

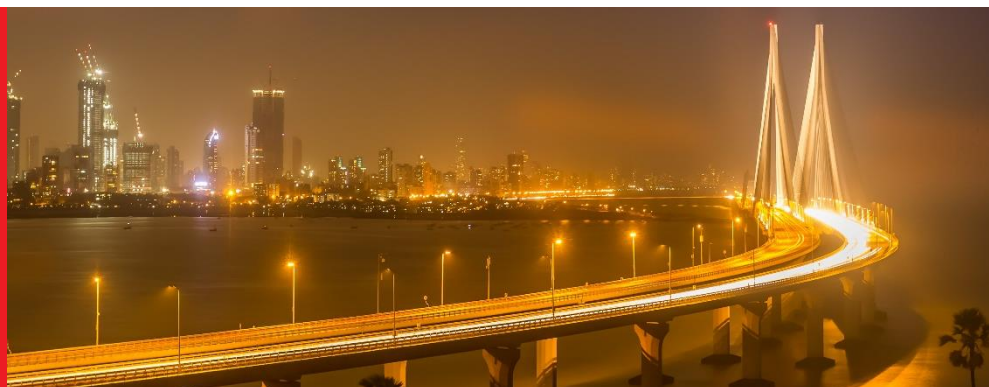


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Understanding Urban India

NEWSLETTER ISSUE | August 2016





Understanding Urban India

Rural India is the bigger market in terms of absolute numbers. However, the purchasing power tends to rest in urban markets.

Also, when it comes to broader choices, be it with respect to brand preferences or TV viewership, Rural viewers tend to emulate Urban India due to the associated aspirational value. It is therefore a fair assumption that the viewership choices of Urban will percolate down to rest of markets eventually.

Topics We Aim To Cover In This Newsletter...



Viewership Pattern Of Urban Markets

- A. Daily viewership pattern



Understanding Key Time-bands

- A. Weekly trends
- B. Reach & ATS Time-band Matrix
- C. Program theme preferences
- D. Who watches during these time-bands?



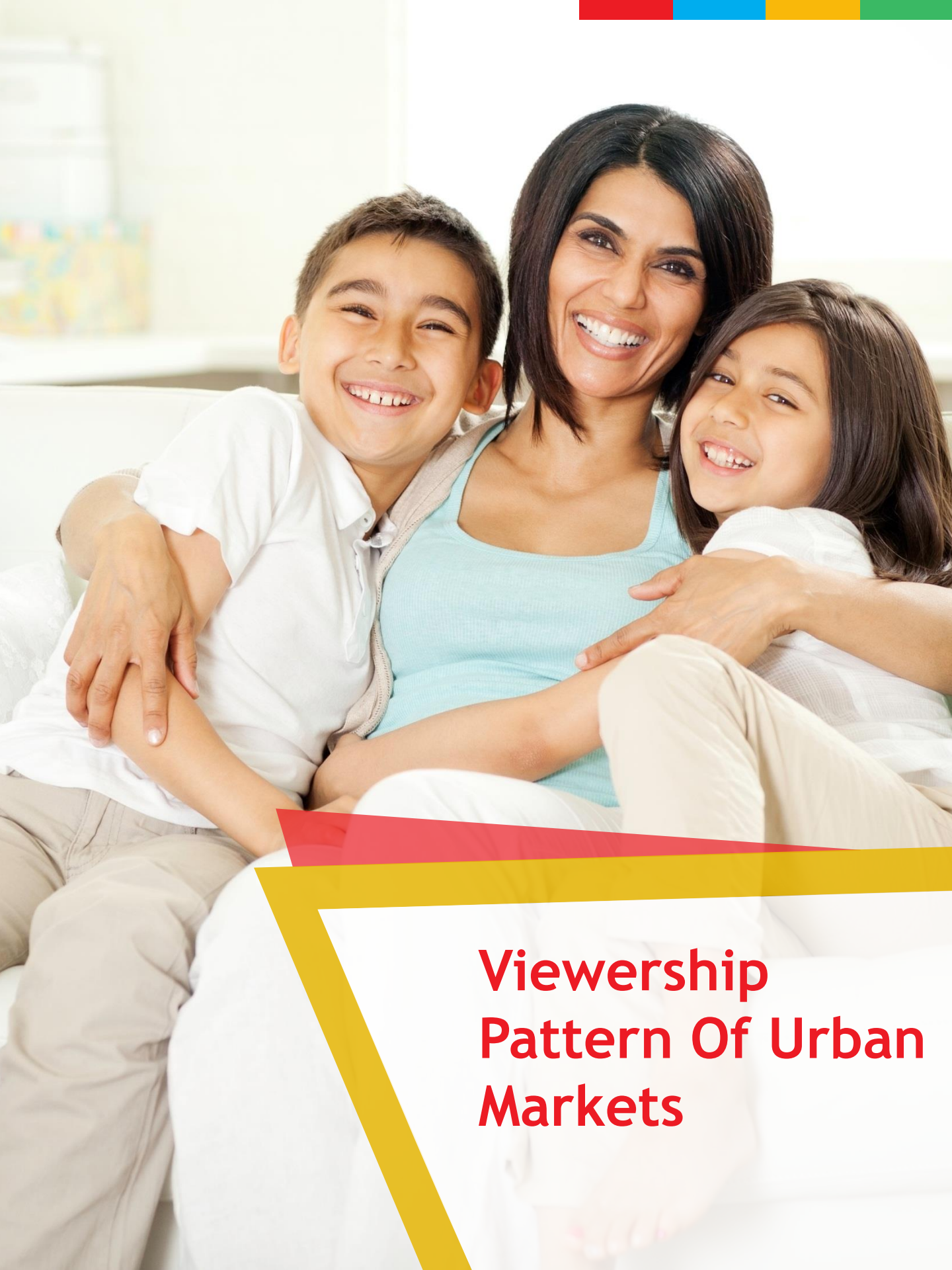
Channel Genre Trends

- A. All day trends
- B. Weekly trends
- C. Reach & ATS Channel Genre Matrix



Product Category Trends

- A. Weekly trends



Viewership Pattern Of Urban Markets



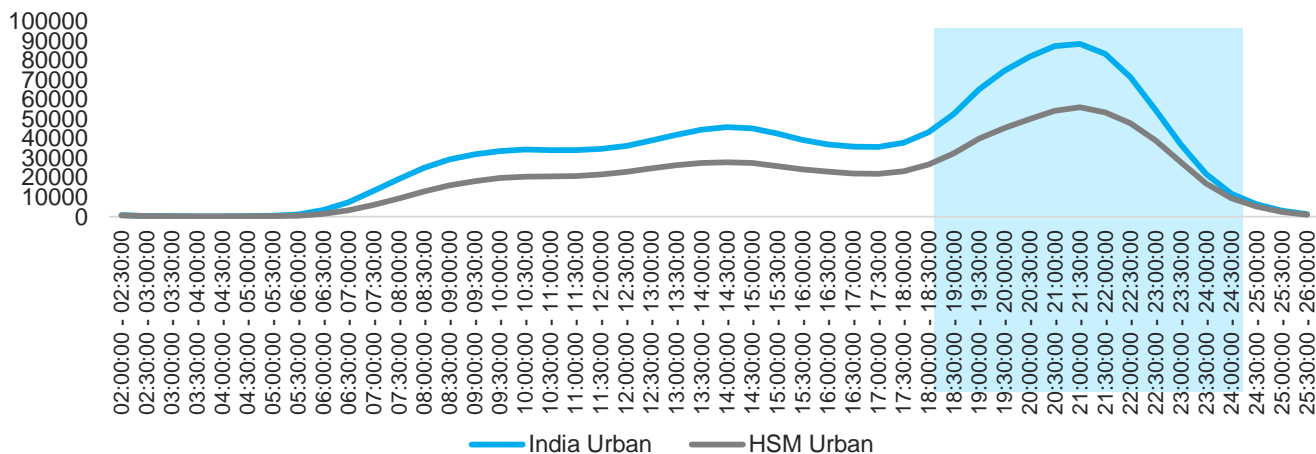
Daily Viewership pattern - All Day Trends

There are no surprises in the all-day pattern for both India & HSM. As expected, **Prime time** sees the maximum viewership.

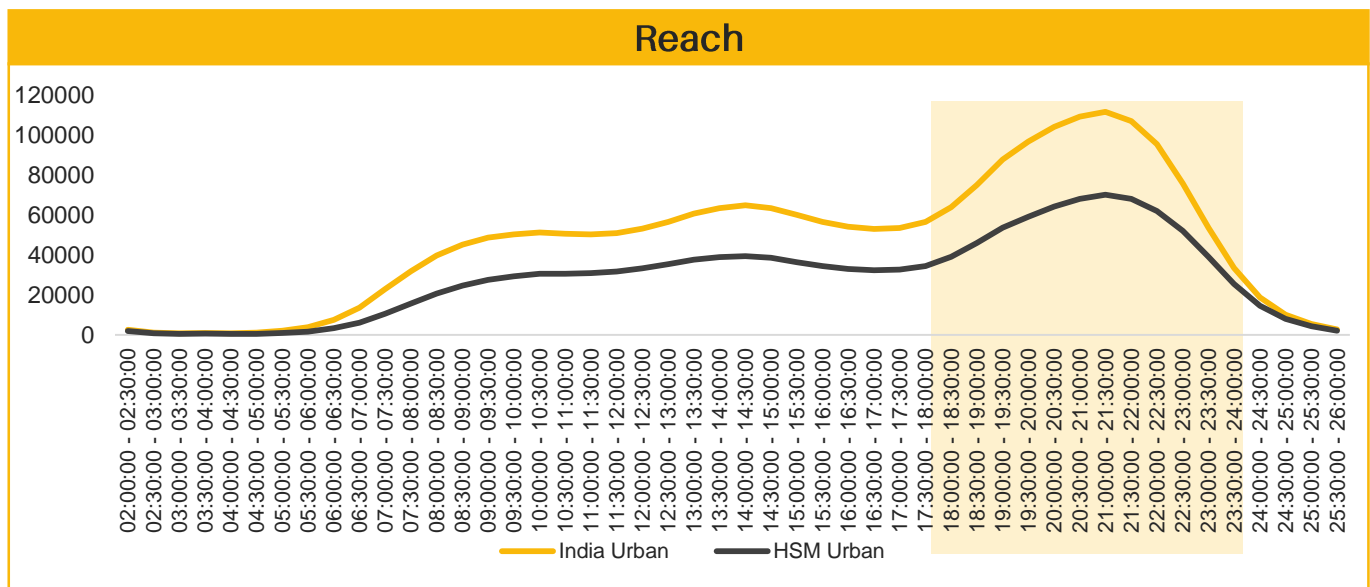
While India has higher Impressions & Reach in absolutes, HSM sees a sharper growth in Core Prime-time (20:00-24:00 hrs.) compared to India. Also, the spike during prime-time lasts till later in HSM.

Surprisingly, India & HSM have the **same ATS**. Only during 22:00-24:00 hrs, the ATS for HSM is higher than India.

Impressions



* Avg. Impressions'000



* Reach'000

As we have observed above, most of the differences in viewership can be attributed to similarities / differences in Prime time viewership.

We have looked in detail at the **PRIME TIME BAND (20:00-24:00 hrs.)** with a split of 30 mins.



Understanding Key Time-bands



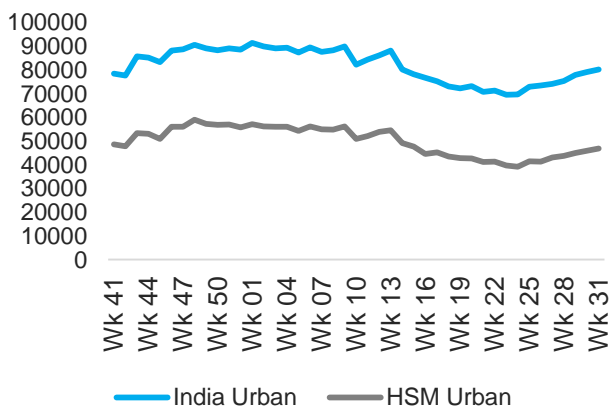
Weekly Trends (Impressions in 000)

Overall viewership for early Prime Time is higher week on week with highest viewership during **21:00-21:30 hours**. The viewership begins to drop from 23:00 hrs onwards.

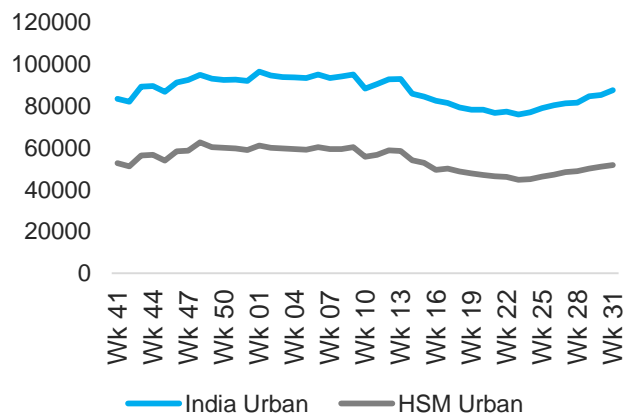
However, the high viewership bands (20:00-23:00 hrs) see **a dip in total viewership from Wk 12 to Wk 24**. The late prime time bands of 23:00-23:30 hrs & 23:30-24:00 hrs are the only exceptions to this drop.

From Wk 25 onwards all time-bands start to recover from this drop

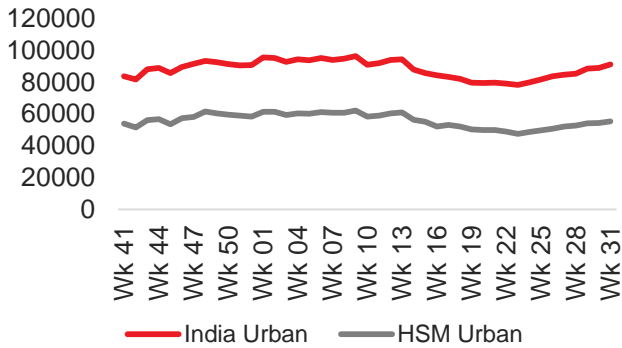
20:00-20:30



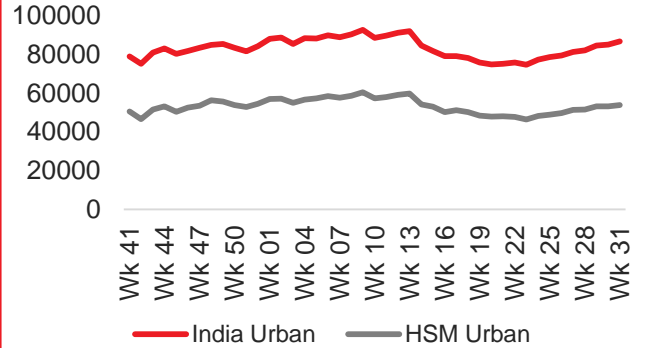
20:30-21:00



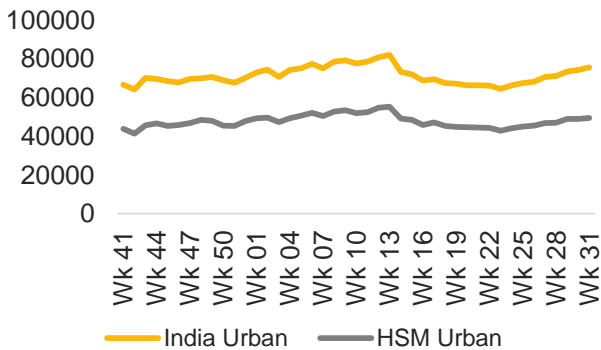
21:00-21:30



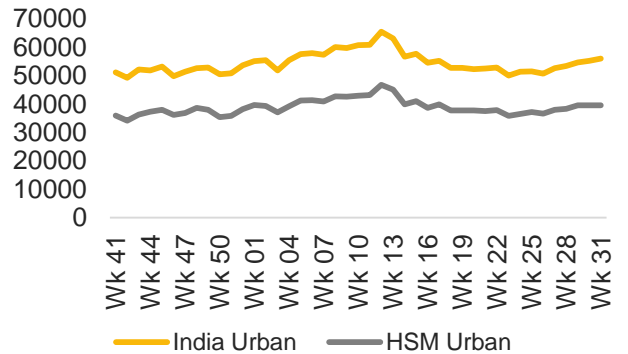
21:30-22:00



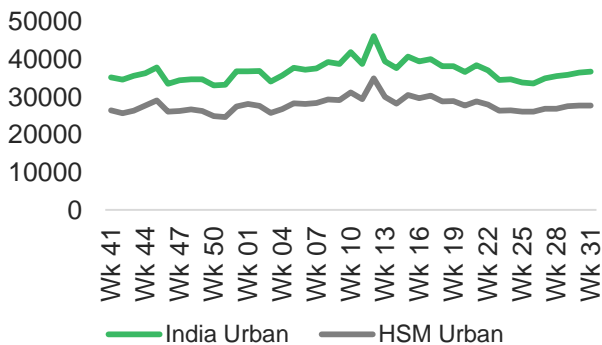
22:00-22:30



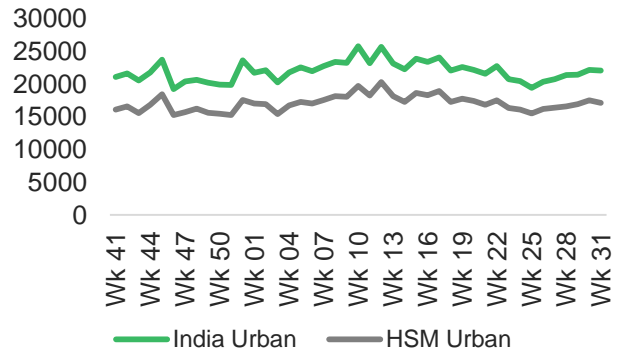
22:30-23:00



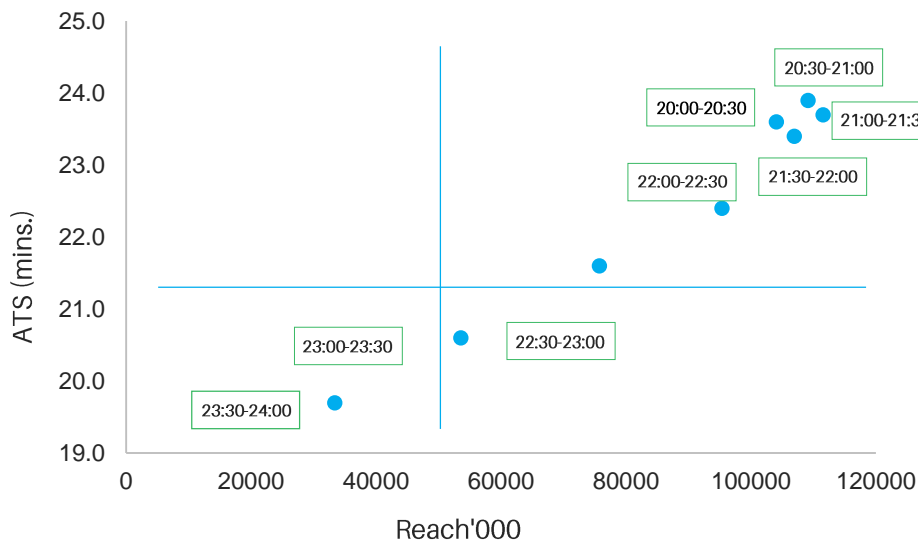
23:00-23:30



23:30-24:00



Reach & ATS Matrix: Time bands



The **core prime-time bands** figure high on both Reach & ATS.

The late prime bands see a drop as the day progresses. From 22:30 hrs to 24:00 hrs, each successive half hour has lower Reach & ATS than the previous one.

Program Theme Preferences

Late night band has more of **Miscellaneous** content. Conversely, it has lower Serials & News/Business content.

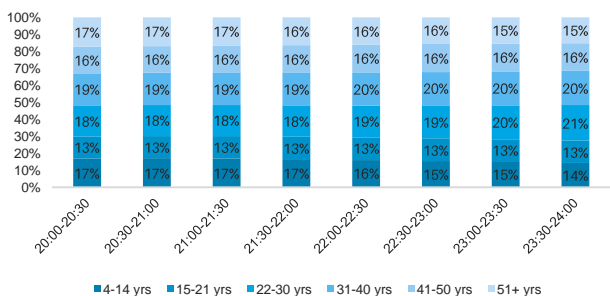
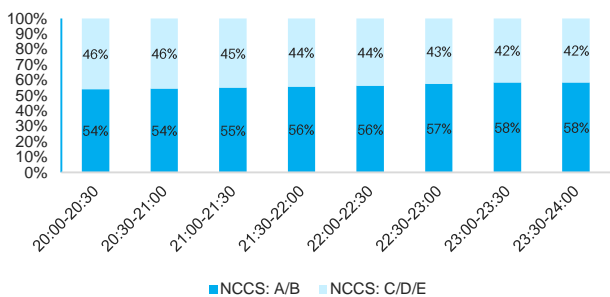
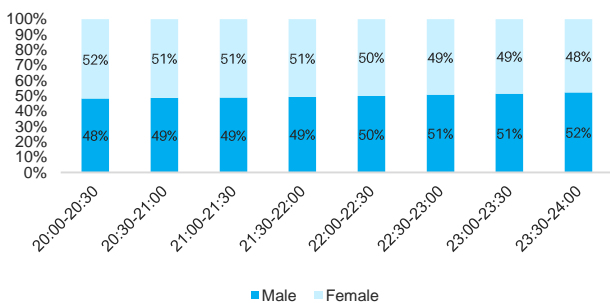
Is this variance in available content the cause of differing performances?

| Programme Theme | 20:00-20:30 | 20:30-21:00 | 21:00-21:30 | 21:30-22:00 | 22:00-22:30 | 22:30-23:00 | 23:00-23:30 | 23:30-24:00 |
|-----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| FILM BASED | 32% | 32% | 36% | 23% | 29% | 27% | 28% | 31% |
| GAME/TALK/QUIZ | 2% | 1% | 2% | 3% | 1% | 2% | 2% | 1% |
| LIFESTYLE | 2% | 2% | 2% | 2% | 2% | 1% | 2% | 2% |
| MISCELLANEOUS | 16% | 13% | 14% | 13% | 15% | 17% | 24% | 25% |
| MUSIC | 3% | 3% | 3% | 3% | 3% | 3% | 4% | 3% |
| NATURE/TOURISM | 3% | 1% | 2% | 2% | 3% | 1% | 2% | 2% |
| NEWS/BUSINESS | 18% | 27% | 17% | 29% | 22% | 27% | 18% | 20% |
| SERIALS | 20% | 18% | 17% | 19% | 19% | 17% | 16% | 11% |
| SPORTS | 5% | 4% | 6% | 5% | 6% | 5% | 5% | 4% |

* Share (%) of Duration; *Miscellaneous: Agriculture/rural dev, arts and culture, cartoons/animation, channel presentation/promotion, events/concerts/awards, teleshopping, etc.



Who Watches These Bands?



India Urban

While the overall profile remains similar across all bands, some demographics display a higher skew during late Prime time.

Male and Female %share of viewership is almost equivalent to each other with a skew to **Females in early Prime time**. However, the skew shifts towards **Males in the late Prime Time**.

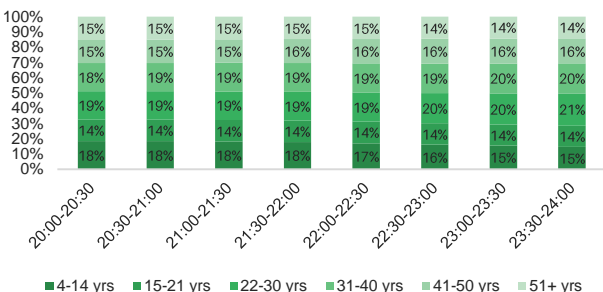
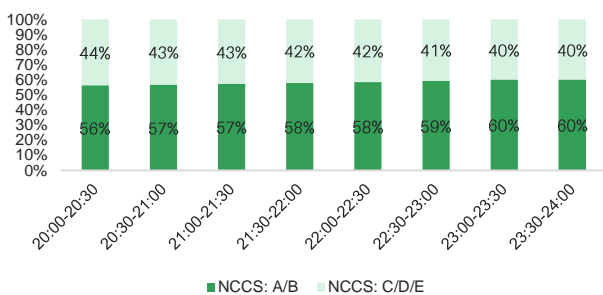
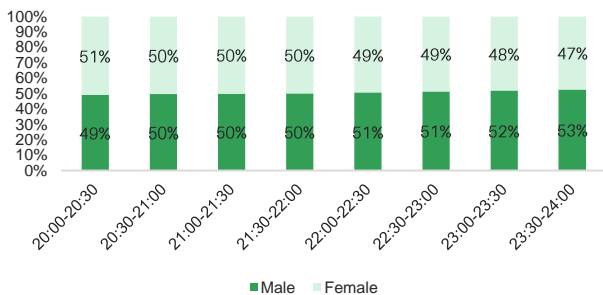
22-40 years contribute the largest chunk of viewership viz. around **40% to total viewership** across all time-bands. However, they also seem to have a greater inclination towards **late Prime Time** shows as compared to other age groups.

NCCS A & NCCS B, which contributes more than 50% to total viewership, report an increase in viewership for **late Prime Time**.

As opposed to that **NCCS C**, who contributes maximum to the overall viewership, sees a skew towards **early prime-time**.



Who Watches These Bands?



HSM Urban

The viewership pattern is similar to All India Urban. However, the skew for **Males** is relatively higher.

22-40 years continue to show an inclination towards **late Prime time**. However, the older age group of **41-50 years** also displays a similar inclination in HSM Urban market.

The **trends among NCCS** remain the same as with All India Urban.

While NCCS A & NCCS B show a growth in viewership for late Prime Time, NCCS C has a higher contribution during early Prime time.

Let us see if any of these differences can be attributed to specific genres

A collage of various images including people, a social network diagram, and a globe, with a red and yellow diagonal stripe. The images are arranged in a grid-like pattern, tilted at an angle. The social network diagram is in the top left, and the globe is in the bottom right. The red and yellow stripe runs diagonally from the bottom left towards the top right.

Channel Genre Trends



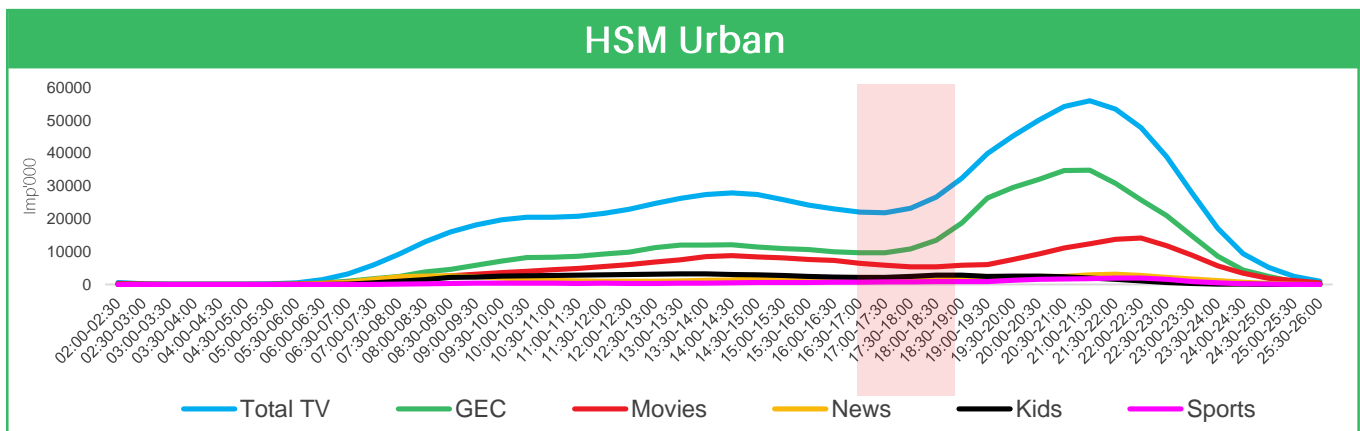
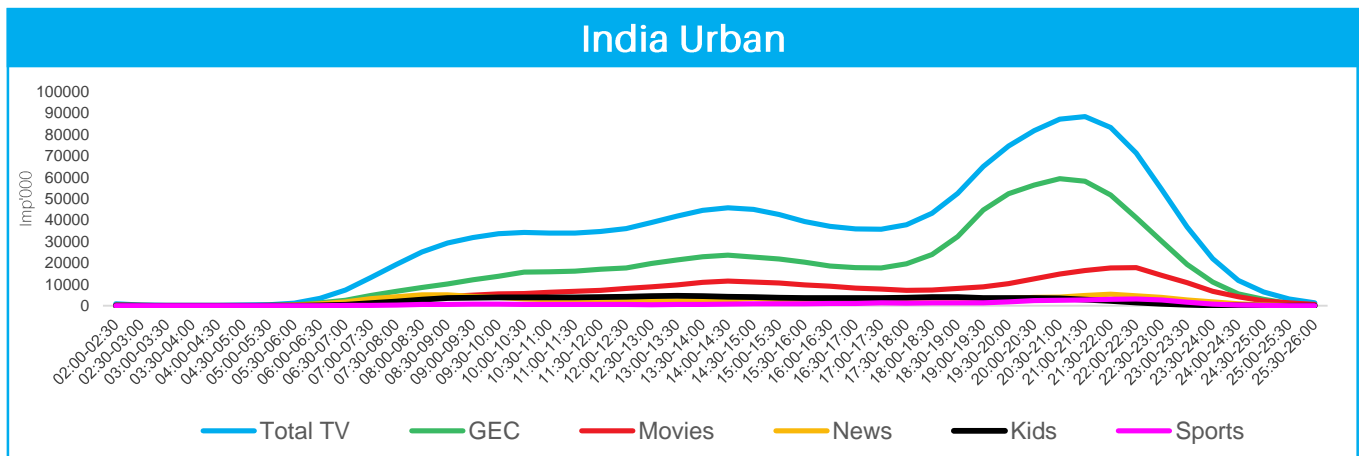
All Day Trends

All genres, except **Kids**, follow similar viewership patterns.

Kids sees maximum viewership in **mornings**, peaking around noon & then sees a gradual drop. However, in HSM, the drop during 16:00-18:00 hrs is steeper than for India. Due to this the subsequent spike at 18:00 hrs is sharper for HSM.

GEC & Movies are almost **parallel** for most of the day barring **prime time**. While GEC picks up during early & core prime time, Movies see a spike in late prime time.

Further in HSM, Movies surpasses GECs at 22:00 hrs itself as opposed to 23:00 hrs in India.



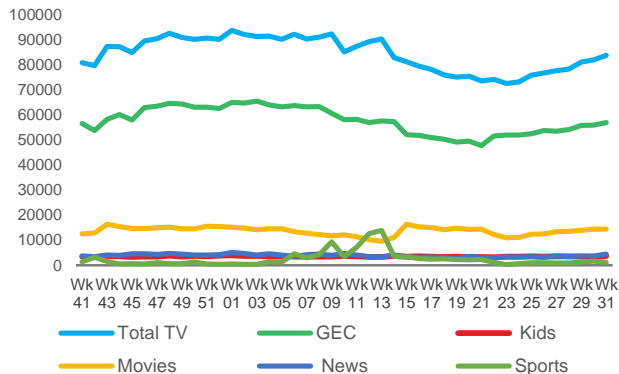


Weekly Trends

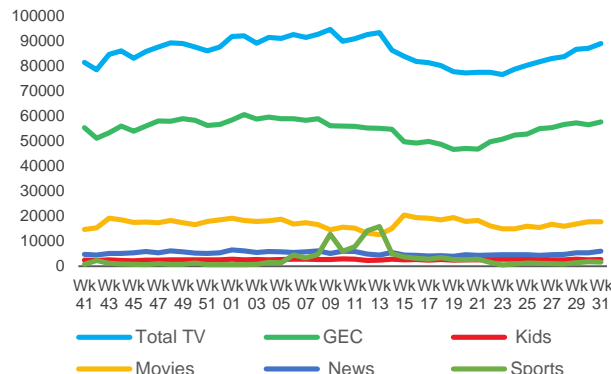
Overall **de-growth** observed in **Late Prime-Time bands** across genres. Late Prime Time viewership for 'GEC' has started rising from Wk 22 and is still growing for Time-Band 22:00-23:00 hrs.

Additionally, there are spikes in some Genres on account of **specific events**. For example, 'Sports' shows growth during Wk 11-Wk 14, which can be attributed to the airing of ICC World Cup T20. Similarly, 'Movies' also sees a spike during Wk 15-Wk 22, the dates for Vivo IPL 2016.

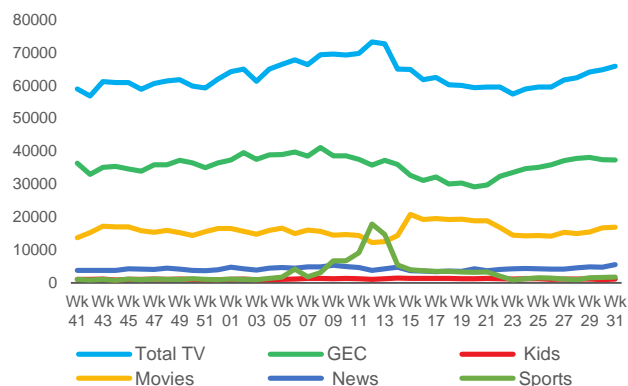
20:00-21:00



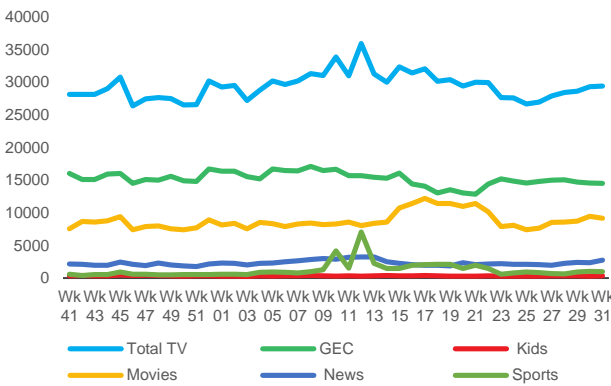
21:00-22:00



22:00-23:00

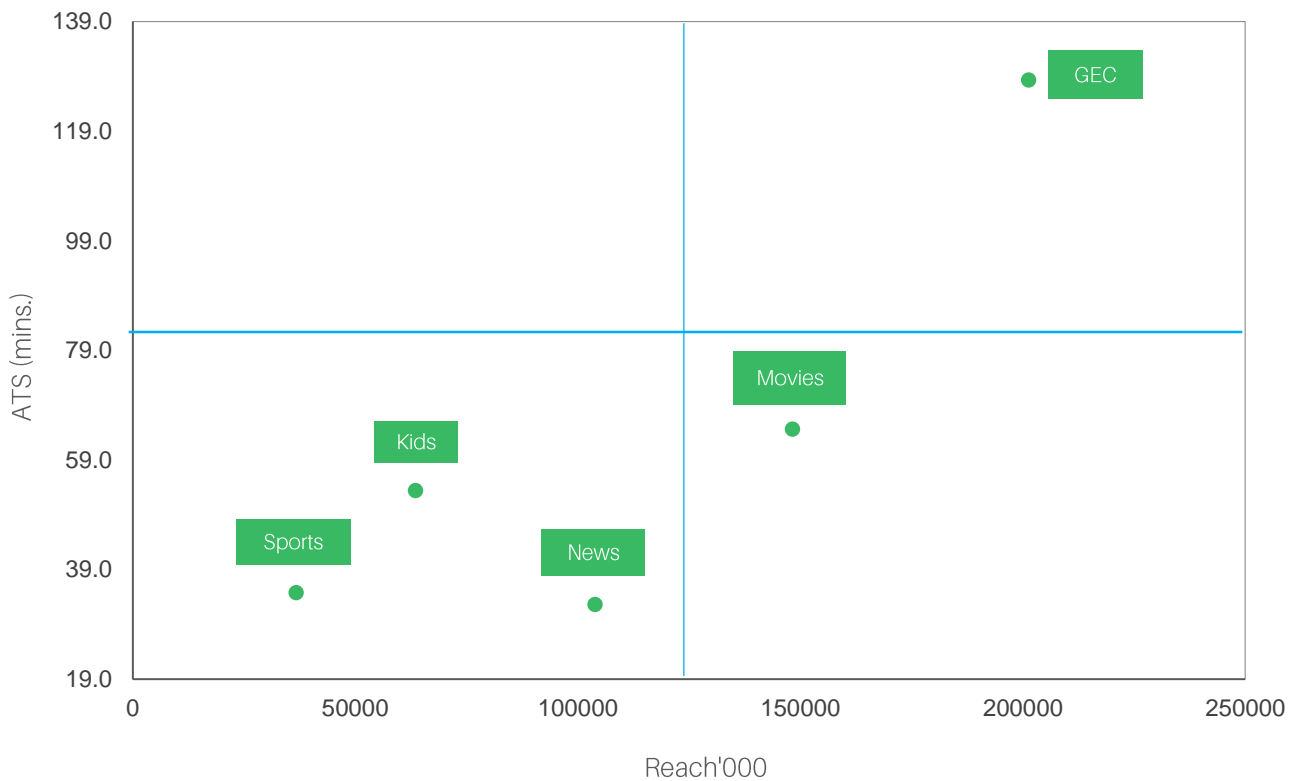


23:00-24:00





Reach & ATS Matrix: Genre



As expected, GEC has the maximum Reach & ATS, followed by Movies.

While News has high Reach, it is the lowest in terms of ATS. Conversely, Kids has low reach but is relatively higher on ATS.

Sports, being a property driven genre, sees low Reach & ATS when averaged across weeks. However, during big-ticket events, both the Reach & ATS for Sports tends to see an increase.



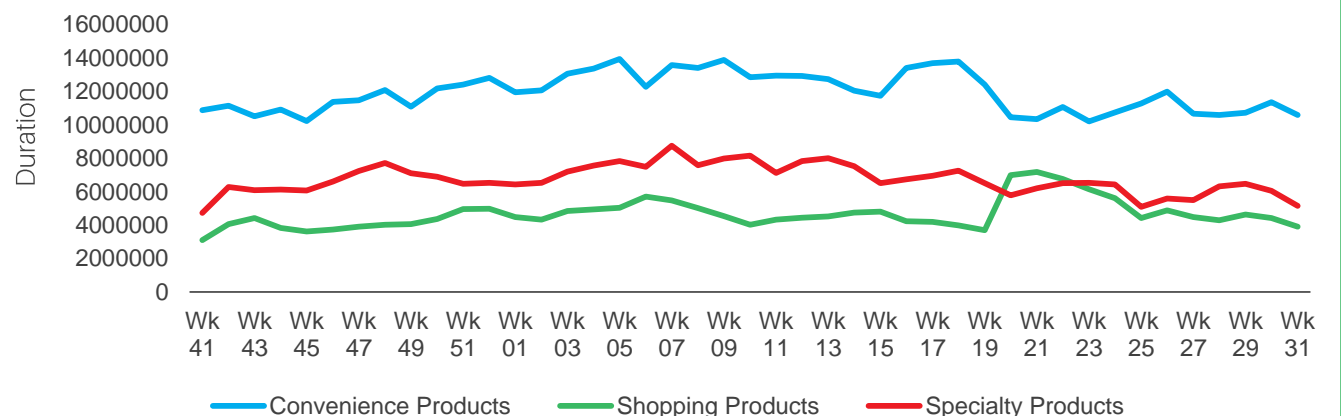
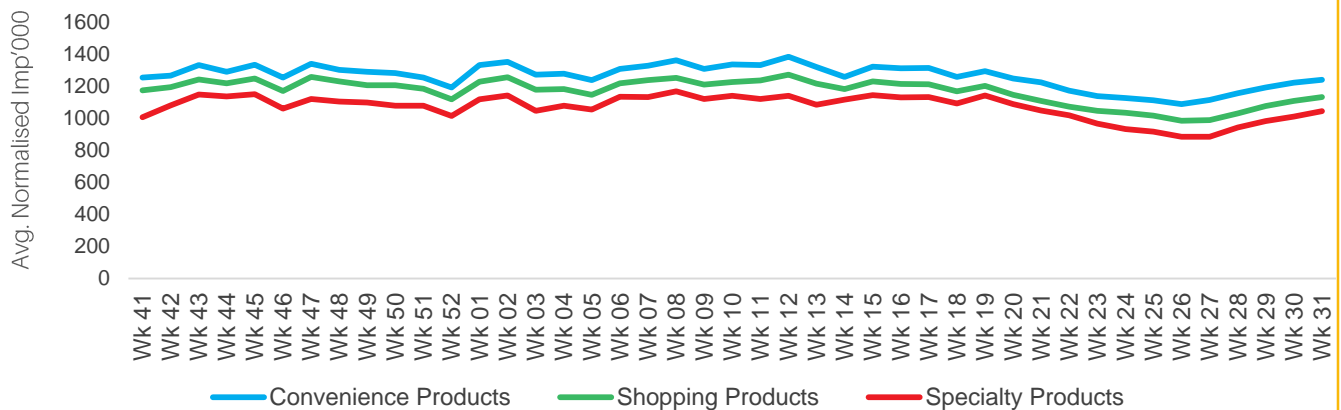
Product Category Trends

Weekly Trends

- BARC reports a total of 494 categories. We have classified the top 233 categories i.e. the ones with Impressions over 100,000, under three types.
- **Convenience Products:** These are the products that appeal to a very large market segment. They are generally consumed regularly and purchased frequently. Because of the high purchase volume, pricing per item tends to be relatively low. **Examples** include categories like Toilet Soaps, Tooth pastes, Face Wash, Hair oils, Chocolates, Soft drinks, etc.
- **Shopping Products:** These are products consumers purchase and consume on a less frequent schedule compared to convenience

products. They are relatively more expensive and may possess additional psychological benefits for the purchaser. **Examples** include categories like Smart phones, Footwear, Clothing/Textiles, Water purifiers, Auto-Tyres, Child care product range, etc.

- **Specialty Products:** These are products that tend to carry a high price tag relative to convenience and shopping products. Consumption may occur at about the same rate as shopping products but consumers are much more selective. **Examples** include categories like Auto- Two wheelers/cars/jeeps, Branded Jewellery, Mutual Funds, Loans/Mortgage, Banking, Hotels, Travel & Tourism, etc.



Convenience products & shopping products display the same trend week on week.

Specialty products seem to show a higher / lower interest level in certain weeks. This may be a reflection of them being high-involvement products. Given their high price, viewers may know in advance which product they prefer and will therefore not be interested in comparing products.



Product Category Trends - By Program Theme

| Program Theme | Convenience Products | Shopping Products | Specialty Products |
|----------------|----------------------|-------------------|--------------------|
| FILM BASED | 3764389 | 2357333 | 938586 |
| GAME/TALK/QUIZ | 222179 | 125202 | 48374 |
| LIFESTYLE | 105780 | 37527 | 20482 |
| MISCELLANEOUS | 1313167 | 586321 | 203569 |
| MUSIC | 50394 | 29570 | 23633 |
| NATURE/TOURISM | 39235 | 72719 | 35848 |
| NEWS/BUSINESS | 538546 | 865575 | 409121 |
| SERIALS | 6713650 | 2749076 | 920918 |
| SPORTS | 231540 | 665262 | 180791 |

*Avg. Normalised Impressions'000

In terms of Impressions across Program themes, Shopping products & Speciality products display similar shares. In comparison to Convenience products, they seem to show a higher preference News / Business & Sports themes. Convenience products on the other hand tend to prefer Serials.

This may be due to the fact that Males tend to be more involved in decisions regarding Shopping products and Speciality products, while Women are decision makers for Convenience products.

| Program Theme | Convenience Products | Shopping Products | Specialty Products |
|----------------|----------------------|-------------------|--------------------|
| FILM BASED | 148904 | 46789 | 61321 |
| GAME/TALK/QUIZ | 4843 | 2052 | 2680 |
| LIFESTYLE | 5930 | 3100 | 3290 |
| MISCELLANEOUS | 46168 | 15977 | 29326 |
| MUSIC | 8989 | 3554 | 6294 |
| NATURE/TOURISM | 2675 | 2765 | 2586 |
| NEWS/BUSINESS | 56810 | 44303 | 83041 |
| SERIALS | 66581 | 18121 | 18991 |
| SPORTS | 4610 | 3951 | 5779 |

Duration (in 000s); * No. of product categories included: All 494; Miscellaneous: Agriculture/rural dev, arts & culture, cartoons/animation, teleshopping, channel presentation/promotion, events/concerts/awards, etc.

As expected, Convenience Products have the maximum presence in terms of Duration. Surprisingly, Speciality products, despite being defined as 'niche' products have a higher secondage than Shopping products. However, it must be noted that Speciality products have maximum presence on News channels.



Summary



Summary

- Time bands 20:30-21:00 and 21:00-21:30 within prime time could be called '**Super prime time**' as they have noticeably higher Reach.
- **Late Prime time** has a very **different viewership** as compared to early & core Prime time – in terms of viewership sensitivity, profile and available program content.
- In Urban HSM and Urban India, **Male audiences** seem to be winning the fight for the remote with Female audiences during later stage of the prime time (23:00 onwards).
- The program themes 'Miscellaneous' and 'Serials' are inversely proportional to each other after 22:00 hours.
- Audiences from lower NCCS are early prime timers whereas upper NCCS audiences are little skewed towards late prime time.
- Sports as a genre is the most responsive genre on the back of **popular big ticket cricket events** such as ICC World Cup T20, Asia Cup T20, VIVO IPL 2016, etc.
- GEC is by far the biggest genre in terms of average time spent and Reach followed by Movies.
- Surprisingly News and Sports are at par with each other in terms of average time spent.
- While Convenience products & Shopping products display the same trend week on week, in terms of Program themes preferences, Shopping products & Speciality products display similar behaviour.



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