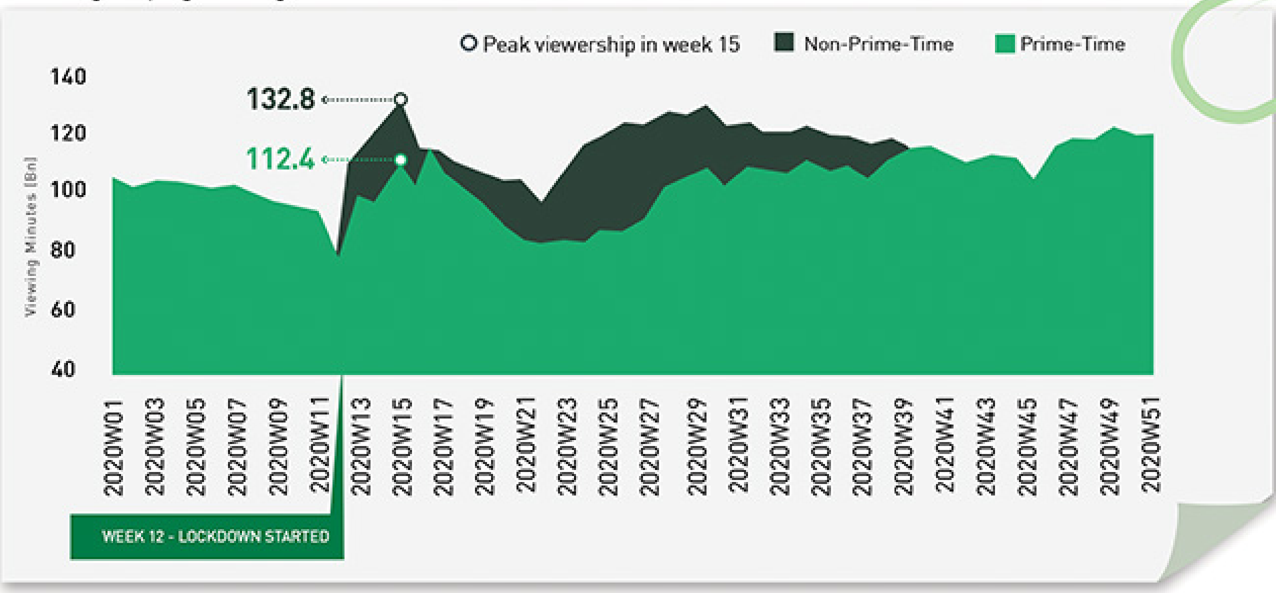
NON-PRIME-TIME EMERGED AS THE NEW PRIME-TIME

The healthy growth of television viewership in 2020 was built around non-prime-time (NPT) viewing, which rose sharply during the lockdown period, and maintained those levels for a large part of the year. With families at home 24x7, there was a visible impact on the volume of daytime viewing, and the share of non-prime-time viewing in total TV Viewership rose from 51% in 2019 to 53% in 2020.

	NPT Change % in 2019 over 2018	NPT Change % in 2020 over 2019	NPT Share to Full Day in 2019	NPT Share to Full Day in 2020
Total	-01%	13%	51%	53%
GEC	-04%	16%	44%	46%
Movies	-05%	11%	54%	55%
News	18%	26%	56%	55%
Kids	-02%	31%	71%	73%
Music / Youth	04%	-10%	73%	74%
Sports	21%	-35%	38%	38%
Misc*	01%	10%	64%	63%

All India, 2+ / Based on Weekly Viewing Minutes in NPT (06:00 to 18:00) / Week 1-52 2018, Week 1-53 2019 & Week 1-52 2020 | All channels
Misc: Infotainment, Lifestyle, Teleshopping, Devotional, Others*

Even for Hindi GEC, non-prime-time garnered higher viewership than prime-time for the period when original programming was unavailable.



Hindi GEC / HSM / 2+ / Viewing Minutes (Bn) / Non-Prime-Time i.e., 06:00 to 18:00 / Prime-Time i.e.,18:00 to 23:00

COMMUNICATION FROM THE GOVERNMENT

Television was a key force multiplier in the government's response to the coronavirus pandemic. With its significant all-India penetration, TV played an important role in disseminating news and information of the pandemic and the government's steps to battle it.

The April-June 2020 quarter (largely, the successive lockdown periods), witnessed the highest volumes for government messaging, with the category witnessing a tripling of advertising over the same period in 2019.

Overall, 2020 saw a **12%** growth in social / government advertisement volumes on TV.

Social Advertisements-Govt
(Ad Volume in Mn secs)

Period	2019	2020	Change %
Pre-COVID	33	21	-36%
COVID: During Lockdown	11	30	184%
COVID: Unlock	17	19	07%
Year-ender	19	20	04%
Grand Total	**80**	**90**	**12%**

Jan to Dec 2019 & 2020 / All channels

THE PRIME MINISTER'S ADDRESSES TO THE NATION

Prime Minister Narendra Modi's addresses to the Nation set new viewership benchmarks every time he appears on television. Whether they are his interviews, speeches at global events, addresses to the nation or even a wildlife adventure show, channels that broadcast the content see their viewership leapfrog and set new levels.

It took the PM's national address on 19th March 2020 for the country to sit up and take note of COVID-19 in the very early stages of the global pandemic. The PM called for a one-day Janata Curfew and followed that up with the announcement of a 21-day National Lockdown on 24th March 2020. The telecast saw Viewing Minutes more than treble over that of his previous address. There was much anticipation for the Prime Minister's speech on 14th April 2020 as well, where he announced Lockdown 2.0. With 203 Mn viewers tuning in, this turned out to be the most tuned-in of all his seven 'COVID-19 addresses'.

Each time the PM's coronavirus related addresses were aired, there was a noticeable drop in viewership of major genres like GEC, Movies and Kids. The PM's 5th address to the nation on 12th May 2020, where he announced an INR 20 Lakh Cr financial package, became the most watched address with 4.3 Bn Viewing Minutes.

TOP 3 COVID-19 RELATED SPEECHES BY PM MODI

COVID-19
(5th Address)/
INR 20 Lakh Financial
Package Announced

12th May 2020

193 **4.3**

COVID-19
(4th Address) / Lockdown 2.0

14th Apr 2020

203 **3.9**

COVID-19
(2nd Address) / 21-day Lockdown

24th Mar 2020

196 **3.9**

No. of Viewers (Mn)   Viewing Minutes (Bn)

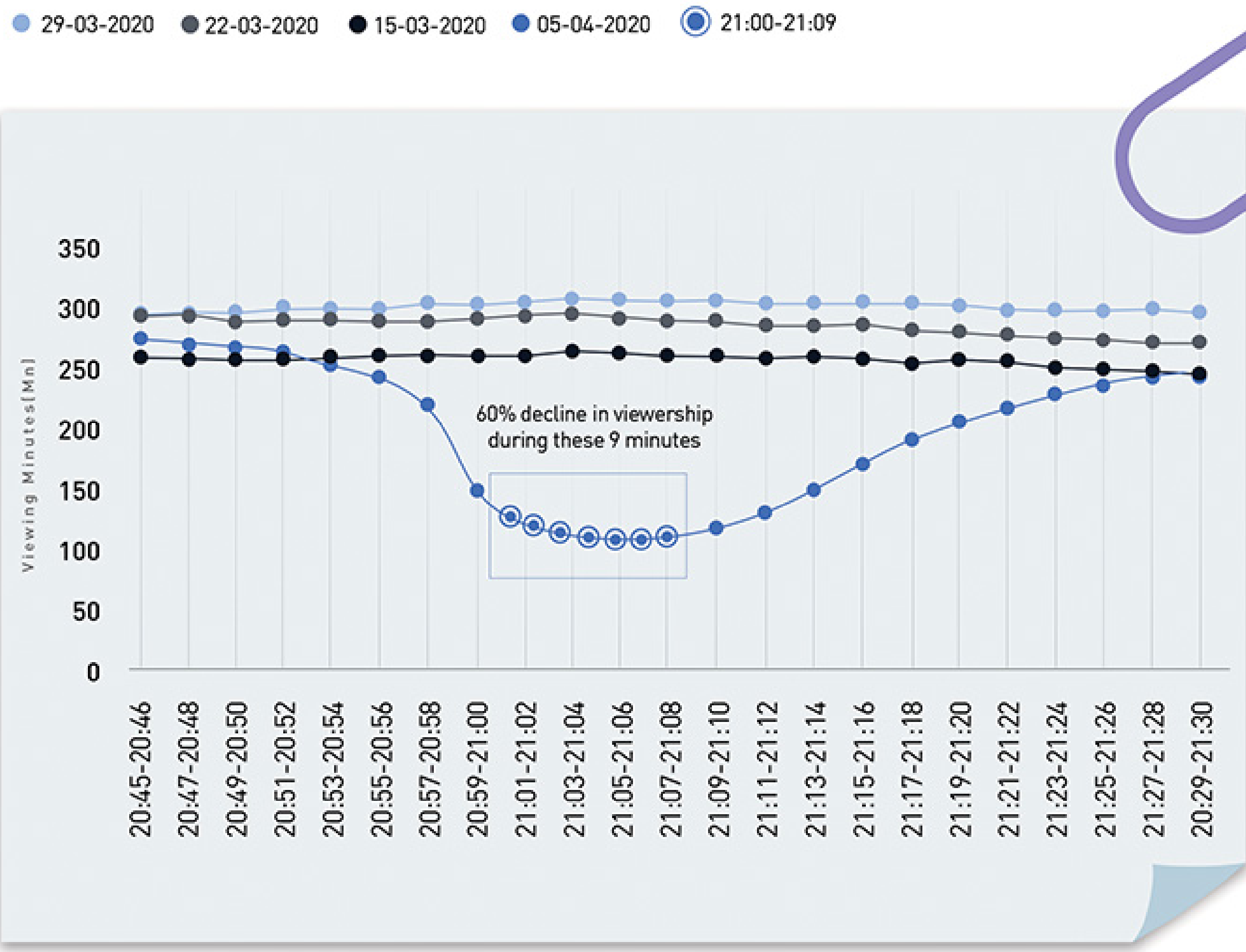
All India, 2+ Count of channels airing the speeches differ

THE IMPACT OF PM'S 9-MINUTES BLACKOUT CALL

The PM's "9-PM-9-Minutes" solidarity call for a nation-wide blackout by turning off all lights at home, and lighting of diyas and candles, was a reassuring success. However, evidently, people also decided to switch off their TV sets in this period and this was reflected in a decline of 60% in TV viewership during these 9 minutes.

*BARC's data for that period was validated by a report of the Power System Operation Corporation Ltd. (POSOCO). It said that "trend of TV switch off data very well correlates to (power) demand drop as well as demand pick up post event."

MINUTE-ON-MINUTE VIEWING MINUTES (MN)



*https://posoco.in/wp-content/uploads/2020/05/Report-on-Pan-India-Lights-Off-Event-9-PM-9-Minutes-on-5th-April-2020-1.pdf

FROM THE RAMPARTS OF THE RED FORT

Independence Day Speech (Live Telecast)

The anticipation and engagement with audiences that the PM is able to drive, was once again proven by the data of his 2020 Independence Day address. Viewership of his I-Day speech clocked a phenomenal 4.6 Bn Viewing Minutes, up by over 40% over previous year.

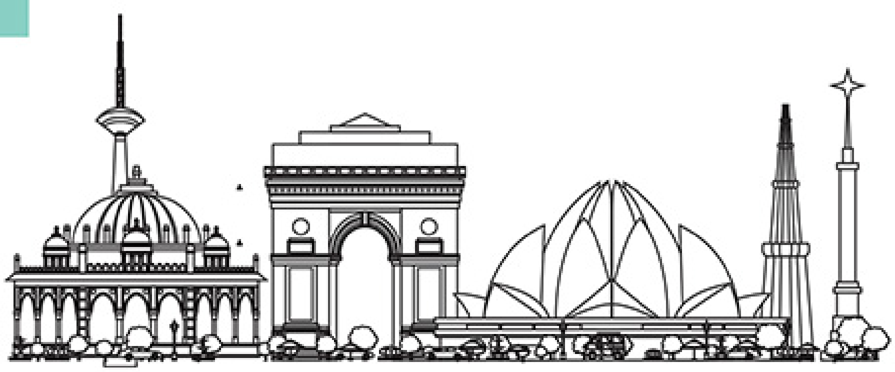
Year	Channels	Duration (in mins)	No. of People who viewed the telecast (in Mn)	Viewing Minutes (Bn)
2018	187	150	121	3.6
2019	192	126	109	3.3
2020	195	152	133	4.6

All India, 2+

BARC NUGGETS

The episode of 'Into The Wild with Bear Grylls' with PM Modi was watched by 15.6 Mn Viewers and garnered 399 Mn Viewing Minutes

*All India 2+



TOP NEWS EVENTS

In the year of the virus, there were several other events and developments that made news across the 52 weeks of 2020.

Once the families were locked-in within their homes, news channels became a window to the anxious world outside. The share of News in total TV Viewership tripled during the lockdown period, from its earlier average of 7% of total Viewership.

NEWS PEAKS

Week 12 garnered the highest Viewership till date

260Bn

Viewing Minutes

with the telecast of the PM's Janata Curfew address and news around outbreak of coronavirus.

This even surpassed the previous high of: Week 9 2019 (The Balakot airstrike and Wing Commander Abhinandan Varthaman's return) with

148Bn

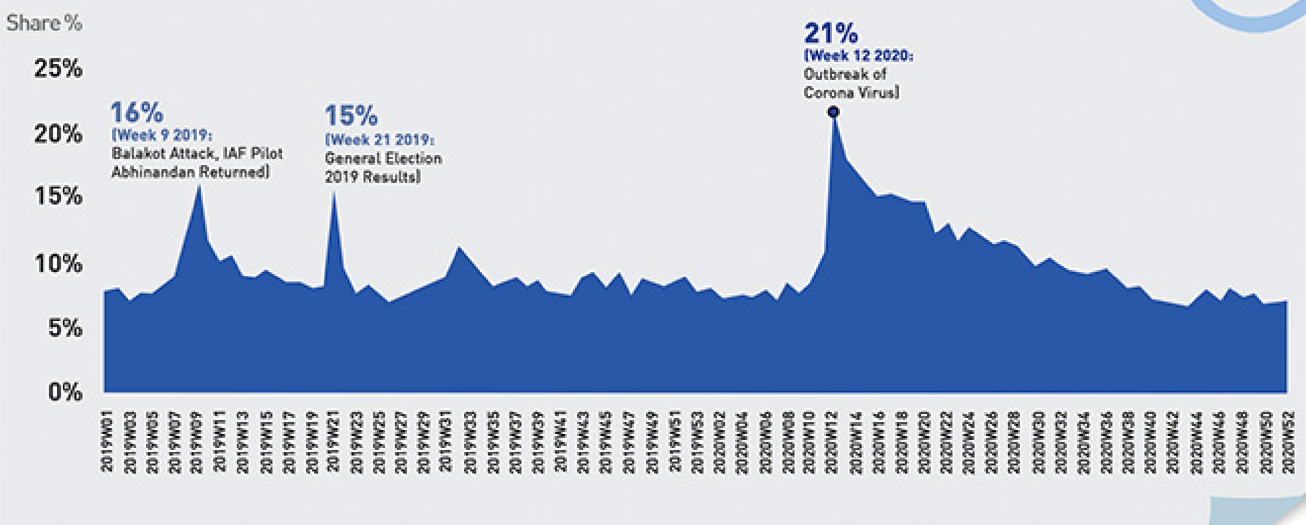
Viewing Minutes.

As well as the high of Week 21 2019 (General Elections) with

144Bn

Viewing Minutes.

News Genre Week-Wise Share%



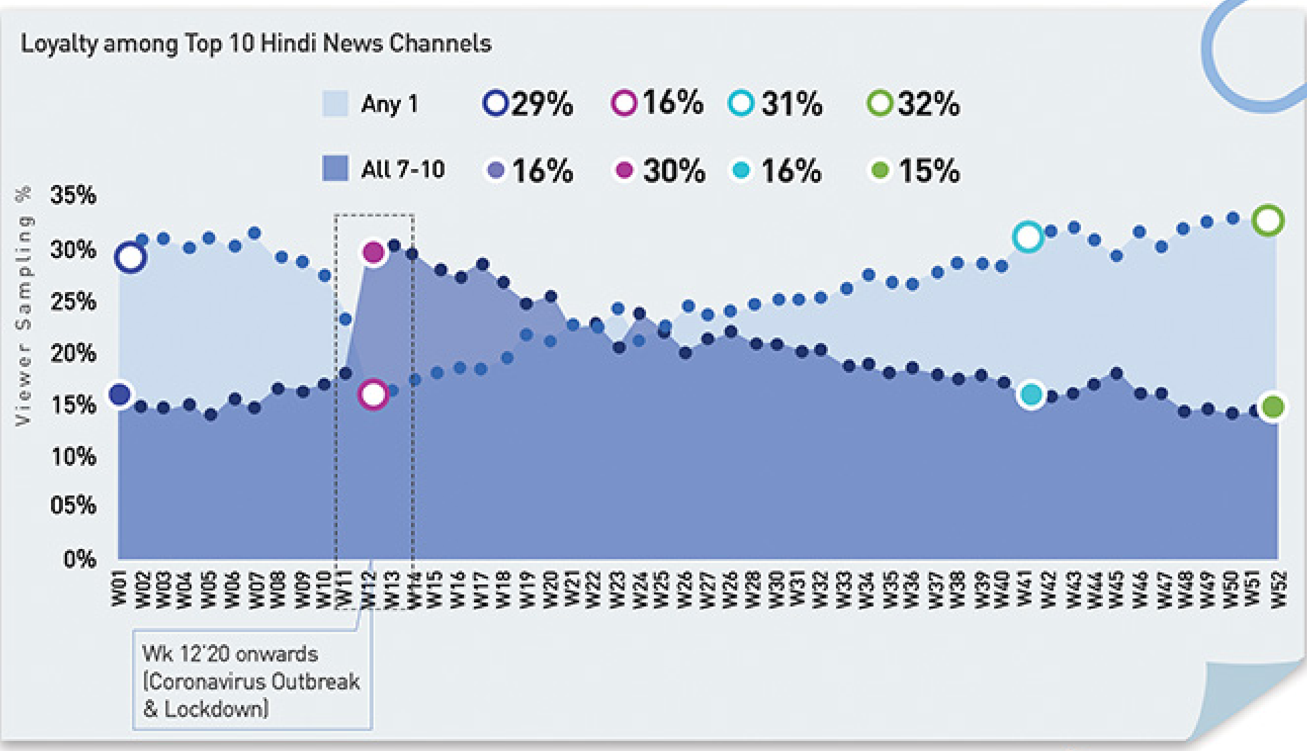
All India, 2+ / News / Business News

VIEWER SAMPLING TRENDS AMONG TOP HINDI NEWS CHANNELS

Whenever events that seriously impact people's lives occur, data indicates that TV viewers tend to 'scan' for more varied news and points of view by sampling multiple channels. This was true during the lockdown.

Hindi News Viewers sampling all 7-10 channels grew from 16% in week 1, 2020 to **30%** in Week 12, 2020.
This returned to its previous levels by the end of 2020.

Hindi News – Usually 70% of Hindi News Viewers watch more than 1 channel. In Wk12'20, that number rose to 84%



HSM / 15+ / Viewers loyalty of Top 10 Channels
(Top 10 channels on the basis of entire year's data)

BARC NUGGETS

TOP SINGER MEGA MARATHON GRAND FINALE episode ran for over 14 long hours!

*Kerala 2+

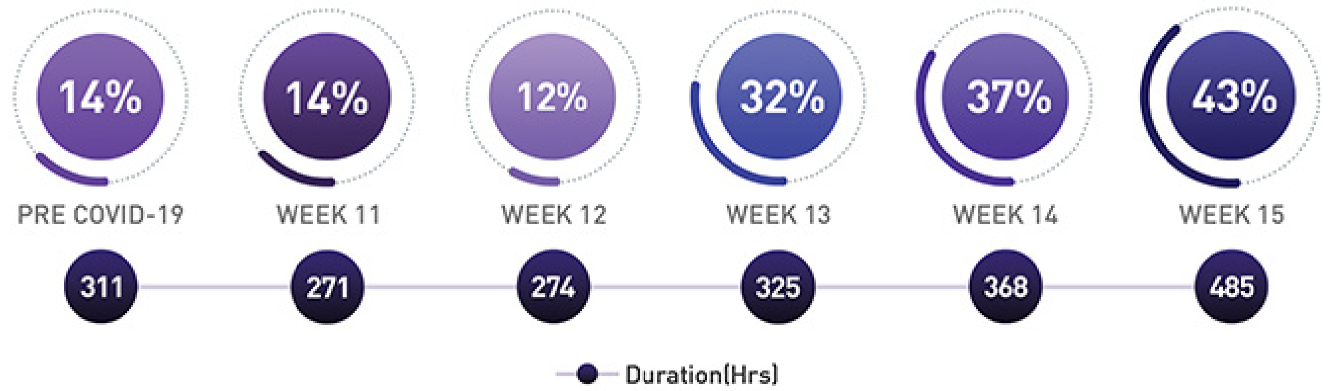
DOORDARSHAN: SUCCESS DOWN MEMORY LANE

With fresh content supply lines drying up, broadcasters fell back on their archived content. And here, Doordarshan stole a march over its peers with a masterstroke as it pulled out classics from yesteryears like Ramayan, Mahabharat, Shri Krishna, Shaktimaan, etc., in what turned out to be a clever programming strategy. The content that DD served up, also seems to have resonated in times of stress with both – those who re-lived the era when these were broadcast earlier, as well as a younger audience who saw this programming for the very first time while sharing screen time with nostalgic adults.

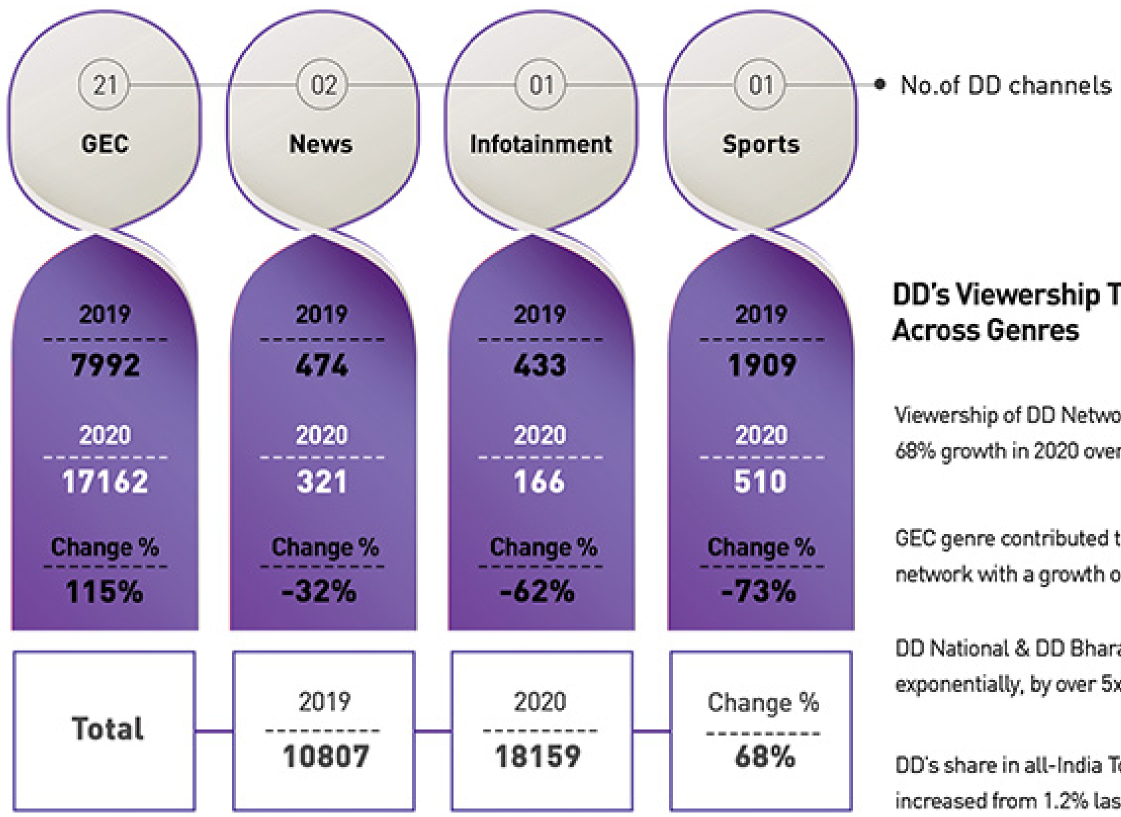
The re-runs of the classics catapulted DD National to pole position among GECs, once again proving that appealing Content remains King.

The viewership contribution of Mythological shows to the Hindi GEC genre, spiked from a mere 14% Pre-COVID to 43% by Week 15, 2020.

Contribution of Mythological Shows to Hindi GEC Viewership (%)



HSM 2+ / SOV based on Viewing Minutes / Mythological Show classification based on Programme Genre – "Mythological / Costume Drama"



DD's Viewership Trend Across Genres

Viewership of DD Network witnessed a 68% growth in 2020 over 2019.

GEC genre contributed the highest to the network with a growth of 115%.

DD National & DD Bharati leapfrogged exponentially, by over 5x & 10x respectively.

DD's share in all-India Total TV viewing increased from 1.2% last year to 1.8% in 2020.

All India, 2+ Weekly Viewing Minutes (Mn)
**DD Sports not reported from week 16 to week 35*

GROWTH OF DD CHANNELS IN 2020

Weekly Viewing Minutes in Mn

Channel	Wk01-10	Wk11-26	Wk27-37	Wk38-52	Full Year
DD National	971	25367	6875	3587	10481
DD Bharati	110	9579	495	162	3120
DD Sahyadri	796	1052	991	648	873
DD Sports	2152	241	69	423	828
DD Punjabi	630	384	380	407	437
DD Retro	NA	785	184	140	356

All India, 2+ / Across all 25 DD Channels
**DD Sports not reported from week 16 to week 35*
Full year avg. for DD Sports calculated excluding week 16 to 35
***DD Retro was launched in Week 15 2020*

DD National's viewership grew **26** times in Wk 11-26 compared to Wk1-10

DD Bharati's viewership grew **87** times over the same period

DD Retro was launched during lockdown and quickly jumped up the ladder to feature in the Top Channels list of Doordarshan

Divine Comeback by DD Channels

Within the Hindi GEC genre, 2020 witnessed a remarkable journey of DD National to the top of the leader-board – powered by the viewership of Ramayan and Mahabharat (during Week 13 – 18, 2020) – the reverential classics that revived memories and resonated with all audiences.

With a large volume of library content available, DD spread the shows across other channels in its network. The positive impact on the viewership of these channels was felt in equal measure – for instance DD Bharati rose to the No. 3 spot amongst Hindi GEC channels in Week 17, 2020.

Viewer watching the show with at least one other family member

Co-Viewing of Ramayan: 88%

Co-Viewing of Mahabharat: 89%

Co-viewing for other Hindi GEC shows Pre-COVID: 86% | 85%

TG: HSM / Universe (2+)
Week 13 & 14 for Ramayan and Mahabharat
Week 9 & 10 Co-viewing for other Hindi GEC shows Pre-COVID
**Co-viewing data generated by BARC Advanced Analytics Tool*

ADVERTISING TRENDS OF DD CHANNELS

Doordarshan understood the lure of mythology for its audiences perfectly and used these shows to increase the viewership of its channels, reaping the dividends of this move. Advertisers quickly leveraged DD's spike in viewership, leading to a 31% increase in Advertising Volumes on DD Channels, as compared to 2019.

Ad Volumes by Genre

Genre	2019	2020	Change %	No. of Channels
Total	25.7	33.7	31%	25
GEC	22.4	29.6	33%	21
News	2.0	2.6	28%	02
Infotainment	1.0	1.1	13%	01
Sports	0.4	0.3	-17%	01

**DD Sports not reported from week 16 to week 35*

GECs gained the most with a **33%** increase, followed closely by News Channels at **28%** and Infotainment with **13%.**

DD Sports saw a dip of **17%** in Advertising Volumes compared to 2019, with Live Sporting events ruled out by the pandemic.

Heightened advertiser interest in DD during this period was further evident from the Phase-Wise Advertising Volumes data.

Ad Volumes in DD GECs (Mn Secs)

Period	2019	2020	Change %
Total	22.4	29.6	33%
Pre-COVID	6.9	7.1	02%
COVID - Lockdown	5.8	9.4	62%
COVID - Unlock	5.1	7.2	41%
Year Ender	4.6	6.0	32%

The April-June period, which coincides with the lockdown phase, and also the period when DD rolled out its mythological classics, saw Ad Volumes jump by 62% over the same period in 2019.

**Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories*

IPL-13

Over the last decade and more, the Indian Premier League (IPL) has emerged as one of the most eagerly awaited sporting events on TV. The pandemic disrupted the IPL calendar in 2020 and it was ultimately played later in the year.

Viewership of IPL-13 saw a substantial 23% increase over 2019, with a 65% contribution from the Hindi language broadcast.

While viewership from Mega Cities grew by 6%, states like Bihar / Jharkhand, Odisha and Kerala saw significant growth in viewership in 2020.

BARC NUGGETS

IPL Season 13 (2020) is the most watched season since season 10 (2017).

6.7 Bn Viewing Minutes Per Match

~41 Min Average Time Spent Daily

*All India 2+

VIEWERSHIP DATA FOR IPL-13 ALSO THROWS UP SOME INTERESTING TRENDS

400Bn
Viewing Minutes

...is the total viewership of IPL-13 – highest for an Indian sports tournament

6.7Bn
Viewing Minutes

...was garnered by IPL-13 per match – an increase of 23% compared to last season

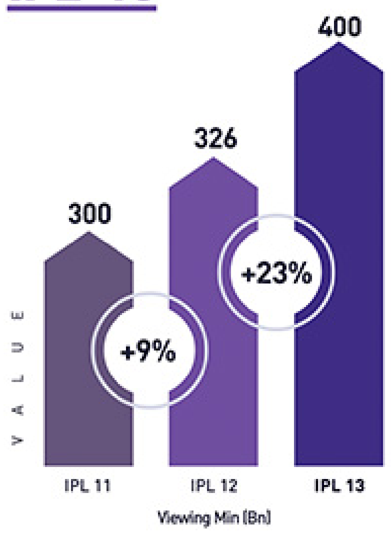
65%

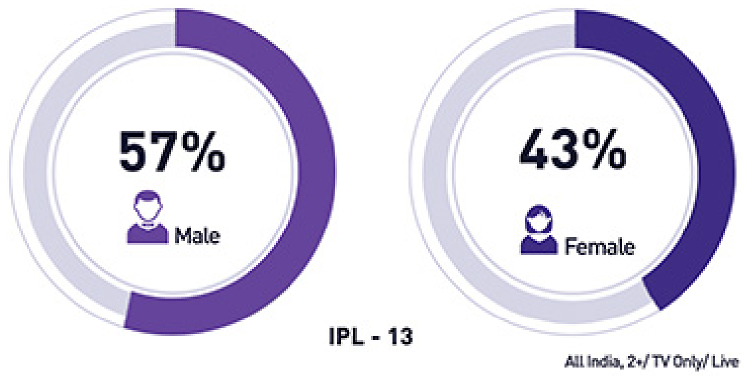
...is the contribution of viewership from Hindi – up from 59% in the previous season

58%

...is the contribution from NCCS AB – up from 57% in the previous season

IPL-13





*Channels airing IPL-13 / STAR Sports 1, STAR Sports 1 HD, STAR Sports 1 HD Hindi, STAR Sports 1 Hindi, STAR Sports 1 Kannada, STAR Sports 1 Tamil, STAR Sports 1 Telugu, STAR Sports Select 1/2 SD, STAR Sports Select 1/2 HD, *STAR Gold 2, STAR Bharat , Asianet Movies, Jalsha Movies, STAR Gold, STAR Gold HD, Star Maa Movies, Star Suvarna Plus, STAR Suvarna, STAR Vijay Super, STAR Maa Gold, STAR Sports 2 HD, STAR Sports 2, STAR Sports 1 Bangla, STAR Sports 3 / *Star Gold 2 & *Star Bharat added only for Final Match / Across 24 Channels*

Despite fewer channels (22) airing all IPL-13 matches compared with IPL-12 (24), viewership for IPL grew by **23%** driven by higher time spent.

48% of the Indian TV viewing audience were glued to their TV sets during the live telecast of IPL-13 matches with **53%** Male viewers.

Younger audiences have always been drawn towards the IPL's fast-paced format. The 15-30 years age group remained the highest viewership contributor (**34%** viewership share).

Region-wise growth in IPL-13

Total Viewing Minutes (Bn)

	2019	2020	Change %
India	326.4	400.4	23%
HSM	226.3	272.2	20%
South	100.1	128.2	28%
Mega Cities	59.1	62.3	06%

Respective Market, 2+ / TV Only / Live Matches Only / Across 24 channels

Region-wise breakdown of IPL-13 viewership reveals a significant growth of 28% coming from the Southern markets, while Hindi Speaking Markets (HSM) posted a 20% rise. Mega Cities registered a growth of 6% in 2020.

ADVERTISING ON IPL-13

Advertising data from IPL-13 once again points to the new 'post-pandemic reality' – the growing relevance and footprint of Internet and mobile-led products and services in our lives.

The top advertised categories and brands during the 2020 edition of IPL underscores that trend - with a majority of them relating to online shopping, education and gaming, e-payment wallets, social media, cellular phones and services.

OPPO India commanded a majority share, emerging as the #1 advertiser for IPL 2020.

Top 5 Sectors 2020

Ad Volumes (Thousand Secs)

SERVICES	638
FOOD & BEVERAGES	282
AUTO	205
TELECOM PRODUCTS	197
TELECOM/INTERNET SERVICE PROVIDERS	123

Top 5 Categories 2020

CELLULAR PHONES-SMART PHONES	197
ECOM-GAMING	174
ECOM-WALLETS	145
ECOM-MEDIA/ENTERTAINMENT /SOCIAL MEDIA	129
EDUC-ECOM-EDUCATION	112

Top 5 Advertisers 2020

OPPO INDIA	105
SPORTA TECHNOLOGIES PRIVATE LIMITED	92
AMAZON ONLINE INDIA PVT LTD	89
VODAFONE IDEA LTD	89
FX MART PVT LTD	89

Top 5 Brands 2020

DREAM11.COM	92
VI CELLULAR PHONE SERVICE	89
PHONEPE	89
AMAZON.IN	80
KAMLA PASAND PAN MASALA	60

THE YEAR IN PHASES

SCOPE OF ANALYSIS

For the last five decades, television has been the primary source of information and entertainment for the masses in India. In 2020, when the COVID-19-led pandemic forced the nation to observe multiple lockdowns, the average Indian turned to television even more to stay engaged.

Seen from the perspective of the all-encompassing viral pandemic, and based on the impact of the lockdown on TV viewership, **the year has been broadly viewed in four phases:**

Viewership

1. "Pre-COVID", Weeks 1-10 i.e. 4th January – 13th March
2. "COVID: During Lockdown", Weeks 11-26, i.e., 14th March – 3rd July
3. "COVID: Unlock", Weeks 27-37, i.e., 4th July – 18th September
4. "Year Ender: Weeks 38-52, i.e., 19th September – 1st January 2021

Advertising

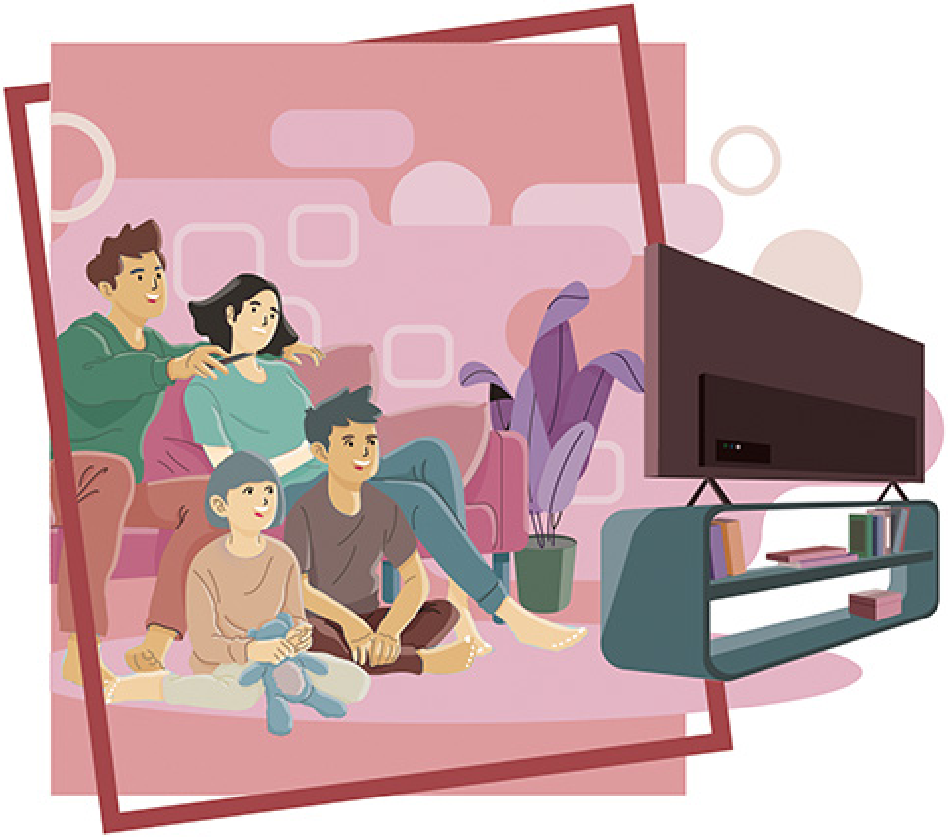
1. "Pre-COVID": January - March 2020
2. "COVID: During Lockdown": April - June 2020
3. "COVID: Unlock": July - September 2020
4. "Year Ender": October - December 2020

Viewership & Advertising Tracker

Change % in 2020 over 2019

Period	Change % in Viewership	Change % in Advertising
PRE-COVID	-06%	-03%
COVID: DURING LOCKDOWN	18%	-32%
COVID: UNLOCK	14%	05%
YEAR ENDER	06%	20%
TOTAL	09%	-03%

All India / 2+ / All Channels
Advertising excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories



THE EBB AND FLOW OF VIEWERSHIP

As in previous years, TV viewership in 2020 too had its ebb and flow. However, what made 2020 stand out is the impact of the epochal event, which wasn't limited to a fixed point in time. Rather, it cast its shadow across the year, with varying intensity and, in fact, hasn't yet stopped its disruptive influence on all walks of life.

A Year of Wide Swings

Weekly Viewing Minutes (Bn)

Period	2019	2020	Change %
PRE-COVID	938.6	880.9	-06%
COVID: DURING LOCKDOWN	916.4	1084.0	18%
COVID: UNLOCK	916.6	1046.8	14%
YEAR ENDER	893.4	951.4	06%
TOTAL	913.7	998.8	09%

All India | 2+ | All Channels

PRE-COVID

On a year-on-year basis, there was a **06%** dip in total TV viewership in this period in 2020.

While GEC and Movies viewership dipped by a similar margin, there was a significant drop in News viewership during this period.

The dip in News viewership in this period should be viewed in the context of the same period in 2019, where News viewing was at unprecedented high levels on account of the impending General Election, the terror attack at Pulwama, the subsequent Balakot airstrike and the return of Wing Commander Abhinandan Varthaman.

Genre-wise Weekly Viewing Minutes (Bn)

Genre	2019	2020	Change %
TOTAL	938.6	880.9	-06%
GEC	486.6	459.4	-06%
Movies	216.1	206.3	-05%
News / Business News	90.5	67.3	-26%
Kids	55.4	59.1	07%
Music / Youth	56.1	52.6	-06%
Sports	20.6	20.7	01%
Devotional / Spiritual	4.4	5.0	15%
Infotainment	4.8	4.6	-04%
Lifestyle	1.1	1.1	-01%
Others	3.0	4.6	55%

All India | 2+ | All Channels

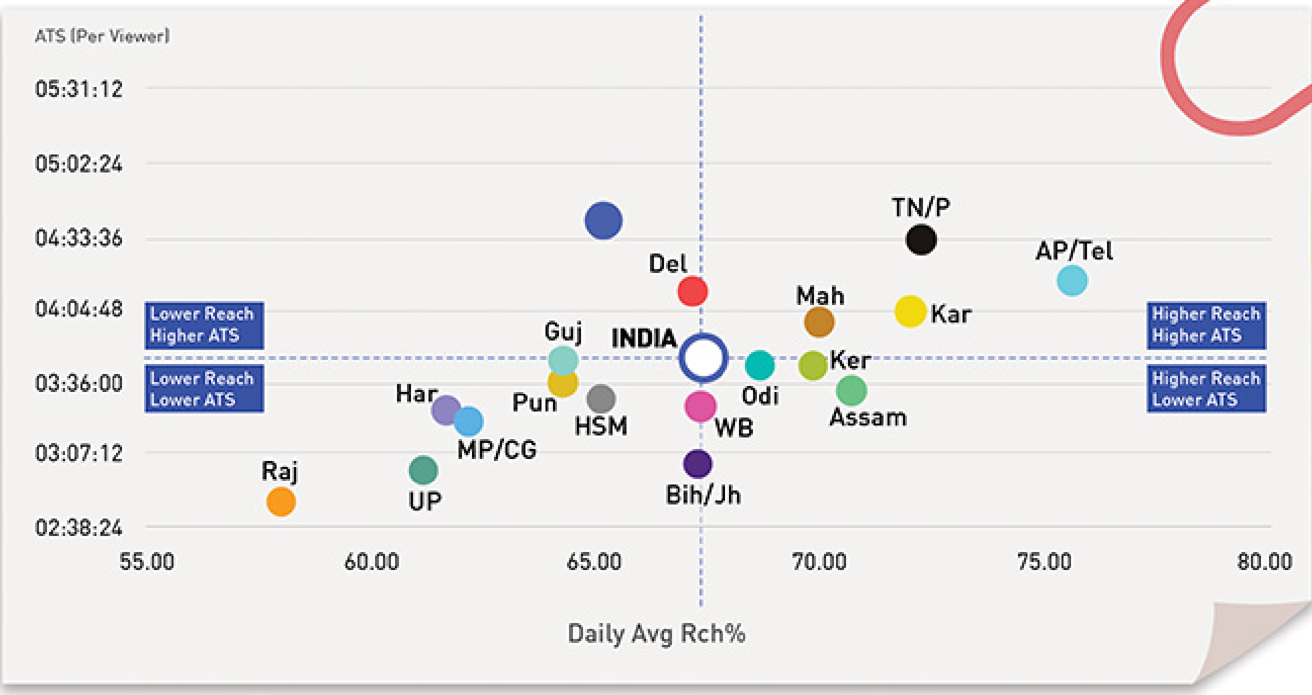
STATE-WISE VIEWERSHIP

PRE-COVID (Week 1-10, 2020)

India was operating at a level of **67.5%** Reach and over 3 hours 42 minutes Average Time Spent per viewer (ATS) daily.

Southern states were significantly ahead during this period, in terms of Reach as well as Time Spent (ATS).

AP/Telangana had the highest daily Reach of **76%** while TN/ Pondicherry led in daily Average Time Spent per viewer (ATS) of over 4 hours 24 minutes.



The 'higher' and 'lower' is with reference to the All-India data

All India / 2+ / All Channels

BARC NUGGETS

Bigg Boss Season 13 (2019-20) is the most watched season since season 11 (2017-18).

681 Mn Average Viewing Minutes Per Episode

~43 Min Average Time Spent Daily

*HSM 2+|Original PT episodes only

COVID: DURING LOCKDOWN

This period coincides with the Lockdown announced by PM Modi. With the nation confined indoors, families were drawn to their TV sets, resulting in a jump of **18%** in total TV viewership (over the same period, 2019).

GEC genre as a whole witnessed an **8%** growth, almost entirely due to the spike in viewership of DD channels.

Given the disruptive situation that not just the nation, but also the whole world faced, it came as no surprise that News viewership scaled new peaks. **News genre** viewership almost doubled in this period.

Sports genre dropped, as a natural consequence of domestic and international live sporting events, being put on hold.

With the closure of schools and other educational institutions, Kids and Young Adults had the remote more often in their hands. The **Kids genre** witnessed a whopping 45% growth in viewership over the same period of 2019.

Genre-wise Weekly Viewing Minutes (Bn)

Genre	2019	**2020**	Change %
TOTAL	916.4	1084.0	18%
GEC	436.5	472.3	08%
Movies	213.0	286.2	34%
News / Business News	83.6	158.8	90%
Kids	59.9	86.7	45%
Music / Youth	62.4	54.6	-12%
Sports	47.5	7.1	-85%
Devotional / Spiritual	3.6	4.6	27%
Infotainment	4.6	6.0	30%
Lifestyle	1.0	1.5	49%
Others	4.2	6.1	44%

All India / 2+ / All Channels

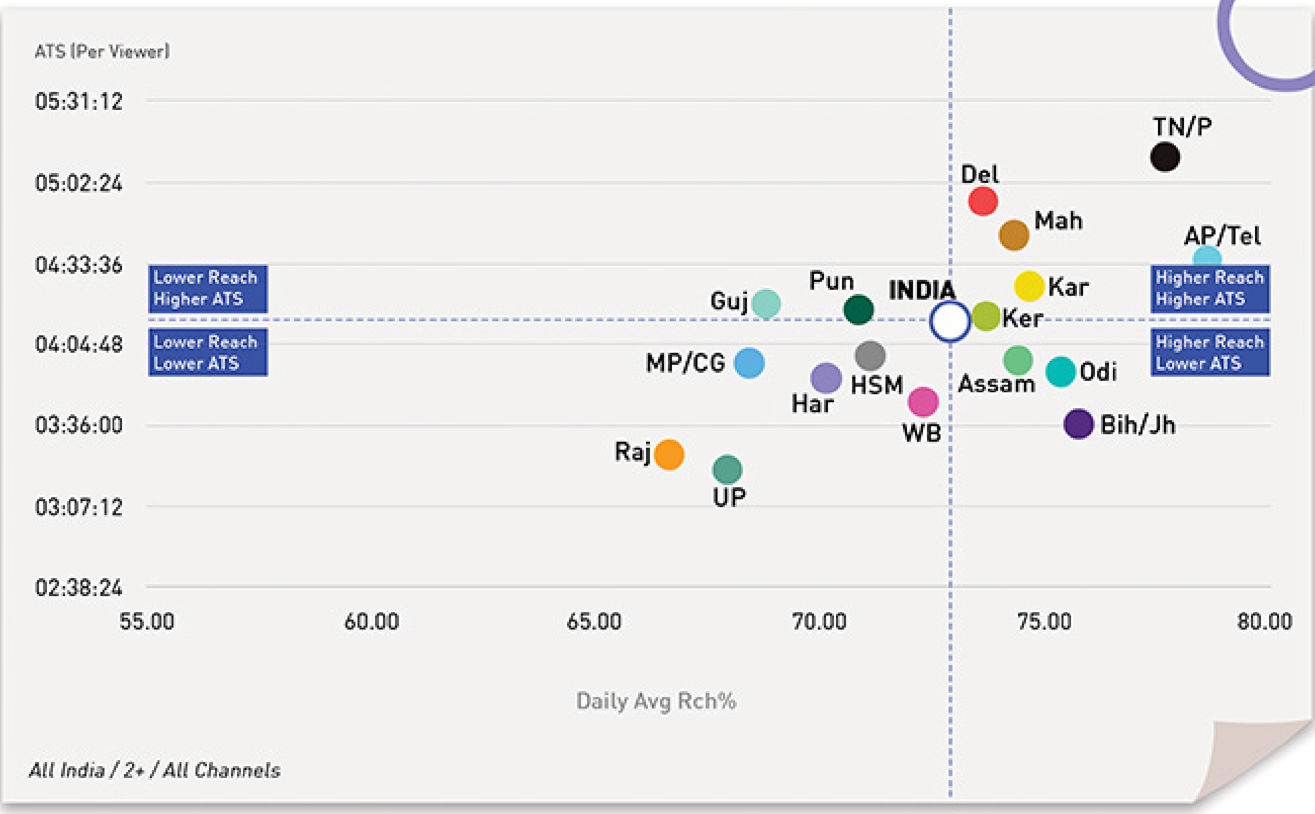
STATE-WISE VIEWERSHIP

During COVID (Week 11-26, 2020)

TN / Pondicherry registered the highest daily Average Time Spent per viewer (ATS) of over **05** hours **10** minutes during COVID.

During this period, All India viewership touched **73%** daily Reach and over 4 hours 13 minutes Average Time Spent per viewer (ATS) (daily half an hour more than Pre-COVID)

AP / Telangana garnered the highest Reach (79%), a **03%** growth compared with Pre-COVID period



The 'higher' and 'lower' is with reference to the All-India data

COVID: UNLOCK

Rise in TV viewership continued unabated during this period – although the lockdown was gradually relaxed in several parts of the country, restrictions on opening of workspaces and movement of people, continued in many areas.

GEC viewership grew as fresh content began returning to the channels in this period.

News genre viewership stayed on a growth path, with the news and updates of the pandemic situation being anxiously watched.

Genre-wise Weekly Viewing Minutes (Bn)

Genre	2019	2020	Change %
TOTAL	916.6	1046.8	14%
GEC	450.3	541.6	20%
Movies	232.4	245.8	06%
News / Business News	80.9	104.1	29%
Kids	55.6	81.0	46%
Music / Youth	52.9	49.6	-06%
Sports	29.3	7.9	-73%
Devotional / Spiritual	4.7	4.4	-06%
Infotainment	5.0	6.5	30%
Lifestyle	1.1	1.2	14%
Others	4.5	4.8	05%

All India / 2+ / All Channels

YEAR-ENDER

Total TV viewership maintained a **6%** growth in in the closing months of 2020.

GEC viewership held on to its healthy growth, as new shows got launched and some-big ticket content returned to TV.

Sports genre saw a huge spike as IPL-13 rolled out, and a cricket starved nation lapped it up.

Genre-wise Weekly Viewing Minutes (Bn)

Genre	2019	2020	Change %
TOTAL	893.4	951.4	06%
GEC	462.0	518.3	12%
Movies	212.2	202.2	-05%
News / Business News	74.8	69.7	-07%
Kids	60.3	65.9	09%
Music / Youth	51.8	43.1	-17%
Sports	17.1	38.7	127%
Devotional / Spiritual	4.7	4.2	-10%
Infotainment	4.7	4.6	-01%
Lifestyle	1.1	0.9	-21%
Others	4.7	3.8	-21%

All India / 2+ / All Channels

ADS ON TV: SIGNALLING RECOVERY

The first half of 2020 was a challenging period for brand managers and marketers. Although TV viewership was scaling new peaks, advertiser interest was understandably muted, with disruptions in supply chains: sales were impacted, as was TV advertising.

However, green shoots of recovery began to emerge in the second half of 2020. And the year ended with a robust **20%** growth in Advertising Volumes on TV during the festive period starting October. Ad Volumes were further buoyed by the return of IPL.

Advertising Gets Past Lockdown Challenges

Total Ad Volumes (Mn Secs)

Period	2019	2020	Change %
PRE-COVID	379	369	-03%
COVID: DURING LOCKDOWN	399	270	-32%
COVID: UNLOCK	379	396	05%
YEAR ENDER	386	462	20%
TOTAL	1542	1497	-03%

All Channels
Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories

ADVERTISING VOLUMES BY PHASES

1. Pre-COVID

Advertising Volumes for GECs in the Pre-COVID period saw a **04%** jump, even as Ad Volumes, at a total TV level, dipped **03%**

Ad Volumes (Mn secs)

Genre	2019	2020	Change %
TOTAL	**378.6**	**369.1**	**-03%**
GEC	91.8	95.9	04%
Movies	75.6	83.4	10%
News / Business News	127.5	114.4	-10%
Kids	11.9	11.6	-02%
Music / Youth	48.7	46.4	-05%
Sports	4.1	3.1	-23%
Infotainment	7.2	5.2	-28%
Misc*	11.8	9.0	-24%

All Channels for 2020 considered
Misc: Lifestyle, Teleshopping, Devotional, Others*
Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories

2. COVID: During Lockdown

Once the lockdown came into force, GEC viewership dropped for a majority of the channels in the genre due to no original programming and supply chain being hampered due to the lockdown. Advertising Volumes, in this genre, also took a hit, dropping 26% over the same period in 2019.

News genre though, registered a viewership growth during the lockdown. Ad Volumes, however, dipped by **27%** over 2019.

Ad Volumes (Mn secs)

Genre	2019	2020	Change %
TOTAL	**398.7**	**269.7**	**-32%**
GEC	93.1	68.6	-26%
Movies	78.6	61.8	-21%
News / Business News	133.5	97.3	-27%
Kids	13.3	8.0	-40%
Music / Youth	55.9	21.1	-62%
Sports	7.5	3.6	-52%
Infotainment	6.5	3.1	-53%
Misc*	10.3	6.3	-39%

All Channels for 2020 considered
Misc: Lifestyle, Teleshopping, Devotional, Others*
Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories

3. COVID: Unlock

Most genres revived during the start of the unlock phase, recording an overall jump of **5%** in Ad Volumes compared to the same period in 2019.

Ad Volume growth, in the Movies genre, showed a trend similar to that of the GEC genre, although the **recovery in the July to September period was sharper** for the genre.

With Unlock 1.0, and news-led events such as the incidents at the India-China border, viewership and advertising on News Channels **rebounded**.

Ad Volumes (Mn secs)

Genre	2019	2020	Change %
TOTAL	**378.6**	**396.2**	**05%**
GEC	98.4	99.2	01%
Movies	82.4	98.4	19%
News / Business News	111.4	127.7	15%
Kids	12.8	12.8	0%
Music / Youth	53.3	42.1	-21%
Sports	3.2	2.3	-28%
Infotainment	6.9	4.9	-28%
Misc*	10.1	8.7	-14%

All Channels for 2020 considered
Misc*: Lifestyle, Teleshopping, Devotional, Others
Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories

4. Year Ender

Oct-Dec saw some big-ticket properties and the festive season driving the Ad Volume growth by **20%** compared with the same quarter in 2019.

Growth was witnessed across genres in this quarter over the same period in 2019.

Ad Volumes (Mn secs)

Genre	2019	2020	Change %
TOTAL	**386.3**	**462.4**	**20%**
GEC	98.2	113.7	16%
Movies	85.9	106.5	24%
News / Business News	117.6	145.9	24%
Kids	12.4	15.0	21%
Music / Youth	51.1	54.9	07%
Sports	3.9	6.1	57%
Infotainment	6.9	7.6	09%
Misc*	10.5	12.6	21%

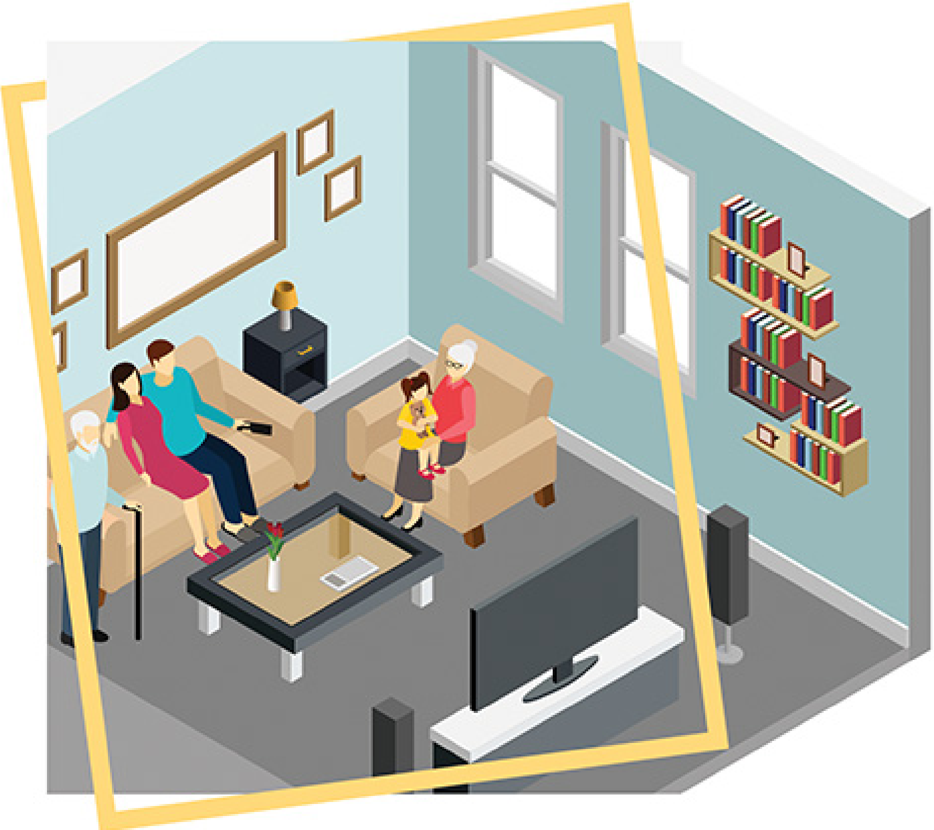
All Channels for 2020 considered
Misc: Lifestyle, Teleshopping, Devotional, Others*
Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories

GENRE-WISE PERFORMANCE

While total TV viewership in 2020 clocked a 9% growth over the previous year and, barring Sports and Music / Youth, all genres also registered a healthy growth, the ebb and flow of share of each genre throws up interesting trends and insights, as we move from one 'phase' to the other.

During lockdown for instance, lack of original content coincided with a reduced share for the GEC genre, which gradually picked up later in the year. However, (GEC+Movies) as a Whole retained their ~75% share in total TV viewership. They yielded some space during lockdown, which was taken up by News viewership, which was regained in Phase-3.

Sports lost out big time in the viewership pie, only to make a strong comeback during Phase-4, riding on IPL-13.



GEC

GEC* viewership as a % of total TV Viewership

**All languages*

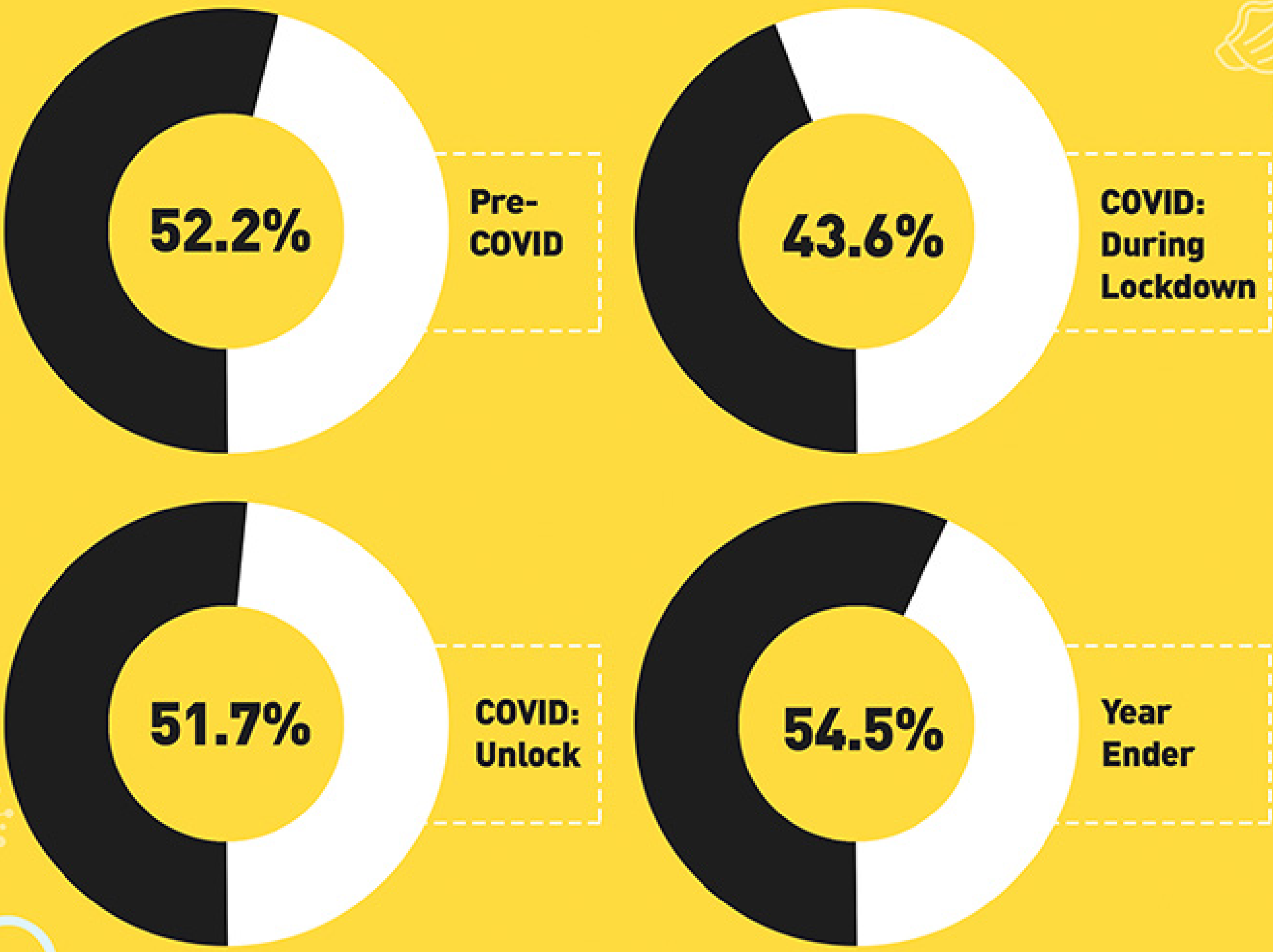
50.0% 2019

49.8% 2020

The GEC genre held its own in 2020. The genre largely retained its share in total TV viewership, although there was a marginal dip of 0.2 percentage points - on account of the significant rise in **News viewership** in 2020.

The story of Indian television over the past few years has been one of strong regional growth. Yet, Hindi GEC maintains its position as the single most popular genre. That trend held in 2020 as well – with viewership of the genre growing by **22%,** and its share in total GEC up from 39% in 2019 to **44%** in 2020.

GEC genre share% in 4 Phases



MARKET-WISE PERFORMANCE OF HINDI GEC GENRE

The major Hindi GEC markets posted growth in viewership in line with the genre growth of

22%.

70%

of the Hindi GEC viewership comes from the top 5 markets of the genre, i.e., Maharashtra / Goa, MP / Chhattisgarh, UP / Uttarakhand, Gujarat / D&D / DNH and Punjab / Haryana / Chd / HP / J&K. That remained unchanged in 2020.

Weekly Viewing Minutes (Bn)	2019	2020	% Change over 2019
All India	178.4	218.4	22%
HSM	174.5	214.3	23%
Mah / Goa	30.2	37.4	24%
MP / Chhattisgarh	24.2	31.9	32%
UP / Uttarakhand	26.0	31.7	22%
Guj / D&D / DNH	22.6	27.4	21%
Pun / Har / Cha / HP / J&K	20.6	24.0	17%
Rajasthan	13.7	17.2	25%
Bihar / Jharkhand	10.6	15.4	45%
Delhi	11.5	12.1	05%
Assam / North East / Sikkim	6.9	6.4	-07%
West Bengal	4.9	6.4	31%
Odisha	3.2	4.3	33%

Respective Markets / 2+

ADVERTISING ON GEC GENRE

Given the extensive reach of the GEC genre, and its dominant share in TV viewership, it is, and continues to be, the favoured destination for advertisers. The genre as a whole – across all languages – accounts for a quarter of the total Ad Volumes on TV.

The strong presence of Regional GECs in their respective language markets, translates into a sizeable share in total Ad Volumes. This is particularly true for the 4 south language markets.

Advertising share of GECs in the total advertising volume pie, remained stable at **25%**.

A breakdown by genres also reveals a stable line across 2019-2020. The share of South GECs stayed at **11%**, while Hindi GECs, and Other Regional GECs, grew marginally by 01%.

	AD VOLUMES IN SECONDS		SHARE IN TOTAL AD VOLUMES	
	2019	**2020**	2019	**2020**
TOTAL AD VOLUMES	1542	1497	100%	100%
OVERALL GEC	382	377	25%	25%
HINDI GEC	80	88	05%	06%
SOUTH GEC	175	160	11%	11%
OTHER REGIONAL GEC	114	123	07%	08%
ENGLISH GEC	13	06	01%	0%

Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories
Other Regional GECs include Bangla, Marathi, Bhojpuri, Assamese, Oriya, Punjabi, Gujarati and Urdu language channels

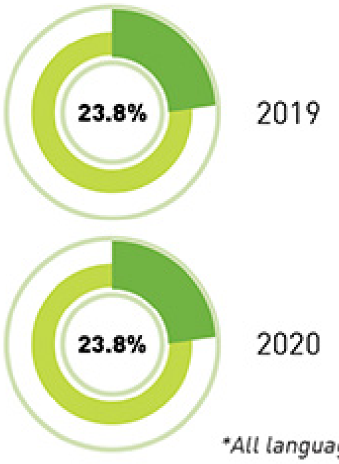
MOVIES

Movies have historically played a significant role in our lives, and the popularity of this genre is evident from the fact that movies and movie-based channels are present across almost all languages and are part of the bouquets of most broadcast networks.

The position of this genre in the Indian TV landscape was further highlighted during the coronavirus pandemic. With families "locked down" at home, movie channels kept people entertained through a demanding period.

Unlike GECs, "fresh content" was not seen as big a stumbling block for the Movies genre, which grew 10% over 2019. Share of the genre in total TV viewership also remained stable in 2020.

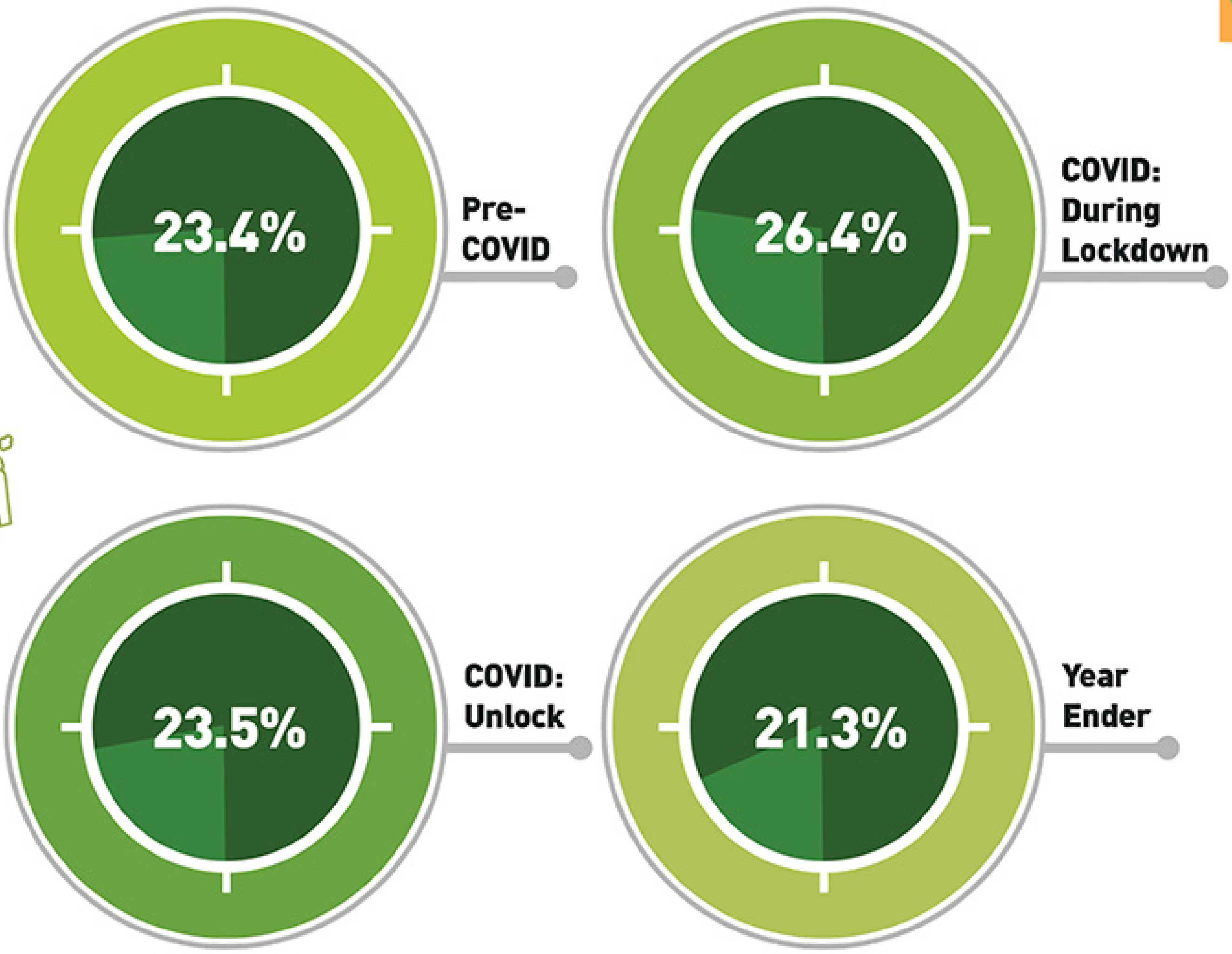
Share of Movies Genre* in Total TV Viewership



*All languages

Movies genre share% in 4 Phases

Regional Movies Genre posted a higher growth than their Hindi counterpart, although the Hindi language genre accounted for close to 60% of the total Movies Genre viewership. Apart from Hindi, the other major markets for the genre were Telugu, Tamil and Kannada.



LANGUAGE-WISE PERFORMANCE OF MOVIES GENRE

Weekly Viewing Minutes(Bn)

Language	2019	2020	% Change over 2019
HINDI	131.8	139.8	06%
TELUGU	25.2	26.8	06%
TAMIL	15.6	20.9	34%
BHOJPURI	13.0	14.6	12%
KANNADA	8.5	10.2	20%
MARATHI	9.3	9.1	-03%
BANGLA	5.0	6.5	30%
MALAYALAM	4.5	4.5	0%
PUNJABI	2.0	2.8	37%
ENGLISH	1.9	2.1	08%
GUJARATI	0.5	0.9	90%
ASSAMESE	0.0	0.0	-
TOTAL	**217**	**238**	**10%**

All India, 2+

BARC NUGGETS

"INDIAN" was the most repeated Hindi Movie in 2020 across Hindi Movies

512 Total Count of airings

356 Mn Total Unique Viewers

*HSM 2+

MARKET-WISE PERFORMANCE OF MOVIES GENRE

Weekly Viewing Minutes(Bn)	2019	2020	% Change over 2019
India	217.4	238.1	10%
Mah / Goa	39.7	40.8	03%
AP / Telangana	24.5	26.0	06%
UP / Uttarakhand	20.9	22.0	05%
TN / Pondicherry	15.3	20.0	31%
MP / Chhattisgarh	18.5	19.7	06%
Guj / D&D / DNH	15.8	16.8	06%
Karnataka	13.6	15.8	17%
West Bengal	11.6	15.4	32%
Pun / Har / Cha / HP / J&K	13.4	14.0	04%
Bihar / Jharkhand	10.3	12.7	23%
Delhi	8.2	8.5	04%
Rajasthan	8.5	8.1	-05%
Assam / North East / Sikkim	7.6	8.0	05%
Odisha	4.3	5.2	20%
Kerala	4.9	5.1	03%

Respective markets, 2+

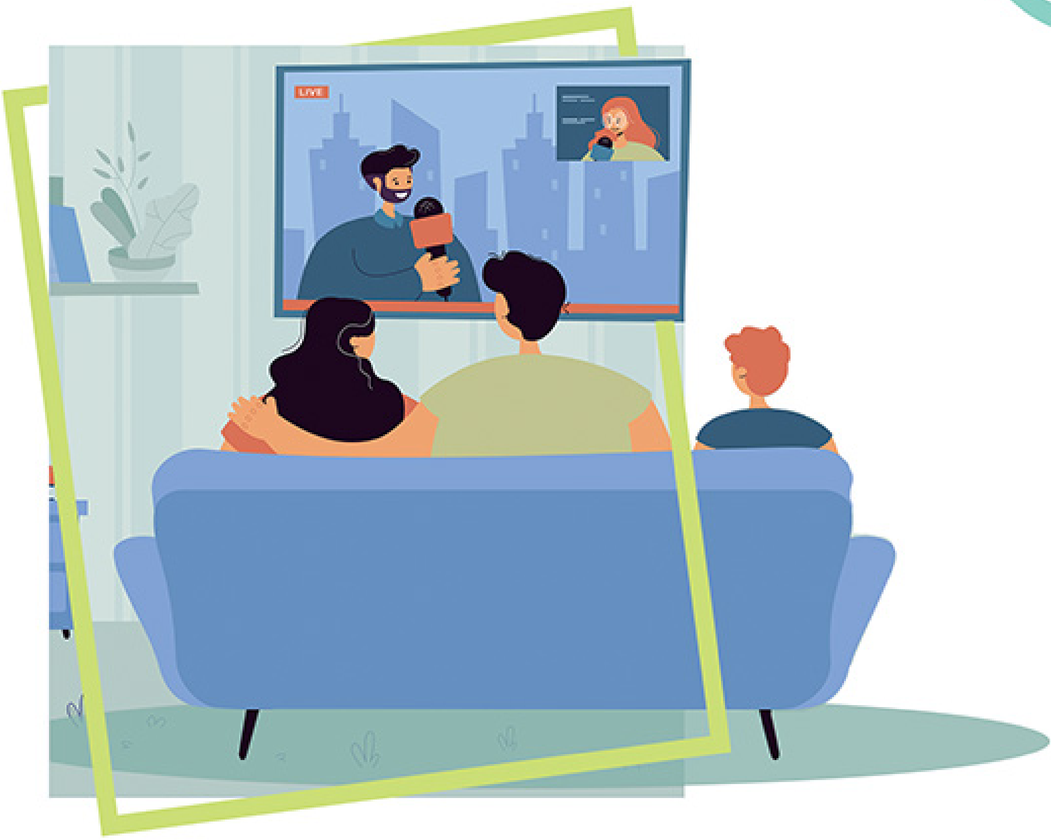
ADVERTISING ON MOVIES GENRE

Overall share of Advertising Volumes for the Movies genre grew from **21%** in 2019 to **23%** in 2020.

Ad Volumes across all languages increased, except for **English Movies**

	Ad Volumes (Mn Secs)		Genre Share%	
Genre	2019	2020	2019	2020
Overall Movies	322	350	21%	23%
Hindi Movies	139	155	09%	10%
South Movies	98	100	06%	07%
Other Regional Movies	55	77	04%	05%
English Movies	31	18	02%	01%
Total	1542	1497	100%	100%

Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories
Other Regional Channels include Bangla, Bhojpuri, Punjabi, Marathi, Gujarati and Assamese



NEWS

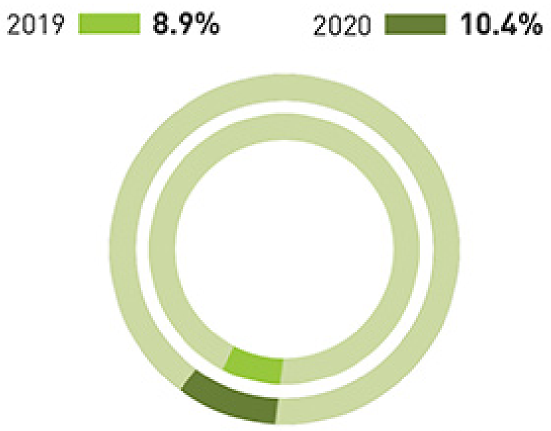
News has been an integral part of Indian television audiences for many decades. While Hindi and English news channels occupy a high-visibility space, there has also been a rapid proliferation of regional news, with the appeal of "news in your language" aiding their growth.

News viewership is driven by events and, therefore, it comes as no surprise that in the year of the virus, the News genre saw a 27% jump in viewership over 2019.

From a 7% viewership share (Pre-COVID), the genre picked up 21% of total TV viewership during the peak COVID Week (Week 12, starting 21st March).

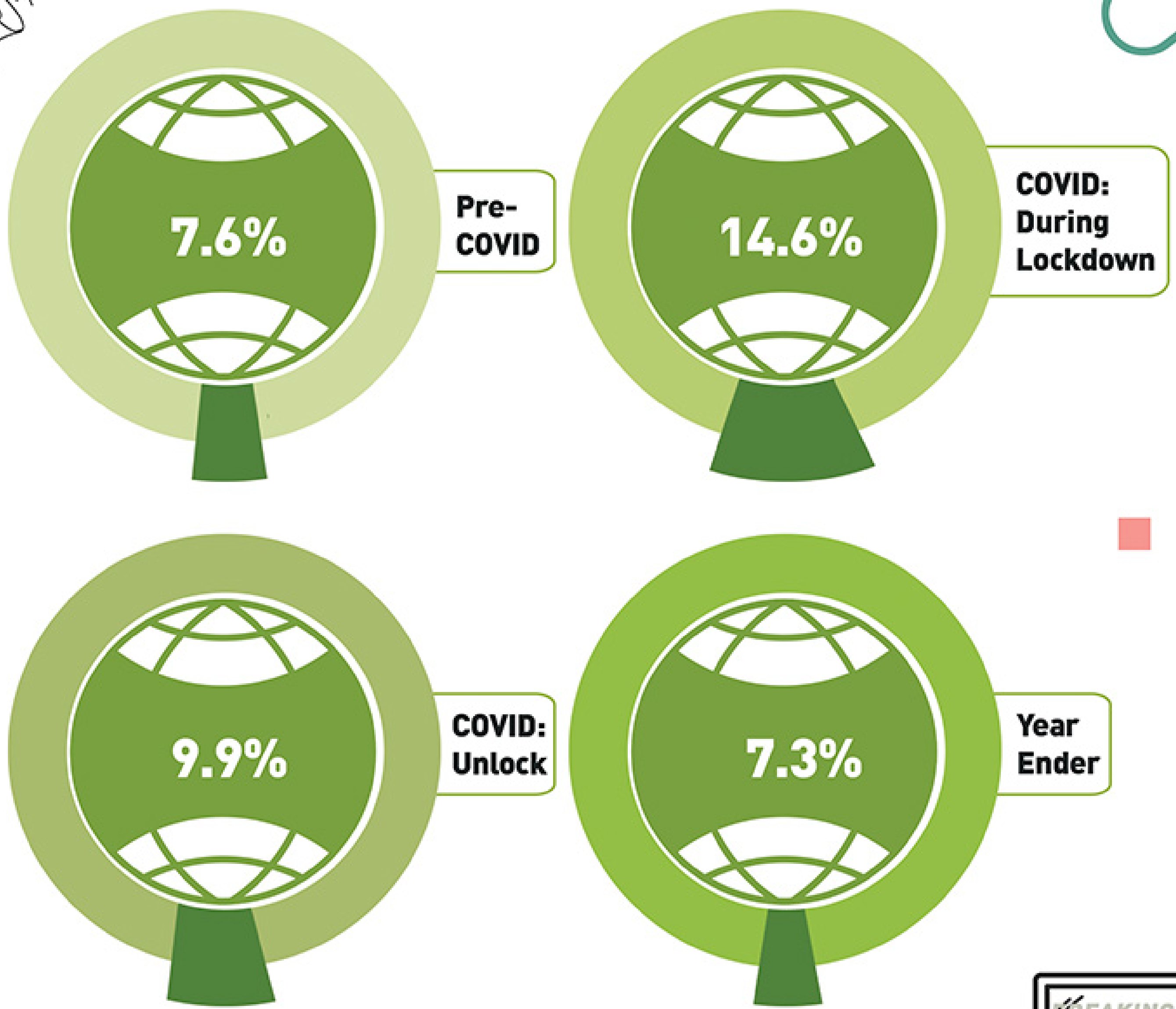
For the year as a whole, News accounted for 10.4% of the total TV viewership

News Genre as a % of TV Viewership



*All languages

News genre share% in 4 Phases



LANGUAGE-WISE PERFORMANCE OF NEWS GENRE

	2019	2020	% Change over 2019
HINDI	37.6	48.5	29%
TELUGU	9.7	11.4	18%
KANNADA	7.8	8.1	04%
TAMIL	5.6	8.0	43%
MARATHI	6.1	7.6	24%
MALAYALAM	3.5	5.8	66%
BANGLA	3.9	4.7	20%
GUJARATI	1.8	3.3	85%
ORIYA	2.0	2.5	23%
ASSAMESE	2.3	2.0	-13%
PUNJABI	0.7	1.3	92%
ENGLISH	0.5	0.5	-02%
URDU	0.2	0.2	06%
Total	**82**	**104**	**27%**

Weekly Viewing Minutes (Bn)
All India / 2+ / All Channels

MARKET-WISE PERFORMANCE OF NEWS GENRE

News genre showed a significant growth across HSM and South Markets in 2020.

Where Mah / Goa and UP / Uttarakhand led the News Viewership in HSM, it was led by AP / Telangana and Karnataka in the South market.

	2019	2020	% Change over 2019
India	82	104	27%
HSM	54	70	28%
South	27	34	25%
Mah / Goa	11.9	14.8	25%
AP / Telangana	9.8	11.5	17%
Karnataka	8.3	8.7	05%
UP / Uttarakhand	6.7	8.6	28%
TN / Pondicherry	5.6	7.9	41%
Pun / Cha / Har / HP / &K	5.5	7.5	37%
West Bengal	5.3	6.5	24%
Guj / D&D / DNH	4.6	6.4	39%
Kerala	3.6	5.8	64%
MP / Chhattisgarh	5.0	5.8	16%
Delhi	3.7	5.4	48%
Bihar / Jharkhand	3.2	4.9	52%
Assam / North East / Sikkim	3.5	3.7	07%
Rajasthan	2.7	3.2	20%
Odisha	2.5	3.1	23%

Weekly Viewing Minutes (Bn)
Respective Markets / 2+

ADVERTISING ON NEWS GENRE

Advertising volumes for the News genre saw a marginal dip in 2020 over 2019. However, at an aggregate level, News continued to account for a third of total Ad Volumes. Hindi and English News genres held on to their respective share of total Ad Volumes.

	Ad Volumes (Mn Secs)		Genre Share%	
Genre	2019	2020	2019	2020
Overall News	490	485	32%	32%
Hindi+ Regional+ Business News	185	183	12%	12%
English + Business News	29	30	02%	02%
South News	132	121	09%	08%
Other Regional News	144	151	09%	10%
Total Ad Volumes	1542	1497	100%	100%

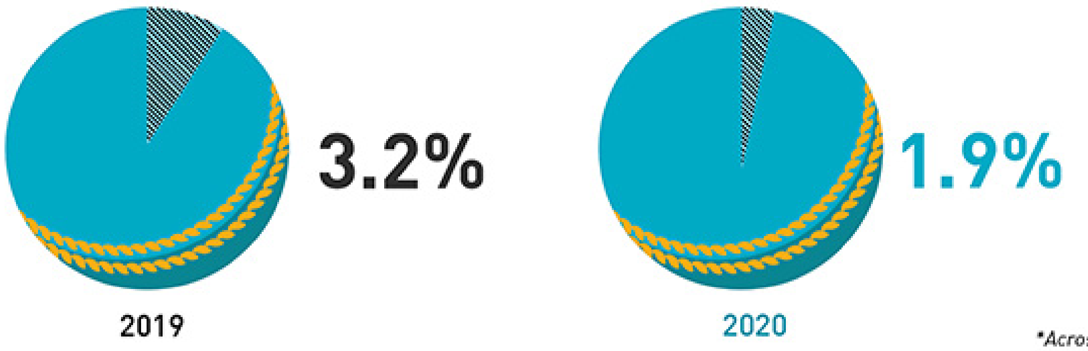
Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories
Other Regional News Channels include: Hindi Regional, Hindi Business, Bangla, Assamese, Oriya, Marathi, Gujarati, Gujarati Business, Punjabi, Urdu

SPORTS

Given that no sports events were possible during the lockdown and the immediate period after that, sports channels were starved of live action for a major part of the year. The genre had some reason to cheer towards the tail-end of the year, with IPL-13 that played out over September – November 2020.

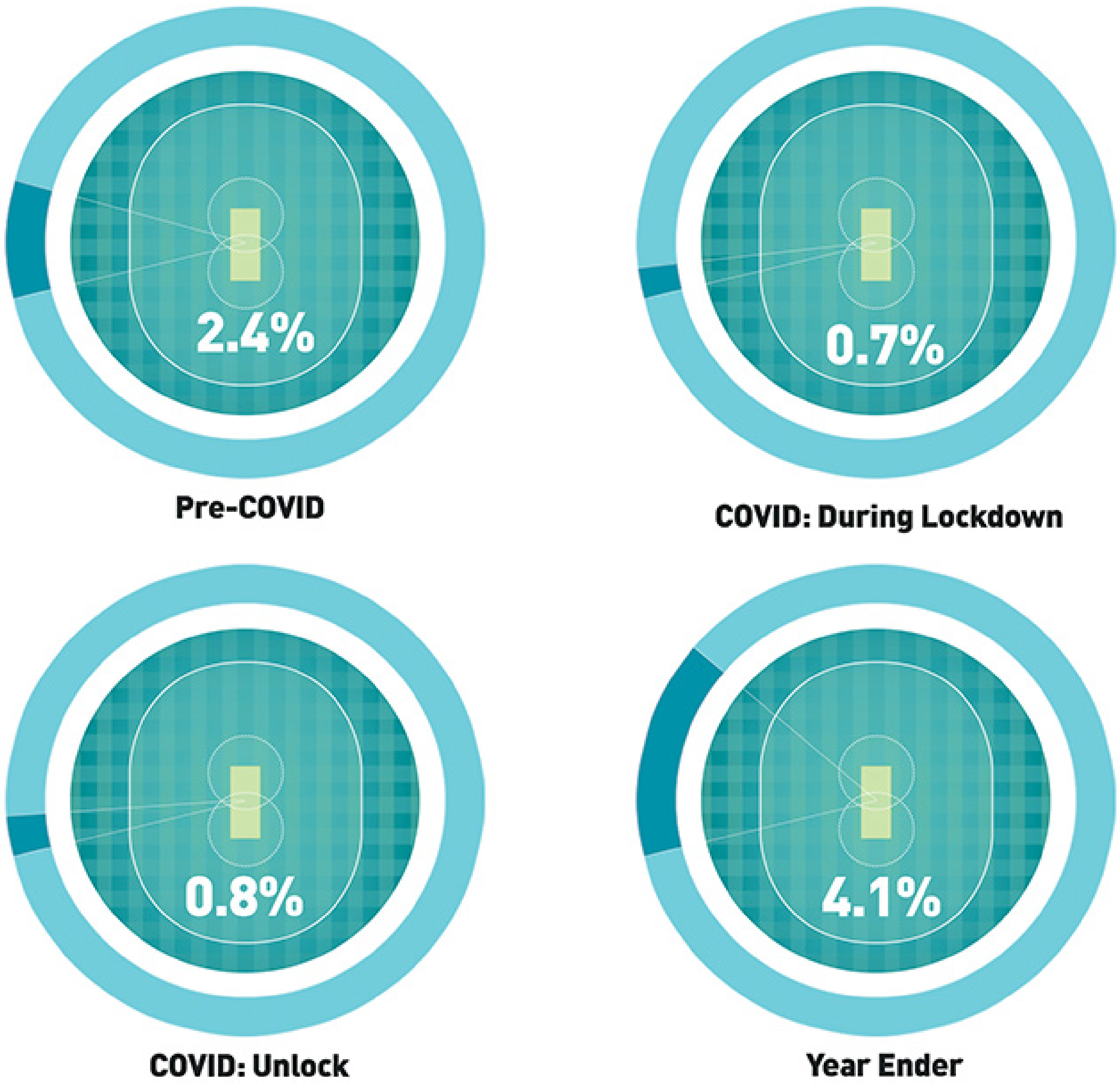
The viewership of the genre understandably declined by 35% over 2019. Advertising Volumes also declined by 19%.

Sports Genre as a % of TV Viewership



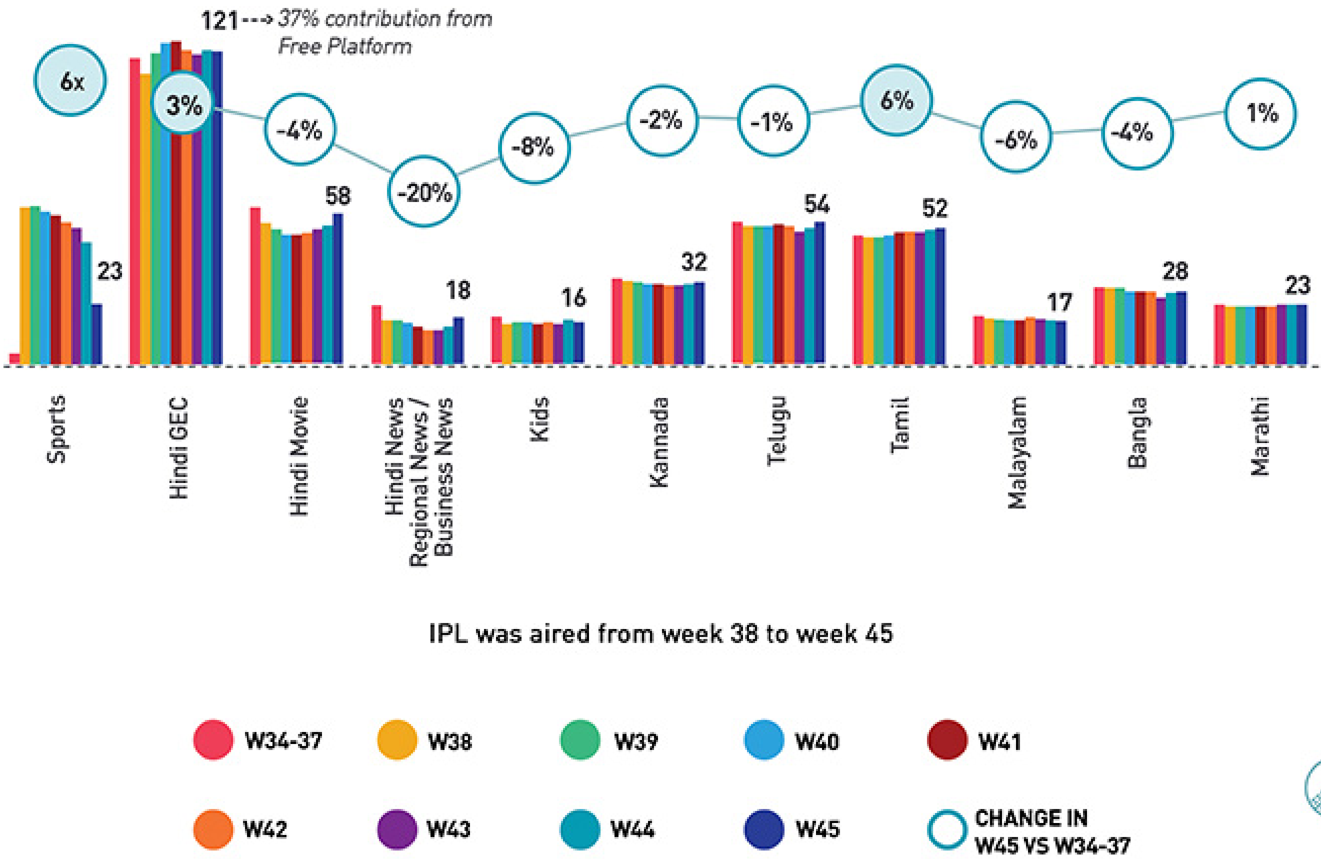
*Across 37 Sports Channels

Sports genre share% in 4 Phases



SPORTS SURPASSED ALL GENRES DURING IPL-13 EXCEPT HINDI GEC (PRIME-TIME)

Prime-Time Viewing Minutes (Bn)



*India 2 yrs+ / TV Only / Prime-Time 1800-2400 Hrs / GD in W45 vs W34-37 / *Hindi News includes national, regional & business news channels*

Advertising on Sports Genre

	AD VOLUMES (MN SECS) 2019	AD VOLUMES (MN SECS) 2020	SHARE% OF AD VOLUMES 2019	SHARE% OF AD VOLUMES 2020
TOTAL AD VOLUMES	1542	1497	100%	100%
SPORTS	19	15	01%	01%

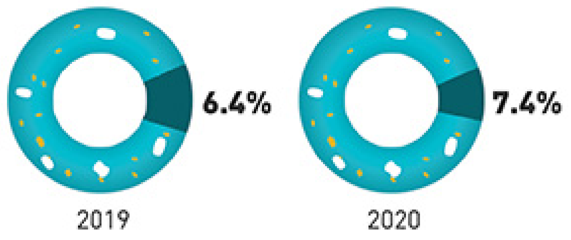
Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories

KIDS

The pandemic-led lockdown provided a major boost to the viewership of Kids Channels, with the target group confined to their homes. Viewership of Kids genre grew 27% in 2020, and the share of the genre in total TV viewership in 2020 rose to **7.4%**, up from 6.4% in 2019.

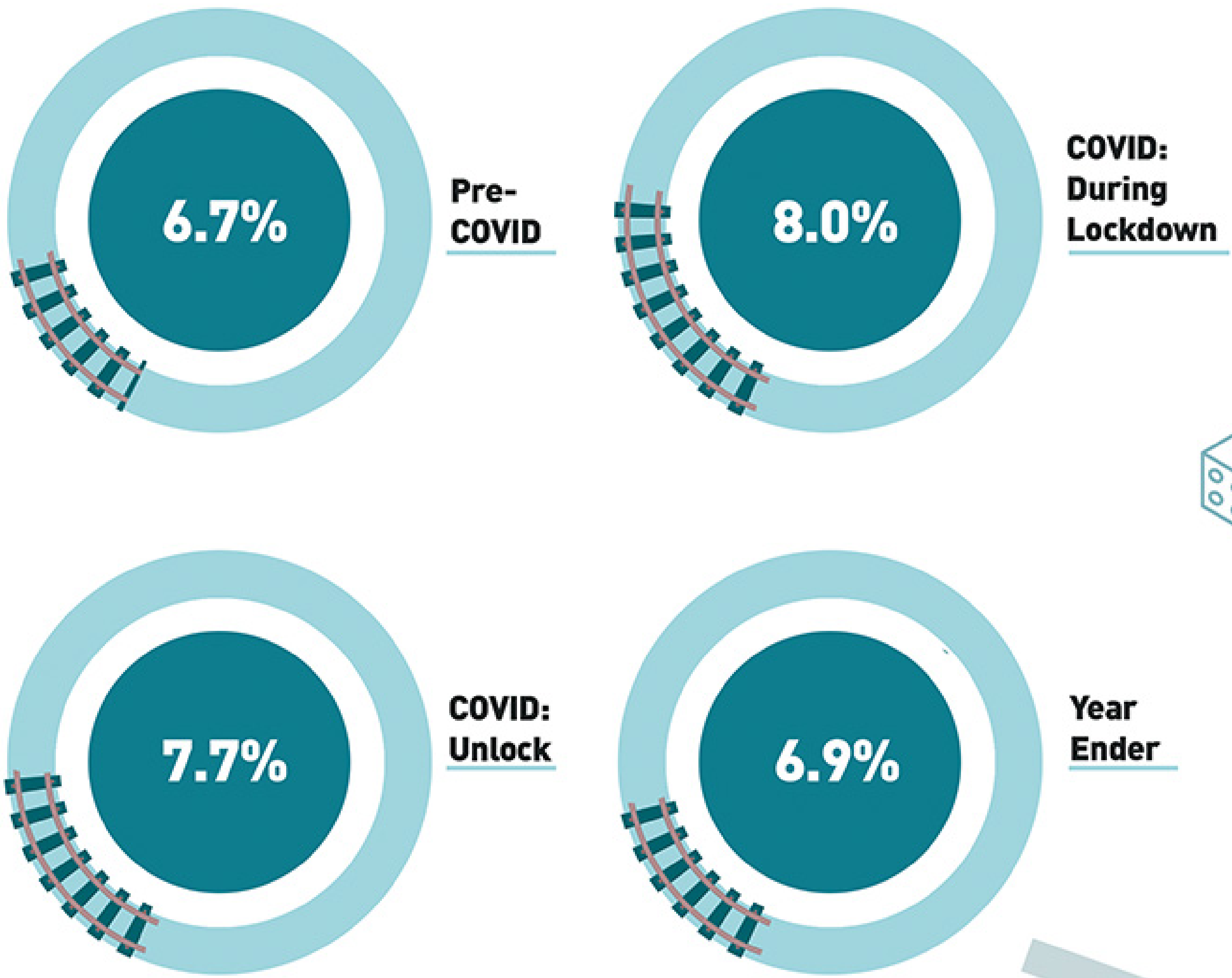
With schools on a break during end-March, and kids confined to their homes, the morning period emerged as the "new prime-time" for channels catering to the 2-14 age group.

Kids Genre as a % of Total TV Viewership



**Across languages*

Kids genre share% in 4 Phases



BARC NUGGETS

UP/Utt, MP/Ch, Mah/Goa, Rajasthan & Bih/Jha contribute **80% to Total Free Platform Households**

*All India 2+

LANGUAGE-WISE PERFORMANCE OF KIDS GENRE

Availability of Kids content (original and dubbed) in local languages has been a prime driver of viewership for the genre over the years, as well as its spread in regional markets. Since Kids content lends itself to be dubbed quite easily, channels that simulcast in multiple languages, account for the largest share of viewership within the genre. That's also the segment that has posted **robust growth in viewership in 2020.**

Weekly Viewing Minutes (Bn)	2019	2020	% Change over 2019
MULTIPLE	52.6	68.1	29%
TELUGU	1.6	1.9	22%
TAMIL	1.8	1.8	-03%
MALAYALAM	1.2	1.0	-12%
KANNADA	0.9	0.8	-08%
BANGLA	0.2	0.6	194%
TOTAL	58	74	27%

All India, 2+

MARKET-WISE PERFORMANCE OF KIDS GENRE

	2019	**2020**	% Change over 2019
All India	58.3	74.2	27%
TN / Pondicherry	8.4	11.0	31%
AP / Telangana	5.9	8.9	50%
Mah / Goa	7.2	8.8	23%
West Bengal	3.5	6.1	76%
Karnataka	4.1	5.5	35%
Guj / D&D / DNH	4.8	5.2	08%
Pun / Har / Cha / HP / J&K	4.1	5.1	23%
UP / Uttarakhand	4.0	4.4	09%
Assam / North East / Sikkim	3.5	3.9	11%
MP / Chhattisgarh	3.2	3.7	13%
Delhi	3.1	3.2	03%
Kerala	2.3	2.8	26%
Bihar / Jharkhand	1.4	2.1	46%
Rajasthan	1.7	1.8	08%
Odisha	1.2	1.8	55%

Weekly Viewing Minutes (Bn)
Respective Markets / 2+

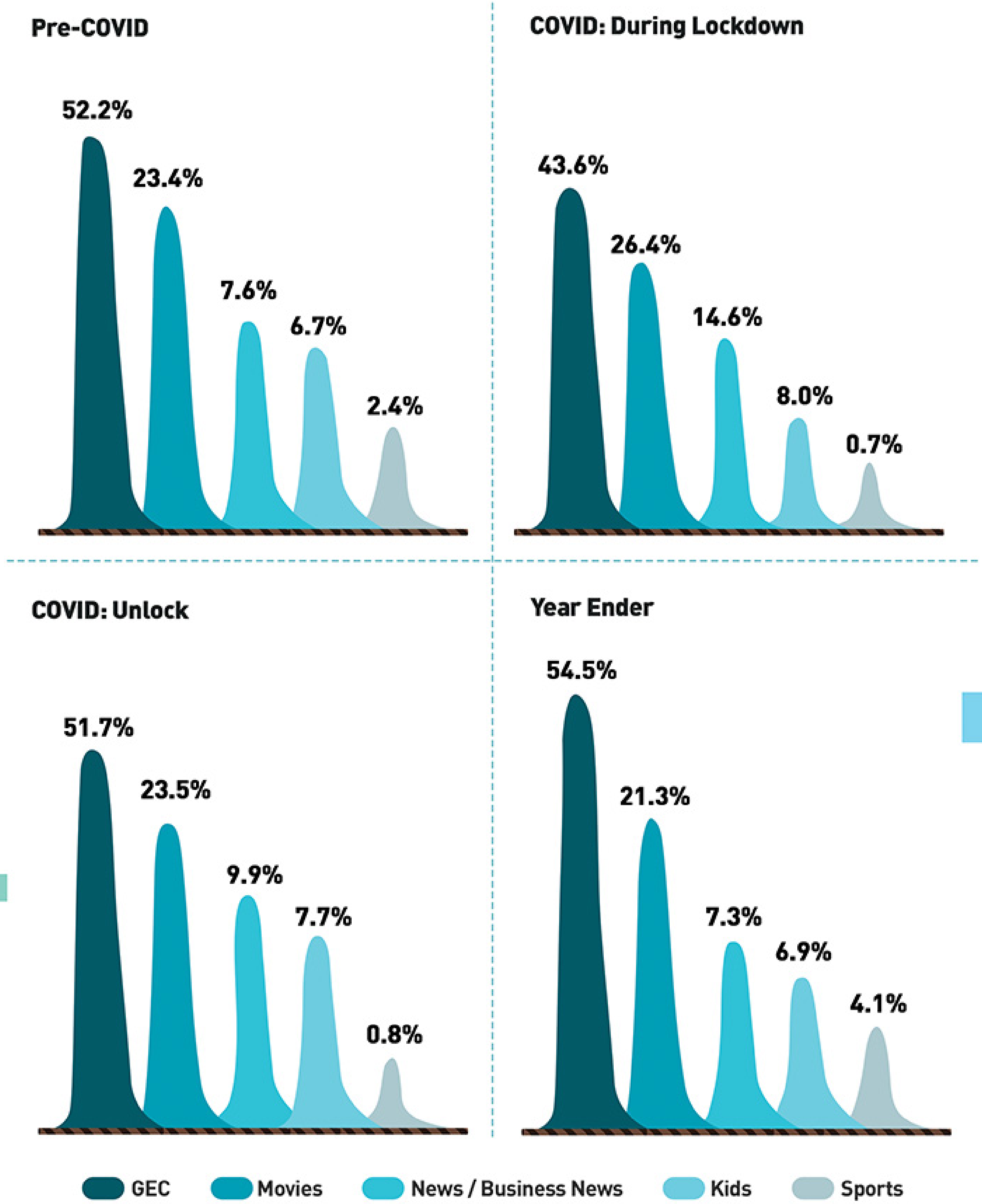
ADVERTISING ON KIDS GENRE

Total Ad Volumes accounted for by Kids channels, declined marginally in 2020, although the share of the genre in total Ad Volumes on TV, remained stable at 03%.

	Ad Volumes (Mn Secs)		Genre share%	
Genre	2019	**2020**	2019	**2020**
Total Ad Volumes	1542	**1497**	100%	**100%**
Kids	50	**47**	3%	**3%**

Excludes ASSOCIATIONS / SOCIAL / CULTURAL ORG, SOCIAL NGOs & Filler categories

SUMMARY OF GENRE-SHARES IN TOTAL TV VIEWERSHIP ACROSS 2020



4 phases

POSTSCRIPT

It was the best of times, it was the worst of times...

The opening line from Charles Dickens' A Tale of Two Cities, serves as an accurate epitaph for The Year After 2019.

While a major part of the year was lived under the cloud of despair, the arrival of the vaccines towards the end of the year, brought hope.

All through the challenges of the year, and the resetting of priorities, television viewership remained a fairly accurate barometer of the impact of the pandemic on businesses, and human lives and the sentiments that shaped our behaviour.

This Yearbook is an attempt to capture all that happened in the domain of television, as seen through the viewfinder of viewership and advertising trends.

Work From Home became the new normal and even during the most stringent lockdown times, BARC India was able to accurately and diligently report the "BARC Currency", the robust barometer for advertisers, agencies and broadcasters, to conduct and transact their businesses. Week on week, with clockwork regularity, this data was released. Thus, enabling all our stakeholders to continue with their business without disruptions.

The Year After 2019 was another year in the journey of improvements for BARC India. We successfully implemented the Landing Page Algorithm - a statistical solution in response to the long-standing industry issue of forced viewership.

In our continuing effort to provide industry with data and metrics that match global standards, we transitioned from the term "Impressions" to "Average Minute Audience" (AMA).

This was also the year when we switched to our advanced analytics platform, "YUMI". We must thank our subscribers for enabling a total and smooth changeover to the new platform.

We closed the year with another process augmentation exercise – one that seeks to further enhance the measurement and reporting standards with respect to news and niche channels' data.

We are also working to roll out a product which will measure video viewing on digital, as well as a screen agnostic measurement - be it on linear television or digital.

We have embarked on another year's journey with a commitment to our subscribers and stakeholders, to deliver a credible, robust, accurate and transparent measure of 'What India Watches™'.

We wish 2021 brings new peaks of successes for all of us, in all our ventures, at our workplaces and at home.

GLOSSARY

ADVERTISER

A group/entity/organization with commercial interest that disseminates messages about a particular brand with the aim of influencing purchase decisions for the products and services represented by the brand

ATS (UNIV)

Average Time Spent on the "Event" by all individuals in the Universe.

ATS (VIEWER)

Average Time Spent by viewers of the "Event".

AMA '000

Stands for Average Minute Audience. The number of individuals in 000s of a target audience who viewed an "Event", averaged across minutes.

BRAND

A company's identity in terms of what commercial products and services it offers. It may refer to a name, design, symbol, or any other feature that identifies the product or service as distinct from those of other sellers.

CUME RCH%

% of the universe that viewed at least one minute of the events in a set of events.

CUME RCH'000

Number of individuals ('000s) in the universe that viewed at least one minute of the events in a set of events.

DAILY AVG RCH%

Stands for Daily Average Reach in %. The daily average percentage of individuals who watched the event for at least one minute over a period of time.

DAILY AVG RCH '000

Stands for Daily Average Reach in 000s. The daily average number of individuals in 000s who watched the event for at least one minute over a period of time.

EVENT

An Event is a TV programme or time slot or any aggregation thereof. E.g., A channel is an aggregation of all time slots for the "Audience Day".

HH UNIVERSE

The total number of households in a defined target group.

MINUTE

A clock minute.

RAT%

Stands for Rating %. The percentage of a target audience who viewed an Event, averaged across minutes.

SHR%

% Share of the "Event" to total TV.

UNIVERSE

The total number of individuals in a defined target group.

VIEWING MINUTES

The sum of minutes watched by all individuals of an event.

ABOUT BARC INDIA

Of the Industry, By the Industry, For the Industry. BARC India is registered with the Ministry of Information & Broadcasting (MIB) as a self-regulated, not-for-profit Joint Industry Body that provides the most authentic audience estimates of What India Watches to Broadcasters, Advertisers and Advertising Agencies.The Big Data driven insights generated by BARC India, powers efficient media spends and content decisions in a highly dynamic and growing television sector. Built upon a robust and future-ready technology backbone, BARC's audience estimates are deeply rooted in measurement science, statistically proven and adequately representative of India's TV viewing households. Sharply focussed on continuous improvement and incorporating the changing market dynamics, BARC India consistently calibrates and updates its processes and methodology via ongoing consultations with industry stakeholders and experts.

The BARC India board comprises nominees of the Indian Broadcasting Foundation (IBF), The Indian Society of Advertisers (ISA) and The Advertising Agencies Association of India (AAAI). BARC's professional management team is guided by its 'Board of Directors' as well as the 'Committees' comprising of stakeholder representatives and industry experts, who oversee measurement science, data validation, the disciplinary code as well as the independent audit of its practices, protocols and finances.

Commencing operations in 2015, today BARC India manages the world's largest and most diverse TV measurement system covering approximately 187000 individuals in approximately 44,000 households, in 513 districts covering over 600 towns and 1300 villages, across India.

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The data referred to in this Yearbook pertains to Week 1 to 52 of 2020, as per BARC India calendar.

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Designed by AGENCY09

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What India Watches™

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