WHAT INDIA WATCHED 2019

PREFACE

Broadcast Audience Research Council (BARC) India has been playing a critical role as the currency for television audience measurement in India. BARC India's data helps marketers take better decisions and assists advertising agencies and broadcasters plan their campaign and programming strategies respectively.

The television viewing growth story of 2019 was underscored by the continuing rise of regional broadcast channels. Hindi increased its share as the dominant language in live sports and the consumption of local language content grew.

In 2019, BARC measured 634 channels which generated 48.4 trillion television viewing minutes and 1.59 billion seconds of advertising. The year had many peak viewing moments, while overall viewership and advertising remained largely stable.

The BARC Yearbook 2019 offers data and insights on What India Watches, When they Watch, How Much they Watch... and more.

Read on...

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FROM THE CEO'S DESK

Sunil Lulla
Chief Executive Officer, BARC India

Television is the screen that Indian households engage with daily, with co-viewing accounting for how 80% of content is watched.

Viewership has grown 38% over the last four years, and a total of 48.4 trillion viewing minutes were consumed on television in 2019. Each household watches 5 hours, 11 minutes of television every day and as many as 222 million individuals tune in to primetime television at any given minute.

2019 ushered in change with the New Tariff Order (NTO). Elections, IPL and the ICC Cricket World Cup were some of the year's mega TV events and there were significant spikes in viewership of News and Movies in southern languages. A highlight of the year was the growth of sports coverage in regional languages. Overall, Assam and the rest of the North East, Andhra Pradesh and Telangana, and Tamil Nadu led the surge. While Ad FCT at 1.6 Bn seconds fell by 3.6% (over 2018), the share of Top 10 advertisers grew by 3.8%.

And with over a 100 million homes in India yet to get a TV set, growth continues to be ahead of us.

BARC India now samples from a panel of 185,000 individuals across 44,000 homes and before the year ends, we will be in 55,000 homes. To enable its constituents to understand viewers and their engagement better, BARC India has introduced need-based products and tools that are gaining in popularity.

On behalf of all our stakeholders and our colleagues at BARC India, I would like to express our sincere thanks to each of you. We encourage you to socialise this report within your stakeholders.

We are here at your service and I look forward to hearing from you.

Wishing you a great 2020.

TV VIEWERSHIP IN 2019

48.4 TRILLION Viewing Minutes

2019

914 Bn
Viewing Minutes
Per Week

11525
Advertisers
on TV

3 Hr 42 Min
Avg Time Spent
Per Viewer

1.59 Bn Seconds
Volume Of
Advertising

836 Mn
Individuals with
Access to TV

762 Mn
Viewers
Per Week

COUNTING DAY

2019 Lok Sabha Election Counting Day (23rd May) registered 59 Bn Viewing Minutes for the News Genre, which contributed to 38% of total TV viewership for the day.

SILVERSCREEN @ HOME

26080 movies were aired on TV. The four South Indian languages contributed to 48% of these unique movie titles.

SUPER HIT

Housefull 4 was the highest viewed Movie Premiere on TV. Telecast of the film registered 4.1 Bn Viewing Minutes.

THE INDO-PAK FACE-OFF

The 2019 ICC Cricket World Cup match between India and Pakistan, was the most watched game between 2016-2019 garnering 29.4 Bn Viewing Minutes.

HOWDY MODI!

The event was telecast live across 163 channels. 69 Mn viewers watched the broadcast, accounting for 2.3 Bn Viewing Minutes.

TV OVER THE YEARS

Robust and Stable Growth

Television ownership, and viewing, continues to grow in India. Over the last 4 years, volume of viewership (Viewing Minutes) has grown by 38%. Year-on-year too, TV viewing has clocked steady growth. In 2019, which also saw the rollout of the New Tariff Order (NTO), TV Viewership remained stable.

Television Viewership

35.0 Tn	42.3 Tn	48 .1 Tn	48.4 Tn
2016	**2017**	**2018**	**2019**

Viewing Minutes, India, 2+

GEC and Movies Continue to Account for 3/4th of TV Viewership

2016	35.0 Tn
2017	42.3 Tn
2018	48.1 Tn
2019	48.4 Tn

■ GEC   ■ MOVIES   ■ NEWS   ■ KIDS   ■ MUSIC   ■ SPORTS   ■ NICHE / OTHERS*

*Channel Genres with Viewership Share < 1% have been grouped under Niche/Others

Viewing Minutes, India, 2+, in descending order of Viewership Share

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De-constructing TV Viewership Growth from 2016 to 2019

28%	47%	46%	56%
GEC	**MOVIES**	**NEWS**	**KIDS**

53%	89%	52%
MUSIC	**SPORTS**	**NICHE / OTHERS**

Viewing Minutes, India, 2+, in descending order of Viewership Share

TV Viewership: Pan-India Growth

Increase in TV viewership over the last 4 years has been driven by strong growth posted by regional language markets, which has come on the back of increasing availability of, and affinity for local language content. For instance, viewership in Assam / North East / Sikkim grew by 119% in the last 4 years and contributed to 3% of total TV viewership in 2019

Assam / North East / Sikkim
119%   3%

Madhya Pradesh / Chhattisgarh
79%   7%

Gujarat / D&D / DNH
70%   6%

Odisha
60%   3%

Maharashtra / Goa
57%   14%

West Bengal
57%   6%

Karnataka
55%   9%

Delhi
48%   3%

Bihar / Jharkhand
32%   3%

Tamil Nadu / Pondicherry
29%   12%

Rajasthan
27%   3%

Andhra Pradesh / Telangana
21%   13%

Uttar Pradesh / Uttarakhand
13%   7%

Punjab / Haryana / Chandigarh / Himachal Pradesh / Jammu & Kashmir
8%   6%

Kerala
5%   4%

Viewing Minutes, Respective Market, 2+, in descending order of growth

⬤ Viewership Growth 2019 over 2016   🔴 Viewership Contribution 2019

Affinity for Local Language Content

Share of viewership of channels other than Hindi and the 4 South languages have risen steadily, from 15% in 2016 to 23% in 2019. Viewership of most regional language channels have doubled in the same period. English Language channels have seen a decline in viewership - one reason is that sports content - which was traditionally broadcast largely in English - is increasingly available in Hindi and regional languages. Here, viewership for Hindi language channels have grown by 31% in the last 4 years and contributed to 44% of total TV viewership in 2019

Channel Language	Viewership Growth (2019 over 2016)	Viewership Share (2019)
HINDI	31%	44%
Multi Language	40%	7%
BANGLA	83%	4%
ODIA	111%	2%
ASSAMESE	125%	0.5%
TELUGU	28%	12%
KANNADA	61%	7%
MALAYALAM	9%	3%
PUNJABI	54%	1%
GUJARATI	157%	0.3%
TAMIL	31%	12%
MARATHI	128%	4%
BHOJPURI	200%	2%
ENGLISH	-41%	1%
URDU	179%	0.1%

🟩 Channel Languages   🟧 Viewership Growth (2019 over 2016)   🟨 Viewership Share (2019)

Viewing Minutes, India, 2+, in Descending order of Viewership Share

Advertising Growing with Viewership

Advertising Volumes on TV have grown 21% (2016-2019). Increasing share of advertising across most languages is another indicator of the growth of regional television.

Ad Volume Bn Seconds	2016	2017	2018	2019
	1.31	1.43	1.64	1.59

Share of Advertising Volume across Languages (Increase / Decrease Over Previous Year)

Language	2016	2017	2018	2019
Hindi	33%	34%	31%	32%
Tamil	11%	11%	11%	10%
Telugu	8%	9%	10%	9%
Bangla	6%	7%	8%	9%
Kannada	6%	7%	7%	7%
English	8%	7%	7%	6%
Multi Language	4%	5%	5%	5%
Malayalam	5%	5%	5%	5%
Marathi	5%	4%	4%	4%
Punjabi	4%	3%	3%	4%
Assamese	3%	3%	3%	3%
Bhojpuri	2%	2%	2%	2%
Odia	2%	2%	2%	2%
Gujarati	1%	2%	2%	2%
Urdu	0.5%	0.5%	0.5%	0.3%

News, General Entertainment and Movies continue to account for over 3/4th of total Advertising Volumes

(Increase / Decrease Over Previous Year)

Genre	2016	2017	2018	2019
News	34%	33%	33%	32%
GEC	24%	24%	24%	25%
Movies	19%	20%	20%	21%
Music	13%	12%	12%	12%
Niche / Others	6%	6%	7%	6%
Kids	4%	3%	3%	3%
Sports	1%	1%	1%	1%

Share of Advertising Volumes, Genres with viewership share < 1% have been grouped under Niche/Others

NEWS SCALES ANOTHER PEAK

Rajat Sharma
Chairman and Editor-in-Chief, India TV

" 2019 witnessed several events which swung the mood of the nation and enkindled curiosity to dig more and this led to a greater shift towards news. We are confident that in a world full of possibilities, we shall witness greater emphasis on awareness and year 2020 shall witness many more avenues for dissemination of news. Television measurement by BARC India reflects the mood of the TV viewing nation. "

Kalli Purie
Vice-Chairperson, India Today Group

" Indians love news, and interestingly we have approximately 400 news channels in the country - which is the highest number worldwide. 2019 was a 'Big News' year in many ways. The Hindi News Genre saw the highest growth (30%) in viewership as compared to all other national genres. We are excited to welcome the new decade of news in India and are ready for the future. As always, we believe BARC India's contribution to the next leap in measurement science will be critical "

Arnab Goswami
Editor-in-Chief, Republic Media Network

" The News Genre has spiked to 9.2% growth in CY 2019 as against 7.4% in CY 2018. News viewing on TV is growing at an incredible pace. Working with BARC India has been fabulous experience and I hope to learn more from the analysis of BARC India data in the coming calendar year. "

Anand Sankeshwar
MD, Dighvijay 24x7 News

" Journey with BARC has been very eventful and a major learning for Dighvijay 24x7 News. Since the launch of this channel BARC India and its proprietary tools have been great help in building the channel and its programming strengths. An organisation like BARC India with shareholders like broadcasters, advertisers, and advertising and media agencies, makes it a more robust and a comprehensive body that would be more suited to address the concerns of the industry in many ways. "

Growth of the News Genre

2019 saw a 23% growth in viewing minutes for News Channels over the previous year, with the genre accounting for 8.9% of total television viewing – its highest share over the last four years.

2019 was the year of General Elections, as well as polls to elect 7 State Assemblies. Earlier in the year, there was extensive news coverage of the Pulwama Terror Attack and the aftermath of that, including the Balakot Air Strike, and capture and release of Wing Commander Abhinandan Varthaman.

News Genre Viewership

BREAKING NEWS	BREAKING NEWS	BREAKING NEWS	BREAKING NEWS
2952 Bn	3464 Bn	3526 Bn	4324 Bn
2016	2017	2018	2019

Viewing Minutes, India, 2+

Later in the year, the triple talaq debate and the abrogation of Article 370 dominated headlines. Beyond political affairs, there were several other developments that drove news viewership in 2019 – severe rains and floods in many parts of the country, Chandrayaan-2, the Ardh Kumbh Mela and ICC World Cup Cricket. These ensured high viewer interest through the year, across the country.

The Maharashtra Legislative Assembly elections and the run-up to government formation, Supreme Court decision on Ram Janmabhoomi-Babri Masjid dispute and the controversy around Citizenship Amendment Act also led to successive viewership peaks for the news genre.

Top 20 News Stories of 2019

AIR POLLUTION IN INDIA **ARTICLE 370 SCRAPPED**

INX MEDIA & AIRCEL MAXIS MONEY LAUNDERING CASE

RESULTS OF GENERAL & STATE ELECTIONS FLOODS IN BIHAR

GENERAL ELECTIONS

CEASEFIRE VIOLATION AT INDIA PAK BORDER

ARDH KUMBH MELA IN UTTAR PRADESH

MONSOON IN INDIA MONSOON IN MAHARASHTRA

MAHARASHTRA & HARYANA POLL RESULTS **BALAKOT AIR STRIKE**

ARUN JAITLEY **BABRI MASJID-** DEMISE **RAMJANMABHOOMI DISPUTE**

PULWAMA ATTACK GOVT. FORMATION MAHARASHTRA

AIR POLLUTION IN DELHI

Powered by **BIO NEWS**

Size of text above indicates viewership share of Top 20 News Stories across all channels available in BIO News, All India, 2+

Contribution of News to Total TV Viewership

5 State Groups - Maharashtra / Goa, Andhra Pradesh / Telangana, Karnataka, Tamil Nadu / Pondicherry & Uttar Pradesh / Uttarakhand accounted for 52% of Total News viewership

Above 10%
- Maharashtra / Goa
- Andhra Pradesh / Telangana
- Karnataka

5% to 10%
- Uttar Pradesh / Uttarakhand
- Tamil Nadu / Pondicherry
- Punjab / Haryana / Chandigarh / Himachal Pradesh/ Jammu & Kashmir
- West Bengal
- Madhya Pradesh / Chhattisgarh
- Gujarat / D&D / DNH

Below 5%
- Delhi
- Kerala
- Assam / North East / Sikkim
- Bihar / Jharkhand
- Rajasthan
- Odisha

Growth of News Viewership (2019 Vs 2018)

Bihar/Jharkhand, West Bengal, Maharashtra / Goa and Punjab / Haryana / Chandigarh / Himachal Pradesh / Jammu & Kashmir recorded the highest News viewership growth

Above 30%
- Bihar / Jharkhand
- West Bengal
- Maharashtra / Goa
- Punjab / Haryana / Chandigarh / Himachal Pradesh / Jammu & Kashmir

20% to 30%
- Uttar Pradesh / Uttarakhand
- Gujarat / D&D / DNH
- Delhi

10% to 20%
- Andhra Pradesh / Telangana
- Odisha
- Madhya Pradesh / Chhattisgarh
- Karnataka

5% to 10%
- Rajasthan
- Tamil Nadu / Pondicherry

Below 5 %
- Assam / North East / Sikkim
- Kerala

News Consumption in Regional Languages

More than 90% of news viewership in the South Indian states come from the respective local language news channels.
For instance, 98% of total News viewership in Andhra Pradesh / Telangana comes from 19 Telugu News Channels.

Region	Language	%	Channels
Andhra Pradesh / Telangana	TELUGU	98%	19*
Tamil Nadu / Pondicherry	TAMIL	97%	14*
Kerala	MALAYALAM	97%	8*
Karnataka	KANNADA	92%	12*
Odisha	ODIA	80%	8*
West Bengal	BANGLA	73%	10*
Assam / North East / Sikkim	ASSAMESE	66%	8*
Maharashtra / Goa	MARATHI	51%	7*
Gujarat / D&D / DNH	GUJARATI	39%	10*
Punjab / Chandigarh	PUNJABI	21%	4*

*Number of News Channels in Respective Language

Respective Market, 2+, in descending order of regional language News channels contribution to total News Genre viewership

News Viewership by Language

MARATHI GUJARATI
ASSAMESE ENGLISH
TELUGU
HINDI
KANNADA TAMIL
BANGLA ODIA PUNJABI
MALAYALAM

Size of text above indicates Relative Viewership share in News by languages, All India, 2+

General Elections 2019

A mammoth electoral exercise held in 7 phases spread across 39 days had viewers glued to TV - the favourite medium of most Indians for latest update news and developments.

Phase 1 : 11 April 2019 (91 Constituencies 20 States)

Phase 2: 18 April 2019 (95 Constituencies 13 States)

Phase 3 : 23 April 2019 (117 Constituencies 15 States)

Phase 4 : 29 April 2019 (71 Constituencies 9 States)

Phase 5 : 6 May 2019 (51 Constituencies 7 States)

Phase 6 : 12 May 2019 (59 Constituencies 7 States)

Phase 7 : 19 May 2019 (59 Constituencies 8 States)

Source : Election Commission of India

Dispersion of Electors	REGIONS	Dispersion of Individuals with access to TV
17%	Uttar Pradesh / Uttarakhand	10%
10%	Maharashtra / Goa	12%
10%	Bihar / Jharkhand	5%
8%	Andhra Pradesh / Telangana	10%
8%	Madhya Pradesh / Chhattisgarh	8%
8%	West Bengal	7%
6%	Tamil Nadu / Pondicherry	9%
6%	Karnataka	8%
5%	Gujarat / D&D / DNH	7%
5%	Rajasthan	5%
4%	Odisha	3%
3%	Haryana / Himachal Pradesh / Jammu & Kashmir	4%
3%	Kerala	4%
3%	Assam / North East / Sikkim	3%
2%	Delhi	3%
2%	Punjab / Chandigarh	3%

910 MN India **836 MN**

Source: Election Commission of India, BI Survey 2018

Impact of Poll Fever on TV Viewership

The growth of viewership across town class, gender, NCCS, and age-groups show that people continue to engage heavily with TV for staying updated on current news developments.

2019 had already witnessed "news high" weeks in the month of February - following Pulwama terror attack and its aftermath. The news genre held its own subsequently, during IPL-12. The General Elections 2019 Counting Day took news viewership to an altogether new height, clocking 40% share among viewers over the age of 15.

News was the Highest Viewed Genre on Counting Day

■ P13 Weeks   ■ Counting Day

Growth of Viewership on Counting Day

328%
India Urban 15+

371%
India Rural 15+

352%
Males 15+

347%
Female 15+

328%
NCCS A 15+

343%
NCCS B 15+

367%
NCCS CDE 15+

364%	351%	366%	343%	345%	321%
15-21 Years	22-30 Years	31-40 Years	41-50 Years	51-60 Years	> 61 Years

Counting day Viewing Minutes compared with P13 Week Average , All India, 15+

A NEW TARIFF FRAMEWORK

Anuj Gandhi
Group CEO, IndiaCast

" In February 2019, New Tariff Order (NTO) was introduced by TRAI to be implemented across the TV distribution sector. Freedom for subscribers to opt for the channels of their choice, transparency in the sector and better realisation of value for all stakeholders were the key objectives to be achieved through NTO.

Broadcasters invested immense resources to inform & get the subscribers to exercise choice of their channels. The sector still faces challenges of complete transparency, state of the art infrastructure, full compliance of QoS Regulations to truly achieve the principles on which NTO and other regulations were based upon. "

Manish Singhal
Chairman & Managing Director Enterr 10 Networks

" The Hindi Genre performance for the year was a rollercoaster due to NTO. Our channels were sampled and we have shown growth in 2019. We have also successfully launched new shows on the channel which are performing well. We expect the overall Hindi GEC genre to grow by about 15-18% in the year 2020 "

NTO - 2019

On the 1st of February 2019, the Telecom Regulatory Authority of India (TRAI)'s New Tariff Order (NTO) for Broadcasting and Cable Services came into force. TRAI called it a New Regulatory Framework aimed at ensuring that the consumer be empowered and allowed to exercise her option of choice.

Under the New Framework, subscribers of DTH and Digital Cable TV services could choose individual channels and/or packs as per their preferences. The NTO also mandated a base and add-on packs of Free-to-Air (FTA) channels at fixed costs which was termed as Network Connection Fee (NCF).

As the NTO was rolled out, and the eco-system transitioned from the erstwhile pricing structure, Broadcasters, Distributors and Consumers aligned themselves to the new regulations. Impact of on-ground changes on viewership was accurately picked up by BARC India's measurement system.

One trend that emerged post NTO was a drop in percentage of households that watched 30 channels or more on an average per week, while share of homes that watched 20 channels or less increased.

NTO Impact: More Homes Watched Fewer Channels

Legend: W26 - 50'2018 | W6 - 9'2019 (NTO Roll Out) | W10 - 29'2019 | W40 - 53'2019

Axis labels: % Of Total TV Households (y-axis) | Number of Channels Viewed in a Week by a Household (x-axis)

W26-50' 2018 (23rd June - 14th Dec 2018) | W6-9' 2019 (2nd Feb - 1st Mar 2019) | W10-29' 2019 (2nd Mar - 19th July 2019) | W40-53' 2019 (28th Sep 2019 - 3rd Jan 2020)

NTO: Viewership Trend across 2019

At the Universe (Total TV) level, Average Daily Reach (viz., number of people who sample TV daily) dropped around 5% over the year. After a small dip during the transition period, Time Spent watching TV by an average individual (ATS) climbed back and stabilised at earlier levels.

The consistent level of engagement, as indicated by time spent watching TV is another affirmation of the fact that TV remains the preferred destination of most Indians for entertainment, news and information.

Daily TV Tune-ins

	Pre-NTO: W 1-5 (29th Dec '18 – 1st Feb '19	W 14-26 (30th Mar '19 – 28th Jun '19)	W 27-39 (29th Jun '19 – 27th Sep '19)	W 40-53 (28th Sep '19 – 3rd Jan '20)
	594	594	590	567

Average Daily Reach Mn, All India, 2+

Time Spent Watching TV: Back to near pre-NTO Levels

	Pre-NTO: W 1-5 (29th Dec '18 – 1st Feb '19	W 14-26 (30th Mar '19 – 28th Jun '19)	W 27-39 (29th Jun '19 – 27th Sep '19)	W 40-53 (28th Sep '19 – 3rd Jan '20)
	232	219	221	225

ATS (minutes per viewer), All India, 2+

Key Genre Movements

Across January to December 2019, data indicates higher level of TV viewing, with growth in Reach and Time Spent for some key genres.

Average Daily Reach for the GEC genre regained close to earlier levels, while ATS has grown. Viewership has thus approached pre-NTO levels

For the Movies genre, end of the year viewership was lower than what it was in Jan 2019.

GEC & Movies: Regaining pre-NTO Levels

Weekly Viewing Minutes Bn, All India, 2+

● GEC   ● Movies

News and Sports viewership continue to be "event driven".

In the particular case of News, given that most channels are Free to Air, it is challenging to statistically isolate any "NTO impact" on news viewership as a noteworthy trend.

Events Drive News & Sports Viewership

Weekly Viewing Minutes Bn, All India, 2+

● News   ● Sports

KIDS: A SIGNIFICANT VIEWER SEGMENT

Nina Elavia Jaipuria

Head – Hindi Mass Entertainment
and Kids TV Network, Viacom18

" The year, 2019, has been phenomenal for the Kids genre.
Despite fragmentation and emergence of multiple screens,
the genre continues to garner a robust 6 percent viewership at 2+.
Relatable custom-made content and innovative marketing
campaigns have struck the right chord with the audience.
The genre will continue to entertain and enthrall kids across the country. "

Co-viewing Adds Another Dimension to Kids Viewership

India being predominantly a market of single TV homes, a substantial amount of co-viewing happens across all states and town classes. One way this reflects in viewership data is that while Kids (age: 2-14 years) make up 20% of the TV viewing universe in India, viewership of Kids Genre accounts for 6% of total TV Viewership.

Due to co-viewing, Kids' viewing has a footprint well beyond channels and content specifically targeted at them. They end up watching a lot of GEC, Movies, Sports and the like with other members of the family. Likewise, Kids channels are viewed by the 15+ age group as well.

The various co-viewing combos has insights for marketers and broadcasters, which help shape more efficient content targeting and messaging on TV. For instance, over 50% of co-viewing of kids' channels is with their mothers.

Kids Channels Contributed To 6% of total TV Viewership In 2019

- Kids Channels, 6%
- Other Genres, 94%

Viewing Minutes, India, 2+

Kids Viewership Across Markets

The different viewing habits of Indian homes across various markets reflects in the dispersion of Kids genre viewership.

On the one hand there are markets like Tamil Nadu /Pondicherry which have a high volume of Kids genre viewership and a high share of the genre in Total state viewership. In Maharashtra/Goa on the other hand, while the volume of Kids genre viewership is significant, its share in the overall state-level viewership is lower than the all-India average of 6%.

Market Contribution & Genre Share within market

Viewing Minutes (Bn) — % Share

Legend:
- Kids Genre Viewership
- Share of Kids Genre in Total Viewership in Respective Market
- All India Average

Green bars indicate share of Kids genre in Total TV Viewership of a market is higher than the all-India average
Yellow bars indicate share of Kids genre in Total TV Viewership of a market is lower than the all-India average

Respective Market, 2+

Kids Watch a lot of GEC and Movies...

Niche & Others **2%**
Sport **3%**
Music **5%**
News **6%**
Kids **12%**
Movies **24%**
GEC **47%**

India, 2 – 14

...And Adults Watch a lot of Kids Content

39% of Kids Content is watched by 2-14 year olds

AGE

- 2-14
- 15-21
- 22-30
- 31-40
- 41-50
- 51-60
- 61+

6%
6%
9%
39%
18%
9%
13%

Share of Viewing Minutes, Kids Genre, India 2+

What Do Kids Watch?

Dubbing helps Kids content travel easily across language markets, and broad-bases its viewership.

The overwhelmingly largest share of viewership of Kids content (92%) is accounted for by "multi- language" channels, i.e., those in which the same content is available in several language feeds.

Within that slice, the largest consumed language is Hindi, followed by English, Tamil and Telugu.

Kids Channels available in Multiple Languages corner 92% of Viewership

Multi Language
Tamil
Telugu
Malayalam
Kannada

3% 2% 2% 1%
92%

Viewership Split within "Multi-Language"

Hindi
English
Tamil
Telugu
Bangla
Kannada
Malayalam

1%
1%
1%
6%
11%
17%
64%

Kids Genre, India, 2-14

Young Vs Older Kids

The Kids Genre gets a higher share of viewership from the 2-8 years age group.

However, kids in the age group 9-14 years watch more TV than those in the 2-8 age group.

2 to 8 year-olds watch 16% more of Kids Channels than those in 9-14 age group...

46% 54%

2-8 Years ■ 9-14 Years

Kids Genre, Viewing Minutes, All India

... but 9-14 year-olds watch more TV (44% more) than their younger counterparts

59% 41%

Total TV, Viewing Minutes, All India

For all genres other than Kids, older kids account for a larger share of viewership than younger ones.

Music, Sports and Niche channels score with older kids

AGE
■ 2-8 Years
■ 9-14 Years

Total TV, Viewing Minutes Bn, India.

SPORTS RETAINS ITS DRAW

Gautam Thakar
CEO, Star Sports

" 2019 was a defining year for Sports in India.
The growth was driven by our consistent effort in customisation,
regionalisation and innovation around some of our
marquee properties in Cricket, Kabaddi and Football.
In Cricket, Vivo IPL 2019 was the biggest ever! "

Bigger and More Broad-based

Viewership of Sports channels has been growing steadily year on year: 2019 saw a growth of 17% (viewing minutes) over 2018. The genre contributed to 3.2% of total TV viewership in 2019 - which was the highest over the last four years.

Within sports, Cricket retains its numero uno position. Live cricket (excluding the opening, mid-match and end-shows) pockets 58% of viewing minutes of sports broadcasts.

2019 had its share of marquee events such as the ICC Cricket World Cup, Indian Premier League, South Africa tour of India among others. The first-ever Pink Ball Test Match played in India was also a big draw - Day 1 of the Test Match was viewed by 43 million people and clocked 2 billion viewing minutes - which was also the highest viewership for a first day of any Test Match played over 2018-19.

Beyond cricket, the most watched sports on TV are Kabaddi, Wrestling and Football. Together, they corner 85% of viewing minutes of non-cricket events. Within these disciplines, there are visible preferences of various audience segments:

71% of Kabaddi viewership comes from Rural India

Wrestling on the other hand gets 52% of its viewership from Urban India

Football gets more than half its viewership from Kerala (21%), Assam/North East/Sikkim (20%) and West Bengal (11%)

In terms of telecast duration on Sport Channels, cricket occupies the maximum airtime indicating its huge popularity. However, other sports also find a fair share, indicating the wide range of viewing preferences of Indians.

Sports Telecast: Share of Duration Vs Share of Viewership

Sport	Share of Duration of Sports	Share of Sports Viewership
CRICKET	44%	79%
SOCCER	20%	3%
KABADDI	9%	8%
WRESTLING	7%	6%
TENNIS	4%	0.2%
CAR / BIKE RACING	3%	0.1%
MIXED MARTIAL ARTS	3%	0.3%
BASKETBALL	2%	0.1%
OTHERS	9%	2%

■ Share of Duration of Sports ■ Share of Sports Viewership

All India 2+

Diversity in Preference of Various Sports

The affinity towards different sports varies across the different states / markets, pointing to the huge diversity of the country. For example, data points to a strong affinity for cricket over other sports for viewers in Bihar & Jharkhand – with 88% of all Sports Channels' viewership in the market coming from cricket. However, in Assam, there is a fair share of viewership that comes from Soccer (20%), Wrestling (15%) and Mixed Martial Arts (4%). Similarly, Kabaddi connects well with viewers in AP/Telangana, Karnataka, and MP/Chhattisgarh.

	CRICKET	KABADDI	WRESTLING	SOCCER	OTHERS
Andhra Pradesh / Telangana	79%	15%	4%	1%	1%
Assam / North East / Sikkim	52%	2%	15%	20%	11%
Bihar / Jharkhand	88%	4%	3%	1%	3%
Delhi	85%	4%	8%	1%	2%
Gujarat / D&D / DNH	86%	5%	7%	1%	1%
Haryana / Himachal Pradesh / Jammu & Kashmir	76%	10%	10%	1%	3%
Karnataka	78%	11%	6%	1%	4%
Kerala	69%	3%	3%	21%	4%
Maharashtra / Goa	82%	9%	6%	1%	2%
Madhya Pradesh / Chhattisgarh	80%	11%	5%	1%	3%
Odisha	83%	4%	8%	2%	2%
Punjab / Chandigarh	81%	6%	10%	1%	2%
Rajasthan	82%	10%	5%	1%	2%
Tamil Nadu / Pondicherry	79%	8%	8%	3%	2%
Uttar Pradesh / Uttarakhand	85%	7%	5%	1%	3%
West Bengal	78%	2%	5%	11%	4%
India	79%	8%	6%	3%	3%

Viewership Share of Various Sports in Respective Markets, 2+
White Cells: Viewership Share of Sport in a Market is EQUAL TO Share of that Sport at All India level
Green Cells: Viewership Share of Sport in a Market is GREATER THAN Share of that Sport at All India level
Red Cells: Viewership Share of Sport in a Market is LESS THAN Share of Chhat Sport at All India level

IPL: 12 and Going Strong

Ever since its debut in 2008, the Indian Premier League (IPL) has only got bigger on TV, drawing more audiences each successive year.

In 2019, 424 million viewers (which is 51% of the total TV viewing population) watched Live matches of IPL-12. BARC India's pioneering Out of Home Measurement showed that an additional 9% watched the tournament in restaurants, pubs and other such "Out of Home" locations.

Viewership data reflects in the strong allegiance of fans with their city-teams and sporting heroes. Popularity of Mumbai Indians as a team, and its star players comes across very clearly in the viewership data. All the top 5 IPL Games in terms of viewership involved MI this year.

24
Channels

60
Matches

326 Bn
Viewing Minutes

424 Mn
Unique Viewers

1.58 Bn
Impressions

36 Minutes 35 Seconds
Per Viewer

Top 5 Matches by Viewership

12.1 Bn
MI Vs CSK

7.5 Bn
DC Vs MI

8 Bn
MI Vs RCB

7.8 Bn
MI Vs CSK

7.4 Bn
KXIP Vs MI

The above represents matches played.

Figures in white indicate match number.

Numbers in yellow are Viewing Minutes.

India, 2+

ICC Cricket World Cup 2019

The quadrennial event is much awaited by fans, broadcasters and advertisers. The 2019 edition was no different – pulling in 509 million viewers at home and out of home, as 10 nations battled for supremacy across 45 matches. 2 million seconds of advertising featuring 192 brands played out over the tournament's broadcast.

While the Cricket World Cup brings together the world's best, for most Indian fans it's all about the Men in Blue. Any India-Pak face-off gets a fanatical following which again shows up clearly in TV viewership numbers: despite being disrupted by rain, the India Vs Pakistan WC game was viewed by 244 million viewers at home and out of home: which was 48% of the entire tournament's viewers!

All the Top 5 viewed matches were those that featured India. Once India got knocked out in the semi-finals, viewer interest flagged. And although the Final went down to the wire, viewership didn't scale any new peak.

21
Channels

45
Matches

344 Bn
Viewing Minutes

471 Mn
Unique Viewers

1.65 Bn
Impressions

45 Minutes **45** Seconds
Per Viewer

Top 5 Matches by Viewership

28.8 Bn
🇬🇧 Vs 🇮🇳

23.5 Bn
🇮🇳 Vs 🇧🇩

25.0 Bn
🇳🇿 Vs 🇮🇳

**Final
ENG Vs NZ**

29.4 Bn
🇮🇳 Vs 🇵🇰

21.5 Bn
🇮🇳 Vs 🇦🇺

The above represents matches played.

Figures in white indicate match number.

Numbers in yellow are Viewing Minutes.

India, 2+

Top 10 Brands Advertised on IPL-12...

VIVO V15 / V15 PRO
MPL (MOBILE PREMIER LEAGUE)
FOGG
VIMAL ELAICHI PAN MASALA
vivo
IPL
OPPO F11 PRO
SPRITE
PHONEPE
SWIGGY
DREAM11
BYJUS LEARNING APP

... And ICC Cricket World Cup 2019

AMFI (ASSO OF MUTUAL FUNDS IN INDIA)
DISNEY BYJUS EARLY LEARN APP
NISSAN KICKS
FOGG
PHONEPE
KAMLA PASAND PAN MASALA
UBER
ICC CRICKET WORLD CUP ENGLAND & WALES 2019
PURO HEALTHY SALT
VIMAL ELAICHI PAN MASALA
DREAM11

Size of the text above indicates relative volume of FCT

REGIONAL MARKETS: DIVERSE AND VIBRANT

Pancham Chanda
Business Head, Pride East

" The journey of Pride East Entertainments Private Limited with BARC India is quite pleasant and fruitful. The camaraderie with BARC India has helped us with audience details from Northeast India with better insights and accuracy. It clearly captures 'What Northeast India Watches'. Over the last four years, BARC India has played a pivotal role in achieving our goals. With its realistic and transparent audience measurement service, it has been inspiring us to adopt progressive strategies and develop our content. "

Sanjeev Jaiswal
CEO, DY365

" The regional Assamese content consumption is growing.
The rural market is very much glued to the new content being provided by various News as well as Entertainment Channels making celebrities of people in a market like Assam also.
Our experience with BARC India has always been a very positive relationship wherein it is a very professional as well as an approachable organisation and we can see that it has grown over the years taking up new challenges on its day to day path and trying to bring out a consensus solution to every aspect of the business. "

Jagi Mangat Panda
MD, Odisha Television Ltd

" The TV penetration in Odisha has grown in double digits percentage since the commencement of BARC India in the state. The year 2019 has shown a noticeable increase in TV viewership of all the genres specifically in the entertainment genre....which means that greater investment in local content will further drive the growth of Broadcast industry in the state in 2020..
TV revenue however has not grown proportionate to the viewership growth in 2019. but I believe that the revenues in 2020 will be far higher. "

Shashi Nayyar
National Sales Head, Aakash Aath

" Though the recent slowdown has affected the media & entertainment revenue growth predictions, regional markets are projected to be the next growth frontiers with the increase demand in media consumption. With the NTO 2.0 implementation around the corner, the potentiality for FTA television channel viewership is poised to increase and content will be the major differentiator."

Amongst the major regional markets, Bengal has a larger potential to grow in viewership than the already matured Southern markets fuelled by increase in TV penetration and appetite for good local content. "

India: Vibrant and Diverse

As per Census 2011, two third of India's population live in rural areas. BARC India's BI-2018 Survey on the other hand estimated that 44% individuals with access to TV live in Urban areas, while 56% are in Rural India.

This is an outcome of higher TV penetration in Urban areas, given that television ownership is linked largely to economic status (among other factors like availability of power, cable TV distribution etc.).

The Urban and Rural viewer profile has some key differences, which influence the respective character of TV consumption: While Rural India accounts for a higher viewership share than Urban India for GEC and Movies genre, the picture is reversed for the Kids genre. In News, the viewership contribution is split evenly between Urban and Rural.

Rural Vs Urban India: Genre - wise Viewership Contribution

Viewing Minutes Bn, India 2+, in descending order of Viewership Share

Rural   Urban

There are noticeable differences in Language preference of urban and rural viewers. For instance, Telugu contributes to 14% of Rural viewership, and a lower 11% to Urban. Tamil on the other hand accounts for 10% of Rural viewing, but 13% of Urban viewership.

Hindi   Telugu   Tamil   Multi Language   Kannada   Marathi   Bangla   Malayalam   Bhojpuri
Odia   Punjabi   English   Assamese   Gujarati   Others

Viewing Minutes Bn, India 2+, in descending order of Viewership Share

A Closer Look at Regional Market Behaviour

The 634 channels measured by BARC India address audiences across 16 regional markets. These markets share some common features between themselves, and at the same time reflect the diversity of India with some unique features.

On one hand there are markets like Maharashtra / Goa and Andhra Pradesh / Telangana with a TV population of over 23 Mn homes each. On the other hand, Odisha and Punjab/Chandigarh have just about 6 Mn TV homes each. In all the four states from South India, well over 90% of homes have TV, while percentage of TV penetration in Bihar/Jharkhand is below 35%.

There are several factors that define the unique viewership attributes of each of these markets: Language, NCCS status, Urban / Rural spread, Age profile, availability of Content in local language etc. Each market's viewership data brings out these characterstics.

ANDHRA PRADESH / TELANGANA

10% TV Population Share | **13%** Viewership Share | **6275 Bn** Viewing Minutes | **04:12** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
TELUGU	3473	81	1246	176	506	196	49	91%
MULTI LANGUAGE	0	230	--	3	0	23	38	5%
HINDI	67	0	34	28	8	8	8	2%
TAMIL	45	1	10	5	1	0	1	1%
ENGLISH	0	0	9	0	2	0	21	1%
OTHERS	5	0	1	1	2	0	0	0%
% SHARE BY GENRE	57%	5%	21%	3%	8%	4%	2%	

KARNATAKA

8% TV Population Share | **9%** Viewership Share | **4367 Bn** Viewing Minutes | **04:07** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
KANNADA	2200	44	440	168	402	6	29	75%
HINDI	125	0	161	47	16	7	14	8%
MULTI LANGUAGE	158	5	33	17	5	2	2	5%
TAMIL	112	1	70	9	5	16	1	5%
TELUGU	0	165	--	3	0	12	23	5%
ENGLISH	0	0	10	1	4	0	26	1%
OTHERS	20	0	5	1	3	0	0	1%
% SHARE BY GENRE	60%	5%	16%	6%	10%	1%	2%	

KERALA

| 4% | TV Population Share | 4% | Viewership Share | 1804 Bn | Viewing Minutes | 03:39 | ATS(V) hh:mm |

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
MALAYALAM	1072	62	233	22	182	--	--	87%
MULTI LANGUAGE	52	2	14	14	1	1	0	5%
TAMIL	0	55	--	1	0	7	10	4%
ENGLISH	1	0	11	1	2	0	31	3%
KANNADA	13	1	1	1	1	0	0	1%
OTHERS	3	0	3	4	1	1	2	1%
% SHARE BY GENRE	63%	7%	15%	2%	10%	1%	2%	

TAMIL NADU / PONDICHERRY

| 9% | TV Population Share | 12% | Viewership Share | 5781 Bn | Viewing Minutes | 04:30 | ATS(V) hh:mm |

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
TAMIL	3666	87	768	329	290	28	88	91%
MULTI LANGUAGE	0	355	--	0	0	23	21	7%
ENGLISH	1	0	24	1	1	0	18	1%
OTHERS	40	1	16	7	7	5	4	1%
% SHARE BY GENRE	64%	8%	14%	6%	6%	1%	2%	

DELHI

3% TV Population Share | **3%** Viewership Share | **1605 Bn** Viewing Minutes | **04:05** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	611	0	406	54	189	29	49	83%
MULTI LANGUAGE	1	163	–	8	0	12	5	12%
BHOJPURI	10	–	21	2	–	1	–	2%
PUNJABI	5	–	4	11	1	2	–	1%
ENGLISH	1	0	3	0	1	0	5	1%
OTHERS	8	0	3	0	2	0	0	1%
% SHARE BY GENRE	40%	10%	27%	4%	12%	3%	4%	

RAJASTHAN

5% TV Population Share | **3%** Viewership Share | **1638 Bn** Viewing Minutes | **02:54** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	726	0	427	70	141	41	67	90%
MULTI LANGUAGE	0	91	–	13	0	6	4	7%
BHOJPURI	11	–	22	0	–	0	–	2%
PUNJABI	1	–	2	4	0	2	–	1%
ENGLISH	0	0	0	0	1	0	3	3%
OTHERS	5	0	1	0	1	0	0	4%
% SHARE BY GENRE	45%	6%	28%	5%	9%	3%	5%	

HARYANA / HIMACHAL PRADESH / JAMMU & KASHMIR

4% TV Population Share | **3%** Viewership Share | **1458 Bn** Viewing Minutes | **03:15** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	584	0	335	44	169	29	51	83%
MULTI LANGUAGE	0	100	–	6.8	0	8	5	8%
PUNJABI	9	–	17	46	11	7	–	6%
BHOJPURI	7	–	17	0	–	0	–	2%
ENGLISH	0	0	1	0	1	0	5	0%
OTHERS	4	0	0	0	0	0	0	0%
% SHARE BY GENRE	41%	7%	25%	7%	12%	3%	4%	

PUNJAB / CHANDIGARH

3% TV Population Share | **3%** Viewership Share | **1439 Bn** Viewing Minutes | **03:29** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	506	0	254	22	85	24	43	65%
PUNJABI	132	–	74	64	23	45	–	23%
MULTI LANGUAGE	1	118	–	4	0	9	5	10%
BHOJPURI	6	–	11	0	–	0	–	1%
ENGLISH	0	0	1	0	0	0	5	0%
OTHERS	3	0	1	0	0	0	0	0%
% SHARE BY GENRE	45%	8%	24%	6%	8%	5%	4%	

MADHYA PRADESH / CHHATTISGARH

8% TV Population Share | **7%** Viewership Share | **3189 Bn** Viewing Minutes | **03:26** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	1283	0	843	162	259	78	107	86%
MULTI LANGUAGE	1	171	–	28	0	17	7	7%
BHOJPURI	64	–	133	1	–	1	–	6%
PUNJABI	1	–	2	3	0	2	–	0%
OTHERS	14	0	5	31	2	2	0	1%
% SHARE BY GENRE	43%	5%	31%	6%	8%	3%	4%	

UTTAR PRADESH / UTTARAKHAND

10% TV Population Share | **7%** Viewership Share | **3631 Bn** Viewing Minutes | **02:54** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	1379	0	931	187	353	79	124	84%
MULTI LANGUAGE	1	212	–	29	0	16	8	7%
BHOJPURI	85	–	170	3	–	2	–	7%
PUNJABI	4	–	6	14	0	5	–	1%
OTHERS	13	0	2	1	4	0	5	1%
% SHARE BY GENRE	41%	6%	31%	6%	10%	3%	4%	

GUJARAT / D&D / DNH

7% TV Population Share | **6%** Viewership Share | **2995 Bn** Viewing Minutes | **03:42** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	1196	0	774	138	144	47	113	81%
MULTI LANGUAGE	1	254	–	23	0	23	14	10%
GUJARATI	44	–	25	–	94	–	–	5%
BHOJPURI	20	–	30	1	–	0	–	2%
MARATHI	15	–	7	2	2	–	0	1%
OTHERS	0	0	2	1	1	0	8	1%
% SHARE BY GENRE	43%	8%	28%	6%	8%	2%	4%	

MAHARASHTRA / GOA

12% TV Population Share | **14%** Viewership Share | **6853 Bn** Viewing Minutes | **04:07** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	1598	0	1549	335	296	100	237	60%
MARATHI	1162	–	482	83	321	–	0	30%
MULTI LANGUAGE	1	379	–	44	1	40	25	7%
BHOJPURI	25	–	54	2	–	1	–	1%
KANNADA	20	0	7	4	1	0	0	0%
OTHERS	38	0	16	3	9	3	18	1%
% SHARE BY GENRE	41%	6%	31%	7%	9%	2%	4%	

ASSAM / NORTH EAST / SIKKIM

3% TV Population Share | **3%** Viewership Share | **1560 Bn** Viewing Minutes | **03:32** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	364	0	337	42	57	21	35	55%
MULTI LANGUAGE	2	186	–	6	0	24	17	15%
ASSAMESE	83	–	–	11	122	0	–	14%
BANGLA	128	0	24	2	5	–	0	10%
ENGLISH	3	0	28	5	2	0	35	5%
BHOJPURI	5	–	13	0	–	1	–	1%
OTHERS	1	0	0	1	0	0	0	1%
% SHARE BY GENRE	38%	12%	26%	4%	12%	3%	6%	

BIHAR / JHARKHAND

5% TV Population Share | **3%** Viewership Share | **1658 Bn** Viewing Minutes | **02:48** ATS(V) hh:mm

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
HINDI	563	0	368	74	168	30	54	76%
BHOJPURI	103	–	178	2	–	9	–	18%
MULTI LANGUAGE	0	75	–	13	0	5	3	6%
OTHERS	1	0	0	7	0	0	0	0%
% SHARE BY GENRE	41%	5%	33%	5%	10%	3%	3%	

ODISHA

| 3% | TV Population Share | 3% | Viewership Share | 1335 Bn | Viewing Minutes | 03:35 | ATS(V) hh:mm |

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
ORIYA	551	–	–	33	105	37	–	54%
HINDI	171	0	208	25	25	9	28	35%
MULTI LANGUAGE	0	62	–	3	0	8	4	6%
TELUGU	22	0	6	1	1	2	0	2%
BHOJPURI	3	–	11	0	–	0	–	1%
OTHERS	7	0	3	3	1	0	8	1%
% SHARE BY GENRE	57%	5%	17%	5%	10%	4%	3%	

WEST BENGAL

| 7% | TV Population Share | 6% | Viewership Share | 2834 Bn | Viewing Minutes | 03:16 | ATS(V) hh:mm |

	GEC	Kids	Movies	Music	News	Niche / Others	Sports	% Share by Language
BANGLA	1244	11	233	40	203	–	2	61%
HINDI	258	0	352	74	74	20	48	29%
MULTI LANGUAGE	0	172	–	4	0	15	15	7%
BHOJPURI	11	–	29	2	–	1	–	2%
ENGLISH	0	0	3	0	1	0	10	1%
OTHERS	4	0	1	1	2	0	0	0%
% SHARE BY GENRE	54%	6%	22%	4%	10%	1%	3%	

DOORDARSHAN AND PUBLIC SERVICE BROADCASTING

सत्यम् शिवम् सुन्दरम्

Shashi S. Vempati
CEO, Prasar Bharati

" Doordarshan is not just a broadcaster – it is an Institution that has helped germinate, build and popularise television in India.

In the dynamic broadcast sector, Doordarshan too is transforming itself to keep in sync with its core mandate of public service broadcasting as well as meet audience expectations. Towards this, we rely on data and insights from BARC India to help target and deliver our content in a more effective manner.

BARC India has done a great job in building the world's largest TV viewership measurement system. As a key stakeholder of BARC India, we continue to engage and collaborate with the industry body as it consolidates and expands its services further. "

Doordarshan and Public Service Broadcasting

TV Broadcasting started in India as an "experiment" on September 15, 1959. By 1965, signals of the Public Broadcaster Doordarshan were being transmitted in and around New Delhi. Subsequently, DD's reach expanded to Mumbai, and then to several other cities across the country.

Since then, Doordarshan has grown from a solitary terrestrial "all in one" channel into a network of 7 National and 17 Regional channels, addressing specific language markets and genres.

| DD National | DD News | DD India | DD Kisan | DD Sports | DD Bharati | DD Urdu |

For an entire generation of Indians, TV was synonymous with Doordarshan, and the Broadcaster's popularity scaled many highs on the back of iconic programmes like Ramayan, Mahabharat, Nukkad, Chitrahaar, Bharat Ek Khoj, Malgudi Days and many more.

Over the last three decades, the "satellite TV boom" has led to a steady rise in the number of channels available to viewers in India. The market is now highly fragmented, and there is intense competition between channels for a share of the viewership pie.

Although it no longer enjoys a monopoly position, Doordarshan continues to have its dedicated audience, and continues with its specific responsibility of public service and socially relevant broadcasting.

In 2019, Doordarshan's viewership rose 16% over the previous year. The extensive pan-India reach of DD Network gives it a balanced viewership spread: half of its viewership comes from Hindi channels, and the other half from its regional language channels.

Among the 24 DD channels measured by BARC India, viewership of its English news channel DD India grew 63% over the previous year, while that of DD Kisan gained 48%. Notably, in the English news space, DD India contributes to 22% of the entire genre viewership.

DD Network Viewership: Growth Across Genre

	GEC	News	Niche/Others	Sports	Total Viewership
2019	424	25	23	101	573
2018	355	24	16	98	492
Growth	19%	5%	48%	4%	16%
Channel Genre	GEC	News	Niche/Others	Sports	Total Viewership

Viewing Minutes Bn, India, 2+

Most languages witnessed growth in 2019 over 2018

HINDI
2019
288
2018
256
Growth
12%

MARATHI
2019
48
2018
47
Growth
2%

PUNJABI
2019
43
2018
49
Growth
-13%

TELUGU
2019
34
2018
30
Growth
16%

URDU
2019
33
2018
9
Growth
256%

KANNADA
2019
33
2018
26
Growth
29%

TAMIL
2019
28
2018
23
Growth
25%

BANGLA
2019
13
2018
12.8
Growth
-1%

BHOJPURI
2019
12
2018
8
Growth
52%

ODIA
2019
11
2018
9
Growth
31%

MALAYALAM
2019
9
2018
7
Growth
30%

GUJARATI
2019
9
2018
9.3
Growth
-5%

ASSAMESE
2019
5
2018
3
Growth
60%

ENGLISH
2019
5
2018
3
Growth
63%

Viewing Minutes Bn, India, 2+, in descending order of viewership for 2019

ADVERTISING: LEVERAGING TV'S LARGE REACH

Ashish Sehgal

Chief Growth Officer, Advertisement Revenue
at Zee Entertainment Enterprises Limited

❝❝ TV continues to be largest and most effective medium to reach the widest cross section of Indian consumers. It touches the lives of people in Urban and Rural India, across the large spectrum of affluence and age groups. Television is also projected to retain its position as the preferred medium for Brands, across Print, Digital, Radio, Out-of-Home etc. ❞❞

Advertising on TV – Growing with Viewership

Over the last 4 years, the volume of advertising on TV (FCT) has grown 21%.

Growth of Ad Volume on TV: 2016 - 2019

Ad Volume Mn Seconds

In 2019, 11,525 Advertisers ran 76.8 million ads across 634 measured channels that reached out to 197 million homes across India.

All leading products and services use TV's huge reach to connect with their target consumers. Of these, FMCG occupies the top slot, accounting for 54% of ad duration in 2019.

FMCG and e-Commerce were the two segments that upped their ad volumes on TV in 2019, over the previous year.

FMCG & E-Commerce increased their presence on TV in 2019

Ad volume Mn Seconds

In terms of Genre share in Advertising, GEC, Movies and News account for the largest share of Ad volumes (78% in 2019). This is linked to the substantial viewership share of these 3 genres (83% of total TV viewing minutes in 2019).

However, volume of TV Advertising across various genres is linked not only to viewership size of the genre, but also factors like number of channels available, brand fitment, ad rates, among others. News genre, for instance, contributes to 9% of total viewership but accounts for 32% of Ad volumes (FCT).

Although TV carries the tag of a "mass medium", multiple genres within the sector address different sets of audiences, and thereby offer marketers alternate avenues to target their desired consumer segments. The Categories x Genre matrix in the next page highlights that detail.

Top 10 Advertised Categories All Channels & Across Genres

All Channels	GEC	Movies	News
TOILET SOAPS	TOILET SOAPS	TOILET SOAPS	SOCIAL ADVERTISEMENTS-GOVT
SOCIAL ADVERTISEMENTS-GOVT	SOCIAL ADVERTISEMENTS-GOVT	SHAMPOOS	AUTO-CARS
SHAMPOOS	WASHING POWDERS / LIQUIDS	WASHING POWDERS / LIQUIDS	POLITICAL ADS
WASHING POWDERS / LIQUIDS	TOOTH PASTES	TOILET / FLOOR CLEANERS	RETAIL OUTLETS-JEWELLERS
TOILET / FLOOR CLEANERS	SHAMPOOS	TOOTH PASTES	TOILET SOAPS
TOOTH PASTES	MILK BEVERAGES	CHOCOLATES	SOCIAL ADVERTISEMENTS-NGOS
ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	TOILET / FLOOR CLEANERS	MILK BEVERAGES	PAINTS
MILK BEVERAGES	CHOCOLATES	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	SPICES
CHOCOLATES	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	SOCIAL ADVERTISEMENTS-GOVT	AUTO-TWO WHEELERS
AUTO - CARS	BISCUITS	RUBS AND BALMS	CEMENT

	All Channels	GEC	Movies	News
Ad Volume (Mn secs)	1587	393	330	506
Share of Ad Volume		25%	21%	32%
Share of Viewership		50%	24%	9%
All Channels		155	105	203

GEC and Movies are the two "mass genres" on TV with the largest viewership share (74% between them). There are a favoured destination for a similar set of Categories - predominantly Consumer Goods, targeting all family members

News genre accounts for 9% of total viewership but 32% of Ad Volumes. The top 10 Categories that advertise on News are also quite different from that for all channels

Top 10 Advertised Categories All Channels & Across Genres

Kids	Music	Sports	Niche / Others
MILK BEVERAGES	TOILET SOAPS	PERFUMES / DEODORANT	ECOM-TRAVEL & TOURISM
TOILET / FLOOR CLEANERS	SHAMPOOS	CELLULAR PHONES- SMART PHONES	TOILET / FLOOR CLEANERS
SUGAR CONFECTIONARIES	TOILET / FLOOR CLEANERS	AUTO-TWO WHEELERS	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA
BISCUITS	WASHING POWDERS / LIQUIDS	AUTO-CARS	TOILET SOAPS
TOOTH PASTES	TOOTH PASTES	ECOM-GAMING	TRAVEL & TOURISM
TOILET SOAPS	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	SOCIAL ADVERTISEMENTS-GOVT
DIAPERS	CHOCOLATES	MPSB-MULTI PRODUCT SINGLE BRAND	SOCIAL ADVERTISEMENTS-NGOS
WAFER/CHIPS	AUTO-TWO WHEELERS	ECOM-WALLETS	AUTO-CARS
WASHING POWDERS / LIQUIDS	HAIR OILS	PAN MASALA / ZARDA / GUTKHA	PERFUMES/DEODORANT
SHAMPOOS	MOISTURISING LOTION / CREAMS	EDUC-ECOM-EDUCATION	CELLULAR PHONES- SMART PHONES

	Kids	Music	Sports	Niche / Others
Ad Volume (Mn secs)	51	197	19	91
Share of Ad Volume	3.2%	12%	1.2%	6%
Share of Viewership	6.4%	5%	3.2%	2%
All Channels	18	56	30	67

Kids genre too has its unique slice of top advertised Categories. Co-viewing and segmentation offers a unique platform to marketers

Sectors that heavily advertise on Music, Sports, Infotainment, Lifestyle and other special interest channels are fairly distinct, and point to the ability of TV to target specific sets of audiences (and consumers). Travel and Tourism, E-commerce, Cellular/Smartphones, Perfumes/Deodarants are some of the top Categories in these genres that highlight this.

Top 10 Advertised Categories All Channels & Across Languages

All Channels	Hindi	Bhojpuri	Punjabi
TOILET SOAPS	SOCIAL ADVERTISEMENTS - GOVT	TOILET SOAPS	SHAMPOOS
SOCIAL ADVERTISEMENTS-GOVT	TOILET SOAPS	TOILET / FLOOR CLEANERS	SOCIAL ADVERTISEMENTS-GOVT
SHAMPOOS	SHAMPOOS	SOCIAL ADVERTISEMENTS - GOVT	WASHING POWDERS / LIQUIDS
WASHING POWDERS / LIQUIDS	WASHING POWDERS / LIQUIDS	MILK BEVERAGES	TOILET SOAPS
TOILET / FLOOR CLEANERS	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	TOOTH PASTES	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA
TOOTH PASTES	TOOTH PASTES	WASHING POWDERS / LIQUIDS	TOOTH PASTES
ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	CHOCOLATES	SHAMPOOS	PROF SERV-EDUC / IMMIGRATION CONSULTANTS
MILK BEVERAGES	FAIRNESS CREAMS	RUBS AND BALMS	POLITICAL ADS
CHOCOLATES	HAIR OILS	HAIR OILS	TEA
AUTO - CARS	TOILET / FLOOR CLEANERS	TOILET LIQUIDS	SCOURERS

	All Channels	Hindi	Bhojpuri	Punjabi
Ad Volume (Mn secs)	1587	502	36	62
Share of Ad Volume		32%	2.3%	3.9%
Share of Viewership		43.8%	2.2%	1.0%

Top 10 Advertised Categories All Channels & Across Languages

Tamil	Telugu	Kannada	Malayalam
TOILET SOAPS	TOILET SOAPS	TOILET SOAPS	TOILET SOAPS
TOILET / FLOOR CLEANERS	TOILET / FLOOR CLEANERS	TOILET / FLOOR CLEANERS	CHOCOLATES
RETAIL OUTLETS - JEWELLERS	RETAIL OUTLETS - JEWELLERS	RETAIL OUTLETS - JEWELLERS	WASHING POWDERS / LIQUIDS
TOOTH PASTES	SOCIAL ADVERTISEMENTS - NGOS	TOOTH PASTES	RETAIL OUTLETS - JEWELLERS
MILK BEVERAGES	TOOTH PASTES	WASHING POWDERS / LIQUIDS	TOOTH PASTES
SHAMPOOS	MILK BEVERAGES	SHAMPOOS	TOILET / FLOOR CLEANERS
WASHING POWDERS / LIQUIDS	WASHING POWDERS / LIQUIDS	MILK BEVERAGES	PAINTS
RETAIL OUTLETS - CLOTHING / TEXTILES/FASHION	SHAMPOOS	PROF SERV -FINANCIAL SERVICES	BISCUITS
PAINTS	SOCIAL ADVERTISEMENTS - GOVT	CHOCOLATES	MILK BEVERAGES
SOCIAL ADVERTISEMENTS - GOVT	POLITICAL ADS	DTH SERVICE PROVIDERS	SOCIAL ADVERTISEMENTS - GOVT

	Tamil	Telugu	Kannada	Malayalam
Ad Volume (Mn secs)	163	151	117	86
Share of Ad Volume	10.3%	9.5%	7.3%	5.4%
Share of Viewership	11.7%	12.5%	6.9%	3.3%

Top 10 Advertised Categories All Channels & Across Languages

All Channels	Bangla	Assamese	Odia
TOILET SOAPS	TOILET SOAPS	TOILET SOAPS	SOCIAL ADVERTISEMENTS - GOVT
SOCIAL ADVERTISEMENTS-GOVT	TOILET / FLOOR CLEANERS	MILK BEVERAGES	TOILET SOAPS
SHAMPOOS	SHAMPOOS	WASHING POWDERS / LIQUIDS	TOOTH PASTES
WASHING POWDERS / LIQUIDS	MILK BEVERAGES	SOCIAL ADVERTISEMENTS - GOVT	RETAIL OUTLETS-JEWELLERS
TOILET / FLOOR CLEANERS	WASHING POWDERS / LIQUIDS	TOOTH PASTES	MILK BEVERAGES
TOOTH PASTES	SOCIAL ADVERTISEMENTS-GOVT	CEMENT	HAIR OILS
ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	TOOTH PASTES	SHAMPOOS	WASHING POWDERS / LIQUIDS
MILK BEVERAGES	TOILET LIQUIDS	PUBLICATIONS/BOOKS	AUTO-TWO WHEELERS
CHOCOLATES	MOISTURISING LOTION / CREAMS	MOISTURISING LOTION / CREAMS	BISCUITS
AUTO - CARS	BISCUITS	BISCUITS	CEMENT

Ad Volume (Mn secs)	1587	136	41	30
Share of Ad Volume		8.6%	2.6%	1.9%
Share of Viewership		4.0%	0.6%	1.5%

Top 10 Advertised Categories All Channels & Across Languages

Marathi	Gujarati	English	Multi Language
TOILET SOAPS	SOCIAL ADVERTISEMENTS - GOVT	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	ECOM-TRAVEL & TOURISM
SOCIAL ADVERTISEMENTS-GOVT	TOILET SOAPS	AUTO-CARS	MILK BEVERAGES
SOFT DRINK AERATED	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA	ECOM - TRAVEL & TOURISM	TOILET / FLOOR CLEANERS
CHOCOLATES	TOOTH PASTES	SOCIAL ADVERTISEMENTS - GOVT	ECOM-MEDIA / ENTERTAINMENT / SOCIAL MEDIA
WASHING POWDERS / LIQUIDS	AUTO-CARS	CELLULAR PHONES - SMART PHONES	AUTO-CARS
TOOTH PASTES	SOCIAL ADVERTISEMENTS-NGOS	SOCIAL ADVERTISEMENTS - NGOS	TRAVEL & TOURISM
TOILET LIQUIDS	PUBLICATIONS/BOOKS	CORPORATE / BRAND IMAGE	SUGAR CONFECTIONARIES
ECOM-MATRIMONIALS	EDIBLE OIL	ECOM - ONLINE SHOPPING	EDUC-ECOM-EDUCATION
HAIR DYES	PAN MASALA / ZARDA /GUTKHA	AUTO - TWO WHEELERS	PERFUMES/DEODORANT
MOSQ REPELLENTS	CORPORATE / BRAND IMAGE	MPSB - MULTI PRODUCT SINGLE BRAND	TOOTH PASTES

	Marathi	Gujarati	English	Multi Language
Ad Volume (Mn secs)	66	27	88	393
Share of Ad Volume	4.2%	1.7%	5.5%	4.9%
Share of Viewership	4.3%	0.3%	0.7%	6.7%

Marketers are aware of the capability of TV to effectively address distinct audiences and target groups, and BARC India's viewership data gives them the insights to drive higher reach and efficiency in their marketing plans and ad campaigns, thereby enabling better business outcomes.

BARC INDIA'S PRODUCTS: ADDING VALUE TO INDUSTRY

INSIGHT PRODUCTS

YUMI
An advanced analytics platform with graphical outputs and evolved BMW modules

PrimaVu
Measurement of TV viewership of premium homes across 6 megacities

TV + OOH TV
First of its kind integration of OOH TV viewership with TV viewership

BIO GEC
Content level insights using video metadata fused with TV viewership

BIO NEWS
Comprehensive planning tool for news broadcasters

BIO MUSIC
Tool for Music broadcasters & Music labels with song metadata mapped with TV viewership

INSIGHT REPORTS

SELF SERVICE PORTAL
Online e-commerce data portal for accessing viewership reports

SPOT TREK
Next day spot monitoring & spot certificate service

PREVIEW
Special viewership report for a single TV event available 3 days post actual airing

BROADCAST INDIA
Broadcast India is one of the largest research studies conducted across 3 Lakh households covering 28 states, 5 union territories and 5000+ towns & villages

THINK
Insights paper uncovering various elements of audience measurement

ALPHA CLUB

KIDS REPORT

HEADS-UP SERIES

1

PrimaVu

Measurement of TV viewership of premium homes across 6 megacities

Benefits

- Content preferences in premium homes
- Beneficial for premium brands
- High incidence of HD viewing
- Sharper Targeting of Premium Homes for Advertisers/Agencies

Audience Profile

- NCCS A1++ homes
- Own a car > 10 lacs
- Owning laptop, desktop, smart phones
- Own 2 ACs or Central AC
- Minimum 3 rooms + Kitchen
- Travelled to premium destinations (domestic/international)

Panel is representative of NCCS A spread within the city covering affluent regions within the city

7.7 lakh Premium Homes in Megacities | **~3 Mn** Individuals in Premium Homes

PANEL SIZE

2500 meters across 1500 Homes in 6 Megacities

Insights

05:18 hh:mm

Time spent by
Prima VU Households

05:47 hh:mm

Time spent by Currency Households
6 Megacities – NCCS A

Hindi GEC ATS

2 Hrs 29 Min
Prima VU Homes

Vs

2 Hrs 27Mins
Currency (Mega cities)

English Entertainment Viewership

69%

Vs

31%

HD

SD

Share of viewing on Prima VU

51% GEC   **17%** Movies   **20%** News   **12%** Others

Megacities ATS

4:19:12
3:50:24
3:21:36
2:52:48
2:24:00
1:55:12
1:26:24
0:57:36
0:28:48
0:00:00

Tamil GEC
Kannada GEC
Telugu GEC
Bangla GEC
Marathi GEC
Hindi GEC
Hindi Movies
Telugu Movies
Kids
Tamil Movies

Megacities HD Vs SD

100%
80%
60%
40%
20%
0%

EEC
English Movies
Sports
Infotainment
Hindi GEC
Lifestyle
Marathi Channels
Hindi Movies
Bangla Channels
Tamil Channels

■ HD ■ SD

In South, movie genre holds 7% of the total Viewing Minutes among premium audiences.

Data from WK29 to WK53, 2019 | HH level | All Channels

English language garners the third highest viewership after Telugu and Tamil among premium South audience.

PrimeVu - Powered by emerging5

2 **BIO**
GEC

A facial recognition solution which enables GEC broadcasters to generate data driven insights on linear content performance by mapping granular content metadata with TV viewership

Benefits

| Performance of characters stickiness, engagement, likeability inside a show | Assess performance of combination of characters, age profiling of characters | Production elements – whether Outdoor scenes have better ROI compared to Indoor | Cinematography, Audio profile – working combinations |

Features

- Minute by Minute Viewership of shows and characters
- Competitor Insights
- Ability to modularize the offering

Modules

- Character exposure & ranking
- Character health
- Show profile-character
- Show profile-screenplay

Insights

Illustrative example of a singing based reality show where one can understand character/contestant engagement & stickiness

Data for Reality show of a Bangla GEC channel | Wk 27, 2019 to Wk 31, 2019 | For 2+ | West Bengal

Wk 27   Wk 28   Wk 29   Wk 30   Wk 31

● Contestant 1   ● Contestant 2   ● Contestant 3   ● Contestant 4

Correlation between character duration and ratings of the show

Character A

WEEKS   ■ AVG IMP   ■ AVG SOD

Character B

WEEKS   ■ AVG IMP   ■ AVG SOD

- **Character A has negative correlation of duration to ratings**
- **Character B has positive correlation of duration to ratings**
- **Elderly characters had a negative correlation**

Data for Fiction show of a TN GEC channel | Wk 40,2019 to Wk 53, 2019 |For 2+ | Tamil Nadu

BIO GEC - Powered by - athenas owl

Elderly Characters

WEEKS   ■ Only Adults 40+   ■ AVG IMP

3 BIO NEWS

Comprehensive planning tool for news broadcasters, at regional level, providing inter-channel comparison at regional level, anchor level and story frequency & genre level giving SOV, SOD and yield from main storyline

Benefits

Along with BMW/Yumi, Bio-News helps to correlate BARC data with content & ad-break strategy decisions

Evaluate whether specific story worked or not; compare performance across channels

Identify who was the first to break a news story/event

Features

- Interactive and user-friendly UI
- Graphical and visual representations
- Content mapping to viewership
- Insights by markets and target groups
- Teleview: Video streaming mapped to viewership

Modules

- Story ranking
- Story build-up
- Tele view
- Story diagnostics
- Anchor
- Personality & Guest
- Story diffrentiation
- Region-wise performance

Insights

Top News Genre : BIO News (English)

Genre	SOV
POLITICAL NEWS/GOVERNMENT NEWS	52.32%
CRIME/LAW & ORDER	18.83%
SOCIAL	15.18%
SPORTS NEWS	3.49%
WEATHER/ENVIRONMENT	2.13%

Data from Jan-Dec 2019 | For Male AB 22+ | All India| 8 channels
SOV = Share of Viewership

Top Personalities : BIO News (Hindi)

Personality	SOV
NARENDRA MODI(BJP)	18.22%
ABHINANDAN VARTHAMAN	3.12%
AMIT SHAH(BJP)	2.74%
IMRAN KHAN	2.61%
RAHUL GANDHI(INC)	2.11%

Data from Jan-Dec 2019 | For 15+ | HSM level | 12 channels

- Political News remains the most viewed News genre followed by Crime/Law & Order in English News genre
- Narendra Modi has maximum viewership share across Hindi News channels

BIO News (Malayalam)

Pinarayi Vijayan (CPIM) featured in the Top 5personalities list
The Top story covered was the Violent protest against CAB across India having a 12.6 Mn viewership
Political and Science & Space were among the top most viewed Genres
Lathidha Farsana,RV Babu,NK Premachandran (RSP),MM Rahim were among the Top 5 Guests

BIO News - Powered by - **Gramener** Insights as Stories TAM

Data from Wk 51-52, 2019 | For 2+ | Kerala| 4 channels

4 BIO MUSIC

BIO Music is a tool for Music Broadcasters and Music Labels to get song metadata on for TV Music channels, along with In depth analysis of songs with music data mapped

Benefits

| Assess best performing songs, actors, labels, artists to improve ROI | Content acquisition decisions | Helps in scheduling program line up | Competitor line up analysis | In-song branding opportunities |

Features

- Song metadata and viewership
- Study performance by time bands and regions
- Study song program strategy

Modules

- Top songs, genre, actors, artists, programmes
- Channel Trends and performance comparison

Insights

Songs	Impressions	Song Count
Ghungroo	6 Mn	3.5K
Odhani odhu	6 Mn	2.5K
Ek toh kum zindagani	5 Mn	1.6K
Jai jai shivshankar	5 Mn	1.9K
Dheeme dheeme	5 Mn	1.6K

Labels	Impressions	Duration (Mins)
T-Series Music	191 Mn	115.3K
Zee Music	86 Mn	77.4K
Sony Music	57 Mn	55.6K
Yash Raj Films	41 Mn	42.3K
Venus Music	27 Mn	29.1K

Top 5 Actors	Impressions
Salman Khan	6.2 Mn
Akshay Kumar	4.6 Mn
Shah Rukh Khan	3.9 Mn
Kareena Kapoor	2.5 Mn
Hrithik Roshan	2.1 Mn

Top 5 Artistes	Impressions
Alka Yagnik	7.4 Mn
Udit Narayan	6.2 Mn
Neha Kakkar	5.1 Mn
Kumar Sanu	4.4 Mn
Arijit Singh	3.4 Mn

- T-series music garners highest viewership and also has the highest duration across Music channels
- Ghungroo has the highest viewership and also the most song count

BIO Music - Powered by - TESSACT

5

TV + OOH TV

First of its kind integration of OOH TV viewership with TV viewership

Benefits

Tracking TV viewing drive of individuals from Home to Restaurants/Pubs	**Understanding the overall viewership garnered on TV and the combined impact of the two mediums**	**Uncovering more value and insights into the TV viewing behaviors both inside and outside the home for broadcasters and advertisers**

Insights

LIFT OF OOH TV ACROSS GENRES DURING FESTIVE WEEKS

Week Number	English News	English Movies	Music & Youth	Hindi News	Hindi Movies	Sports
Week 44	1 Mn	1.3 Mn	36 Mn	15.5 Mn	26.2 Mn	19 Mn
Week 45	0.44 Mn	1.8 Mn	28 Mn	15.7 Mn	25.8 Mn	33 Mn
Week 46	0.55 Mn	2.6 Mn	30 Mn	18.5 Mn	24 Mn	35 Mn
Week 47	0.56 Mn	1.5 Mn	33 Mn	3.3 Mn	25.3 Mn	30 Mn
Average Increase	**0.6 Mn**	**1.8 Mn**	**32 Mn**	**13.2 Mn**	**25.3 Mn**	**29.5 Mn**

*Impressions Festive week -Data of 4 Week- Wk 44 to Wk 47, 2019 | For 2+ | All India | All channels

Music & Youth gets the maximum lift during festive weeks followed by Sports

LIFT OF OOH TV ACROSS GENRES DURING IPL WEEKS

Week Number	English Movies	English news	Music & Youth	Hindi Movies	Hindi News	Sports Genre
Week 13	1.84	0.57	17.42	19.49	12.07	75.93
Week 14	0.95	0.33	17.55	20.13	12.04	81.62
Week 15	1.35	0.30	18.97	21.12	13.05	78.31
Week 16	0.76	0.58	19.83	21.07	11.13	77.20
Average Increase	**1.22 Mn**	**0.45 Mn**	**18.44 Mn**	**20.45 Mn**	**12.08 Mn**	**78.27 Mn**

*Impressions IPL Week – Data of 4 Week- Wk 13 to Wk 16, 2019 | For 2+ | All India | All channels

Sports gets the maximum lift during IPL weeks

6 ADVANCED ANALYTICS
(Coming Soon)

A BARC India product which provides insights similar to what the industry would derive from respondent level data. This product aims do a deep dive to understand the viewing behavior at individual level in the TV space.

Benefits

Understand episodic level loyalty at program level

Understand the co-viewing behavior of the audience

Plan the content better as per your target audience

Features

- Understanding the co-viewing behavior of the target audiences
- Loyalty and retention of the audience at episodic level
- Shifted & Common viewers at competition

Modules

- Duplication and retention
- Loyalty mapping
- Channel & program deep viewing
- Co-viewing behavior

Insights

Audience evolution of a newly launched show across first 6 episodes

Episode						
Episode 1	100%					
Episode 2	45%	55%				
Episode 3	41%	21%	38%			
Episode 4	37%	17%	9%	37%		
Episode 5	35%	18%	9%	11%	26%	
Episode 6	35%	16%	9%	9%	5%	26%

Legend: 1, 2, 3, 4, 5, 6

Data for Fiction show of a Hindi GEC channel | Wk 14-15, 2019 | For 2+ | All India

Viewership contribution by audiences

Bar chart values:
- Common Viewers: -27
- New Viewers: 624
- Shifted Viewers: -311
- Non Viewers: -251
- Total Diff: 34

Data of a Hindi GEC channel | Wk 50, 2019 (2 dates considered) | For 2+ | HSM Urban

Advanced Analytics - Powered by - **MARKDATA**   * Impressions breakup

Kids Show

Bar chart values:
- 2-14: 100%
- Co w / 22-40M: 37%
- Co w / 22-40F: 55%

For a popular kids show, it is observed that kids of 2 – 14 have a higher co-viewing with Females 22-40 when compared to Males 22-40

*Data of Wk 50, 2019, India

41 - 50 M Coviewing For News

Bar chart values:
- Eng News1: 15% / 12%
- Eng News2: 11% / 19%

Legend: 15-21M, 31-240F

Comparison between two English news channels where for one of the channels co-viewing of 41-5M with 15-21M is higher and for other co-viewing with 31-40F is higher

*Data of Wk 50, 2019, India

Comedy Show | Crime Show

Bar chart values:
- Comedy Show: 30% / 70%
- Crime Show: 37% / 63%

Legend: Person or 2 People, 3 People or More

A comedy show has more of the family watching together compared to a crime show

*Hindi GEC Data of Wk 50, 2019, HSM

7 SELF SERVICE PORTAL

SSP product provides viewership reports at your fingertips in a few clicks. The reports are available at a nominal charge and would be delivered to your mailbox within a few days.

Benefits

Custom BARC viewership reports

Buy ready to use reports in 4 easy steps

Pay Online

Standard Reports

- Viewership by timeband, genre and event performance
- Viewership by language and region
- Advertising trends by top brands and categories
- Campaign Planning and performance

8 SPOT TREK

Next day spot monitoring & spot certificate service

9 PREVIEW

Special viewership report for a single TV event available 3 days post actual airing

10 BROADCAST INDIA

Broadcast India is one of the largest research studies conducted across 3 Lakh households covering 28 states, 5 union territories and 5000+ towns & villages

In-depth data available on the below parameters across states & town-classes

Demographic details

- Age, Gender, Household size
- Education (Literacy rate)

Socio-economic details

- NCCS, Working status (Employment rate)
- Durable ownership- TV, A/Cs, Refrigerators, Washing machines, Two-wheelers, Four-wheelers
- Mother tongue, Medium of Education of kid

TV and other details

- Number of TV sets and type of TV
- MOSR (Split of Digital cable and DTH)
- Languages Spoken by Individual
- Language in which Newspaper was Read
- Language of movie Watched in cinema in past 3 months

Self Service Portal - Powered by - **RMG**
Renee Media Group

GLOSSARY / TERMINOLOGY

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.

ATR%: The percentage of a target audience who viewed any TV channel, averaged across minutes.

ATR' 000: Number of individuals in 000s of a target audience who viewed any TV channel, averaged across minutes.

ATS (UNIV): Average Time Spent on the "Event" by all individuals in the Universe.

ATS (VIEWER): Average Time Spent by viewers of the "Event"

AUDIENCE DAY: An Audience Day is a 24-hour period starting from 02:00 to 25:59.

AUDIENCE PROFILE: An audience profile divides the main audience category into its subcategory. Audience profiles are mostly represented in percentages.

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 of the events in a set of events.

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

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.

IMPRESSIONS '000: Number of individuals in 000s of a target audience who viewed an "Event", averaged across minutes. Also known as TVT.

VIEWING MINUTES: The sum of minutes watched by all individuals of an event.

MINUTE: A clock minute.

RAT%: The percentage of a target audience who viewed an Event, averaged across minutes. Also known as TRP.

RCH '000: Stands for Reach in 000s. Number of individuals who viewed the Event for at least 1 minute. Viewing based on attribution rules.

SHR%: % Share of the "Event" to total TV.

UNIVERSE: The total number of individuals in a defined target group.

Thank You for reading What India Watched 2019.

Keep watching TV while we continue measuring What India Watches.

@barcindia @barcindia @barcindia BARC India