TV Universe Estimates 2020

Introduction

India is home to 1.3 billion people and more than 300 million households[1] with diverse cultures. However, while TV owning households in the country represent about 2/3rd of all households, they have been increasing and have doubled over the past two decades (Figure 1). Trends using census data and the past 2 Broadcast India (BI) studies, suggest a drop in the family size and an increase in the count of homes.

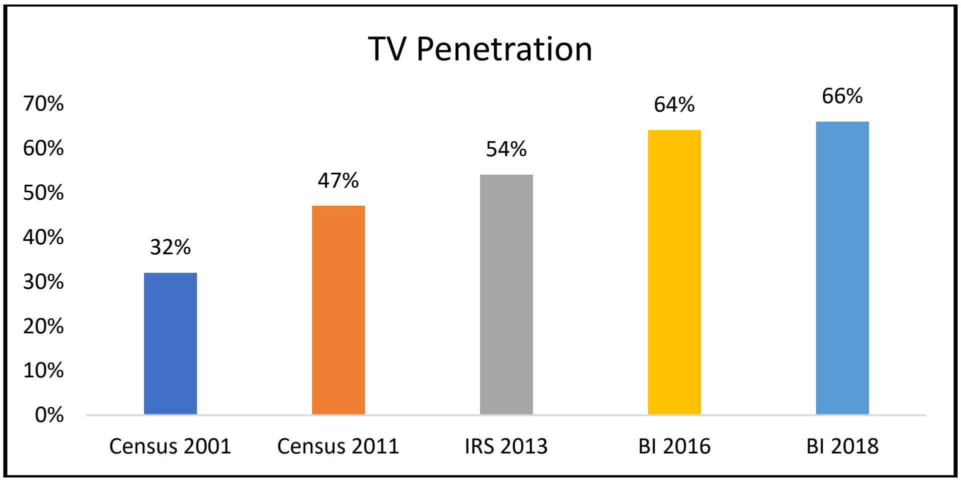

Figure 1. TV Penetration in India

TV Universe Estimates (UEs) play an important role in the structuring of BARC India's sample design, ensuring the panel reflects a true microcosm of India. Updated TV UEs ensure that the weighting and calibration systems properly, and accurately, project audience estimates to the population and are free of any bias.

The last update of TV UEs was done in 2018 after the establishment study known as Broadcast India (BI) 2018. While there were plans to conduct BI 2019 and BI 2020 surveys, at the advice of the industry, BI 2019 was not conducted due to NTO, and subsequently, due to COVID nationwide lockdowns, fieldwork could not be conducted for BI 2020.

In the absence of field work, BARC India team, along with the BARC Technical Committee (TechComm), has evaluated multiple options and identified the best and the most suitable method for updating TV UEs. Based on the recommendations, it was decided to keep projection date as 1st March 2020 for TV HH and individuals.

The detailed methodology is mentioned in the next section.

[1] BARC India. (2018). Broadcast India 2018.

Methodology

In the recent past, BARC India has also observed changes in the composition of NCCS (i.e., socioeconomic status) and Mode of Signal Reception (MOSR) which are corroborated with other studies such as readership surveys. By continuing to sample the panel against dated NCCS profiles, MOSR distribution and assumed growth in TV households, audience estimates will not be reflective of What India Watches™.

TV UEs have been developed by computing **the Linear growth** of TV Households and TV Individuals from the **past two Broadcast India studies (i.e., BI 2016, BI 2018)** at Geographic and Demographic levels. The distribution of the TV population by NCCS was then taken from the **latest Indian readership survey.**

Linear growth is computed using following formula
$y = b_0 + b_1x$

y = 2020 estimate
b_0 = BI 2018 estimate
b_1 = monthly growth rate between BI 2016 and 2018: (BI 2018 estimate – BI 2016 estimate) / number of months between projection points
x = number of months between 2020 and BI 2018 projection points

Results:

TV Homes in India increased by 6.9% to 210 million from previous 197 million in 2018. TV viewing Individuals grew by 6.7%, effectively an increase of 56 million (Figure 2, Figure 3).

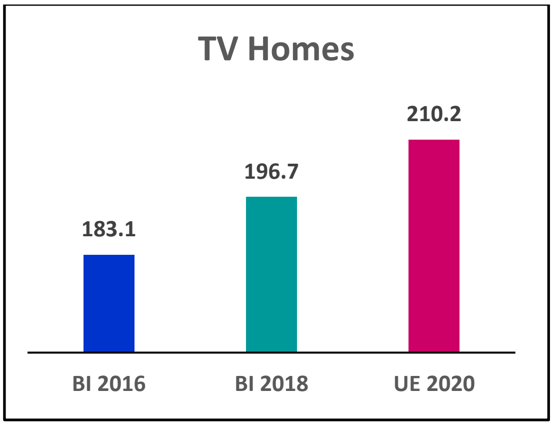

Figure 2. TV Households in India (in Millions)

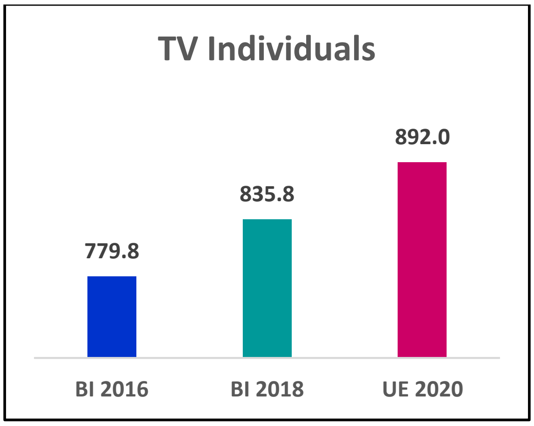

Figure 3. TV Individuals in India (in Millions)

TV households have increased in Urban and Rural markets by 4% and 9% respectively. In absolute terms, there is an increase in TV households of nearly 3.2 Mn in Urban India and 10.3 Mn in Rural India. TV households grew in all town classes of Urban markets with megacities growing by 6%. (Figure 4, 5)

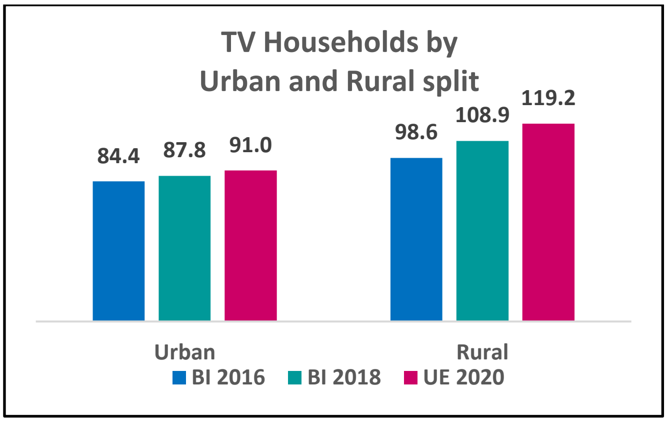

Figure 4. TV Households (Millions) by Urban and Rural

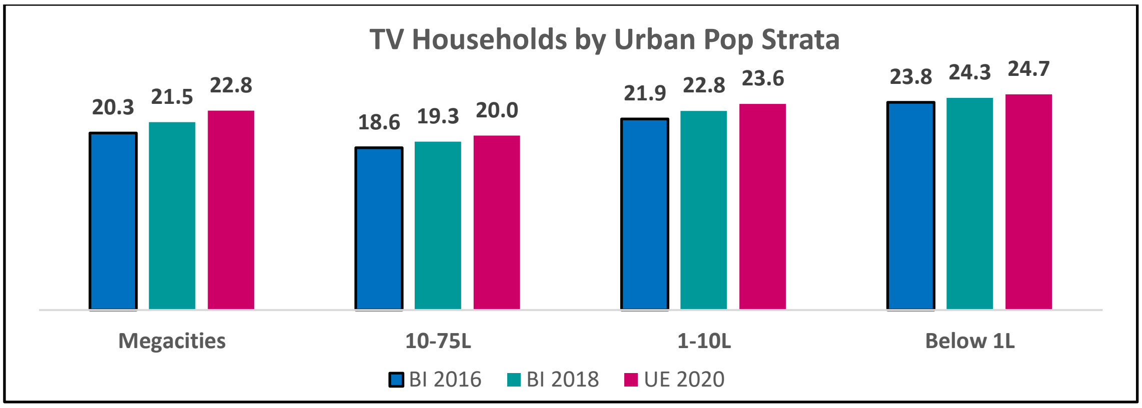

Figure 5. TV Households (in Millions) by Urban Pop strata

TV households have increased in all reporting States/State Groups in 2020. The growth in overall HSM states is relatively higher than the South states due to an already high TV penetration. Bihar/Jharkhand, Assam/NE and Odisha have seen double digit growth in TV households (Table 1).

Table 1. TV Homes by State/ State Groups (in Millions)

TV Homes (Mn)	BI 2016	BI 2018	UE 2020	% Change vs 2018
India	**183.1**	**196.7**	**210.2**	**7%**
HSM	**119.5**	**128.4**	**138.3**	**8%**
Assam/NE/Sikkim	4.9	6.0	6.8	14%
Bihar/Jharkhand	6.5	8.0	9.9	23%
Delhi	5.2	5.4	5.6	4%
Guj/D&D/DNH	11.8	12.3	12.9	5%
Har/HP/J&K	6.2	6.4	6.5	2%
Mah/Goa	22.2	23.7	25.5	7%
MP/Chhattisgarh	14.3	15.3	16.4	7%
Odisha	5.4	6.0	6.8	13%
Pun/Cha	5.8	6.2	6.6	7%
Rajasthan	7.8	8.4	9.1	9%
UP/Uttarakhand	16.0	16.5	17.0	3%
West Bengal	13.5	14.3	15.3	7%
SOUTH	**63.5**	**68.4**	**71.9**	**5%**
AP/Telangana	20.8	23.2	24.6	6%

Karnataka	14.1	15.3	16.1	6%
Kerala	7.8	8.2	8.6	5%
TN/Pondicherry	20.9	21.7	22.6	4%

In the recent years, a limited number of media studies have been conducted (e.g., Indian Readership Survey - IRS). These studies have indicated that the NCCS profile of the Indian population is changing as people have been moving up on the socioeconomic pyramid. BARC India has also observed this change in the NCCS profile of TV Panel households.

As per the updated UEs, the proportion of NCCS A and B have increased to 27% and 31% respectively while NCCS DE have further contracted to 9% of overall TV households in the country. (Figure 6, Table 2)

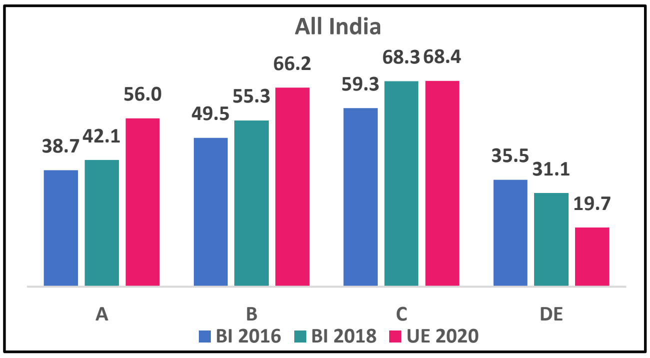

Figure 6. Households by NCCS (in Millions)

NCCS Distribution

Table 2. NCCS Household Distribution (All India)

NCCS	BI 2016	BI 2018	UE 2020
A	21%	21%	27%
B	27%	28%	31%
C	32%	35%	33%
DE	19%	16%	9%
Total	100%	100%	100%

Composition of Mode of Signal Reception (MOSR) in the country has also changed over this period. The share of DD Free Dish has increased to 19% from 13% in 2018, and the share of Cable TV[2] has decreased to 48% (Figure 7).

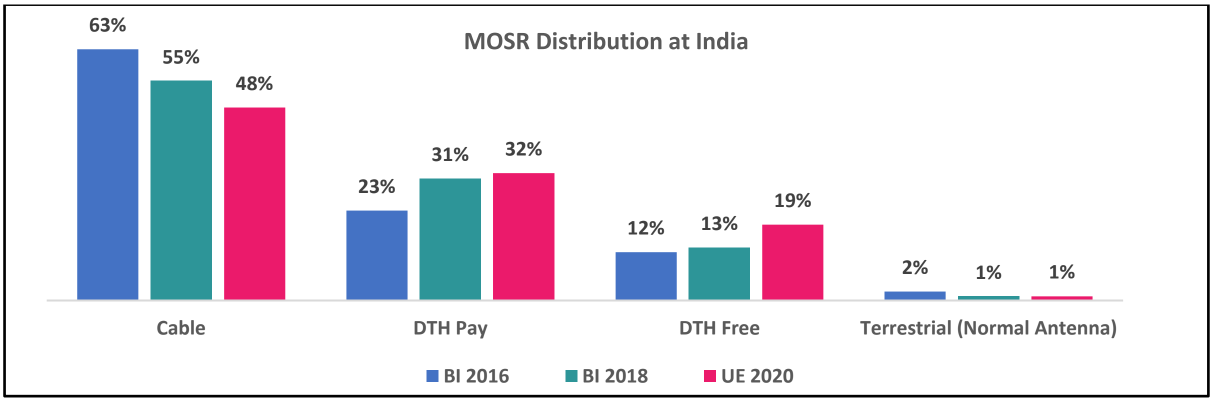

Figure 7. MOSR Distribution

TV Individuals have seen an increase across age groups and sex. The growth of Females is higher, driven by Rural India (Table 3). There has also been an increase in the population of Kids (i.e., 2 to 14 years) and 22 to 40-year olds in Rural India being higher than other age groups. (Table 4).

[2] Cable TV includes Digital Cable and where still present, Analogue Cable connections

Table 3. TV Individuals by Sex (in Millions)

All India	TV Individuals (in Millions)			% Change over 2018		
Sex	Urban	Rural	Total (U+R)	Urban	Rural	Total (U+R)
Female	187.1	248.3	435.4	4%	10%	7%
Male	196.7	259.9	456.6	3%	9%	6%
Total	383.8	508.2	892	3%	9%	7%

Table 4. Individuals by Age Groups (in Millions)

All India	TV Individuals in Millions			% Change over 2018		
Age Groups	Urban	Rural	Total (U+R)	Urban	Rural	Total (U+R)
2 to 14	87.8	141.8	229.6	3%	13%	9%
15 to 21	55	73	128	4%	6%	5%
22 to 30	71.3	86.9	158.3	5%	10%	7%
31 to 40	63.8	76.1	139.9	3%	10%	7%
41 to 50	47.3	56.2	103.5	2%	7%	4%
51 to 60	30.6	37	67.7	3%	8%	6%
61+	27.9	37.1	65	2%	7%	5%
Total	383.8	508.2	892	3%	9%	7%

Simulation of the New UEs on TV Viewership Data

The increase in the TV population has resulted in an overall growth in TV viewership. In line with the pattern of regional growth of the population, TV viewership has grown more in Bihar/Jharkhand, Assam/NE and Odisha (Table 5). Similarly, TV viewership of upper NCCS (A and B) has increased due to increase in population while lower NCCS profile (NCCS CDE) has seen a drop of around 12% at all India level. (Table 6).

TOTAL TV Viewership (AMA'000s)

Table 5 - TOTAL TV Viewership (AMA'000s) by State/State Groups

Regions (Ind 2+)	OLD	NEW	Index
India	**89061**	**93797**	**105**
HSM	**54733**	**58300**	**107**
Assam/North East/Sikkim	2234	2653	119
Bihar/Jharkhand	3430	4168	122
Delhi	2863	2973	104
Guj/D&D/DNH	5295	5509	104
Har/HP/J&K	2619	2634	101
Mah/Goa	11381	12089	106
MP/Chhattisgarh	6080	6389	105
Odisha	2739	3094	113
Pun/Cha	2688	2818	105
Rajasthan	2610	2810	108
UP/Uttarakhand	6785	6879	101
West Bengal	6010	6284	105

South	34328	35497	103
AP/Telangana	11305	11861	105
Karnataka	7953	8239	104
Kerala	3368	3487	104
TN/Pondicherry	11701	11910	102

Individuals 2+, Average of Weekly AMA'000s (Avg.), Week 1 to 4, 2021

Table 6 - TOTAL TV Viewership (AMA'000s) by NCCS

Regions	Target Group	OLD	NEW	Index
India	**Universe (2+)**	**89061**	**93797**	**105**
	NCCS A	17311	23012	**133**
	NCCS B	25103	29633	**118**
	NCCS CDE	46647	41152	**88**
HSM	**Universe (2+)**	**54733**	**58300**	**107**
	NCCS A	11382	14666	**129**
	NCCS B	15191	17957	**118**
	NCCS CDE	28160	25678	**91**
South	**Universe (2+)**	**34328**	**35497**	**103**
	NCCS A	5928	8346	**141**
	NCCS B	9912	11676	**118**
	NCCS CDE	18487	15475	**84**

Individuals 2+, Average of Weekly AMA'000s (Avg.), Week 1 to 4, 2021

When comparing the viewership with old UEs, Genres operating at National and HSM level have shown a higher growth with few genres, such as Hindi News, Sports, English Movies and Devotional/Spiritual, showing a double-digit growth (Table 7).

Viewership (AMA'000s) comparison by Genre

Table 7- Key Genres Viewership (AMA'000s) at India and HSM

Genre	Region	Individuals 2+			Individuals 15+			Individuals AB 2+		
		OLD	NEW	Index	OLD	NEW	Index	OLD	NEW	Index
Hindi-GEC	HSM	20916	22132	106	15843	16675	105	10220	12473	122
Hindi-Movies	HSM	12041	12601	105	9444	9835	104	5404	6589	122
Hindi /Regional /Business News	HSM	2672	2953	111	2320	2563	110	1771	2147	121
English Channels	India	489	542	111	408	452	111	300	364	121
English-Movies	India	132	146	110	103	113	110	82	98	118
English-GEC	India	7	9	117	7	8	117	6	7	120
Kids	India	6085	6434	106	3637	3802	105	3049	3761	123
Music	India	3676	3782	103	2919	2992	103	1592	1975	124
Sports	India	1064	1168	110	895	982	110	626	768	123
Infotainment	India	410	442	108	314	339	108	237	291	123
Devotional/Spiritual	India	405	456	113	361	406	113	260	324	125
Lifestyle	India	78	86	109	63	69	109	47	57	121

Average of Weekly AMA'000s(Avg.), Week 1 to 4, 2021

Viewership (AMA'000s) comparison of South regional genres:

Since the TV population increase is lower in the South market compared to HSM, viewership increase of Southern genres is also comparatively lower. Kannada Movies has dropped marginally at Individuals 2+ while there is more than a 40% increase at NCCS AB. (Table 8).

Table 8 - Viewership (AMA'000s) of South Regional Genres at Respective State/State Group

Genre	Region	Individuals 2+			Individuals 15+			Individuals AB 2+		
		OLD	NEW	Index	OLD	NEW	Index	OLD	NEW	Index
Telugu Channels	AP/Telangana	10163	10669	105	8410	8803	105	3879	4758	123
Telugu GEC	AP/Telangana	6439	6764	105	5364	5619	105	2479	3038	123
Telugu Movies	AP/Telangana	2133	2228	104	1738	1806	104	768	943	123
Kannada Channels	Karnataka	5820	6054	104	4788	4956	104	2422	3434	142
Kannada GEC	Karnataka	4073	4274	105	3351	3499	104	1759	2489	141
Kannada Movies	Karnataka	971	963	99	799	787	98	328	469	143
Malayalam Channels	Kerala	2902	3003	103	2479	2567	104	2068	2154	104
Malayalam GEC	Kerala	2045	2114	103	1756	1817	103	1454	1514	104
Malayalam Movies	Kerala	402	412	102	341	348	102	281	288	102
Tamil Channels	TN/Pondicherry	10526	10695	102	8830	8970	102	5078	6684	132
Tamil GEC	TN/Pondicherry	7393	7513	102	6231	6328	102	3555	4682	132
Tamil Movies	TN/Pondicherry	1709	1706	100	1425	1423	100	782	1029	132

Average of Weekly AMA'000s(Avg.), Week 1 to 4, 2021

Viewership (AMA'000s) of other Regional genres:

Viewership of Bhojpuri, Assamese and Oriya channels have grown significantly higher than other genres (Table 9).

Table 9 Viewership (AMA'000s) of Other Regional Genres at Respective State/State Group

Genre	Region	Individuals 2+			Individuals 15+			Individuals AB 2+		
		OLD	NEW	Index	OLD	NEW	Index	OLD	NEW	Index
Marathi Channels	Mah/Goa	3567	3940	110	3003	3301	110	2210	2777	126
Marathi-GEC	Mah/Goa	2515	2802	111	2114	2341	111	1595	2016	126
Marathi-Movies	Mah/Goa	583	622	107	485	516	106	317	390	123
Bangla Channels	West Bengal	3689	3866	105	3050	3193	105	1223	1537	126
Bangla-GEC	West Bengal	2861	2993	105	2365	2471	104	943	1183	125
Bangla-Movies	West Bengal	371	378	102	291	297	102	81	104	128
Assamese Channels	Assam/NE/Sikkim	225	263	117	181	210	116	125	142	113
Bhojpuri	Bihar/Jharkhand	313	375	120	236	281	119	115	166	144
Gujarati Channels	Guj/D&D/DNH	348	363	104	294	303	103	187	223	119
Oriya Channels	Odisha	1425	1637	115	1176	1344	114	533	777	146
Punjabi Channels	Pun/Cha	686	737	107	581	628	108	485	576	119

Average of Weekly AMA'000s(Avg.), Week 1 to 4, 2021

Viewership (AMA'000s) of HD Channels Regional genres:

HD Viewership has grown by 15% at all India level with relatively higher growth observed in Bihar/Jharkhand, Karnataka, Maharashtra and Rajasthan (Table 10)

Table 10 - HD Viewership (AMA'000s) by State/State Groups

HD Channels	OLD	NEW	Index
India	**1926**	**2220**	**115**
HSM	**1099**	**1284**	**117**
Assam/North East/Sikkim	97	112	116
Bihar/Jharkhand	88	116	132
Delhi	141	155	110
Guj/D&D/DNH	102	112	110
Har/HP/J&K	41	45	110
Mah/Goa	296	361	122
MP/Chhattisgarh	65	75	115
Odisha	30	35	117
Pun/Cha	27	29	109
Rajasthan	31	38	121
UP/Uttarakhand	100	111	111
West Bengal	80	94	117
South	**826**	**937**	**113**
AP/Telangana	423	470	111
Karnataka	143	187	130
Kerala	65	66	102
TN/Pondicherry	195	213	109

Average of Weekly AMA'000s(Avg.), Week 1 to 4, 2021

TV Viewership has grown on Free and pay platforms with higher growth observed on Pay platform (Table 11).

Table 11 Total TV Viewership (AMA'000s) on Pay and Free Platform at HSM

HSM/ Ind 2+	OLD	NEW	Index
Pay Platform	40820	43842	107
Free Platform	13913	14458	104

Average of Weekly AMA'000s(Avg.), Week 1 to 4, 2021

Planning for Broadcast India (BI) 2021, using the former methodology of a large-scale establishment survey, is underway and we expect to start the fieldwork soon, assuming no disruptions due to the renewed pandemic concerns. The panel will further be revamped basis the findings of this study so that we continue to accurately report What India Watches™.

BARC India is updating the TV Universe Estimates and, viewership data reported from Week 14, 2021 onwards, will be based on the revised estimates.

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