

Television Viewership and Advertising consumption of IPL-13 2020

Week 38 2020 : 19th to 25th September 2020

EDITION 12



1st OCTOBER 2020

Television Viewership Trends

INDIA TV UNIVERSE – WEEKLY MACRO DATA (W38'20)

The highest ad volume in 2020 was recorded during week 37 and continues to be marginally higher than the peak period volume

PRE-COVID-19
(11th Jan to 31st Jan)

PEAK PERIOD

CURRENT WEEK (W38'20)
(19th Sept to 25th Sept)



WEEKLY VIEWING
MINUTES (BN)

887

43%

1266
(Wk 13'20)

17%

1037



DAILY AVG. REACH
(MN)

560

12%

627
(Wk 14'20)

6%

594



AVERAGE TIME SPENT
(HH:MM)

03:46

27%

04:48
(Wk 13'20)

10%

04:09



INDIVIDUALS WATCHING
7 DAYS A WEEK (MN)

239

52%

363
(Wk 15'20)

26%

300



NO. OF CHANNELS
WATCHED
(PER VIEWER/ WEEK)

16

44%

23
(Wk 13'20)

11%

18



AD VOLUME
(MN)

28

17%

33
(Wk 12'20)

18%

33

TG: All India 2+

Periods:

Week 12- week starting 21 March Week 14 - week starting 4 April

Week 13 - week starting 28 March Week 15 - week starting 11 April

Change% vs. Pre-COVID

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IPL 2020 OPENING WEEK: 15% GROWTH IN VIEWING MINUTES VS. 2019

4

269 Mn viewers watched IPL in its opening week

60.6 Bn viewing minutes across 7 matches & 21 channels

(Higher viewership despite one less match & fewer channels vs 2019)

IPL 2020 OPENING WEEK PERFORMANCE

Opening week definition:

IPL-11 – week 15 2018 (8 Matches)

IPL-12 – week 13 2019 (8 Matches)

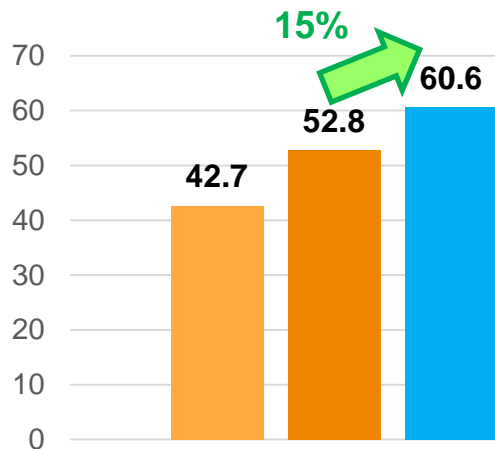
IPL-13 – week 38 2020 (7 Matches)

IPL aired on:

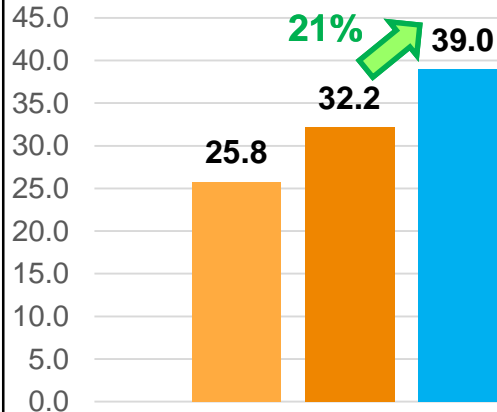
21 TV channels in 2020 vs.

24 TV Channels in 2019

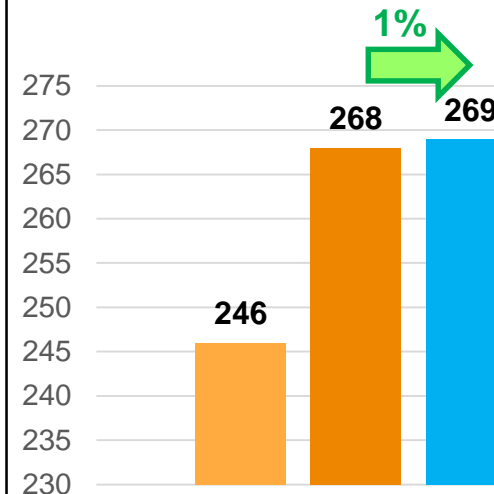
Viewing minutes (Billion)



Average Impressions (Million) Per match



Cume Reach (Mn)



■ IPL 11 (2018) ■ IPL 12 (2019) ■ IPL 13 (2020)

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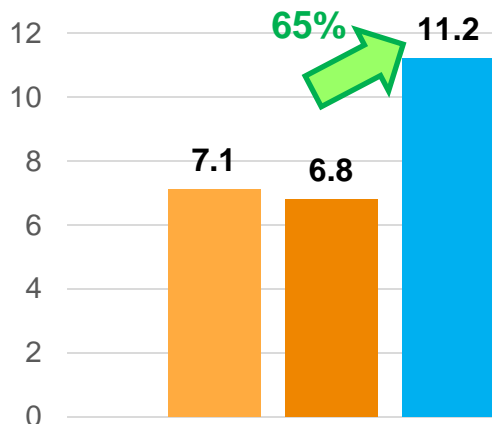
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**MATCH 1 (MI VS. CSK) GARNERED VIEWERSHIP OF 52 MN IMPRESSIONS, 29% > 2019
WATCHED BY 158 MILLION VIEWERS (21% > 2019)**

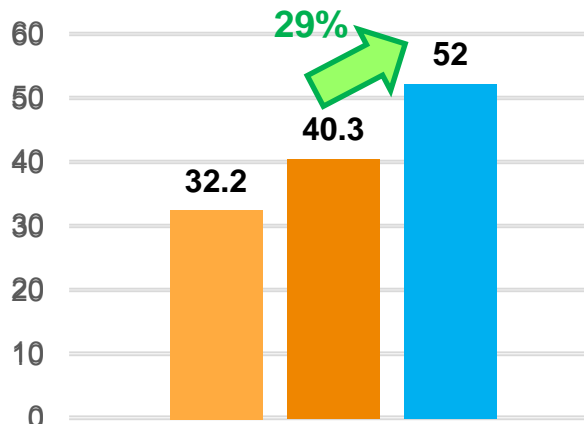
**IPL 2020 OPENING MATCH PERFORMANCE: 19TH SEPTEMBER
MUMBAI INDIANS VS. CHENNAI SUPER KINGS**



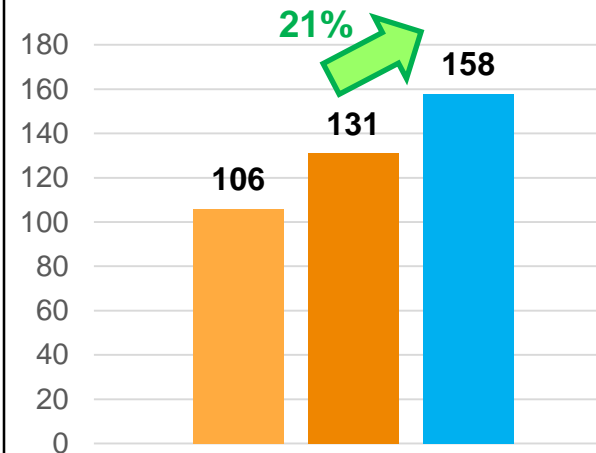
Viewing minutes (Billion)



Average Impressions (Million)



Cume Reach (Million)



All India (U+R) 2 years +/- TV Only/ Live Matches Only

IPL-11: MI vs CSK

IPL-12: RCB vs CSK

IPL-13: MI vs CSK

■ IPL 11 (2018) ■ IPL 12 (2019) ■ IPL 13 (2020)

IPL-11 – week 15 2018

IPL-12 – week 13 2019

IPL-13 – week 38 2020

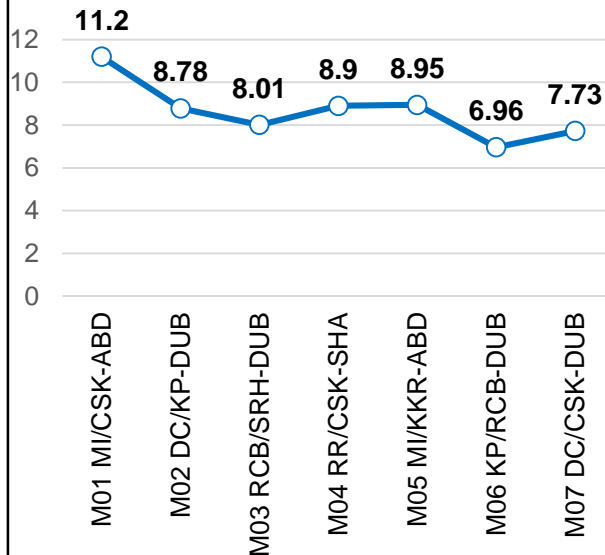
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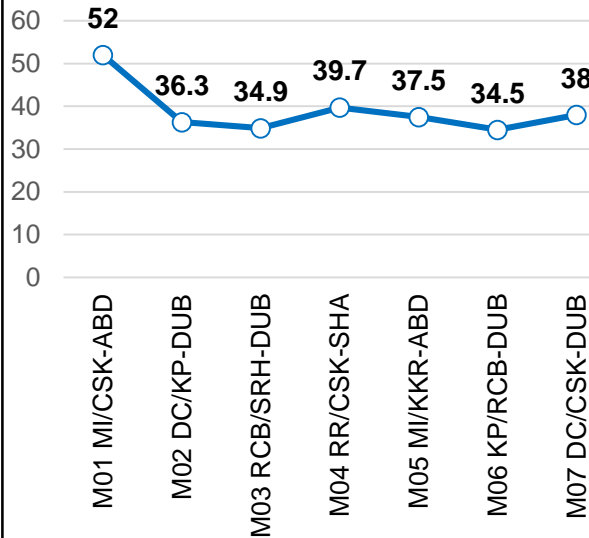
MATCH 2 TO 7 CONTINUED TO GARNER MORE THAN 34 MILLION IMPRESSIONS, VIEWED BY OVER 100 MILLION VIEWERS MATCH ON MATCH

IPL 2020 OPENING WEEK: MATCH-WISE PERFORMANCE

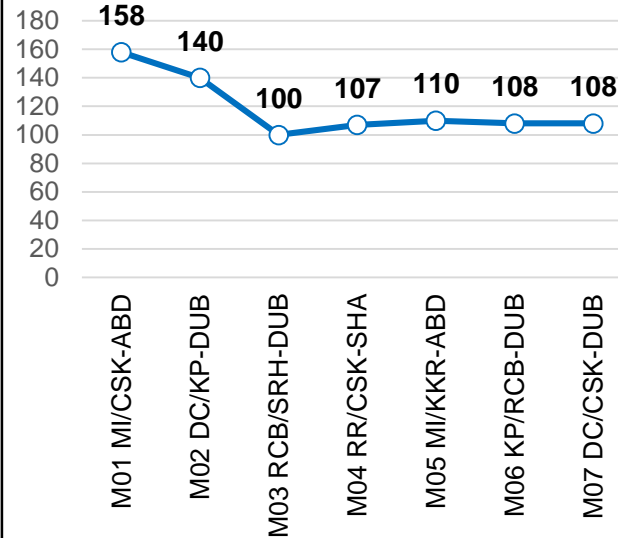
Viewing minutes (Billion)



Average Impressions (Million)



Cume Reach (Million)



M01 MI/CSK-ABD	Mumbai Indians vs Chennai Super Kings
M02 DC/KP-DUB	Delhi Capitals vs Kings XI Punjab
M03 RCB/SRH-DUB	Royal Challengers Bangalore vs Sunrisers Hyderabad
M04 RR/CSK-SHA	Rajasthan Royals vs Chennai Super Kings

M05 MI/KKR-ABD	Mumbai Indians vs Kolkata Knight Riders
M06 KP/RCB-DUB	Kings XI Punjab vs Royal Challengers Bangalore
M07 DC/CSK-DUB	Delhi Capitals vs Chennai Super Kings

Deep-dive into IPL viewership

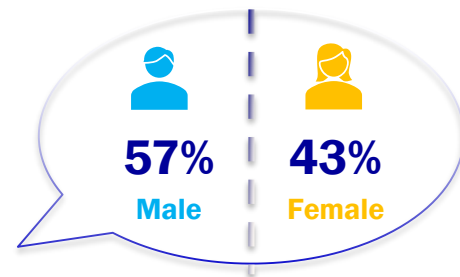
1 OUT OF 3 TV VIEWERS WATCHED IPL-13 LIVE



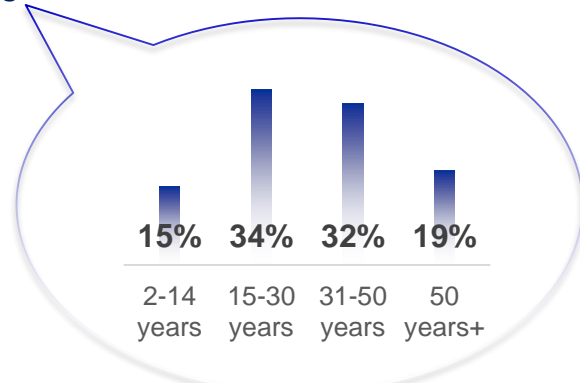
269Mn
Viewers



60.6Bn
Viewing Minutes



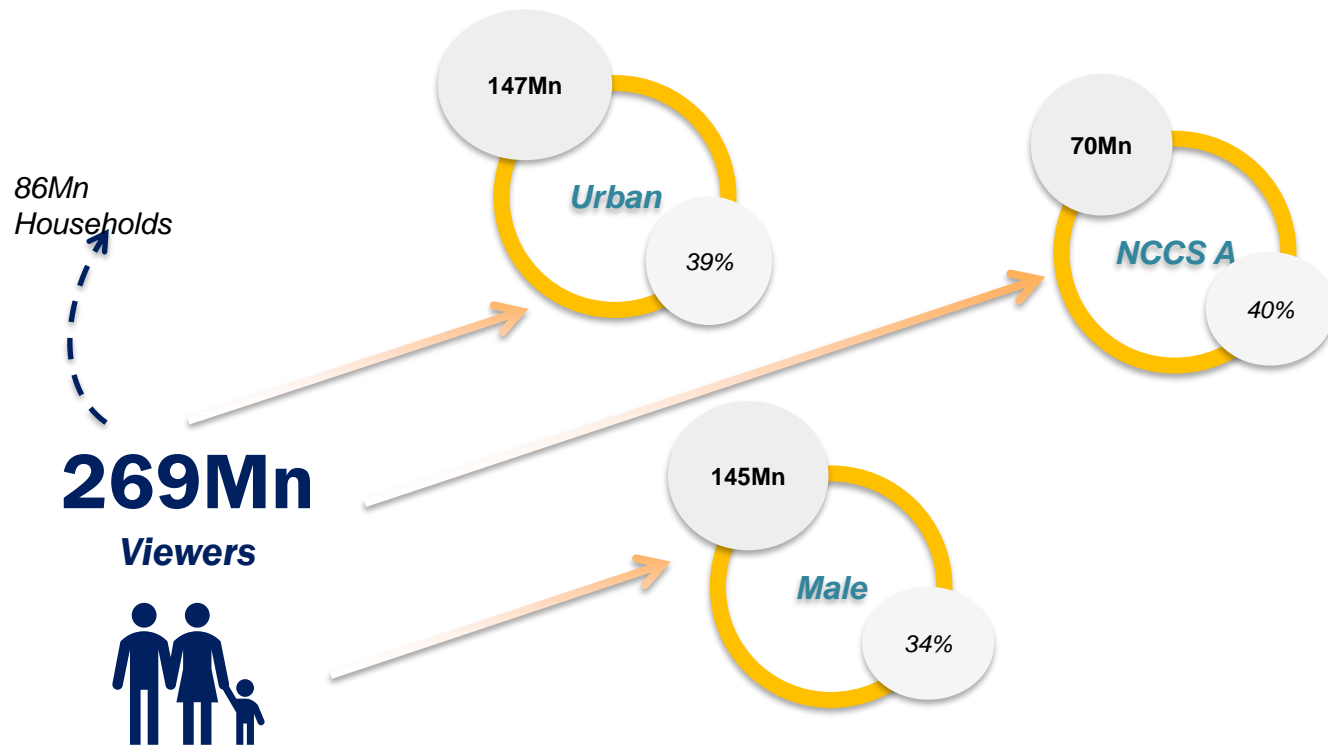
Asianet Movies, Jalsha Movies, STAR Gold, STAR Gold HD, Star Maa Movies, Star Suvarna, Star Suvarna Plus, STAR Vijay Super, STAR Maa Gold, STAR Sports 2 HD, STAR Sports 2, STAR Sports 1 Bangla
STAR Sports 1, STAR Sports 1 HD, STAR Sports 1 HD Hindi, STAR Sports 1 Hindi, STAR Sports 1 Kannada, STAR Sports 1 Tamil, STAR Sports 1 Telugu, STAR Sports Select 1 HD, STAR Sports Select 1 SD



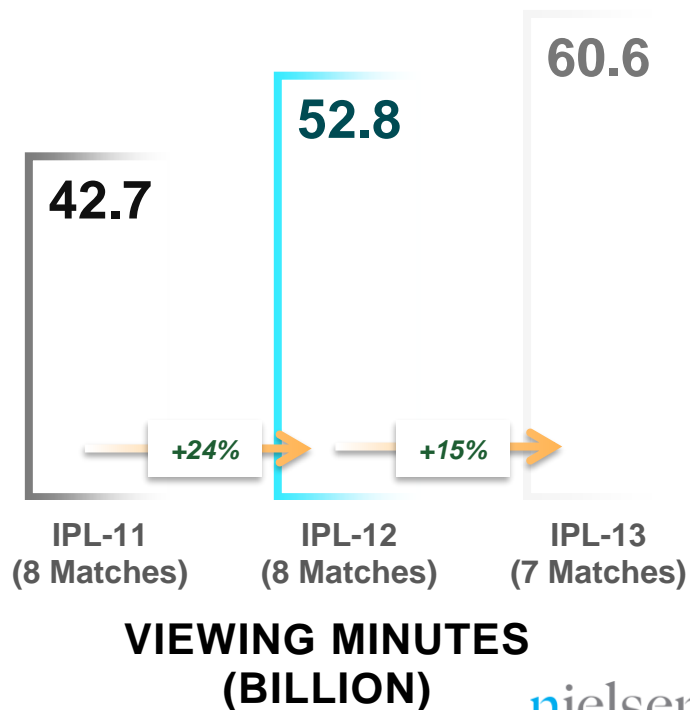
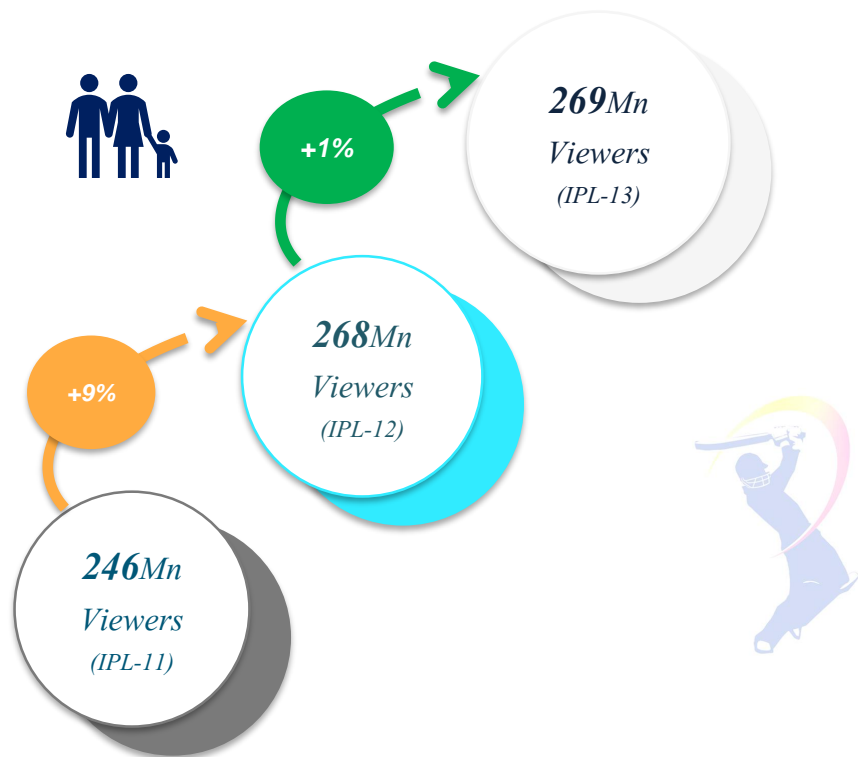
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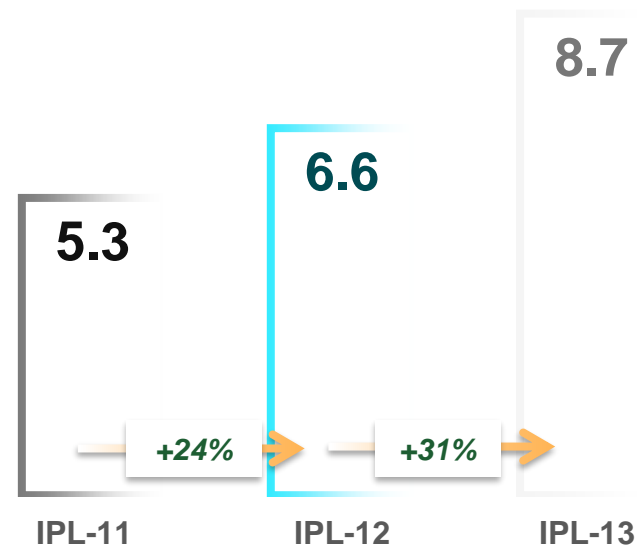
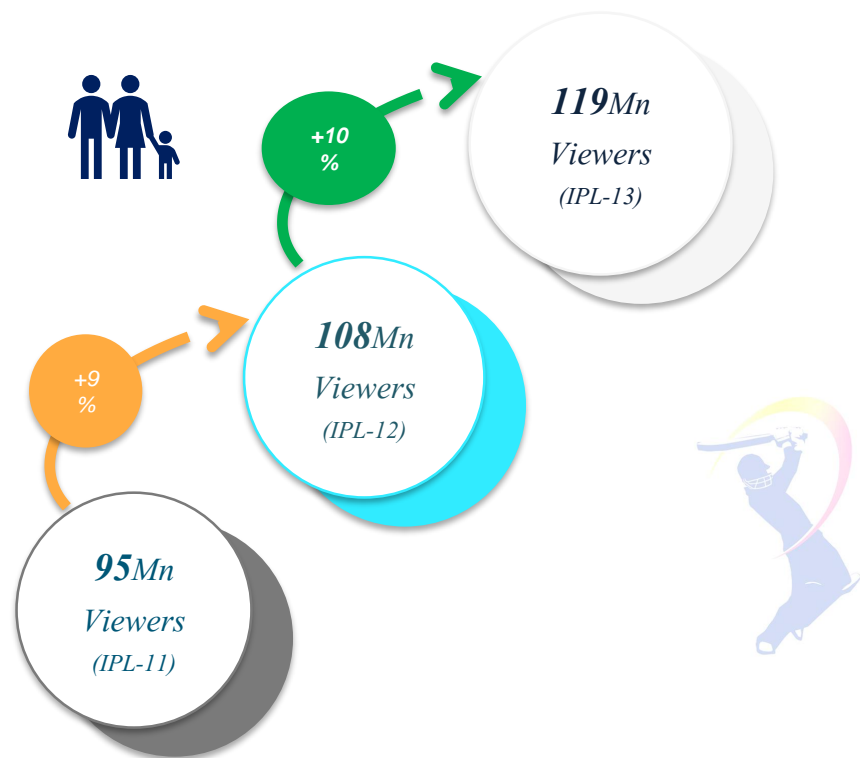
44% OF TV HOUSEHOLDS WATCHED IPL-13 LIVE



15% GROWTH IN VIEWERSHIP DESPITE FEWER CHANNELS & ONE LESS MATCH

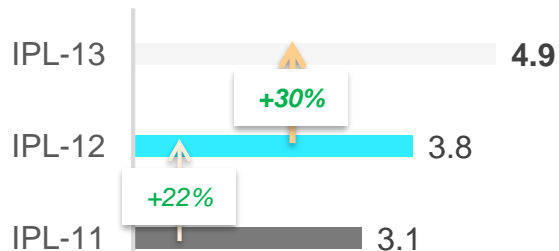


11MN MORE VIEWERS PER MATCH COMPARED TO LAST YEAR

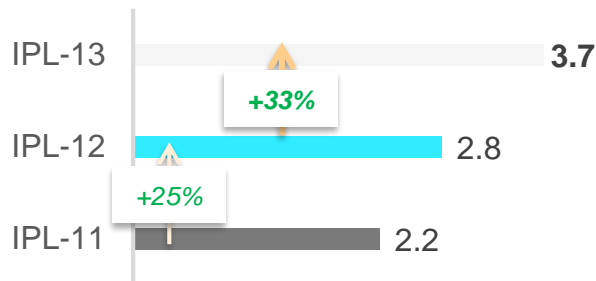


**VIEWING MINUTES
(BILLION)**

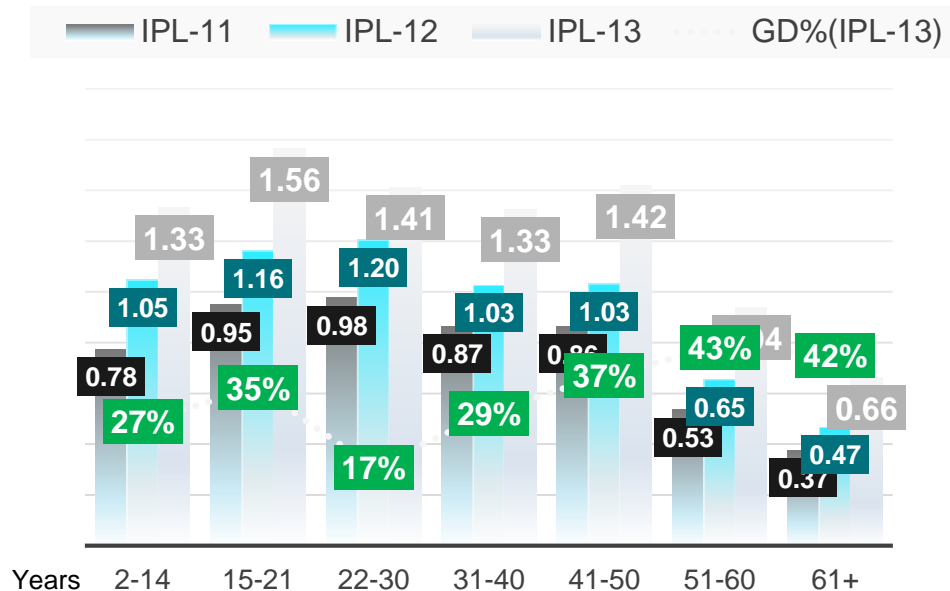
GROWTH ACROSS ALL AGE GROUPS & GENDER



GENDER



AGE GROUP



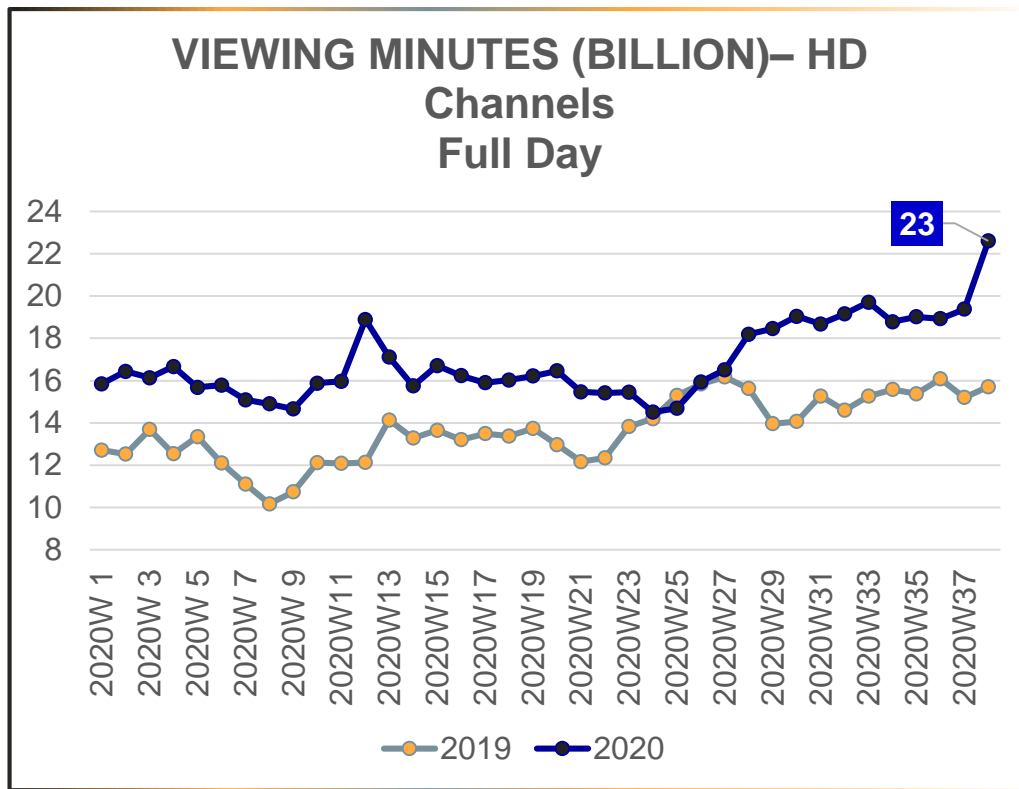
15-21 is the biggest contributor of viewership

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HD CHANNELS HAVE ATTAINED PEAK VIEWERSHIP

13



PRIME TIME

HD CHANNELS

India 2+

Channel	Rank
STAR Sports 1 HD Hindi	#1
STAR Maa HD	#2
STAR Sports 1 HD	#3
Sony TV HD	#4
Colors HD	#5
STAR Plus HD	#6
Zee TV HD	#7
STAR Gold HD	#8
Zee Marathi HD	#9
Sun TV HD	#10

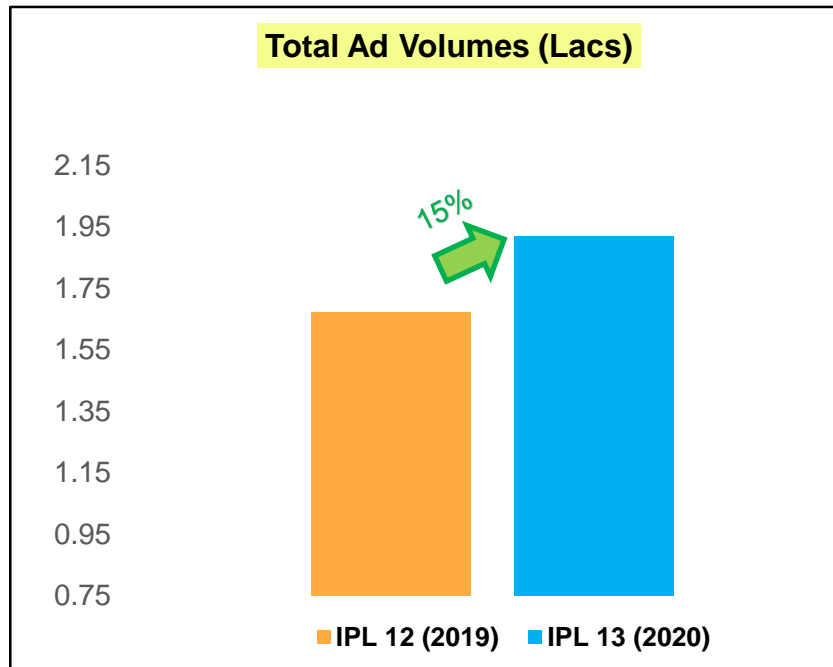
ALL CHANNELS

HSM 2+

Channel	Rank
STAR Sports 1 HD Hindi	#23
Big Magic	#24
Republic Bharat	#25
Colors Marathi	#26
Rishtey Cineplex	#27
STAR Gold 2	#28
&pictures	#29
STAR Bharat	#30
Zee Sarthak	#31
B4U Kadak	#32

Advertising Trends

TOTAL ADVERTISING VOLUME FOR IPL 2020 OPENING WEEK IS 15% HIGHER THAN 2019 OPENING WEEK



Ad Volumes in Lacs (Only Live Matches)

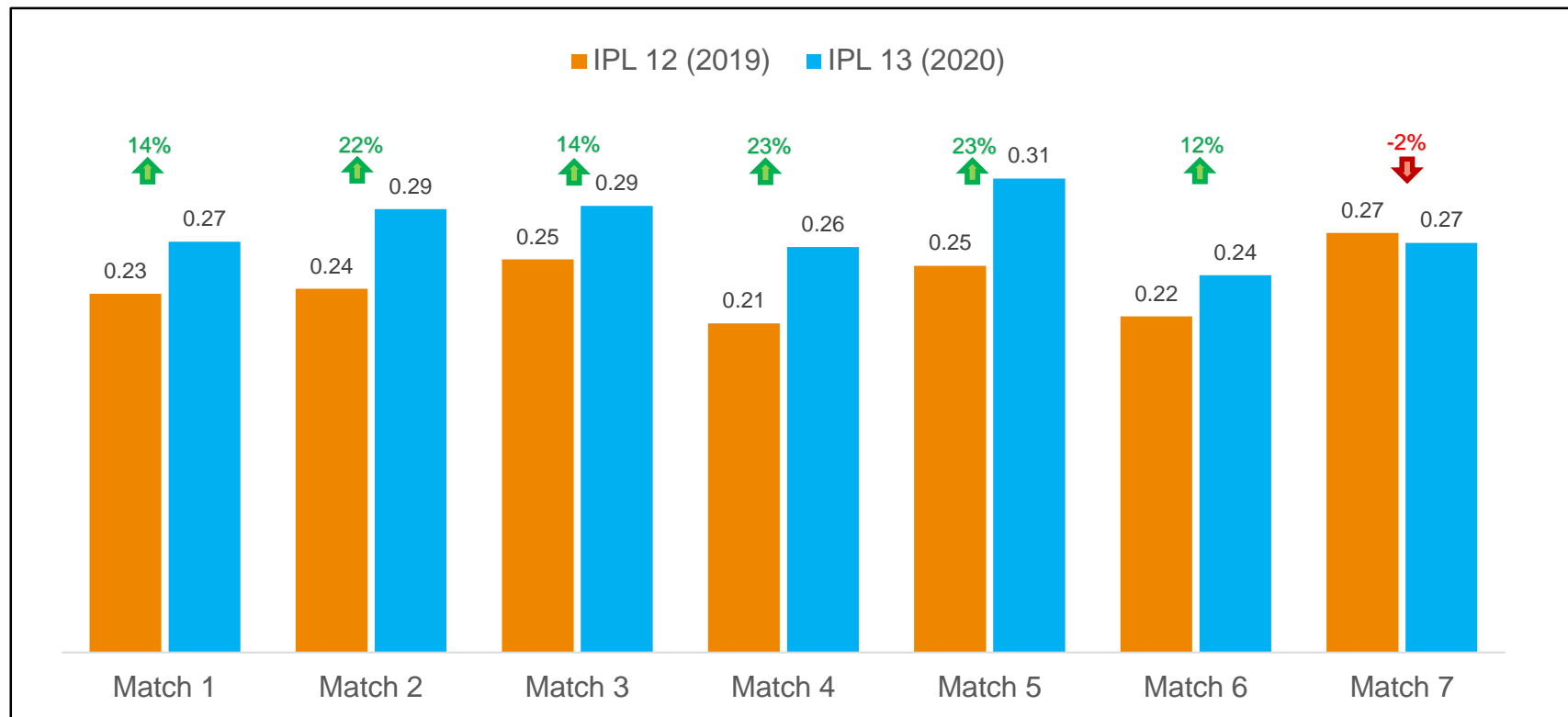
First seven matches considered for both seasons

Channels:- All Star Sports channels considered that aired all matches across both seasons

(Star Sport 1 Bangla, Star Sports 2 (HD+SD) excluded/ since did not air equal number of matches across both seasons)

AD VOLUMES SEE GROWTH ACROSS MATCHES

16



Ad Volumes in Lacs Ad Volumes in Lacs (Only Live Matches)

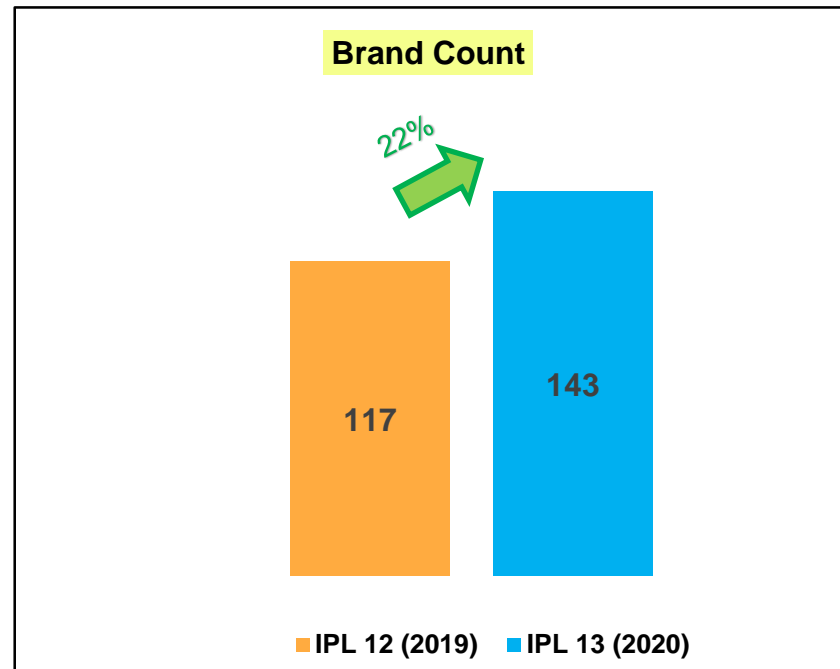
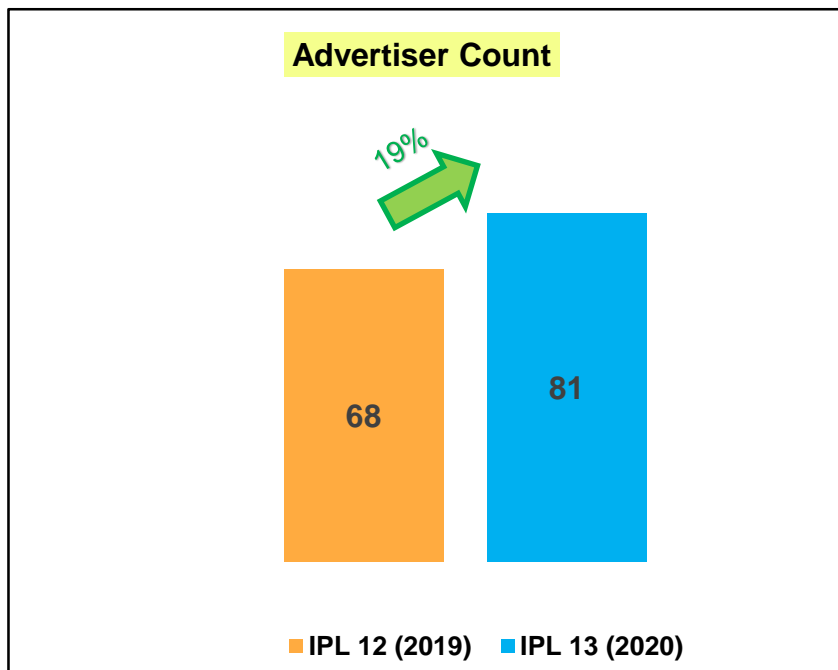
First seven matches considered for both seasons

Channels:- All Star Sports channels considered that aired all matches across both seasons

(Star Sport 1 Bangla, Star Sports 2 (HD+SD) excluded/ since did not air equal number of matches across both seasons)

ADVERTISER & BRAND COUNT IPL 2020 VS IPL 2019

17



First seven matches considered for both seasons (Only Live Matches)

Channels:- All Star Sports channels considered that aired all matches across both seasons

(Star Sport 1 Bangla, Star Sports 2 (HD+SD) excluded/ since did not air equal number of matches across both seasons)

Appendix for 'Advertising Trends' section

FIXTURES : 2019 vs. 2020

IPL 2019

RCB VS CSK

SRH VS KKR

DC VS MI

KP VS RR

DC VS CSK

KKR VS KP

MI VS RCB

IPL 2020

MI VS CSK

DC VS KP

RCB VS SRH

RR VS CSK

MI VS KKR

KP VS RCB

DC VS CSK

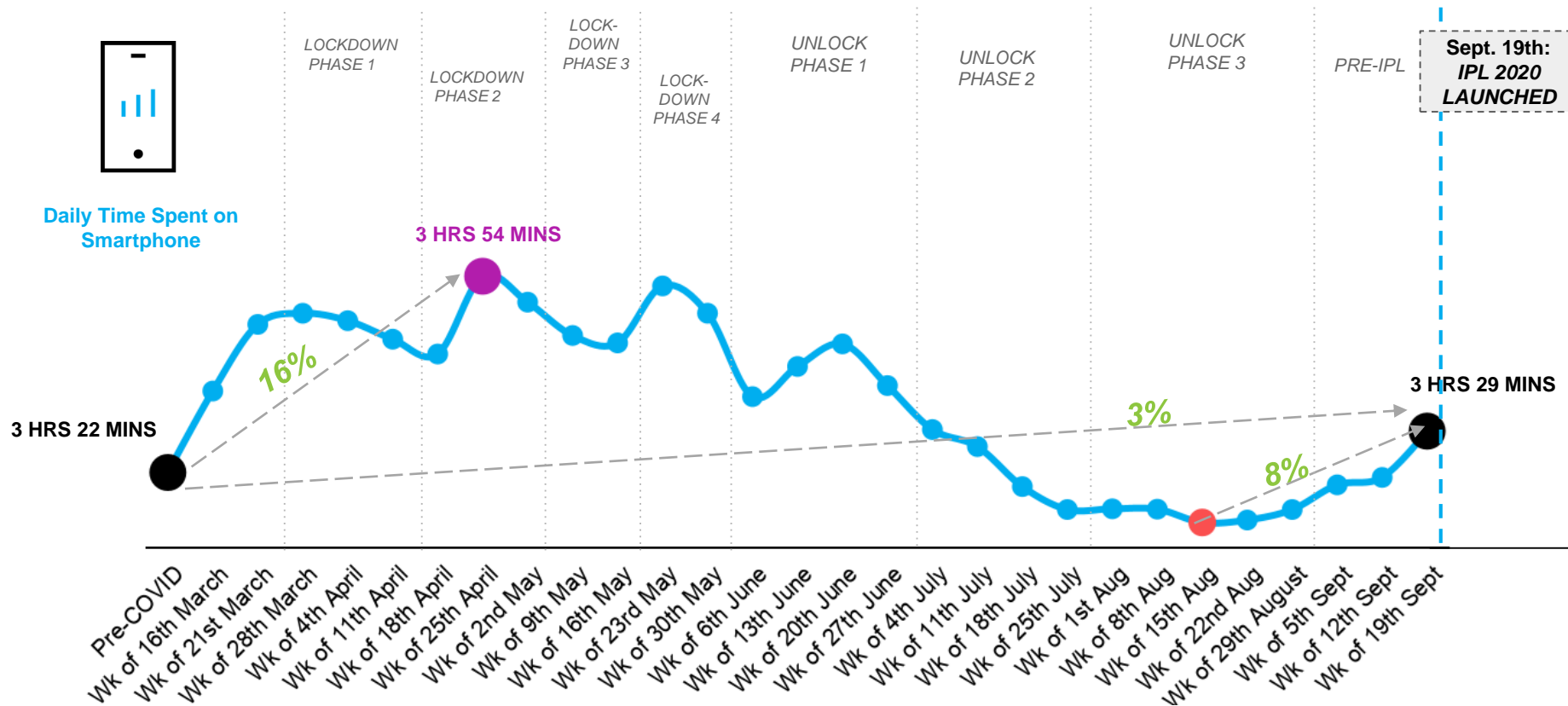
INDIA

SMARTPHONE BEHAVIOR DURING IPL 2020 WEEK 1 (19th - 25th Sept)

SMARTPHONE USAGE IS 8% UP VERSUS THE RECENT WEEKS



Daily Time Spent on Smartphone



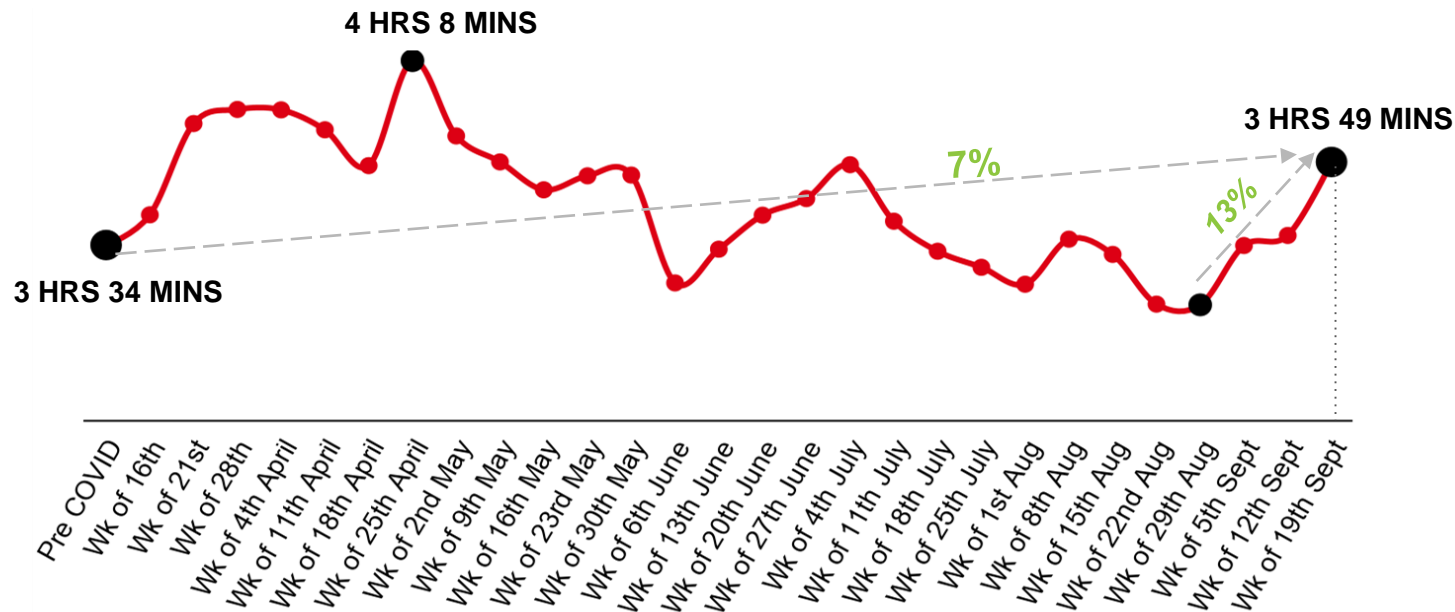
Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

VIDEO STREAMING IS 13% UP VERSUS THE RECENT WEEKS



**VIDEO
STREAMING**

WEEKLY TIME SPENT



Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

MASSIVE GAINS SEEN IN AUDIENCE BASE FOR HOTSTAR, SPORTS APPS, FANTASY SPORTS

	% USERS/WEEK					
	OVERALL			AMONG MALES		
	IPL Week (Wk of 19th Sept)	% change vs Pre Covid	% change over Wk of 12th Sept	IPL Week (Wk of 19th Sept)	% change vs Pre-COVID	% change over Week of 12th Sept
OTT	52%	+4%	+32%	52%	+5%	+40%
DISNEY+HOTSTAR	34%	+13%	+99%	35%	+16%	+128%
SPORTS APPS	12%	+45%	+92%	15%	+35%	+89%
FANTASY SPORTS	20%	+106%	+80%	24%	+93%	147%

1. OTT includes all Video Streaming Apps excluding Youtube
2. Disney+Hotstar App usage above includes all Content and not only Cricket/Sports.
3. Sports Apps includes apps like ESPNcricinfo, OneFootball, CricBuzz, FotMob Soccer Scores, etc. that have sports related content like scoreboards, and match commentaries (this category does not cover gaming apps)
4. Fantasy Sports here includes cricket-related games that involve team creation and scoreboards basis the real-life performance of players

Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

SUMMARY – TV VIEWERSHIP

- In opening week **21% growth in average impressions** per match vs. 2019, despite one less match & fewer channels than 2019
- **269 Mn viewers** watched IPL in its opening week. **11Mn more viewers per match** compared to 2019
 - **1 out of 3 TV viewer** watched IPL-13 Live
 - **44% of TV Households** watched IPL-13 Live
 - Peak viewership for HD channels
- The opening match of Mumbai Indians vs. Chennai Super Kings witnessed a viewership of **52 million impressions** (29% higher than 2019), watched by **158 million viewers** (21% higher than 2019)
- Advertising volumes see 15% growth within Star Sports set of channels/ Live matches (excluding Star Sport 1 Bangla, Star Sports 2 (HD+SD))
- Both Advertiser and Brand counts increase as compared to the earlier season

SUMMARY – SMARTPHONE BEHAVIOR

1. OTT has witnessed a **32% increase** in user base for the IPL week over the previous week, **primarily driven by massive gains seen in Disney+Hotstar.**
2. **Significant Gains** in Audience base seen for related **Sports Apps / Fantasy Sports Apps, Disney Hotstar** during the IPL week .

TG: ABC, 15-45 YEARS, URBAN ANDROID SMARTPHONE USERS IN 1L+ TOWNS/CITIES

THANK YOU

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