



SEASONALITY & TV TRENDS

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INTRODUCTION

The seasonality of the television business is well known, and often talked about, especially in the beginning of a financial year when annual plans are laid out by various stakeholders in the media ecosystem. TV viewership is dynamic and changing every day, yet it seems to be cyclical in nature.

Through this newsletter, we will explore the seasonal nature of television viewing by analyzing BARC's robust viewership data over the past two years. We will attempt to uncover some trends & insights which may be of value to these stakeholders in anticipating and formulating annual plans.

This newsletter will uncover some the following aspects in television seasonality and more:

- 1) How does the quarter on quarter television viewership shape up, and what are its implications?

- 2) Viewership trend across zones & markets- Which markets exhibit consistent viewership trends and which markets tend to fluctuate?

- 3) A unique attempt to understand the effect of external factors such as temperature on TV viewership

- 4) How do various television genres behave and respond to seasonality?

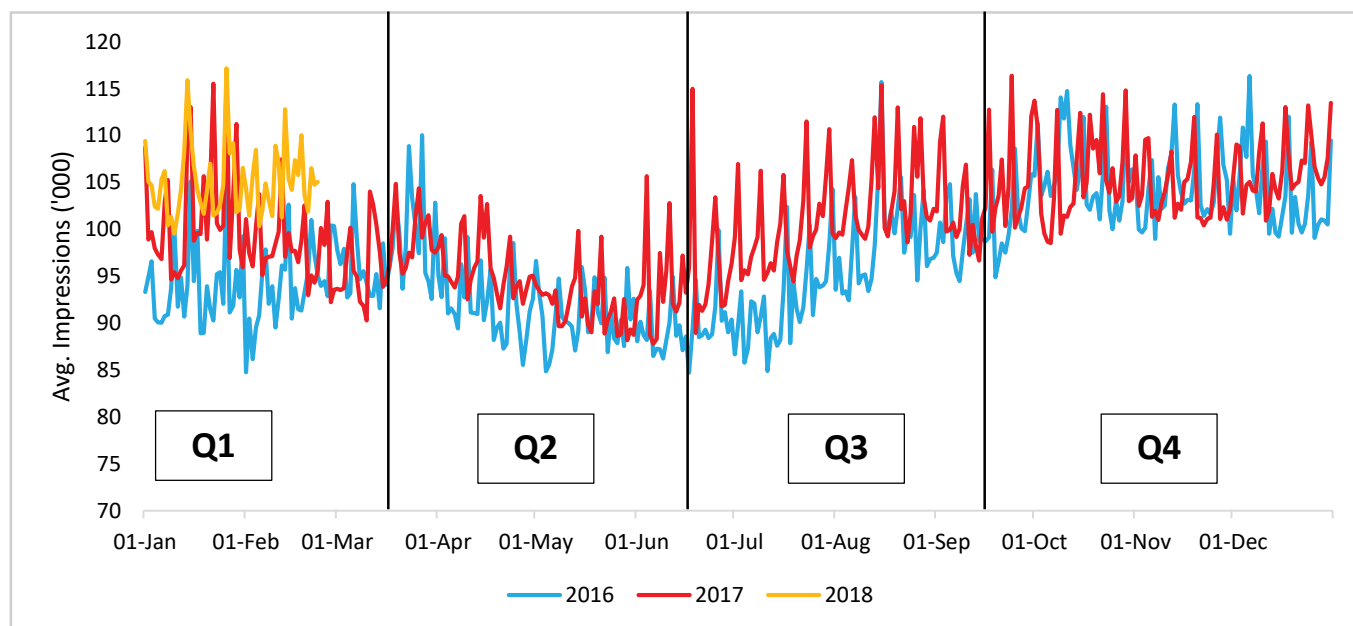
- 5) Do TV viewing day-parts also exhibit seasonality? And are these day parts unique to each other?

For the purpose of this analysis, we will consider the **15+ yrs** segment as our target group. The Kids TG has not been considered to maintain consistency in analysis and factor out any effect of the Universe Update (2-4yrs) on the viewership trends.

SEASONAL TRENDS



Annual TV Viewership All India | 15+



Looking at the ebbs and flows in the viewership trendline, it becomes evident that the TV viewing pattern remains consistent quarter on quarter, each year.

Q2 (April-June) of the calendar year is traditionally the least performing quarter, as the viewership is seen to dip during this period. April-June are the peak summer months, and the onset of the holiday season owing to summer vacations in schools and colleges.

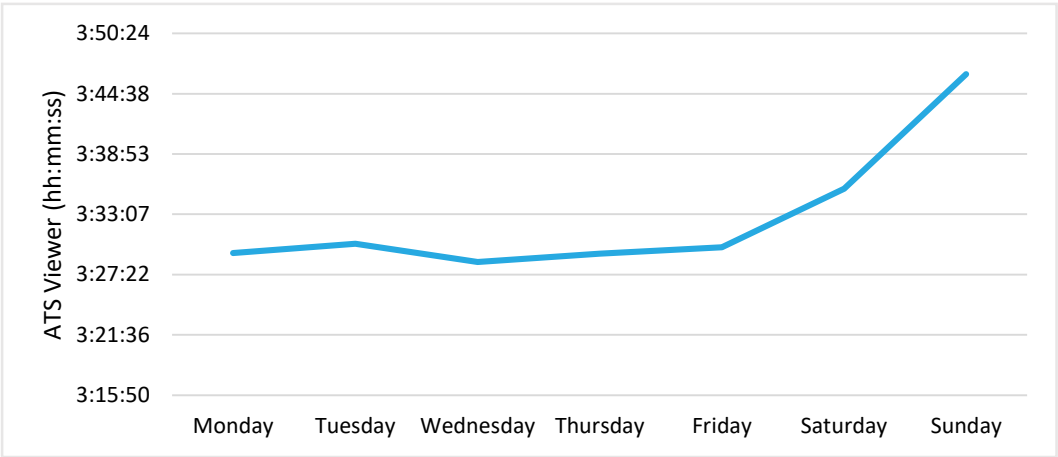
Another possible explanation could be the increase in power cuts and load shedding in the summer, that could cause a dip in viewership.

As the holiday season ends, viewership starts picking up in Q3 (July-September). The quarter witnessed a growth of 5% in overall TV viewership from 2016 to 2017. This is the highest viewership growth across the four quarters, and may be an ideal time to hook the viewers returning to television after a short hiatus, by debuting new content and programmes.

Q4 (October-December) is the strongest quarter of the year with respect to TV viewership. However, this quarter witnessed the least growth of 1% in 2017 over the same quarter in 2016. A lot of special, festive programming occurs in this quarter in lieu of Diwali, Christmas, New Year, and hence viewership may be maxed out in this season.

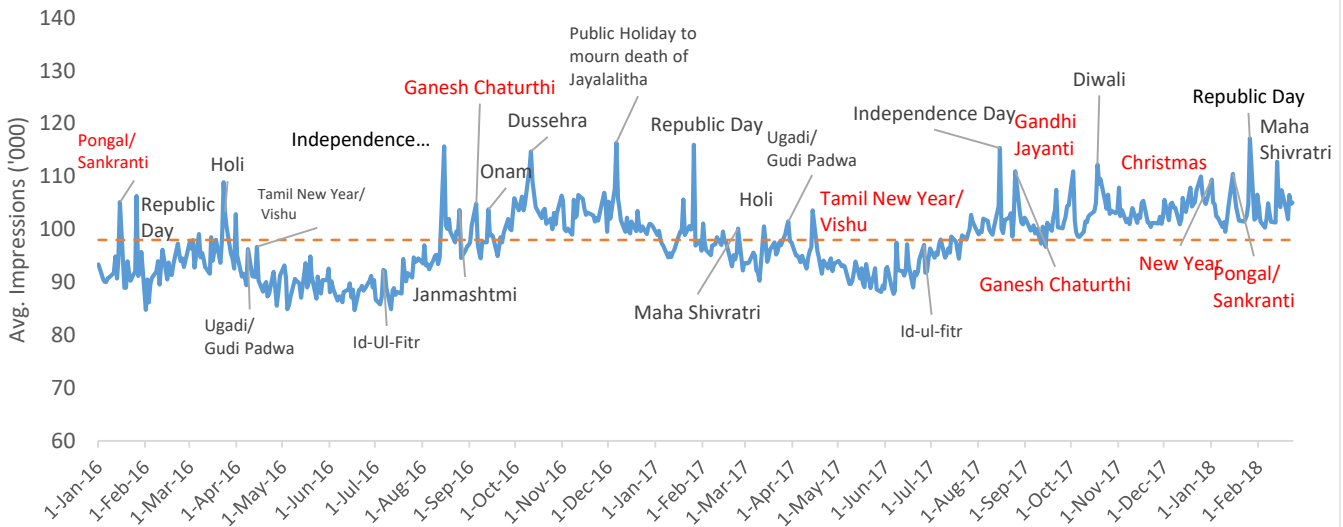
We can also observe viewership spikes at regular intervals across the year. Most of these spikes can be attributed to weekly growth in viewership on weekends, especially on Sundays. This is also reflected quite evidently by the Average Time Spent graph below. While the ATS on weekdays (Mon- Fri) is almost a straight line with minor deviations, there is a sharp upward incline on the weekends, with Sunday achieving the highest ATS.

Total TV ATS
All India | 15+ | Wk 01 '16 – Wk 08 '18



As we have already established that TV viewership is higher on weekends in comparison to a weekday, let us also specifically look at the historic viewership graph for weekdays to identify any trends that may emerge.

Annual TV Viewership (Weekdays) All India | 15+



Holidays highlighted in red occurred on a long weekend (i.e Monday/ Friday)

Most viewership spikes that occur on a weekday can be attributed to a festival or a public holiday. Historically, holidays of National significance i.e. Republic Day and Independence Day witness significantly high TV viewership, as viewers tune in to watch the live parade, President's address, and other special programming such as patriotic movies that are aired to commemorate the occasion.

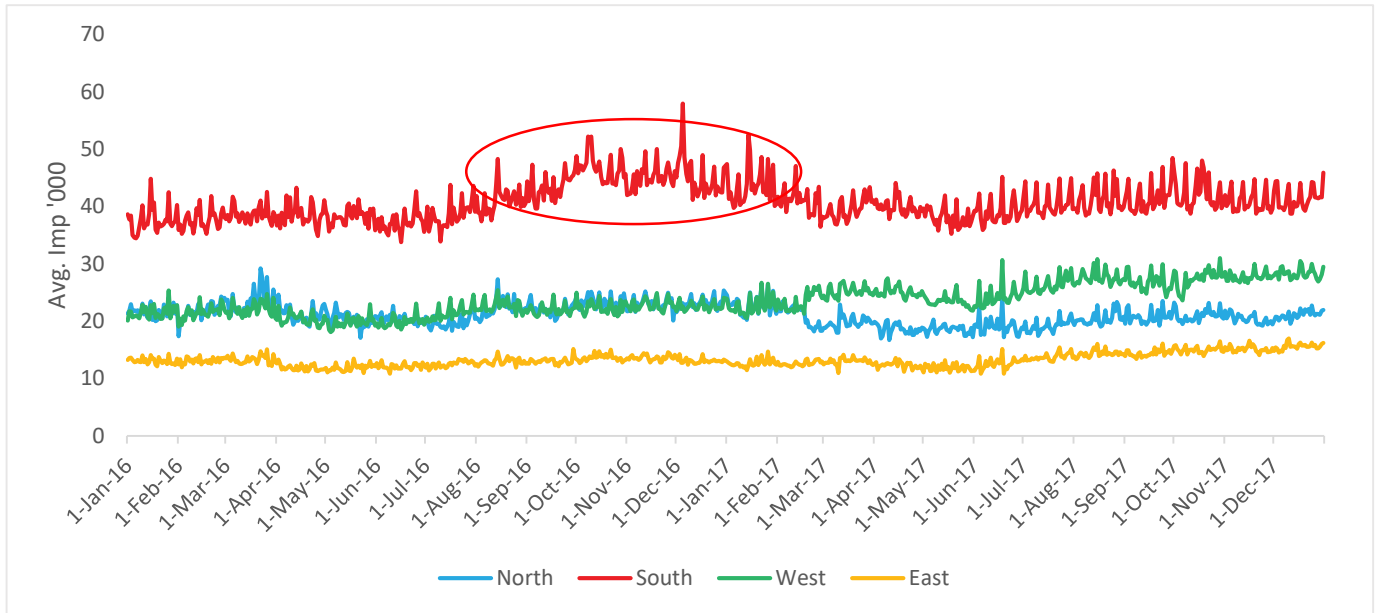
If we were to look at the other holidays, especially those that achieved above average viewership, it can be said that holidays that fall mid-week typically witness better TV viewership than those that fall on a long weekend i.e. Monday or a Friday. Students and the working population get an extra day off in the middle of their hectic week and would probably prefer to stay at home and relax, while on long weekends they may want to make plans to step out and enjoy the extended holiday.

There may be a great opportunity here for broadcasters to hook viewers on long weekends with a cohesive programming strategy spread across 3 – days which would impel the viewers to tune into television to watch the channel/ programme on all days of the long weekend.

MARKET TRENDS



TV Viewership by Zones | 15+



All geographic zones- North, South, East and West exhibit similar TV viewing patterns round the year.

Audiences in South India consume the maximum television throughout the year, as is visible from the high impressions contributed by the South zone to Total TV viewership across both years. AP/ Telangana and TN/ Pondicherry have consistently been in the top 3 markets across all state markets in the country, along with Maharashtra/ Goa. High TV penetration in these states is also an important factor which may have driven high viewership in said markets.

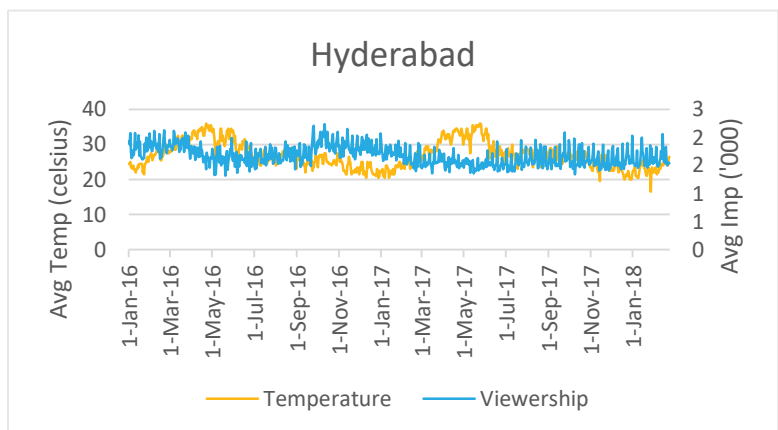
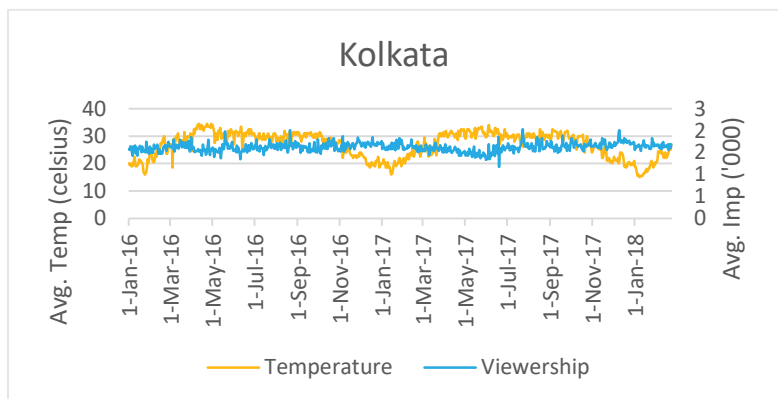
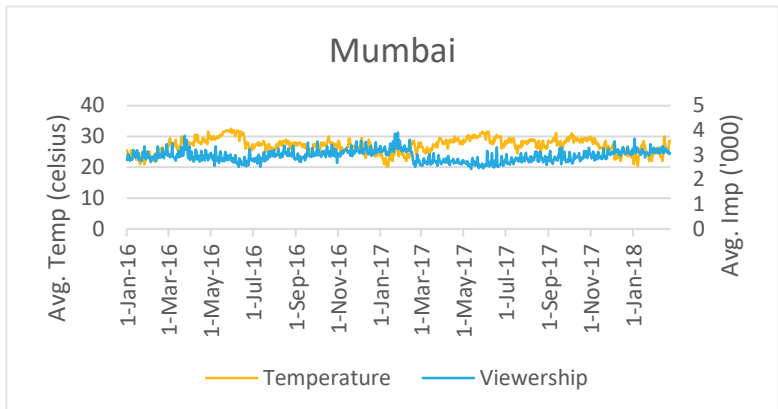
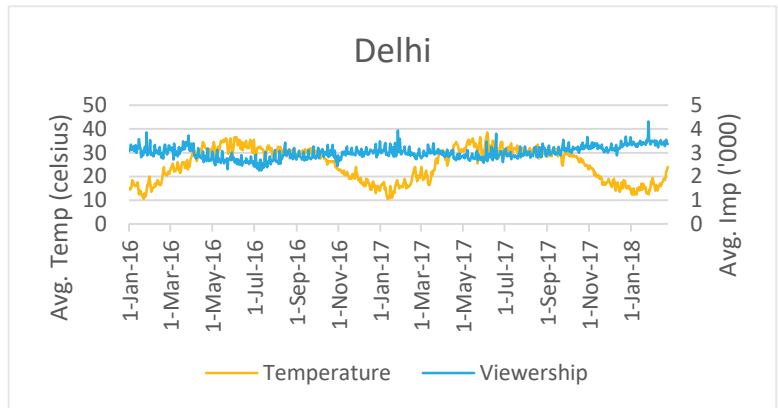
TN/ Pondicherry market saw an increase in TV viewership in the latter half of 2016, on the back of ex-CM Jayalalitha's health crisis & subsequent political unrest. This increase bumped up the All India viewership as well, indicating that viewership in this market is more likely to fluctuate with severity of events

North and West zones were observed to be at par with respect to TV viewership in 2016. While the viewership has shifted slightly, no significant change is observed in the viewing pattern.

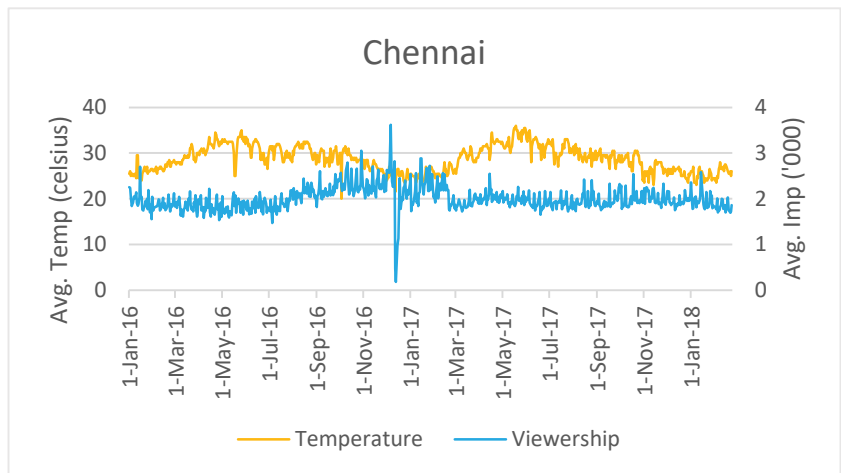
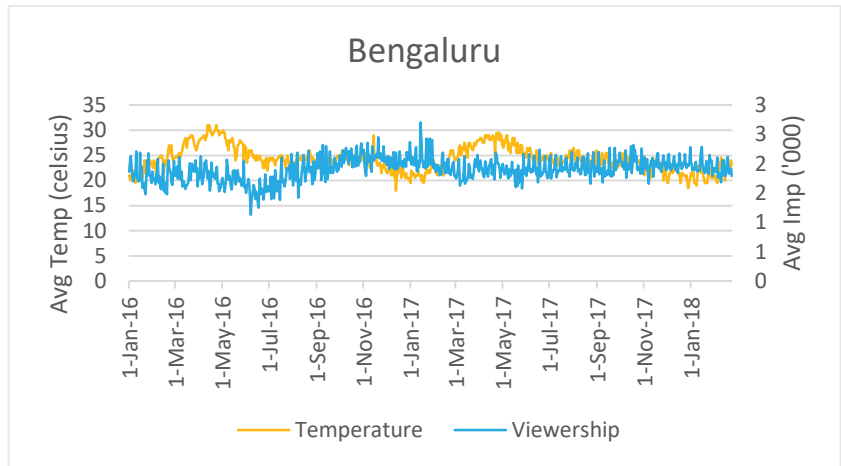
Now that we have established that seasonality does exist in tv viewership, one may wonder if external factors such as the weather or temperature impact tv viewership. To answer this, we have made a unique attempt by mapping the average daily temperature with the viewership data across the 6 megacities-Delhi, Kolkata, Mumbai, Hyderabad, Bangalore & Chennai.



Viewership and Temperature



Looking at the daily viewership of the top 6 megacities, mapped with the average daily temperature, it can be said that **temperature & viewership have an inverse relationship.**



In winters/ cold weather, people stay indoors and watch TV, but in summers/ warm climate people would prefer stepping out and engaging in alternate activities for entertainment. Additionally, as mentioned earlier, The frequency of power cuts and load shedding is higher in the summer, which also leads to a dip in TV viewership.

The cyclic pattern in television viewing could partly be explained by this environmental factor. As we had observed, TV viewing is high in the 4th and 1st quarters, which are typically the autumn & winter months, but in the 2nd quarter (summer) the viewership dips and stays low. This has been the pulse of TV watching in India for the last 2 years, and perhaps previously as well.

This could have some implication for the broadcasters, agencies and advertisers as well. For example, broadcasters can focus new show releases in the autumn/ fall season. Agencies can purchase network advertising packages months in advance, anticipating the pulse of viewership basis the seasonality. Advertisers could benefit by creating a unique seasonality segmentation for their brands. Brands can also invest more in TV advertising for their campaigns that are to be scheduled in the months with typically high TV viewership.

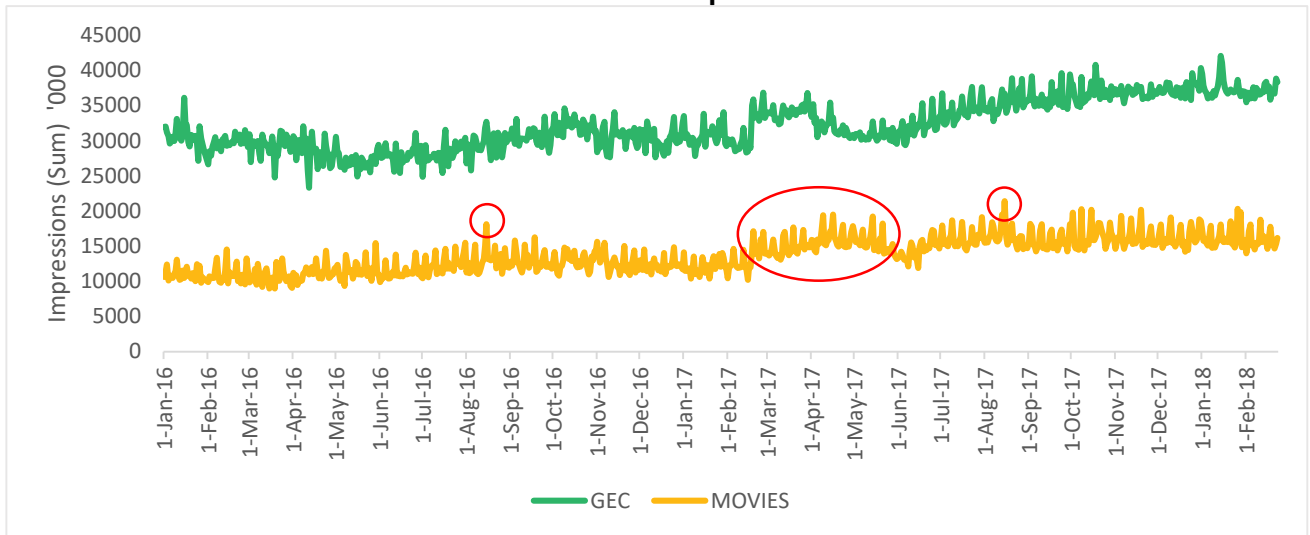


GENRE TRENDS



Looking at the trends across genres over time, multiple observations come to light. Let us look at the genres closely to understand seasonality better.

Genre Viewership All India | 15+



GEC:

The GEC genre appears to be the biggest genre on television with the highest share of viewership across the timeline. It is a relatively stable genre, with no major fluctuations across the year. Some of the spikes observed can be attributed to the airing of specific events, such as award shows & finale episodes of popular reality shows.



Movies:

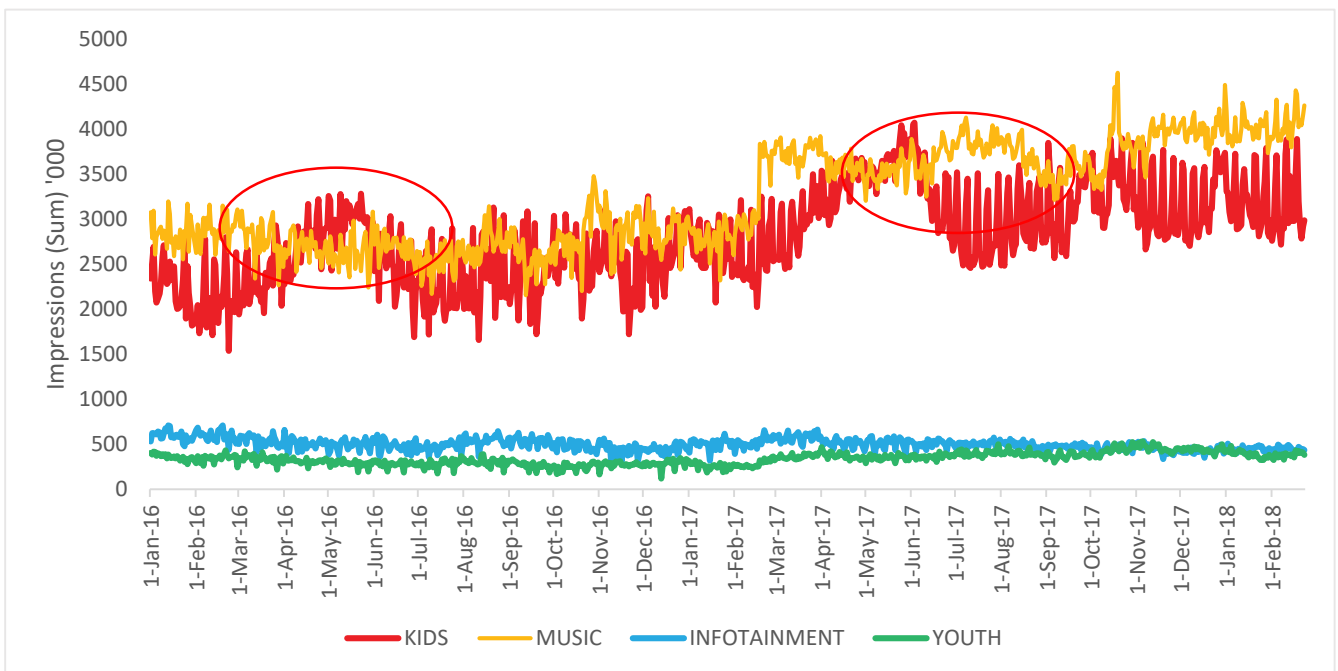
While looking at the Total TV viewership trend earlier, we had observed weekly growth in viewership on weekends. This growth seems to be fueled by the Movie genre, which is also in keeping with the programming strategy of airing blockbuster movies and Premiers/ World TV Premiers on weekends.

A distinct viewership peak is observed in this genre on 15th August across both years. This may likely be the impact of patriotic movies that are aired especially on this day to commemorate the Indian Independence Day.

A note-worthy rise in viewership in the genre is also observed between April-May 2017. This can be attributed specifically to the airing of a popular T20 cricket tournament on a broadcasting channel in the movie genre.

Having looked at the two biggest genres on television, let us also take a close look at the smaller genres

Genre Viewership All India | 15+



Kids:

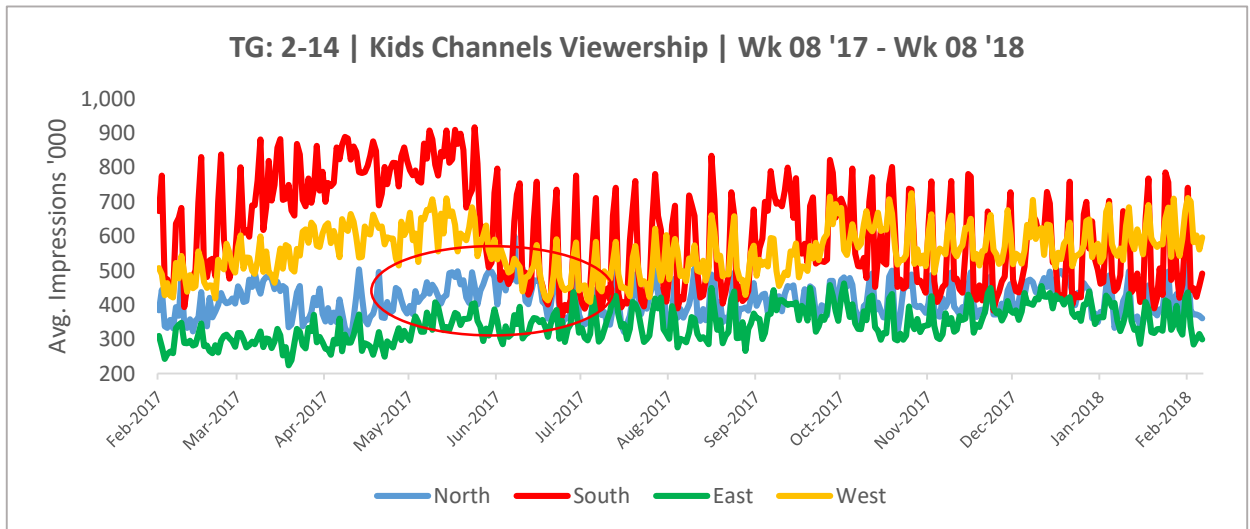
Since the Kids TG has not been considered in this analysis, one would expect the viewership for Kids channels to be lower. However, it is interesting to see that Kids genre continues to receive substantial viewership in comparison to the remaining genres. While some of these viewers may include the older teens, it is also indicative of co-viewership of the older groups along with the kids, as a large percentage (>90%) of TV households in India are single TV homes.

Kids channels could potentially be a good platform for brands to capture the attention of the parents and leverage the pester power of the kids at the same time, especially during the summer vacation months. While most genres see similar seasonal fluctuation patterns, the Kids genre witnesses a substantial increase in viewership during this period as kids are at home and would be spending more time watching television.

In addition to Movies genre, the Kids genre too exhibits regular viewership spikes due to increased consumption of such channels on a weekend as opposed to a weekday.



Since the core TG for the Kids channels is the 2-14-year-old segment, it is only fair that we also take a look at the viewership graph for this target group.



While we know that there is a general increase in the viewership of Kids Genre in the summer months, an interesting story emerges when we break it up by zones.

The various zones across India have different vacation schedules, and these local trends clearly emerge in the viewership graph.

The schools in South typically break for vacation at the end of March and re-open early in June. In the West, schools go on vacation from mid-April till mid-June. The rise and fall in kids' viewership in both these regions also corresponds with this. In North India on the other hand, schools break for summer vacation much later in mid-May and remain closed till end of June, which is also clearly reflected from the graph. The general vacation period in the East zone is typically May-June, as also indicated by the corresponding rise in viewership visible in the graph.

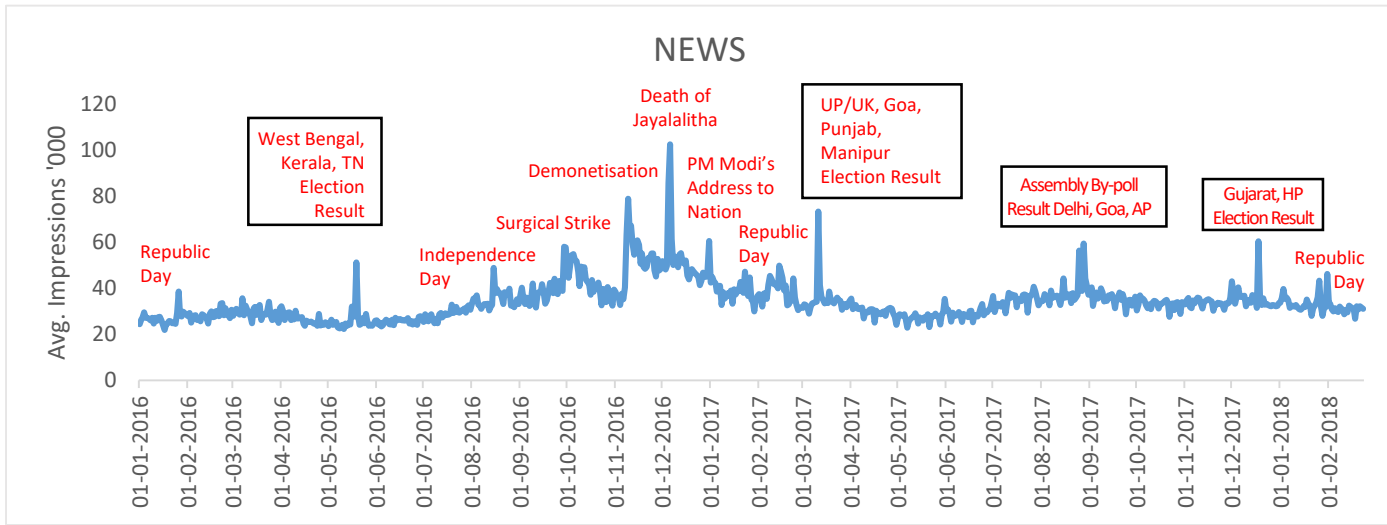
While these months include multiple factors that cause viewership fluctuations, the fact that **the variance in viewership spikes lines up perfectly with the respective regions' vacation period shows us the high sensitivity of kids' viewership to vacations.** Regional broadcasters may therefore look at introducing limited period kids programming in these months to take advantage of the seasonal viewership increase.

Music, Youth & Infotainment:

The Music genre has a similar viewership share as that of Kids genre among the 15+ audience. The genre seems to be growing with an upward linear trend. The Youth and Infotainment genres, are relatively smaller in comparison to the rest. While the Youth genre seems to be stable and consistent, the Infotainment genre exhibits a slightly downward trendline.



News:



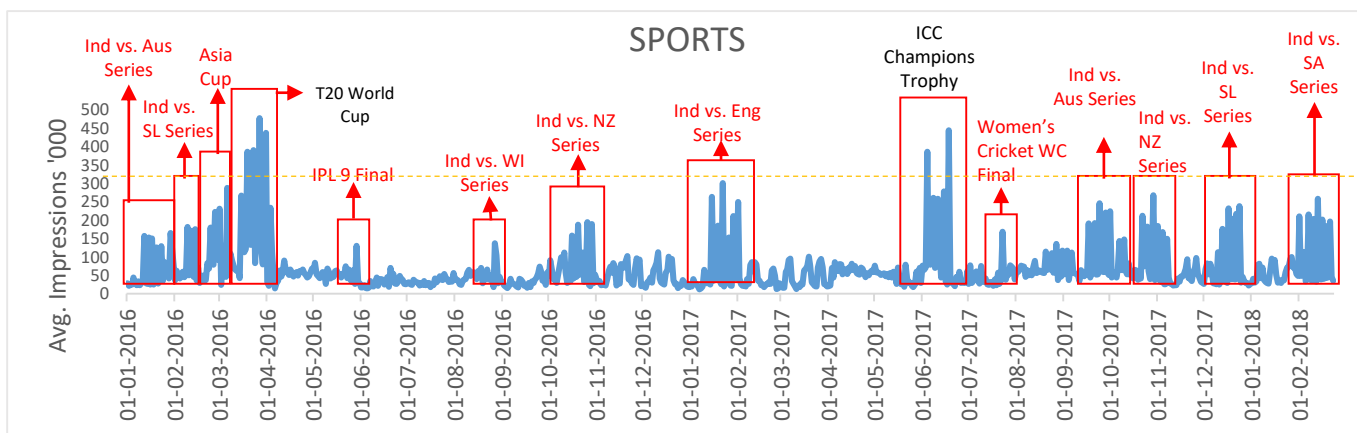
The news genre is a highly event driven and dynamic genre. While it is a small genre, we see some massive spikes across the timeline. All these spikes can be attributed to some major event or story that was being covered by news channels, as indicated in the graph. Some events lead to a higher spike in viewership due to their nature and impact.

For example, the sudden demise of Jayalalitha led to the highest spike in News viewership, across India, over the last 2 years. Though the event was more central to South India, it was covered by most news channels with equal intensity.

Demonetization was another critical event with a big impact. Politically significant events such as Elections also lead to a noticeable increase in viewership, as is evident across the genre timeline.

The news genre also witnesses improved viewership on Republic Day, across years, as viewers tune in to watch the live feed of the processions. While the Republic Day processions are originally telecast on DD channels, News channels across the country also receive the feed and air them on their respective channels.

Sports



Sports is also a very dynamic and property driven genre. Maximum fluctuations can be seen in this genre across the timeline, based on the schedule of major sporting events.

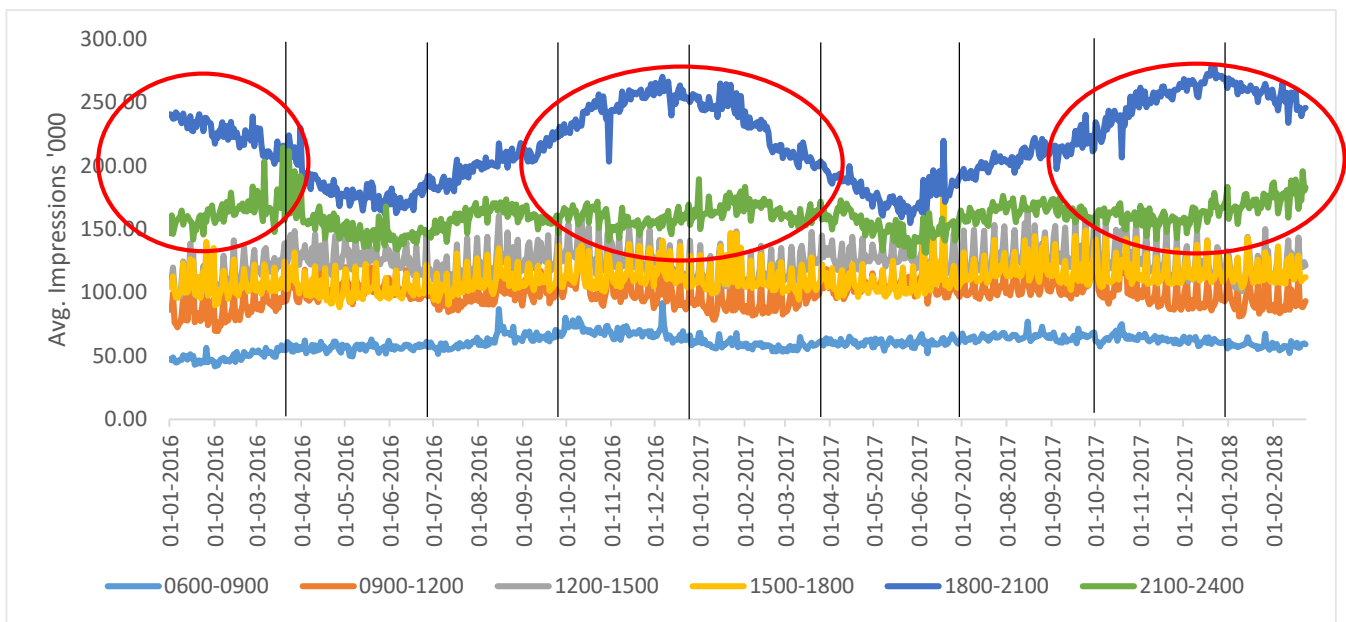
During the telecast of big ticket properties such as the T20 World Cup and the ICC Champions Trophy, the average viewership of the sports genre has surpassed the highest average viewership for GEC genre on a given day during the two-year period.

While the interest in other sports has been on the rise among Indian viewers, with the introduction of new sporting leagues and formats, Cricket still dominates the sports viewership for the average Indian viewer. This is evident from the viewership spikes during all cricket tournaments, especially when Team India is playing.



Daypart Trends





Looking at the historic day-part trends split by 3-hour time bands, it appears that the early Prime Time band (1800-2100 hrs) is the only time band which reflects seasonality in TV viewing, while all other time bands appear immune to it. The late prime time band (2100-2400 hrs) also exhibits seasonality. There is a visible drop in the viewership for this time band during Q2 (April-June) in both years, however the increase in the subsequent quarter is not as high as that of the previous time band.

In fact, it is interesting to note that the early and late Prime Time bands exhibit opposite growth trends, specifically in Q1 (Jan-Mar) and Q4 (Oct-Dec) each year. Since these are also the strongest quarters with respect to Tv viewership, there may be a latent opportunity here to grow viewership by airing compelling content in the late prime time (2100-2400 hrs) time band.



Let us also see if all of these day parts are unique with respect to viewership, or if any time bands can be grouped basis similarity in their viewership. We will use statistical correlation to understand the relationship among the time bands better.

The following table gives the correlation values for all time band groups, based on the daily average viewership of last 2 years.

	0900-1200	1200-1500	1500-1800	1800-2100	2100-2400
0600-0900	55%	49%	43%	19%	2%
0900-1200		94%	66%	-23%	-27%
1200-1500			72%	-15%	-17%
1500-1800				35%	12%
1800-2100					47%

Let us assume 50% as the threshold to indicate that some correlation exists between the time bands.

Hence, we eliminate all time bands that do not meet the 50% criteria. Among the remaining time bands that exhibit a higher degree of correlation (highlighted cells), we see the strongest correlation between the 0900-1200 hrs and 1200-1500 hrs time band, indicating that the viewership pattern in these time bands is very similar to each other.

Interestingly, both these time bands also exhibit an inverse relationship with both the prime time viewing bands (1800-2400 hrs).



From a content availability perspective also, these dayparts have similar offerings as shown in the table below.

Programme Theme	0900-1200	1200-1500
FILM BASED	30%	34%
NEWS/BUSINESS	25%	22%
MISCELLANEOUS	19%	16%
SERIALS	13%	13%
SPORTS	5%	5%
LIFESTYLE	2%	4%
MUSIC	3%	2%
NATURE/TOURISM	2%	2%
GAME/TALK/QUIZ	1%	1%

% share of Duration

Film based programmes and News content together account for a little over 50% of the available content in both these time bands. The film based programmes are being driven by feature films, while the News themes are being driven by news bulletins. Programs classified as Miscellaneous (Primarily cartoons/ animation) and Serials i.e drama & soaps account for another sizeable share of over 30%.

Thus, it can be said that 5 unique dayparts exist in the average TV viewing day. The prime time and early prime time viewership is unique. The early morning (0600-0900) and late afternoon (1500-1800) viewership is also unique.

The 0900-1200 & 1200-1500 hr time bands on the other hand, can be thought of as a single, broad time band. The content offering in this time band can be modified and tailored according to the taste of the demographic group which contributes to maximum viewership in this day-part by creating a noon-special segment.



SUMMARY

1. TV viewership follows similar seasonal fluctuations year-on-year. While Oct-Dec is the strongest quarter of the year, viewership is seen to dip in the peak summer months (Apr-Jun).



2. The cyclic pattern in TV viewing can partly be attributed to external factors such as the climate. Temperature and viewership have an inverse relationship with each other.



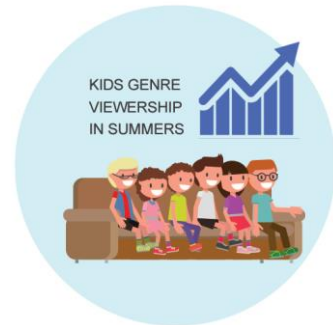
3. Weekly viewership spikes occur on weekends, and is primarily driven by the Movie genre. Sundays have the highest time spent (ATS) on television as compared to any other day of the week.



4. Viewership spikes on weekdays can be attributed mainly to festivals and public holidays. Interestingly, holidays that fall mid-week tend to see better viewership than those on long weekends.



5. Most genres exhibit similar seasonal patterns, except Kids genre. There is a marked increase in viewership of this genre in the summer months (Apr-Jun). This could be a great medium for brands to combat the general viewership drop in this quarter.



6. The viewership for Kids genre lines up perfectly with the school vacation period across all zones, indicating high sensitivity of Kids' viewership during vacations.



7. During telecast of big ticket properties such as the T20 World Cup and the ICC Champions Trophy, the avg. viewership of the Sports genre was seen to have surpassed the highest average viewership for GEC genre on a given day during the two-year period.



8. 5 unique dayparts exist in the average TV viewing day. The late morning (0900-1200) and early afternoon (1200-1500) time bands can be thought of as a single time band, due to high similarity in their viewership patterns.





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