



A day in the life of an Indian Male



Background:

Indian Television space has been discussed and analyzed enough in the context of female audiences. However, male audiences, who contribute 50% of the total Television viewership with an average weekly Reach of 487 million, have largely been ignored. In the contemporary fragmented Television space, understanding the male audiences is relevant from both the TV content standpoint as well as for targeting them in this competitive environment. This newsletter aims to reveal a day in the life of the male audience with reference to their television viewership. Further, we also explore the potential second primetime, for broadcasters, to target core male audience. Finally, we look at what happens after the prime time hours for male audiences in India.

What we attempt to answer here:

- 1. How does an Indian man spend his typical day on TV with respect to content preference by time bands?
- 2. Do male audiences differ by Urban, Rural and Megacities with respect to preferences on TV?
- 3. How similar or different are the male audiences: Upper vs lower social grades, weekday vs weekend viewership
- 4. How core target audience among males consume TV content by dayparts?
- 5. What could be the second prime time slot for broadcasters to grab the viewership pie of the care target audience?
- 6. What happens after the prime time on TV and how male audiences conclude their typical day on TV?
- 7. What is the net value that we are unlocking from the learnings of above mentioned questions for Broadcasters, Advertisers and Agencies?





A. The story of Weekday

	INDIA					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330
FILM BASED	43%	41%	44%	37%	19%	23%
GAME/TALK/QUIZ	1%	5%	1%	2%	1%	2%
LIFESTYLE	0%	2%	1%	0%	0%	0%
MISCELLANEOUS	21%	10%	9%	12%	6%	8%
MUSIC	1%	1%	0%	0%	0%	0%
NATURE/TOURISM	0%	1%	1%	0%	1%	1%
NEWS/BUSINESS	18%	10%	8%	10%	9%	10%
SERIALS	12%	30%	33%	34%	63%	53%
SPORTS	3%	2%	3%	5%	2%	2%
Grand Total (in Mn.)	1,610,793	1,571,013	2,024,554	2,508,243	4,365,864	776,625

	RURAL					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330
FILM BASED	46%	43%	47%	40%	18%	24%
GAME/TALK/QUIZ	1%	5%	1%	1%	1%	2%
LIFESTYLE	0%	1%	1%	0%	0%	0%
MISCELLANEOUS	21%	8%	8%	11%	5%	6%
MUSIC	1%	1%	1%	1%	1%	0%
NATURE/TOURISM	1%	1%	0%	0%	0%	1%
NEWS/BUSINESS	16%	9%	8%	10%	9%	9%
SERIALS	11%	29%	32%	32%	64%	54%
SPORTS	3%	2%	3%	5%	2%	3%
Grand Total (in Mn.)	764,735	708,774	935,173	1,305,851	2,157,192	252,523

		URBAN					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330	
FILM BASED	40%	39%	41%	33%	19%	22%	
GAME/TALK/QUIZ	1%	4%	1%	2%	1%	1%	
LIFESTYLE	0%	2%	1%	1%	0%	0%	
MISCELLANEOUS	21%	11%	11%	13%	7%	9%	
MUSIC	1%	0%	0%	0%	0%	0%	
NATURE/TOURISM	0%	1%	1%	1%	1%	1%	
NEWS/BUSINESS	19%	11%	9%	10%	9%	11%	
SERIALS	13%	30%	33%	36%	61%	52%	
SPORTS	3%	2%	3%	6%	2%	2%	
Grand Total (in Mn.)	845,785	862,232	1,089,397	1,202,414	2,208,672	524,139	

^{*} Share % of Normalised Impressions

	Megacities						
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330	
FILM BASED	39%	36%	40%	30%	20%	21%	
GAME/TALK/QUIZ	1%	4%	1%	3%	1%	1%	
LIFESTYLE	1%	3%	2%	1%	0%	0%	
MISCELLANEOUS	22%	12%	12%	13%	9%	11%	
MUSIC	1%	0%	0%	0%	0%	0%	
NATURE/TOURISM	0%	1%	1%	1%	1%	1%	
NEWS/BUSINESS	20%	11%	9%	10%	10%	11%	
SERIALS	12%	31%	32%	37%	58%	53%	
SPORTS	3%	2%	3%	6%	2%	2%	
Grand Total (in Mn.)	244,220	254,032	307,541	324,139	578,278	180,719	

^{*} Share % of Normalised Impressions

- A typical Indian man starts his day with Film based program as his top choice followed by News/business and Serials. As the day progresses, share of Serials based programs goes up significantly. Interestingly, Film based programs are driven by rural male audiences, whereas Serials are marginally higher in urban India.
- As the day progresses towards primetime (1900-2200), Serial based programs almost double as compared to the previous time band (1600-1900). Surprisingly, across Urban, Rural and even Megacities, male audiences prefer the News/business related programs during the early morning hours of the day as compared to other day parts. This may be a result of the habit of reading newspapers every morning.
- The time band 1600-1900 could be considered as the one of the most preferred time band among male audiences for sports related content on TV. This could be due to the fact that young audiences are back from their schools, colleges and work places and may prefer to catch up with sports related content on TV.



B. The Story of Weekend

	INDIA					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330
FILM BASED	46%	52%	52%	47%	26%	29%
GAME/TALK/QUIZ	2%	3%	2%	1%	2%	3%
LIFESTYLE	0%	1%	1%	0%	0%	0%
MISCELLANEOUS	24%	14%	12%	14%	20%	14%
MUSIC	1%	0%	0%	0%	0%	1%
NATURE/TOURISM	1%	0%	0%	0%	0%	1%
NEWS/BUSINESS	14%	7%	6%	7%	8%	9%
SERIALS	8%	19%	20%	22%	39%	41%
SPORTS	4%	4%	6%	8%	3%	2%
Grand Total (in Mn.)	738,745	837,181	930,775	1,225,523	1,637,614	266,141

	RURAL					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330
FILM BASED	47%	53%	54%	49%	25%	30%
GAME/TALK/QUIZ	1%	3%	2%	1%	2%	3%
LIFESTYLE	0%	1%	1%	0%	0%	0%
MISCELLANEOUS	24%	13%	11%	13%	17%	11%
MUSIC	1%	1%	1%	1%	1%	1%
NATURE/TOURISM	1%	0%	0%	0%	0%	1%
NEWS/BUSINESS	13%	6%	6%	7%	8%	9%
SERIALS	8%	19%	20%	20%	42%	42%
SPORTS	4%	3%	6%	8%	3%	2%
Grand Total (in Mn.)	348,448	375,803	424,227	632,746	784,479	88,750

	URBAN					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330
FILM BASED	44%	51%	49%	44%	27%	28%
GAME/TALK/QUIZ	2%	2%	2%	2%	2%	3%
LIFESTYLE	1%	1%	1%	0%	1%	0%
MISCELLANEOUS	24%	14%	12%	15%	23%	15%
MUSIC	1%	0%	0%	0%	0%	1%
NATURE/TOURISM	1%	1%	1%	1%	0%	1%
NEWS/BUSINESS	15%	7%	7%	7%	8%	9%
SERIALS	9%	19%	21%	23%	36%	41%
SPORTS	5%	4%	7%	8%	3%	2%
Grand Total (in Mn.)	390,271	461,348	506,583	592,752	853,121	177,422

^{*} Share % of Normalised Impressions

	Megacities					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330
FILM BASED	43%	50%	49%	43%	28%	27%
GAME/TALK/QUIZ	2%	3%	2%	2%	2%	3%
LIFESTYLE	1%	1%	1%	0%	1%	0%
MISCELLANEOUS	24%	15%	13%	14%	25%	16%
MUSIC	1%	0%	0%	0%	0%	0%
NATURE/TOURISM	0%	0%	1%	1%	0%	1%
NEWS/BUSINESS	16%	7%	7%	7%	8%	10%
SERIALS	8%	19%	20%	24%	33%	42%
SPORTS	6%	4%	7%	8%	3%	2%
Grand Total (in Mn.)	110,686	137,791	148,913	158,375	232,203	61,704

^{*} Share % of Normalised Impressions

- During weekend, Indian male audience starts their day with a higher preference for Film based programs, which is primarily driven by Rural male audience.
- Contrary to the popular belief, Lifestyle and Sports based content does not witness significant viewership on weekends, even in Megacities or urban audiences.
- Interestingly, there is something very special about the late prime time hours 2200-2330 as the relative viewership share for several genres remains the same across market - Film, Serials, Sports and Lifestyle based content. This similar viewership behavior of male audiences during late prime time will be helpful for Advertisers during pan India planning.





C. The Story of NCCS

	Weekdays – M 15+ NCCS AB						
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330	
FILM BASED	39%	38%	40%	34%	19%	22%	
GAME/TALK/QUIZ	1%	4%	1%	2%	1%	1%	
LIFESTYLE	0%	2%	1%	1%	0%	0%	
MISCELLANEOUS	22%	10%	10%	13%	6%	9%	
MUSIC	1%	1%	1%	1%	0%	0%	
NATURE/TOURISM	0%	1%	1%	0%	1%	1%	
NEWS/BUSINESS	19%	11%	9%	10%	10%	12%	
SERIALS	13%	32%	34%	34%	60%	52%	
SPORTS	3%	2%	3%	6%	2%	2%	
Grand Total (in Mn.)	820,568	837,396	1,061,467	1,328,260	2,315,621	450,436	

		Weekdays – M 15+ NCCS CDE					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330	
FILM BASED	49%	44%	48%	41%	19%	25%	
GAME/TALK/QUIZ	1%	6%	1%	2%	1%	2%	
LIFESTYLE	0%	2%	1%	0%	0%	0%	
MISCELLANEOUS	20%	9%	8%	10%	5%	6%	
MUSIC	1%	0%	0%	0%	0%	0%	
NATURE/TOURISM	0%	1%	0%	0%	0%	1%	
NEWS/BUSINESS	16%	9%	7%	9%	7%	9%	
SERIALS	10%	27%	31%	33%	65%	54%	
SPORTS	3%	2%	3%	5%	2%	2%	
Grand Total (in Mn.)	1,049,331	967,104	1,278,886	1,589,713	2,753,032	422,817	

^{*} Share % of Normalised Impressions; Market: All India

- During weekdays, share of Film based program dominates the upper NCCS right from the early morning till early primetime.
- Sports seems to be equally popular as it has comparable share across upper and lower NCCS. However, surprisingly, share of Lifestyle does not witness any visible difference between upper and lower NCCS.
- News as a programme theme witnesses some significant difference between upper and lower NCCS from 1900 hours onwards.
- Share of Serials, for Indian male audiences gradually rises and reaches its peak during primetime. This can be attributed to single TV households in India as primetime is seen in the context of female audiences.

		Weekends – M 15+ NCCS AB					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330	
FILM BASED	42%	50%	49%	43%	25%	27%	
GAME/TALK/QUIZ	2%	2%	2%	1%	2%	3%	
LIFESTYLE	0%	1%	1%	0%	1%	0%	
MISCELLANEOUS	25%	14%	12%	15%	21%	14%	
MUSIC	1%	1%	0%	1%	0%	1%	
NATURE/TOURISM	1%	0%	0%	0%	0%	1%	
NEWS/BUSINESS	15%	7%	7%	8%	9%	10%	
SERIALS	9%	20%	21%	23%	38%	41%	
SPORTS	5%	4%	7%	9%	3%	2%	
Grand Total (in Mn.)	378,811	442,160	493,095	646,455	888,676	155,086	

	Weekends – M 15+ NCCS CDE						
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330	
FILM BASED	50%	55%	56%	52%	27%	31%	
GAME/TALK/QUIZ	1%	3%	2%	2%	2%	3%	
LIFESTYLE	0%	1%	1%	0%	0%	0%	
MISCELLANEOUS	23%	13%	11%	13%	19%	12%	
MUSIC	1%	0%	0%	0%	0%	1%	
NATURE/TOURISM	1%	0%	0%	0%	0%	1%	
NEWS/BUSINESS	13%	6%	5%	6%	7%	8%	
SERIALS	7%	18%	19%	20%	40%	42%	
SPORTS	4%	3%	5%	7%	3%	2%	
Grand Total (in Mn.)	476,975	521,450	581,215	781,407	1,000,910	145,790	

^{*} Share % of Normalised Impressions; Market: All India

- During weekends, typically Indian male audiences start their day with maximum (viewership share) preference for the Film based content followed by Miscellaneous (Reality show, Tele shopping, Religious/Astrology, Agricultural shows).
- As day progresses, the share of Serials gradually increases to surpass the film based show during 1900 - 2200 hours.
- It is important to note that, Film based content consistently witnesses a higher share among lower NCCS male audiences across the day. This can be due to the fact that lower NCCS prefer to enjoy Films on TV more than upper NCCS during weekend.
- On the other hand, perception-wise male skewed program content like sports shows a higher share for upper NCCS. Similarly, News as a programme theme also enjoys a marginally better share among upper NCCS male audiences.
- It appears, News is being watched by Indian male audiences either during start of the day or at the end of the day across NCCS.

D. The Story of Core Target Audience (M15-40 Years ABC)

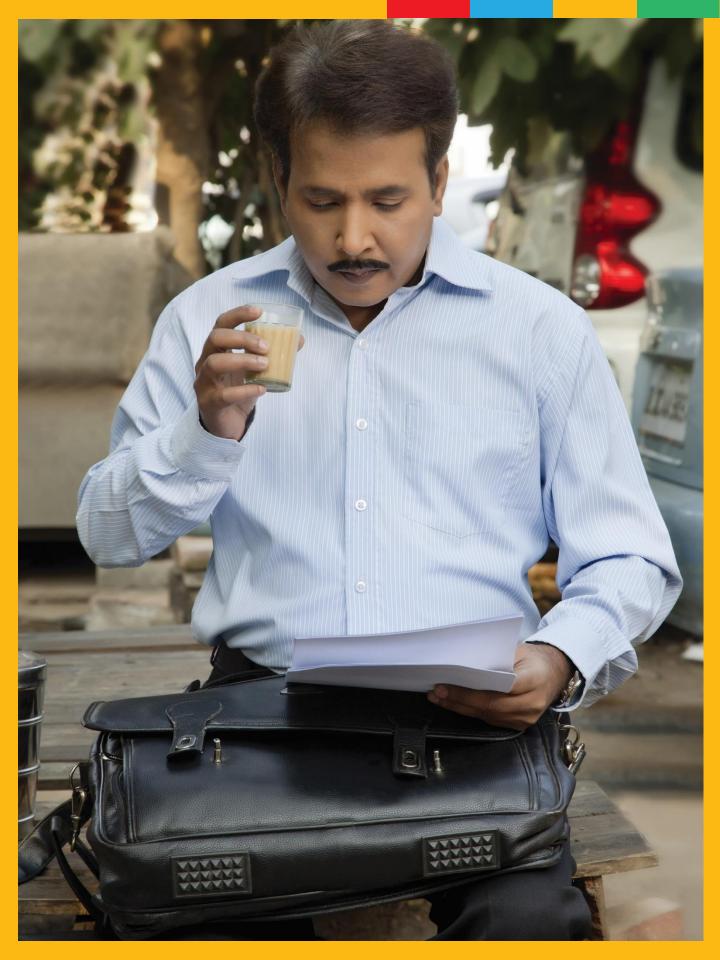
Let's analyze the audience segment that matters the most to broadcasters and Advertisers. It would be an interesting exercise to understand how core audience (15-40 years) consume TV throughout the day.

	Weekdays – M 15-40 Years ABC					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330
FILM BASED	45%	42%	45%	39%	20%	24%
GAME/TALK/QUIZ	1%	4%	1%	1%	1%	1%
LIFESTYLE	0%	2%	1%	0%	0%	0%
MISCELLANEOUS	21%	10%	10%	12%	6%	8%
MUSIC	1%	1%	1%	0%	0%	0%
NATURE/TOURISM	0%	1%	0%	0%	1%	1%
NEWS/BUSINESS	16%	9%	7%	8%	8%	10%
SERIALS	12%	29%	31%	33%	62%	52%
SPORTS	3%	2%	3%	5%	2%	3%
Grand Total (in Mn.)	970,162	963,836	1,223,796	1,526,979	2,582,709	465,545

	Weekend – M 15-40 Years ABC					
Program Theme	0700-1000	1000-1300	1300-1600	1600-1900	1900-2200	2200-2330
FILM BASED	47%	53%	53%	48%	27%	30%
GAME/TALK/QUIZ	1%	2%	2%	1%	2%	3%
LIFESTYLE	0%	1%	1%	0%	0%	0%
MISCELLANEOUS	24%	14%	12%	14%	20%	14%
MUSIC	1%	0%	0%	0%	0%	1%
NATURE/TOURISM	1%	0%	0%	0%	0%	1%
NEWS/BUSINESS	13%	6%	6%	6%	7%	8%
SERIALS	8%	19%	20%	21%	39%	40%
SPORTS	5%	4%	7%	8%	3%	2%
Grand Total (in Mn.)	447,724	519,135	565,893	742,569	976,267	160,582

^{*} Share % of Normalised Impressions; Market: All India

- It is evident that Film based content dominates the viewership pie. However, Miscellaneous content has a visible contribution apart from Serials throughout the day for both weekdays and weekends. This clearly suggests that Film and Miscellaneous based content could be one of the potential program themes for advertisers targeting core audience in addition to Serials.
- Sports, in keeping with conventional wisdom, grabs a higher share during weekends as compared to weekdays.



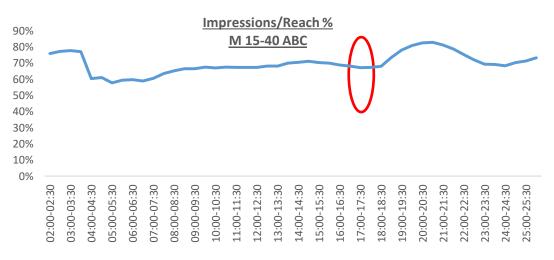
E. Sweet Spot for Broadcasters

What is Fid Ratio (Impressions/Reach%)?

Traditionally, TV content performance is looked at from the angle of either Reach or Impressions (Ratings). However, it is critical to look at Reach to Impressions conversion ratio. This will essentially indicate the stickiness of the content. In other words, it answers the question of after spending a minute on a specific content what happens to the viewer? The questions that broadcasters can ask is what is the holding strength of my content?

Let us understand the Fid Ratio i.e. Impressions/Reach % ratio in the context of core audience.

Let us understand this Impressions/Reach % ratio in the context of core target audience.





*Note: Reach median at 24737 taken as filter to look at Reach to Impressions ratio as second prime time.

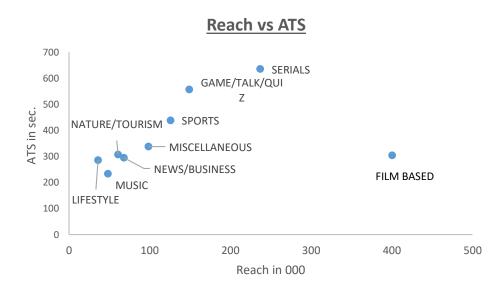
Time-bands	M 15-40 ABC Reach'000	Impressions/Reach
07:00-07:30	13343	61%
07:30-08:00	17178	64%
08:00-08:30	20215	65%
08:30-09:00	21712	67%
09:00-09:30	22538	67%
09:30-10:00	22510	68%
10:00-10:30	22145	67%
10:30-11:00	21420	68%
11:00-11:30	21007	67%
11:30-12:00	20996	67%
12:00-12:30	21787	67%
12:30-13:00	22996	68%
13:00-13:30	24949	68%
13:30-14:00	26430	70%
14:00-14:30	27325	71%
14:30-15:00	27162	71%
15:00-15:30	26239	70%
15:30-16:00	24737	70%
16:00-16:30	23711	69%
16:30-17:00	23184	68%
17:00-17:30	24092	67%
17:30-18:00	27212	67%
18:00-18:30	33550	68%
18:30-19:00	40406	74%
19:00-19:30	46042	78%
19:30-20:00	49597	81%
20:00-20:30	52184	83%
20:30-21:00	52905	83%
21:00-21:30	51512	81%
21:30-22:00	46482	79%
22:00-22:30	38060	75%
22:30-23:00	27954	72%
23:00-23:30	18361	69%

"In the context of the broadcasters,
5pm – 6pm could be the second prime time to target core audience."

- Interestingly, reach to impressions conversion is one of the lowest during 5 pm to 6 pm for core audience. This suggests that there are enough head counts for TV, however they are not converting into impressions. This could be due to the fact that these time bands either have repeat content or lack contemporary engaging content for the audiences.
- We can conclude that there is potential for broadcasters, with contemporary or any
 engaging content based on qualitative findings, to strike between 5 pm to 6 pm and
 take away the potential core audience pie.

Programme Theme 1700-1800	Norm. Impressions'000		
SERIALS	15040		
FILM BASED	12185		
GAME/TALK/QUIZ	8284		
SPORTS	5506		
MISCELLANEOUS	3325		
NEWS/BUSINESS	2008		
NATURE/TOURISM	1860		
MUSIC	1127		
LIFESTYLE	1026		

While film based content garners the maximum reach, the average time spent on serials, game/talk/quiz, sports is significantly higher than film based content. The 1700-1800 hours could be the potential slot for serials, game/talk/quiz or sports related content to offer a fresh and engaging content.



F. The Story After Prime Time

While we have analyzed a day in the life of an Indian male audience, we have only looked at the conventional TV viewing hours so far. Very few analysis focus on what happens after the prime time hours or late night hours. Let us look at how Indian male audience (15+ ABC) end their day on TV i.e. between 23:30-24:30 hrs.



23:30-24:30 Hrs	IND	INDIA		
Program Theme	Weekday	Weekend		
FILM BASED	26%	28%		
GAME/TALK/QUIZ	1%	1%		
LIFESTYLE	1%	2%		
MISCELLANEOUS	11%	21%		
MUSIC	0%	1%		
NATURE/TOURISM	2%	1%		
NEWS/BUSINESS	11%	12%		
SERIALS	46%	33%		
SPORTS	2%	2%		
Grand Total (in Mn.)	111,271	43,724		

23:30-24:30 Hrs	RURAL		
Program Theme	Weekday	Weekend	
FILM BASED	32%	33%	
GAME/TALK/QUIZ	0%	1%	
LIFESTYLE	1%	1%	
MISCELLANEOUS	17%	23%	
MUSIC	0%	1%	
NATURE/TOURISM	2%	1%	
NEWS/BUSINESS	8%	9%	
SERIALS	36%	28%	
SPORTS	3%	2%	
Grand Total (in Mn.)	30,736	11,314	

23:30-24:30 Hrs	URBA	URBAN		
Program Theme	Weekday	Weekend		
FILM BASED	24%	26%		
GAME/TALK/QUIZ	1%	1%		
LIFESTYLE	1%	2%		
MISCELLANEOUS	9%	20%		
MUSIC	0%	1%		
NATURE/TOURISM	2%	1%		
NEWS/BUSINESS	12%	13%		
SERIALS	49%	35%		
SPORTS	2%	2%		
Grand Total (in Mn.)	80,535	32,410		

^{*} Share % of Normalised Impressions; Market: All India; TA: M15+ ABC

23:30-24:30 Hrs	MEGA CITIES		
Program Theme	Weekday	Weekend	
FILM BASED	21%	24%	
GAME/TALK/QUIZ	1%	1%	
LIFESTYLE	1%	2%	
MISCELLANEOUS	9%	19%	
MUSIC	0%	0%	
NATURE/TOURISM	2%	1%	
NEWS/BUSINESS	14%	15%	
SERIALS	50%	37%	
SPORTS	2%	2%	
Grand Total (in Mn.)	32,656	13,143	

^{*} Share % of Normalised Impressions; Market: All India; TA: M15+ ABC

- Serials, during weekdays, stay visibly higher than Film based content.
- Interestingly, during weekends, Film based content surpass serials after prime time in rural India. However, in Urban and Megacities, the trend is reversed Serials stays higher than Film based content even during weekends. This is breaking the myth that film based content enjoys a bigger share of the viewership pie than serials during weekends.
- Miscellaneous is significantly higher during weekends than weekdays. Lifestyle as well as Sports are not sensitive to day of the week. Clearly film based content leads share of program theme.



<u>Summary</u>

Film based content is the most viewed content in the first half of the day (0700-1600 hrs.). As the day progressed, it is surpassed by Serials from 1600 hrs. onwards.

Male audiences prefer News/Business related programs during the early morning hours of the day as compared to any other day-part across rural, urban and Megacities of India.

Late prime time hours (2200-2330 hrs.) during weekends could be effective for pan India targeting as viewership share for several genres, like Film, Serials, Sports and Lifestyle based content, remains on par across markets.

One of the potential time bands for sports could be 1600-1900, this could be due to the fact that male audiences are back from school/colleges, work places.

It has been observed that Lifestyle and Sports content is day agnostic. Day of the week does not matter to Indian male audiences across rural, urban and Megacities.

Surprisingly, share of Lifestyle content does not display any visible difference between upper and lower NCCS.

During weekends, male audience from upper NCCS prefers news more than lower NCCS male audience.

The reach to impressions conversion is one of the lowest during 1700-1800 hrs. for millennials. Hence, there is potential for broadcasters to create a second prime-time in this band.

To counter the lack of conversion of head counts into impressions in 1700-1800 hrs., there is a need for fresh and engaging content in that band. Broadcasters could consider this as a potential slot for Serials, Game/talk/quiz or Sports related content.

During weekends, in late night hours, Serials have a higher share of viewership than Film based content in urban and Megacities of India. This is breaking the myth that film based content leads share of viewership in late night during weekends.



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