




Anatomy of Rural India





According to 2011 Census Report, nearly 70 per cent of India's population lives in rural areas. This means that of the total population of 1.21 Bn, 833 Mn live in Rural areas. Further, looking at the total number of 153.5 Mn TV households, Urban and Rural distribution is quite comparable with 77.5 Mn and 76 Mn TV households respectively.

Despite this, Rural Market has been an unexplored territory when it comes to TV audience measurement in India. Until recently, Rural TV viewing was not monitored at all. For the first time in TV audience measurement history, Rural India is being covered. Hence, this edition of the newsletter tries to delve into the viewing habits of Rural Audiences and understand Rural India on different fronts of TV content consumption.

The Questions that we seek to answer are...

1. What are the viewership patterns for Rural India when compared zone wise across different Audience metrics?

2. On what grounds does Rural India show similarities or differences across zones? Is it a result of Reach, ATS or content type?

3. How does viewership pattern for Rural India differ by Day-parts?

4. What are the key characteristics of Prime-Time in Rural Market – Audience profile, Ad Sector popularity, Content preferences? Or is it driven by the stickiness of channel genre(s)?

5. Taking the largest channel genres in Rural India as a case in point, what are the switching habits of Rural Audience across Day-parts?

Source: BARC India, BMW Data; Period: Wk41 (2015)-Wk40 (2016) 2016, TG: 4+, Prime time-band: 1800-2400 hrs. Non-Prime time-band: 0600-1800 hrs.

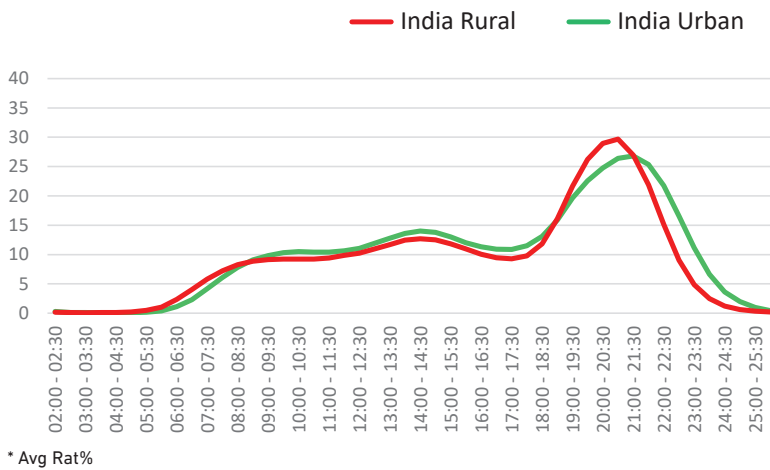
Miscellaneous program theme contains Teleshopping, Reality shows, Cartoon/Animation, Filler, History, etc. Others program theme contains Unclassified

A man with dark hair, wearing a brown sweater over a white collared shirt, is focused on his work. He is in a factory or workshop environment, surrounded by large rolls of colorful materials, including green and yellow. A red wire is visible in the foreground. The entire image is framed by a thick red border.

01

Understanding
the viewership
patterns for
Rural India

a. All Day Trends



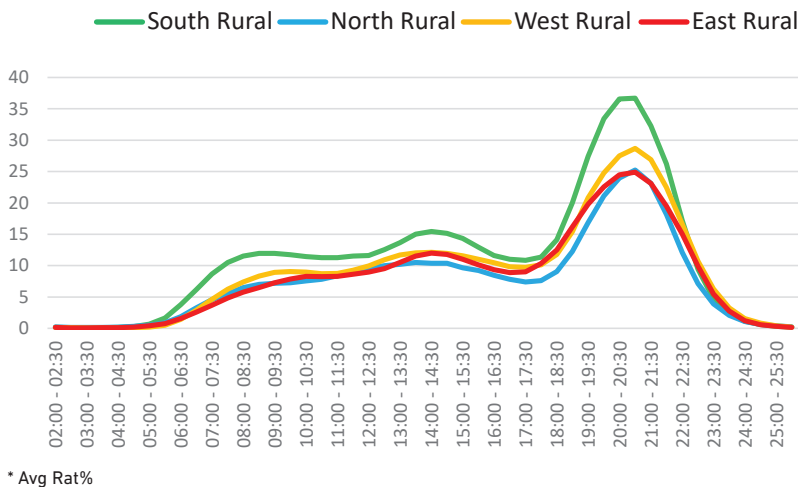
Urban India and Rural India follow distinctly different patterns across the day. Rural India starts its day much earlier than Urban India, at around 05:00 in the morning, and continues to have the higher viewership until 09:00 in the morning.

Post 09:00, Urban India viewership catches up and has higher viewership than Rural India throughout the afternoon & evening. Both Urban and Rural India see a marginal peak during

14:00-14:30 hours.

However, Rural India sees an early spike for Prime time as compared to Urban India. The highest viewership in Rural India is generated during the Time-band 20:30-21:00 followed by the Time-band 20:00-20:30.

The viewership starts declining at around 22:30 hinting at an early wrap up for the day for Rural audience.



If we compare all the four zones in rural market, it seems like the viewership is driven by Southern Rural market followed by the West zone.

The lowest viewership in Rural market can be observed in the North zone which has the lowest avg. rating% for the entire day.

Given the differing viewership pattern for Urban & Rural India, Broadcasters can consider the morning and afternoon bands for Rural India audiences in addition to prime-time, based on audience profile.

Also, Southern Rural is likely to give maximum exposure to advertisers, in terms of viewership, as compared to any other Rural Market in India.

b. Weekday Vs. Weekend Viewership

India Rural	South Rural	North Rural	West Rural	East Rural
Weekday 9.1%	Weekday 11.2%	Weekday 7.5%	Weekday 8.9%	Weekday 8.2%
Weekend 9.6%	Weekend 11.7%	Weekend 7.9%	Weekend 9.5%	Weekend 8.5%

* Avg Rat%

If we look at the zone-wise viewership, both weekdays and weekends are driven by the South zone followed by West zone.

Overall viewership for weekends is marginally higher than weekdays for Rural India. At the zone level, this increase for Weekend viewership is maximum for West zone and the least for East zone.

This is not surprising as weekends give audiences more leisure time at home which in turn is a reason to generate higher viewership. There might be a need to relook at the notion that rural is not different for weekdays and weekends.

c. Prime-Time Vs. Non-Prime-Time Viewership

India Rural	South Rural	North Rural	West Rural	East Rural
Prime Time 17.9%	Prime Time 21.7%	Prime Time 14.6%	Prime Time 17.9%	Prime Time 16.4%
Non-Prime Time 9.4%	Non-Prime Time 11.6%	Non-Prime Time 7.8%	Non-Prime Time 9.0%	Non-Prime Time 8.2%

* Avg Rat%

The average viewership for Prime-time is almost twice that of Non Prime-time for Rural India.

The pattern remains the same for all the four zones, with East zone having the maximum growth during Prime-time followed by West zone.

However, at an absolute level South zone continues to have the highest viewership followed by the West zone.

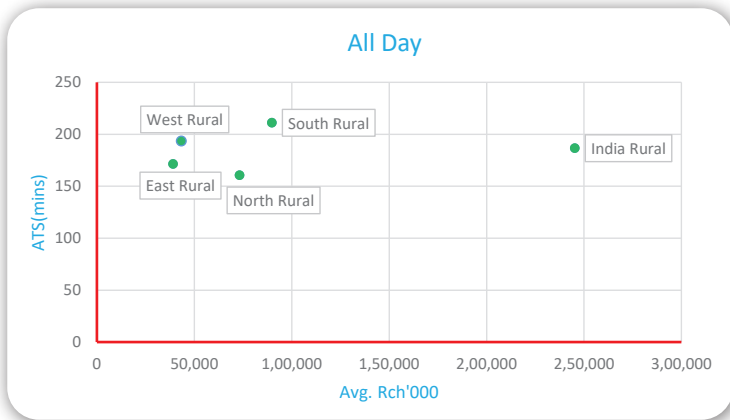
While the viewership differs across zones in absolutes, it must be noted that the viewership trends –across day-parts, Prime-time vs. Non-Prime-time & Weekday vs. Weekend, remain similar across all zones. This is helpful for Broadcasters and marketers attempting to reach Rural audiences.

A photograph of two young girls in school uniforms. One girl is swinging happily on a rope swing, wearing a light blue shirt, dark tie, and dark skirt. The other girl stands behind her, also smiling, wearing a light blue shirt, dark tie, and a red skirt. They are in a grassy field with trees in the background. The image is framed by a green border. A red and orange graphic overlay is at the bottom left.

02

**How does Rural
India differ across
zones?**

a. Reach Vs. ATS



On an overall level, South zone registers the highest Reach and ATS among all the four zones in Rural market.

Looking at West zone, its' ATS is the second highest after South zone. However, it has relatively lower Reach. This shows that audience in the western rural market have lower reach but they spend a high amount of time consuming television content.

Conversely, North zone, has the lowest ATS but has a comparatively better reach. We can infer that audience in North zone do not stick to television viewing for as long as those in other zones.

For Marketers targeting West or East zone, Frequency based plans will yield results easily. On the other hand, for those targeting North, Reach based plans may be more achievable.

b. By Program Theme

Program Themes	India Rural	East Rural	West Rural	North Rural	South Rural
Serials	40%	43%	43%	48%	32%
Film Based	37%	34%	38%	31%	41%
Miscellaneous	10%	11%	9%	9%	12%
News/business	6%	5%	5%	5%	7%
Sports	4%	4%	4%	3%	3%
Game/talk/quiz	2%	1%	0%	0%	3%
Music	1%	1%	0%	3%	0%
Nature/tourism	0%	1%	1%	0%	0%
Lifestyle	0%	0%	0%	0%	1%
Others	0%	0%	0%	0%	0%

% Share of Normalised Avg. Impressions'000

On an overall level for Rural India, Serial based programs secure the highest share among all, followed by Film-based programs. This pattern is consistent across all zones with the exception of South.

Viewership for Serials is driven majorly by the North zone while Film-based programs have the maximum viewership in the South zone, which doesn't come as a surprise.

Most of the Program themes are driven by South zone. The only exception is Music which is driven almost entirely by North zone.

For Broadcasters in the Serials and Music genre, North Rural market is the key. For advertisers and marketers targeting North and South zone, Serials and Film-based content will be the 'Holy Grail' to reach their audiences respectively, as over 30% of the viewership is attributed to each of these content types across zones.

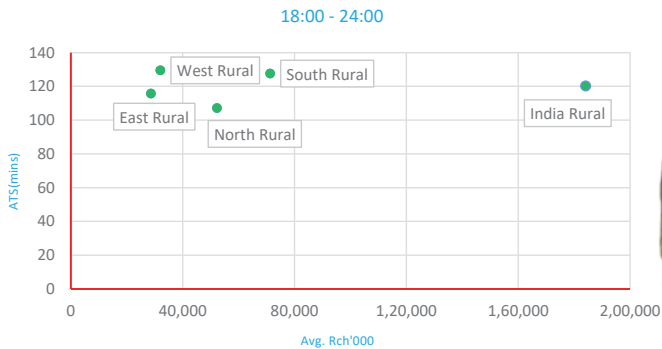
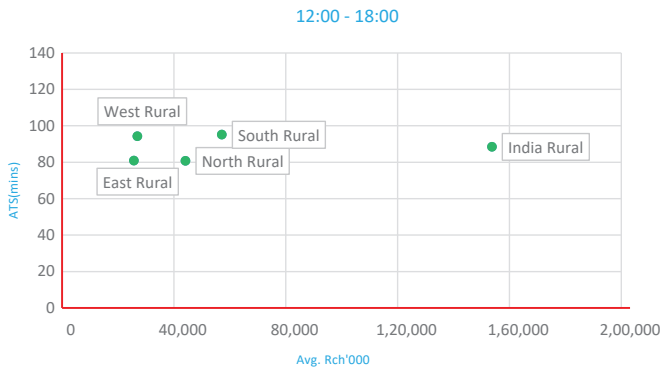
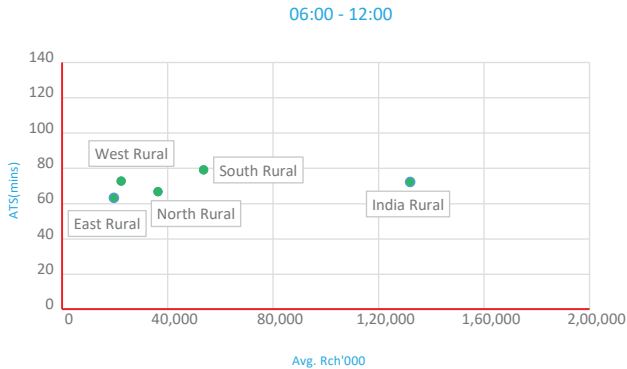
प्रमुख अधिकारियों के फोन नं
कंस: अधिकारियों का पदनाम
जतर विभाग
पुलिस हाता केन्द्र
अग्निरक्षा केन्द्र
साधक
लेखक
प्रधान व्यापक
ग्राम प्रधान
सहायक वेसिक शिक्षा अधिकारी
खण्ड कोस अधिकारी
प्रभागी कृषि अधिकारी
पशु चिकित्सा अधिकारी
उप निदेशक
जिला सहायक
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03

How does viewership
of Rural India differ
by day-parts?

a. Reach Vs. ATS



It may be worthwhile for Broadcasters and Marketers to take a closer look at the Prime-time and non Prime-time viewership habits of East zone to understand the reason for the spike.

South zone seems to maintain its ATS throughout the day. However, during Prime-Time, West zone manages to surpass it marginally.

While West zone loses in terms of garnering more reach, it turns out to be more loyal television viewers. On the other hand, South zone reaches a larger set of audience, it is also successful in making viewers stay for long on television.

East and North zone both seem to be unsuccessful in garnering either a higher Reach or ATS

However, for the Prime-time band (18:00-24:00 hours), East Rural has managed to jump highest in ATS compared to the previous Time-band. **Viewers in East zone seem to be heavy Prime Time content consumers.**





04

How does viewership
of Rural India differ
during Prime-Time?

a. By Demographics

Viewership in India during Prime time is equally divided among both the genders.

However, if compared by the 4 zones, North and West zone have a higher percentage of Male viewers. **(51% and 52% respectively)**

Millennials **(age group 15-30)** form the largest percentage of audience in Rural India.

The pattern is the same among all the 4 zones with the exception of South where Gen X **(age group 31-50)** forms the largest percentage of audiences.

NCCS C has the highest share of viewership among all zones in Rural India.

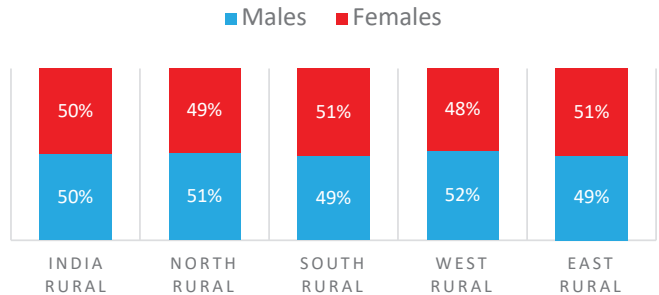
While West zone & East zone display a composition similar to Rural India, North zone and South zone have some variations.

North zone has a substantially higher composition of NCCS A & NCCS B, while the contribution of NCCS C is lower than the Rural India average.

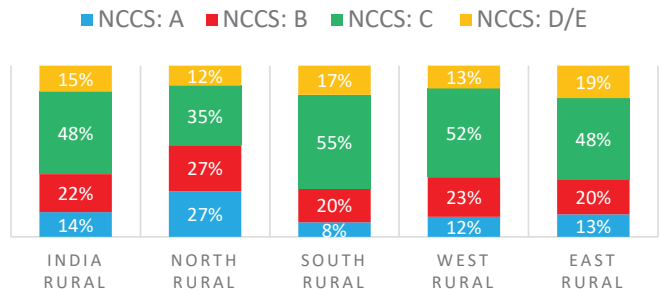
Conversely, in South zone, the contribution of NCCS A is low.

Millennials in Rural India could be the next big target for Broadcasters and advertisers to hold on to.

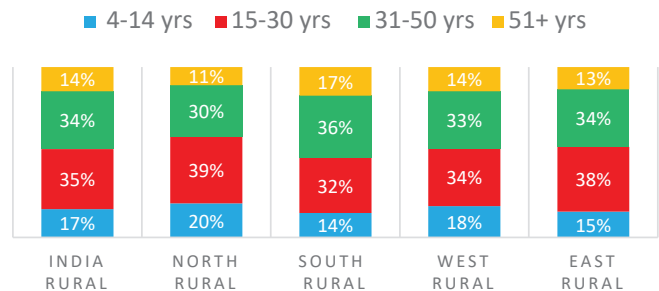
BY GENDER



BY NCCS



BY AGE GROUP



b. By Program Theme Stickiness

Before we try to understand the stickiness for content during Prime time, to set the context, let us look at how much exposure does it get.

Program Themes	India Rural	East Rural	West Rural	North Rural	South Rural
Film Based	32%	31%	34%	28%	34%
Serials	20%	22%	22%	22%	17%
Game/talk/quiz	15%	11%	4%	3%	33%
Sports	9%	11%	10%	6%	12%
Miscellaneous	7%	7%	6%	6%	9%
Nature/tourism	5%	6%	6%	3%	6%
Music	4%	4%	1%	9%	1%
News/business	3%	3%	3%	2%	5%
Lifestyle	3%	2%	1%	1%	6%
Others	2%	1%	1%	1%	3%

Avg. Reach%

While most content sees similar Reach across zones during Prime time, some content has a higher / lower preference in certain zones.

North zone has low Reach for both Film based as well as Sports content, in comparison to other zones.



While Reach gives us an idea of the exposure to the content, Fidelity helps us understand the content stickiness.

Fidelity Index gives the average % of a time-band/program that is contacted by each individual. Looking at the Fidelity Index can give an idea of the stickiness of the program content.

Program Themes	India Rural	East Rural	West Rural	North Rural	South Rural
Serials	34%	31%	33%	31%	40%
Game/Talk/Qquiz	20%	20%	20%	15%	20%
Lifestyle	18%	17%	18%	16%	19%
News/Business	17%	15%	17%	17%	18%
Miscellaneous	17%	15%	16%	15%	18%
Sports	16%	15%	19%	18%	15%
Music	16%	12%	10%	17%	13%
Nature/Tourism	13%	13%	13%	13%	13%
Film Based	8%	7%	8%	7%	11%
Others	5%	15%	6%	12%	3%

Fid%

- Surprisingly, Film-based programs, which have the maximum Reach during Prime time, have one of the lowest stickiness across Rural India for all the four zones.
- Game/Talk/Quiz and Lifestyle based programs can hold the audiences for longer as they have healthy ratio for reach to fidelity.
- In rural India, stickiness for serial based programs is the highest across program themes. Surprisingly, it is driven mostly by South zone, which had the lowest Reach among all zones for this content.
- Interestingly, if we compare this to the audience composition analysed above, North zone and West zone, which have a higher percentage of Male audiences, also see higher stickiness for Sports programs.
- Lifestyle based content in terms of stickiness has much better ratio of reach to fidelity across zones.

Stickiness of the genre may be an important indicator for Broadcasters in terms of engagement with the content.

c. By Ad Sector Popularity

Ad Sector	India Rural	East Rural	West Rural	North Rural	South Rural
Personal Care/Personal Hygiene	21%	22%	23%	24%	18%
Food & Beverages	21%	21%	19%	17%	23%
Hair Care	7%	7%	7%	8%	6%
Services	7%	7%	8%	7%	6%
Miscellaneous	6%	7%	6%	7%	6%
Household Products	5%	5%	5%	6%	5%
Auto	5%	5%	5%	4%	6%
Personal Healthcare	5%	5%	5%	6%	4%
Laundry	4%	4%	5%	5%	4%
Durables	3%	2%	2%	2%	3%
Telecom/Internet Service Providers	3%	3%	2%	2%	3%
Telecom Products	2%	2%	2%	1%	2%
Personal Accessories	2%	1%	1%	1%	3%
Building, Industrial & Land Materials/Equipments	2%	2%	1%	2%	2%
Banking/Finance/Investment	1%	1%	1%	1%	1%

Top 15 Categories, % Share of Normalised Avg. Impressions

The top Ad sectors by viewership during Prime time in Rural India are Personal Care/Hygiene, Food & Beverages, Hair Care, Services etc. Personal Care/Hygiene and Hair Care sector have a higher share in the North zone. This can also be seen while comparing all the zones for the 'Personal Healthcare' category, where again North zone takes the lead. On the other hand, South Zone is more inclined towards categories like Food and Beverages, Auto, Durables and Personal accessories.



A portrait of a young woman with dark hair pulled back, smiling warmly at the camera. She is wearing a red long-sleeved top and a white shawl draped over her shoulders. The background is a soft-focus outdoor scene with green foliage. The image is framed by a blue border. A red semi-transparent rectangle is overlaid on the bottom left, containing the page number and title.

05

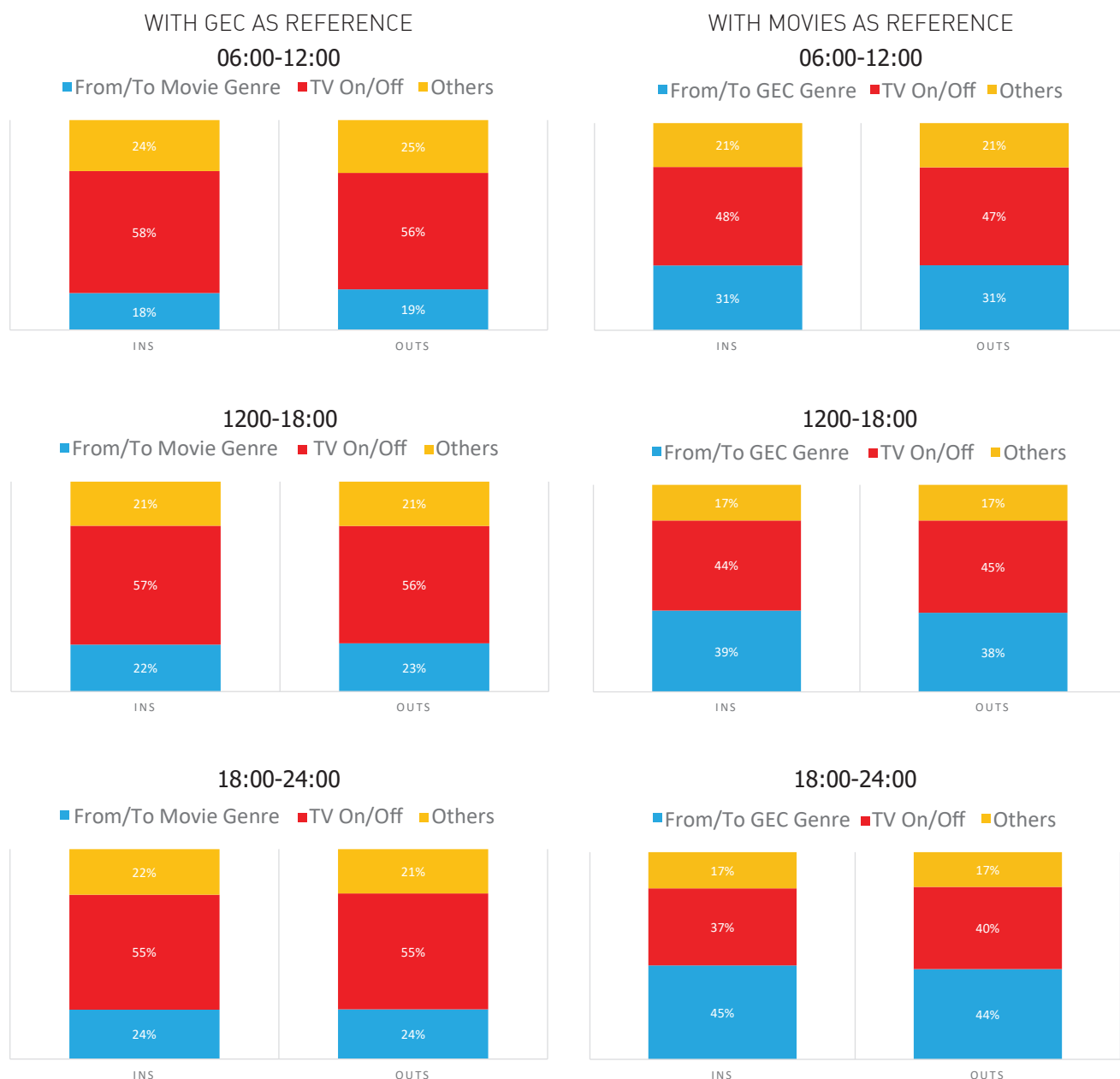
**Switching pattern for
GEC & Movie Genre**

Since most of the TV viewership is generated by GEC and Movie genre, it would be interesting to understand the switching pattern of Rural India on a day-part level.

The graphs below showcase the switching pattern to GEC from Movies and vice-versa.

'Ins' is the percentage of viewers who switched to a particular genre. Conversely, 'Outs' gives the percentage of viewers who switched out of a particular genre. Switching could be:


1. From one genre to another
2. Ins due to TV On / Outs due to TV Off
3. From other channels



As observed in the graphs above, throughout the day, most of the switching to or from a channel genre happens due to audience switching the TV on or off. However, it declines during the later time-bands. The only exception is 18:00-24:00 where switching between Movies and GEC is higher than viewers switching TV off during that time- band (with Movies as reference).

On comparing switching from Movies to GEC Genre, switching percentage remains almost comparable for throughout the day. On the other hand, switching from GEC to Movies declines during later time-bands.

On an overall level, switching from GEC to Movies is seen more often than the switching from Movies to GEC.



What is surprising is that maximum loss of viewers, across all time bands, is due to the audience switching the TV on or off and not switching across genres.



- Viewership trends for Rural India remain similar across all zones. This can be leveraged by Broadcasters and marketers for pan India plans.
- South Rural leads in viewership among all four zones for both weekdays and week-ends.
- Frequency based plans will yield results easily for Western and Eastern Rural markets whereas for Northern Rural market Reach based plans are more achievable.
- For advertisers and marketers targeting North and South zone, Serials and Film-based content are the key to reach their audiences.
- Though Film based programs have better reach, Serials engage Rural India better than Film based.
- To Marketers' and Broadcasters' pleasant surprise, Lifestyle based content has better stickiness across Rural India despite lower Reach numbers.

SUMMARY



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Images Courtesy - www.imagesbazaar.com / www.shutterstock.com

THINK



BROADCAST
AUDIENCE
RESEARCH
COUNCIL
INDIA