

THINK



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WHAT YOUNG INDIA WATCHES!

INTRODUCTION

The youth segment is one of the most talked about and most sought-after demographic groups in the country. In a fragmented and increasingly competitive scenario, where everyone is vying for the attention of this emerging segment, it is important to understand them not only from a TV content point of view, but also how to target and reach this segment more effectively.

Through this newsletter, we aim to get deeper insights in the day of a life of the Indian Youth with respect to TV viewership by analyzing:

1. The demographic composition of the Youth in India viz. Share of population and Share of eyeballs to TV viewership.
2. How does an Indian youth spend his/her typical day on TV with respect to content preference by time bands.
3. How are the Youth from different pop strata similar or different in their viewing patterns and preferences.
4. Which advertising appeals to the Youth and what are its implications.

The Youth (15-30 yrs) as a television audience contributes a staggering 33% share of eyeballs to the Total TV viewership , across age cuts.

	Age Group	Share of Universe
Kids	2-14 yrs	20%
Youth/ Millennials	15-21 yrs	17%
	22-30 yrs	16%
Adults	31-40 yrs	17%
	41-50 yrs	15%
Mature	51-60 yrs	9%
Seniors	61+ yrs	7%

% Share of Impressions

Source: BARC India; BMW data; Period- Wk08-Wk52, 2017, TG: 15-30 yrs, Market: All India, Channels considered: All

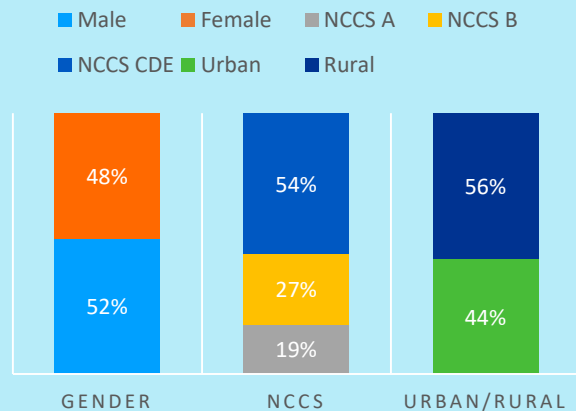
WHO ARE THE **YOUTH** & WHERE ARE THEY?



In this section, we will first attempt to understand the demographics of the much sought-after Youth segment, by comparing the share of viewership with the population composition to get a holistic view of where the viewership comes from.

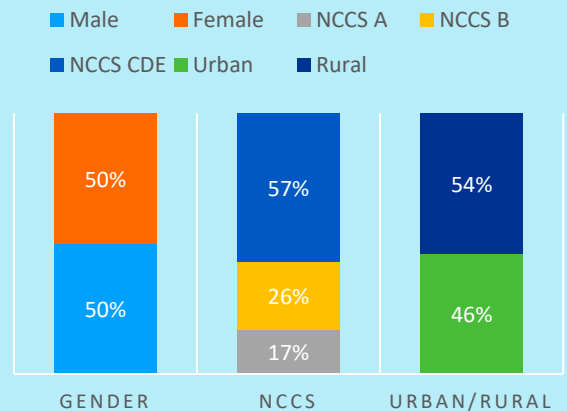
Youth 15-30 yrs | All India

POPULATION SHARE



% share of Targets

VIEWERSHIP SHARE



% share of Impressions

The Youth population composition is relatively skewed towards males, but when we look at the viewership share we see that the female viewership is comparable to that of males. Both contribute an equal share of eyeballs to TV viewership, i.e. 50% each.

Looking at the socio-economic classification, NCCS CDE emerges as the largest contributor with more than half the viewership share among the youth. While one may say that this could be due to the size of the NCCS CDE population, when we look at it in relation with the share of population across NCCS, we see that the Youth from NCCS CDE are over-indexed in comparison to the youth from NCCS A & B.

Furthermore, looking at the Urban- Rural split, the viewership share of Rural India is higher, but it is the Youth in Urban India that seems to be spending more time on television in relation with the population share.

If we further break up the Urban viewership, we can see that a relatively larger share of eyeballs come from the Below 10L markets.

Town Class (Urban)	Share of Population (%)	Share of Viewership (%)
Below 10L Urban	24%	25%
Mega Cities	10%	11%
10-75L	10%	10%

% share of Targets% share of Impressions

It appears that much of the Indian youth resides in small towns/ cities and rural India. This is the aspiring youth, which could be a potential segment of interest to both broadcasters and advertisers.

Let us further our understanding of the Youth, by attempting to understand their TV viewing behavior. What are they watching on television, which genres do they consume, which ad sectors are they getting exposed to, and when are they active on television.



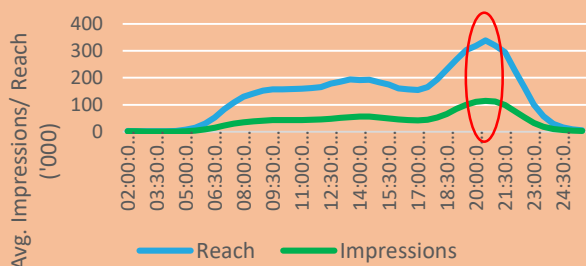
A DAY IN THE LIFE OF THE **INDIAN YOUTH**



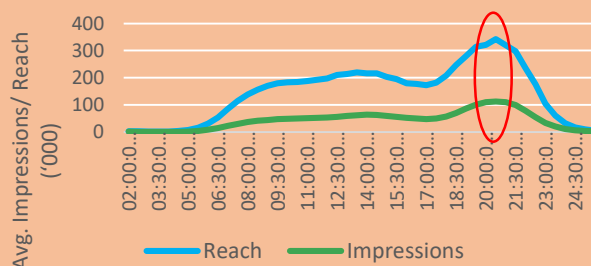


Vs

Weekday



Weekend



The viewership of the youth on TV follows a consistent trend across weekend and weekdays. As expected, the viewership is the highest during Prime Time. Viewership starts from 6:00 am in the morning, rises gradually through the day, and peaks between 8.30-9.00 pm.

While the Reach and the Impressions peak between 8.30-9.00 pm on both weekday and weekends, the gap between Reach and Impressions is marginally higher on weekends, indicating that there are not enough conversions when compared to the weekday. This may likely be due to other activities competing for the attention of the Youth, and hence scope to create compelling content to attract more youth audience.

It is also surprising that TV viewership by Youth remains at the same levels across weekday & weekend, with minor deviations. This may be breaking the notion that the youth watch more TV during weekends.

Let us see how does an Indian youth spend his/her typical weekday-weekend on TV with respect to content preference by time bands.

For ease of reading and understanding data, we will club the time bands into broader bands of 3- hours each.

Weekday

Programme Theme	0600-0900 hrs	0900-1200 hrs	1200-1500 hrs	1500-1800 hrs	1800-2100 hrs	2100-2400 hrs
FILM BASED	52%	46%	46%	48%	28%	18%
GAME/TALK/QUIZ	1%	1%	1%	1%	1%	3%
LIFESTYLE	0%	1%	1%	1%	0%	0%
MISCELLANEOUS	22%	12%	8%	13%	5%	8%
MUSIC	2%	1%	1%	1%	0%	0%
NATURE/TOURISM	0%	1%	0%	1%	0%	0%
NEWS/BUSINESS	11%	6%	5%	5%	5%	7%
SERIALS	10%	31%	35%	27%	56%	58%
SPORTS	2%	2%	3%	4%	4%	5%

Weekend

% Share of Norm. Imp

Programme Theme	0600-0900 hrs	0900-1200 hrs	1200-1500 hrs	1500-1800 hrs	1800-2100 hrs	2100-2400 hrs
FILM BASED	55%	55%	54%	54%	37%	23%
GAME/TALK/QUIZ	1%	2%	2%	1%	2%	5%
LIFESTYLE	0%	0%	1%	0%	0%	0%
MISCELLANEOUS	22%	17%	12%	16%	19%	20%
MUSIC	1%	1%	0%	1%	0%	0%
NATURE/TOURISM	0%	0%	0%	0%	0%	0%
NEWS/BUSINESS	10%	5%	4%	4%	5%	7%
SERIALS	8%	18%	19%	18%	31%	36%
SPORTS	2%	2%	6%	6%	6%	8%

% Share of Norm. Imp

A typical Indian youth likes to start his day with film based programs as the preferred choice, followed by some programs classified as Miscellaneous, and News/ Business programs. The choice of film based programs dominates NPT from 0600-1800 hrs. As the day progresses towards Prime Time, the viewership share of Serial based programs goes up, and film based programs start declining.

Miscellaneous programs garner relatively higher share of viewership throughout the day on weekends as opposed to weekdays. The late-night viewing hours particularly, are driven by Miscellaneous programs on weekends.

This viewership of Miscellaneous programs post 1800 hrs is being driven by Reality Shows and Talent search programs, which are usually aired on weekends, thus contributing to the high viewership.

The viewership of Miscellaneous programs in the morning (0600-0900 hrs) is primarily being driven by Religious/ Astrology programs. Cartoon/ Animation programs also contribute significantly to Misc. program viewership from 0600-1800 hrs on an average tv viewing day. This viewership of Kids cartoon programs could mean that some teens in the audience segment are primary viewers of these shows. Additionally, it could also be indicative of co-viewership of the young parents along with their children.

News programs are seen to be preferred in the early morning hours, than any other part of the day, on both weekdays and weekends as the viewers may want to start the day with an update of what is happening around them.

It also appears that while film based programs have a relatively better share on weekends throughout the day, serial based programs do relatively better on a weekday. The higher share of viewership for films could most likely be attributed to special programming such as World TV Premieres or airing of popular movies, which usually occurs on weekends.

While the late-night viewing hours on weekends are being driven by Miscellaneous content viz. Reality shows and Talent hunt programs, on weekdays, the late-night viewing is driven by Serials. As television prime time begins (1800 hrs) on a typical weekday, we see the viewership share for serial based programs almost double as compared to the previous Time Band. This seems to be consistent with programming strategy of key shows and serials being aired during Prime Time.

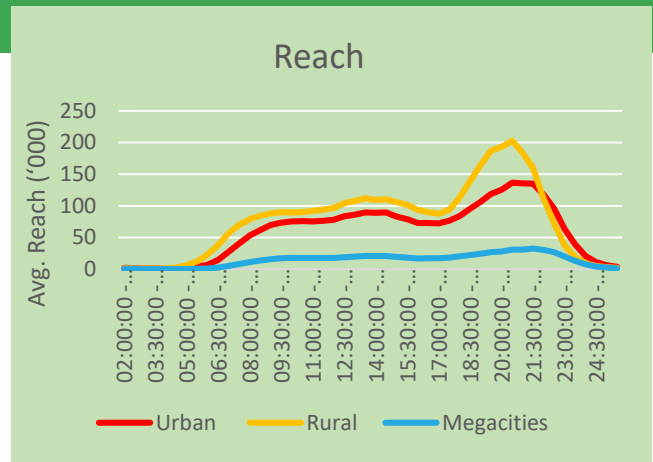
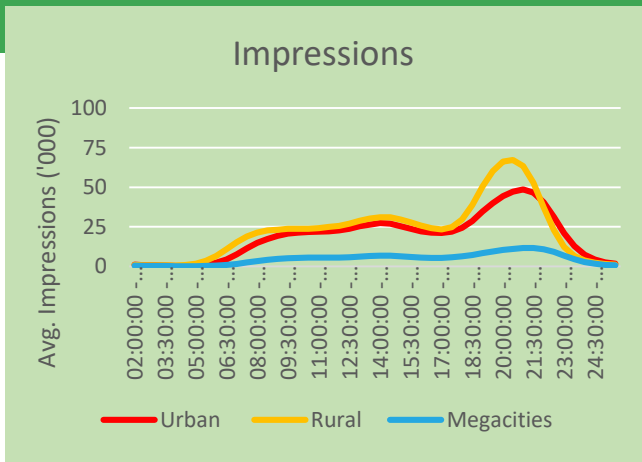
Sports programming enjoys a relatively better share on weekends, among the youth. However, it must be noted that sports as a genre is heavily contingent on programming, and the viewership depends on when an event is being aired.



RURAL VS URBAN VS MEGACITIES



Now that we have some insight into the nuances of a typical weekday and weekend viewing behavior of the youth on television, let us also understand if the Youth is one coherent group, or if the viewership patterns differ by pop strata.



The youth in Rural India prefer to start their day relatively early as compared to the youth in Urban areas and the metro cities. We can see the viewership graph rising for the Youth in rural India from 5:30 am. Viewership in Urban areas begins an hour later, from 6:30 am, while the viewership in Megacities begins even later i.e. 7:30 am onwards.

The Youth in Rural areas also end their day earlier in comparison. We can see the Reach and Impressions decline rapidly for both Rural and Urban India post 11:00 pm, while the decline for Megacities is more gradual, indicating the prevalence of late-night viewing.

It is also interesting to note that Prime Time viewership in rural India peaks between 8:30-9:00 pm, half an hour before Urban and Megacities, which peak between 9:00-9:30 pm.

The Prime-Time viewership seems to be significantly driven by the Youth from rural India, in comparison to Urban and Megacities. This is not only in terms of viewership but also Reach. This indicates TV penetration, as well as the importance of TV as a medium for prime-time entertainment in these regions.

Looking at the overall Reach and Impressions trend-line across all regions, the Reach for rural India is consistently higher during the day, but the Impressions are comparable for Rural and Urban between 9:30 am - 5:30 pm. This potentially reflects that the Reach to Impressions conversion is relatively better for Urban towns versus in Rural areas. This could likely be due to lack of power supply, or involvement of the rural audience in agriculture/ancillary activities, and hence they may not be spending enough time on television.

Let us take this further by analyzing the content preferences of the youth in Rural, Urban and the top 6 Metro cities across the day.

Rural

Programme Theme	0600-0900 hrs	0900-1200 hrs	1200-1500 hrs	1500-1800 hrs	1800-2100 hrs	2100-2400 hrs
FILM BASED	54%	50%	51%	52%	30%	20%
GAME/TALK/QUIZ	1%	2%	2%	1%	1%	3%
LIFESTYLE	0%	0%	1%	0%	0%	0%
MISCELLANEOUS	21%	13%	8%	13%	8%	10%
MUSIC	2%	1%	1%	1%	1%	0%
NATURE/TOURISM	0%	0%	0%	0%	0%	0%
NEWS/BUSINESS	10%	6%	5%	4%	5%	7%
SERIALS	10%	27%	29%	24%	50%	54%
SPORTS	2%	2%	4%	4%	5%	7%

% Share of Norm. Imp

Urban

Programme Theme	0600-0900 hrs	0900-1200 hrs	1200-1500 hrs	1500-1800 hrs	1800-2100 hrs	2100-2400 hrs
FILM BASED	51%	49%	47%	48%	31%	20%
GAME/TALK/QUIZ	1%	2%	2%	1%	1%	3%
LIFESTYLE	0%	1%	1%	1%	0%	0%
MISCELLANEOUS	23%	14%	11%	15%	11%	12%
MUSIC	1%	1%	0%	1%	0%	0%
NATURE/TOURISM	0%	1%	0%	1%	0%	1%
NEWS/BUSINESS	11%	6%	5%	5%	5%	7%
SERIALS	9%	26%	30%	24%	47%	52%
SPORTS	2%	2%	4%	5%	5%	6%

% Share of Norm. Imp

Megacity

Programme Theme	0600-0900 hrs	0900-1200 hrs	1200-1500 hrs	1500-1800 hrs	1800-2100 hrs	2100-2400 hrs
FILM BASED	48%	47%	45%	46%	30%	20%
GAME/TALK/QUIZ	1%	2%	2%	2%	1%	3%
LIFESTYLE	0%	1%	2%	1%	0%	0%
MISCELLANEOUS	25%	15%	13%	17%	13%	13%
MUSIC	1%	0%	0%	1%	0%	0%
NATURE/TOURISM	0%	0%	0%	1%	0%	1%
NEWS/BUSINESS	14%	7%	5%	5%	5%	7%
SERIALS	8%	25%	29%	23%	46%	50%
SPORTS	2%	2%	4%	5%	5%	5%

% Share of Norm. Imp

Looking at the content preference trends of Rural, Urban and megacity audiences, some interesting observations can be made.

The viewership of film based programs is driven by the youth audiences from rural markets, especially in the daytime. Post 1800 hours, the viewership share for such programs decline and is comparable among all markets.

Viewership share for Serial based programmes rises substantially post 1800 hrs, and the share of film based programmes decreases. The growth in viewership of Serials in Prime Time is primarily driven by the youth in rural regions.

While the rural youth is hooked on to serials during late night hours, the viewership for Miscellaneous classified programs is visibly driven by the youth from Megacities in comparison.

It is also quite interesting to note that in the late-night hours (2100-2400 hrs), there is higher viewership of sports programmes among rural youth than in urban towns and mega cities. This viewership of sports programmes is also comparable to the viewership of News/ Business programmes in the same time band among rural youth.

We had earlier observed that News/Business programs are preferred in the early morning time bands on both weekday and weekends. Interestingly, this observation holds true across Urban, Rural and even Megacities. This could be arising from the general habit among Indians to read the newspaper first thing in the morning, and probably follow it up with updates on news channels.

Contrary to popular belief, niche programmes such as Lifestyle, Nature and Tourism, or Music do not witness significantly higher viewership in Megacities or urban audiences, compared to rural areas. This could mean that the Youth are unified in their viewership for such programmes.

Hence, while there may be some similarities in the general viewership patterns of the Youth, there are clear differences in terms of content preferences, especially in Megacities and Rural areas- the two extremes of the pop strata scale.



GENRE GROWTH



Let us broadly look at how the Youth is present across genres on television

Channel Genre	Viewership Share (15-30 yrs)		Difference
	2016	2017	
GEC	53%	51%	-2%
MOVIES	23%	25%	2%
NEWS	8%	7%	-1%
MUSIC	6%	7%	1%
KIDS	5%	4%	0%
SPORTS	3%	3%	0%
YOUTH	1%	1%	0%
INFOTAINMENT	1%	1%	0%
OTHERS	1%	1%	0%

% Share of Impressions

“Others” includes Devotional, Lifestyle, Tele-shopping & Business News

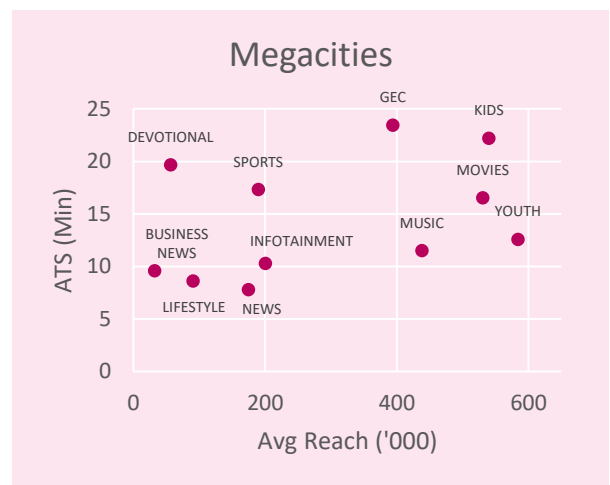
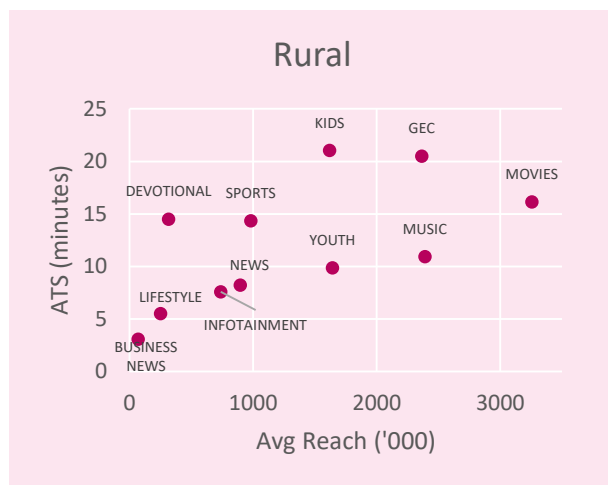
GEC dominates the genre viewership pie with the highest share of eyeballs (51%), followed by Movies (25%)- the two biggest genres on Television.

However, it is interesting to see that compared to the same period in 2016, the GEC genre has marginally declined in viewership share, while the Movies genre has gained relatively. This may likely be a result of the increasing popularity of film based programmes among the Youth that we had observed earlier.

Music channels, Kids channels and Sports together comprise a sizeable 14% of the viewership share (in 2017), with a slight increase in share witnessed for the Music genre over 2016.

Though the viewership share for Youth channels is not very substantial, it must also be kept in mind that it is the smallest genre on television with only 4 active channels. Hence there may be some potential to expand this genre viz. new channels catering to the youth.

As we had observed some differences in content preferences for the Youth from Megacities versus the Youth from Rural areas, let us look at the All India ATS vs Reach for various channel genres in these regions, for a more holistic picture.



The reach and stickiness of various channel genres varies for Rural youth audience versus the youth in Megacities.

Movie channels have the best Reach among rural youth, which is consistent with our earlier observation of rural audience driving viewership for film based programs, especially during the day (till 1800 hrs).

In Megacities, on the other hand, Youth channels have the maximum reach among genres. This means that the youth in the big metro cities are increasingly sampling these channels, and there may be an opportunity to hook & engage these viewers with new channels in the genre with fresh positioning and content.

GECs have a relatively better reach in Rural India as compared to Megacities, but the ATS for GEC channels is higher for Megacities.

It is interesting to note that one of the highest ATS is on Kids channels, for both Rural and Megacity audiences. This is consistent with our earlier observation of a significant share of impressions coming from Cartoon/ Animation programmes, further indicating that there may be some co-viewership of the older Youth audience along with their children.

Being a property driven genre, the Reach for Sports genre is relatively less when averaged across weeks. However, during big-ticket events, the Reach of this genre tends to increase.

Interestingly, the Youth in Megacities clearly spends more time on devotional channels as compared to the Rural Youth, which comes as a surprise. This may likely be due to growing popularity of practices such as Yoga & Ayurveda in big cities.

It is also interesting to note that while youth in rural audience spends more time on News channels, the Youth in Megacities have better ATS on Business news channels.

With the exception of News Genre, the Youth in Megacities spend more time on TV across genres than the youth in Rural towns and cities. The ATS for News genre is comparable in both Rural and Megacities.

AD SECTOR

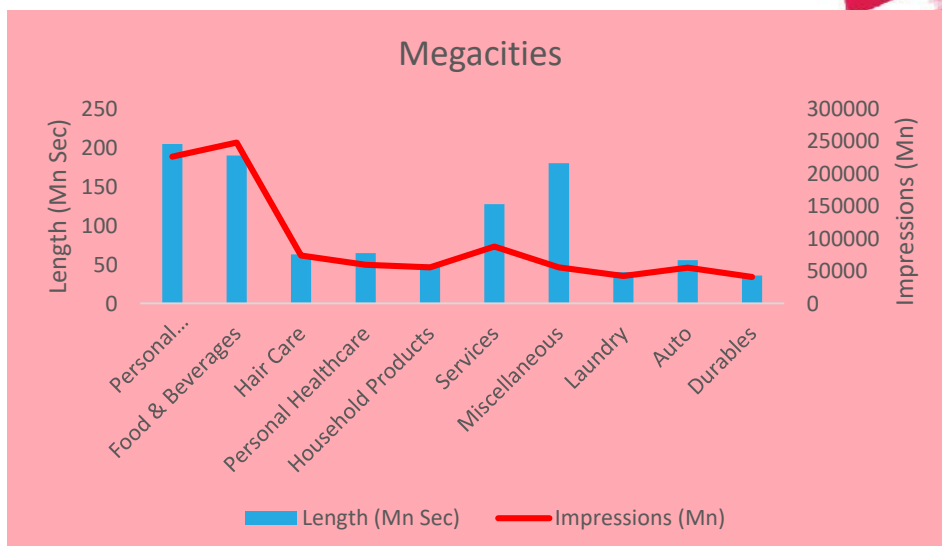
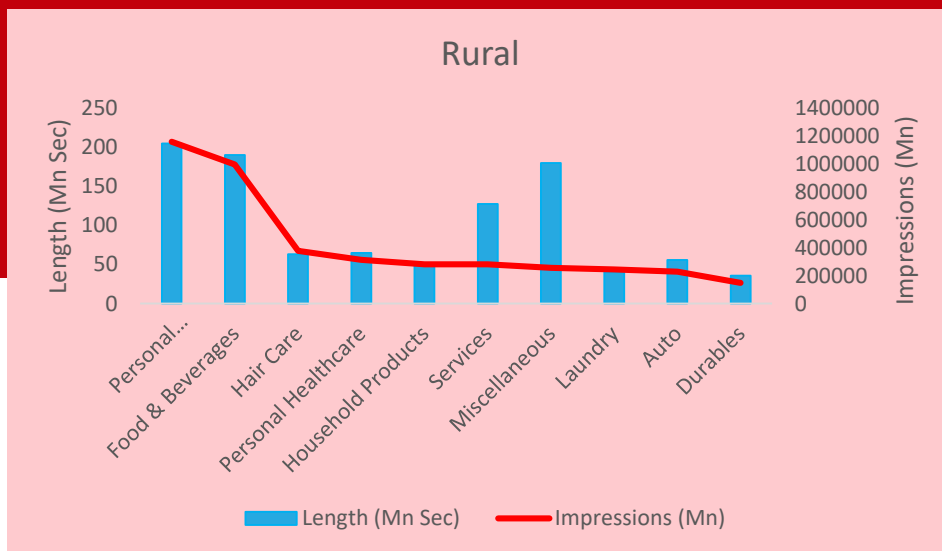
RECEPTIVITY



The aspiring Indian youth has increasingly more dispensable income and open minds. They are willing to try and buy new products, which makes them an important consumer segment for all marketers and advertiser.

However, the Rural Youth and Youth in Megacities may differ in their preference and capacity of purchase, due to socio-economic differences.

In this section, we will look at the effectiveness of the top 10 Ad sectors which garner eyeballs from Youth in Rural and Mega cities. We will look at these from the lens of Impression-Duration ratio, a metric which will helps us understand the conversion of TV presence into viewership.



Personal Care/ Personal Hygiene and F&B sector together account for 50% of the advertising impressions from Youth in both Rural India and Megacities. These are also the most advertised sectors, and hence volume may be leading to viewership.

While the top contributing categories in the Personal Care and Hygiene sector includes soaps, perfumes/ deodorants, face washes and fairness creams, which are high on self-involvement, F&B categories such as chocolates, milk beverages, and biscuits are high impulse purchase products. Many brands operating in these categories are mass advertisers and their communication is directly targeted at the youth.

When we look at the Auto and Durables sector viz. Impression to Duration ratio, we find that these sectors are relatively more effective in megacities than rural audience. This could mean that the youth in mega-cities is well-to-do economically, and may seek information through TV ads for purchase consideration. While the youth in rural towns may not be very receptive towards advertisement for high involvement products.

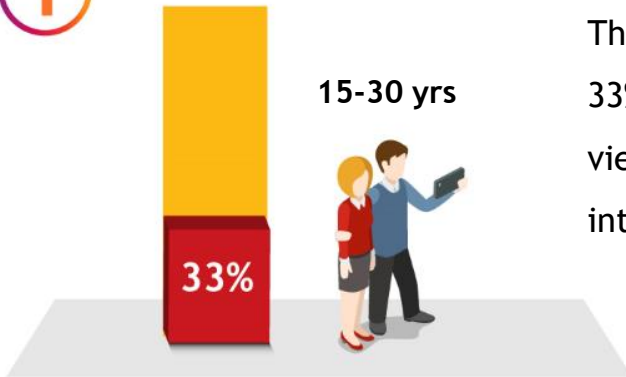
The most effective sectors among the Rural youth are Laundry and Hair Care. This is interesting, as many players in this sector have come up with smaller packaging units at lower price points to appeal to this segment.

The services sector is being driven by Internet services and E-commerce categories in both Rural and Megacities. However, it is not as effective in rural towns, while in megacities it ranks as the 3rd most effective category. This could likely be due to the digital divide between youth in rural areas versus youth living in the metro cities, resulting from factors such as Internet penetration, data availability and connectivity.



SUMMARY

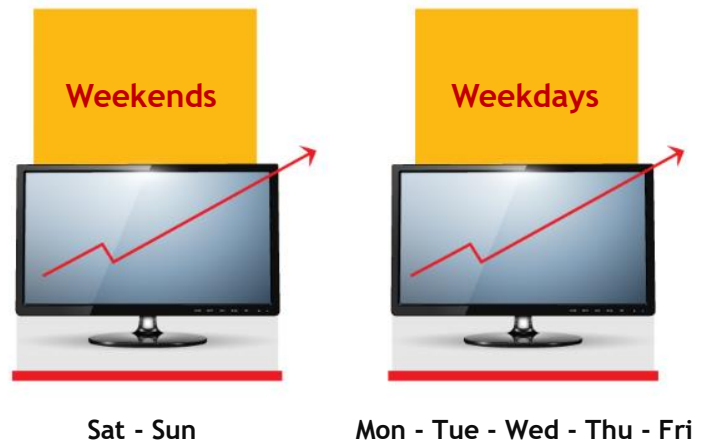
1



The Youth (15-30 yrs) contributes a massive 33% share of eyeballs to Total TV viewership, making them a segment of interest for broadcasters and advertisers.

2

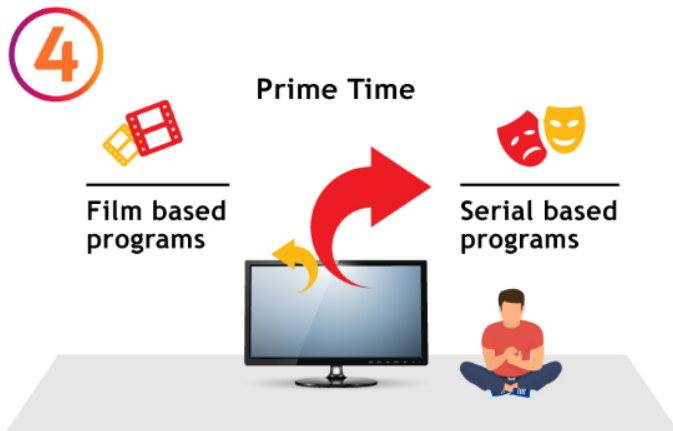
TV viewership remains consistent across weekday & weekend, with minor deviations, breaking the notion that the youth watch more TV during weekends.



3



Youth in Rural India start and end their day relatively early, while there is prevalence of late-night viewership in Megacities.



Film based programs dominates NPT from 0600-1800 hrs. But, as we approach Prime Time, the viewership share of Serial based programs goes up significantly.

5

The Youth in rural India is hooked to viewing serials during the late-night hours, while the Youth in Megacities drives viewership for Reality shows and Talent search programs (classified Miscellaneous).



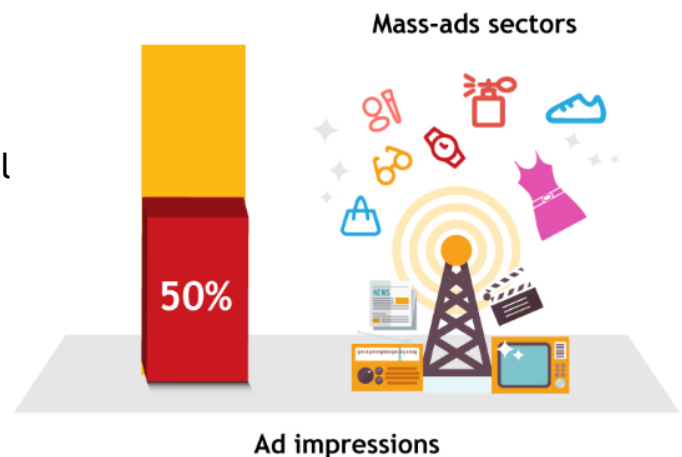
Youth genre channels have the highest Reach among Youth in megacities, but low ATS, which presents a possible opportunity to hook & engage this segment viz. new channels & fresh content



Contrary to common perception, the ATS for Devotional channels is higher among Youth in Megacities than the Youth in Rural towns/ cities. This opportunity can be capitalized by both broadcasters and advertisers.

8

Mass-advertising sectors such as Personal Care & Hygiene, and F&B account for 50% of Ad impressions from the Youth in both Rural towns and Megacities.



9



Advertising for high involvement sectors such as Auto and Durables are more effective among the Youth in Megacities than in Rural areas. This is also true for Service sector, which is heavily dominated by Internet services and E-commerce category.



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