THINK

BREAKING THE NEWS STORY

INTRODUCTION

The past year has been quite unique and interesting on the news front, from incessant breaking news alerts to major economic policies and reforms, to a string of natural disasters, and much more.

Through this newsletter, we attempt to get a glimpse of the dynamic and extremely diverse news genre, by taking stock of the overall news landscape on television, and then narrowing our focus to take a closer look at some specific events and how they shaped up news viewership on television.

This Newsletter is broadly divided into 3 parts:

A. **The News Landscape** - analyzing the contribution of News Genre to Total TV, who is the audience for News, and Week on Week News viewership in context of events.

B. **Viewership Analysis of a Scheduled Event** - Understanding the impact of a planned event on News viewership viz. All day trends, Viewership by channel language & programme genre, and effect on advertising.

C. **Viewership Analysis of an Unscheduled Event** - Understanding how the sudden breaking of a major news story affects the News genre viz. All day trends, Genre movement, Viewership by programme genre and impact on advertising categories.

SEARCH.......
UNEXPECTED +//*- ++HAS OCCURRED

News Landscape – A Bird's Eye View

NEWS 8%
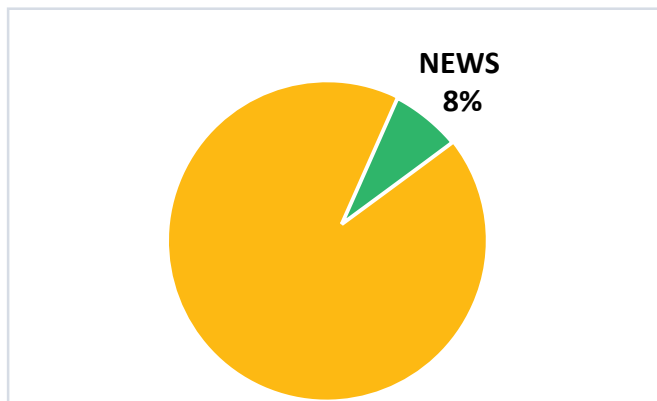
% share of Impressions

News genre contributes 8% to total TV Viewership, making it the 3rd biggest genre on television in terms of viewership.

The News genre has witnessed a 15% increase in the number of channels, from 142 channels in 2016 to 163 channels in 2017.*

7%

1%

47%

36%

52%

57%

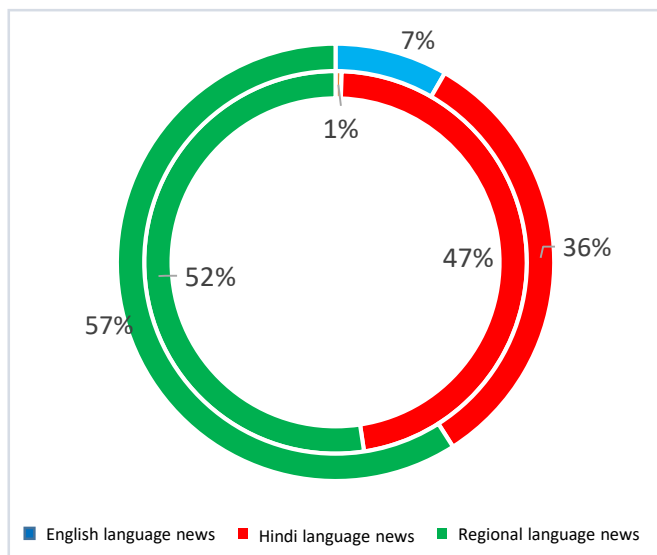■ English language news   ■ Hindi language news   ■ Regional language news

Inner circle: % share of Impressions; Outer circle: % share of number of news channels

As news is dynamic, people would like to know of the events and incidents happening around them, as it may have a direct impact on their life. This may be why, within the News genre, we see that the largest share of viewership takes place on the Regional language channels.

There are 93 regional news channels spread across multiple regional languages. This number has witnessed an 8% increase as compared to the same period in 2016.*

The large consumption of Hindi language news can be attributed to the large number of Hindi speaking markets in the country, with 58 news channels catering to them presently, versus 47 channels in 2016.*

English news is very niche in India, and therefore accounts for only 1% share of News viewership at an All India level. However, English news has witnessed the maximum growth in the number of channels compared to 2016.* It has grown by 33% with 12 active channels currently.

* % Growth as compared to Wk08-Wk48 2016

Viewership by State Markets

Zone	State Market	VIEWERSHIP SHARE		
		Total TV	News	Difference
North	Pun / Har / Cha / HP / J&K	6%	7%	1%
North	UP/Uttarakhand	8%	11%	3%
North	Rajasthan	3%	3%	0%
North	Delhi	3%	5%	2%
North	Zone Total		26%	
East	Assam / North East / Sikkim	2%	4%	1%
East	Odisha	3%	3%	0%
East	West Bengal	6%	5%	-1%
East	Bihar/Jharkhand	3%	3%	0%
East	Zone Total		15%	
West	Guj / D&D / DNH	6%	5%	-1%
West	Mah / Goa	14%	12%	-2%
West	MP/Chhattisgarh	7%	6%	-1%
West	Zone Total		23%	
South	Karnataka	9%	8%	-1%
South	AP / Telangana	14%	14%	0%
South	Kerala	4%	5%	1%
South	TN/Pondicherry	12%	9%	-3%
South	Zone Total		36%	

% share of Impressions

Looking at the viewership share by State Markets, we see varied preferences for News consumption, as compared to Total TV viewership.

Among states, UP/ Uttarakhand and Delhi markets show the highest relative preference for News genre. Pun/ Har/ Cha/ HP/ J&K, Assam/ NE/ Sikkim, and Kerala markets too show a marginally higher preference towards viewing News genre.

Across zones, the highest share of News viewership comes from South India, followed by the North, while the East contributes the least to News genre viewership.

Maharashtra/ Goa accounts for almost 50% of the News viewership in the West zone, however, it contributes a relatively less share of eyeballs to News content as compared to Total TV.

AUDIENCE PROFILE

Let us also glance at the demographic profile of news viewers viz. Gender, Age and NCCS. This has been benchmarked against the total TV viewership profile, to better understand and identify the key audience for this genre.

TOTAL TV

Legend: ■ Male ■ Female ■ 2-14 yrs ■ 15-21 yrs
■ 22-30 yrs ■ 31-40 yrs ■ 41-50 yrs ■ 51-60 yrs
■ 61+ yrs ■ NCCS A ■ NCCS B ■ NCCS CDE

GENDER	AGE	NCCS
50% (Female)	7% / 9% / 15% / 17% / 16% / 17% / 20%	54%
50% (Male)		27%
		19%

NEWS GENRE

Legend: ■ Male ■ Female ■ 2-14 yrs ■ 15-21 yrs
■ 22-30 yrs ■ 31-40 yrs ■ 41-50 yrs ■ 51-60 yrs
■ 61+ yrs ■ NCCS A ■ NCCS B ■ NCCS CDE

GENDER	AGE	NCCS
46% (Female)	9% / 12% / 18% / 17% / 16% / 15% / 14%	47%
54% (Male)		28%
		25%
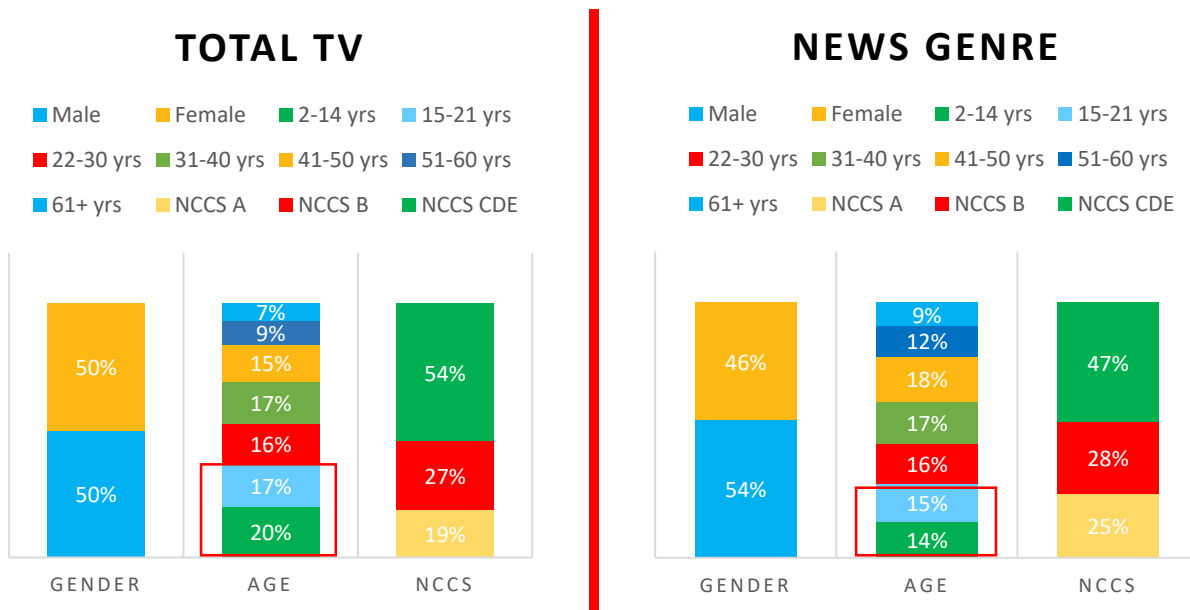
Gender: The gender ratio clearly indicates that the news genre is skewed towards male audiences, as opposed to total TV where the split is seen to be equal.

Age: Looking at the viewer profile by age cuts, we see the viewership to be quite fragmented between all age groups.

Surprisingly, the share of viewership for news is higher for Kids (2-14 yr olds) than that of the Mature (51-60 yrs) and Senior (61+ yrs) audiences. This can likely be attributed to two factors. Firstly, it may be due to co-viewing, as a large percentage of TV owning homes are single TV households. Secondly, it may also reflect the composition of the overall Universe. Since Kids is one of the largest age groups in the TV viewing population, they have high absolute numbers.

However, when compared with Total TV viewership, we find that the share of news viewership is relatively lower for the 2-14 yrs and 15-21 yrs segment, while for all other age groups the share is equal or marginally higher, further supporting the previous observation.

NCCS: Likewise, looking at the NCCS distribution for news viewership, we see that NCCS A and B exhibit a marginally higher preference for News channels as compared to total TV, while the preference among NCCS CDE is relatively lower.

Thus, at an All India level, News Genre audience is skewed towards Males, age group of 22+ years and for NCCS A & B as compared to Total TV viewership.

However, we cannot ignore the fact that a large share of the news viewership comes from NCCS CDE, by virtue of being the largest NCCS group in the Universe.

Thus, all further analysis in this newsletter will be done on the Target Group **Males 22+ years**

WEEK ON WEEK VIEWERSHIP TREND IN CONTEXT OF EVENTS

Week On Week Viewership of News Genre
M 22+ All India
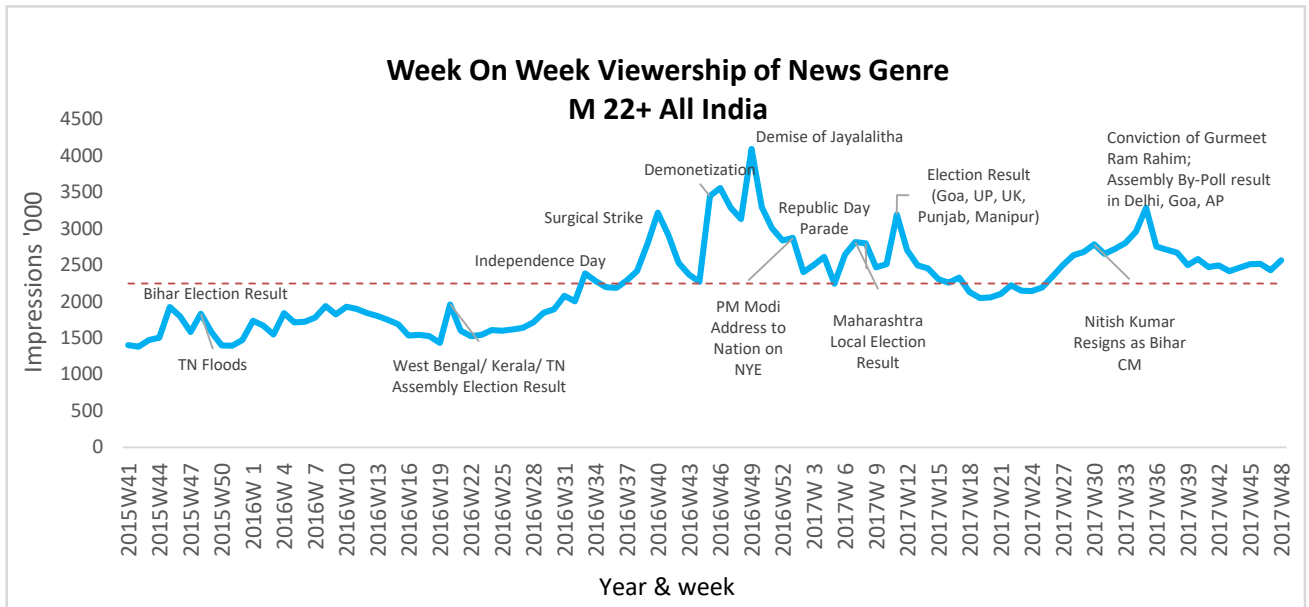
As news is a highly event driven genre, let us look at how the week on week viewership shapes up the genre, and what kind of events lead to a surge in viewership of news. For this analysis, we will consider a larger period i.e. October 2015 onwards.

Looking at the week on week trend over 2 years, we can say that news is in fact a highly dynamic genre, and viewers move in and out depending on the stories and events being covered.

Some events lead to a higher spike in viewership as compared to others. For example, the demise of Jayalalitha led to the highest spike in News viewership, across India, over the last 2 years.

National affairs of critical nature also lead to significant rise in viewership. For example, Demonetization, which impacted every single individual in the country. Politically significant events such as Elections also lead to a noticeable increase in viewership, as can be seen across the timeline.

Let us deep dive further, and understand how various events shape up news viewership. While each event will differ in impact based on the intensity and nature of the event, we can broadly classify these events as:

1) **Scheduled Events** – events that can be foreseen/ predicted by the audiences. example- Republic Day Parade, State Elections etc.

2) **Unscheduled Events** – events & occurrences that cannot be foreseen and are reported as they occur. For example- Natural disasters, sudden demise of a politician/ celebrity etc.

VIEWERSHIP ANALYSIS OF A SCHEDULED EVENT – STATE ELECTIONS

The state elections in India hold special importance in the national politics affecting all major political parties. Broadcasters aim to cover it as it is a scheduled event and has lot of eagerness among viewers. We will analyze this event in depth as we have previously seen that state elections have consistently led to viewership spikes.

We will look at some of the following aspects:

- The impact of state elections on the viewership of respective states and how the all-day viewership trends shape up.

- How does viewership differ by channel language across respective state markets.

- How does viewership differ by story format across markets.

- Break & Program contribution before and after elections.

For this analysis, we will consider state elections from 2016 and 2017, which may provide some useful learnings/ insights to broadcasters and advertisers for any forthcoming elections.

The schedule and list of elections considered is as follows:

State	Election Dates (Phase wise)	Result Date
West Bengal	4th April, 11th April, 17th April, 21st April, 25th April, 30th April, 5th May – 2016	19th May, 2016
Kerala	16th May, 2016	19th May, 2016
Tamil Nadu	16th May, 2016	19th May, 2016
Uttar Pradesh	11th Feb, 15th Feb, 19th Feb, 23rd Feb, 27th Feb, 4th March, 8th March – 2017	11th March, 2017

Note: for the entire election analysis, for each State election the respective State market as reported by BMW has been considered i.e. West Bengal, Kerala, TN/Pondi and UP/ Uttarakhand.

1) All Day Trends (by Time Band)
Pre-election weeks vs. Election Day vs. Result Day

West Bengal

Kerala

Tamil Nadu/ Pondicherry

Uttar Pradesh/ Uttarakhand
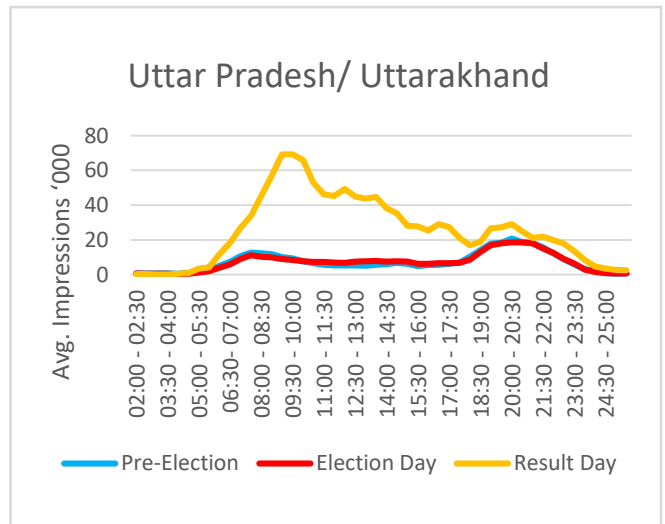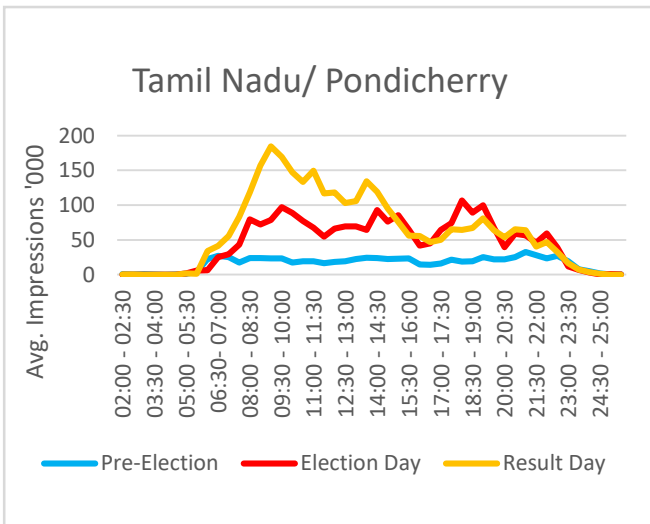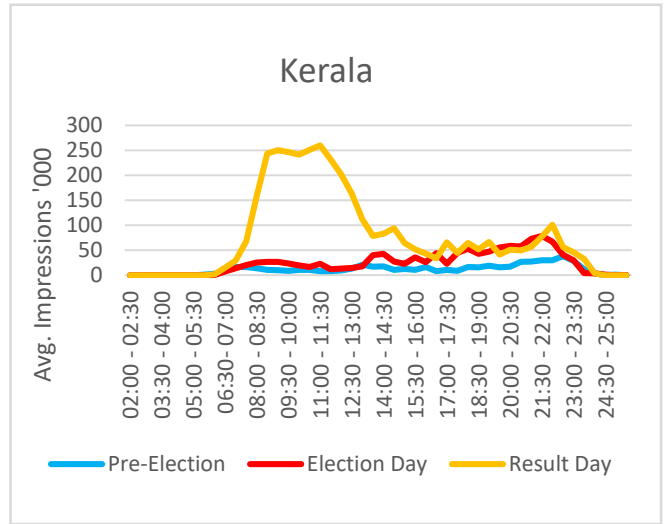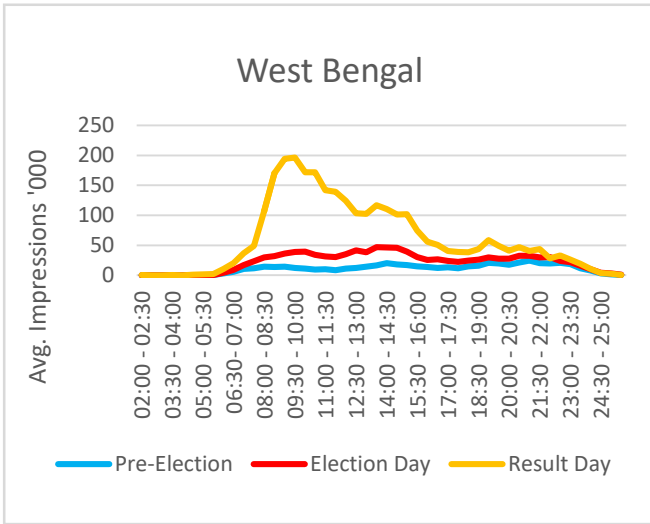
Note: News channels considered for each market: For UP/Uttarakhand - English + Hindi. For WB - English + Hindi + Bangla. For TN/ Pondi - English + Tamil. For Kerala – English + Malayalam.

Looking at the all-day viewership trend, it is evident that the election result day receives significantly high viewership throughout the day, across all markets, as compared to the election days or weeks preceding it.

The growth is highest for Kerala on the result day, as compared to the pre-election days, and the least in UP/UK.

Interestingly, the importance of election day & result day varies across markets.

The difference in viewership for pre-election weeks and election day is the maximum for TN/ Pondicherry, indicating the importance and impact of the poll-day for this market, while the other markets are predominantly result-oriented.

Conversely, the viewership trendline for pre-election weeks and election day is similar for UP/UK with very minor deviations indicating the election day does not hold much importance in the market.

It is interesting to note that while all other markets see their viewership peak during Prime Time, West Bengal has maximum viewership in the morning on Election days.

In addition to West Bengal, Kerala also registers high viewership in the morning hours, on result day, starting from 7:00 am till 10:30 am. However, after this Kerala viewership falls steeply, while West Bengal viewership declines gradually in comparison.

Viewership in Tamil Nadu/Pondicherry has a more fluctuating trend through the day. It peaks in the morning, and then again in the afternoon between 2:00-2:30 pm

2) Result Day Viewership on News Channels by Language

Since election result days leads to the maximum growth in viewership across respective markets, let us see how this viewership varies by channel language.

	West Bengal	Kerala	TN/Pondicherry	UP/Uttarakhand
English News	0.3	0.0	0.3	0.1
Hindi News	0.7	0.0	0.0	25.0
Regional News	60.0	78.0	63.0	

Avg. Impressions ('000)

Note: for each state market, respective language news channels have been considered as Regional news i.e. Bangla news channels for WB, Malayalam News channels for Kerala, Tamil News Channels for TN/Pondi and Hindi news channels for UP/ Uttarakhand

The above table depicts the viewership for Result Day across markets where elections were held.

As expected, the viewership on Regional channels is significantly higher for each of the state markets.

The two south markets (Kerala and TN) did not register any viewership on Hindi language news channels. The viewership on National news channels (in English) also remains negligible, as the event is very local and state specific in nature.

3) Viewership by Programme Genre

PROGRAMME GENRE	West Bengal	Kerala	TN/Pondi	UP/Uttarakhand
NEWS BULLETIN	50%	52%	50%	85%
INTERVIEWS/PORTRAITS/DISCUSSION	45%	28%	50%	7%
REVIEWS/REPORTS	0%	19%	0%	6%
TALK SHOWS/CHAT SHOW	4%	0%	0%	2%
OTHERS	1%	0%	1%	1%

% share of Norm. Impressions

Note: for each state market, only respective regional news channels have been considered for analysis i.e. Bangla news channels for WB, Malayalam News channels for Kerala, Tamil News Channels for TN/Pondi and Hindi news channels for UP/ Uttarakhand

Looking at the programme genre preferences for various markets during on election result day, a clear trend emerges.

News bulletins are the most popular format of news consumption across markets followed by Interviews and discussions.

The share of news viewing via Bulletins and Interview formats is comparable for West Bengal and TN/ Pondi. While audience in West Bengal also have some preference for Talk shows/ Chat shows, in TN/Pondi the viewership is split only between Bulletins and Interview formats.

Reviews/ Reports are a popular format of viewership in only one market – Kerala, with a 19% share.

Interestingly, UP/Uttarakhand market shows a major preference for only one story format i.e. News Bulletins. All other formats account for very little viewership in this market.

4) Break & Program Contribution

We will also look at the break and news programming contribution of the respective regional news channels, to understand whether and how it differs on an average viewing day before elections versus on the election result day.
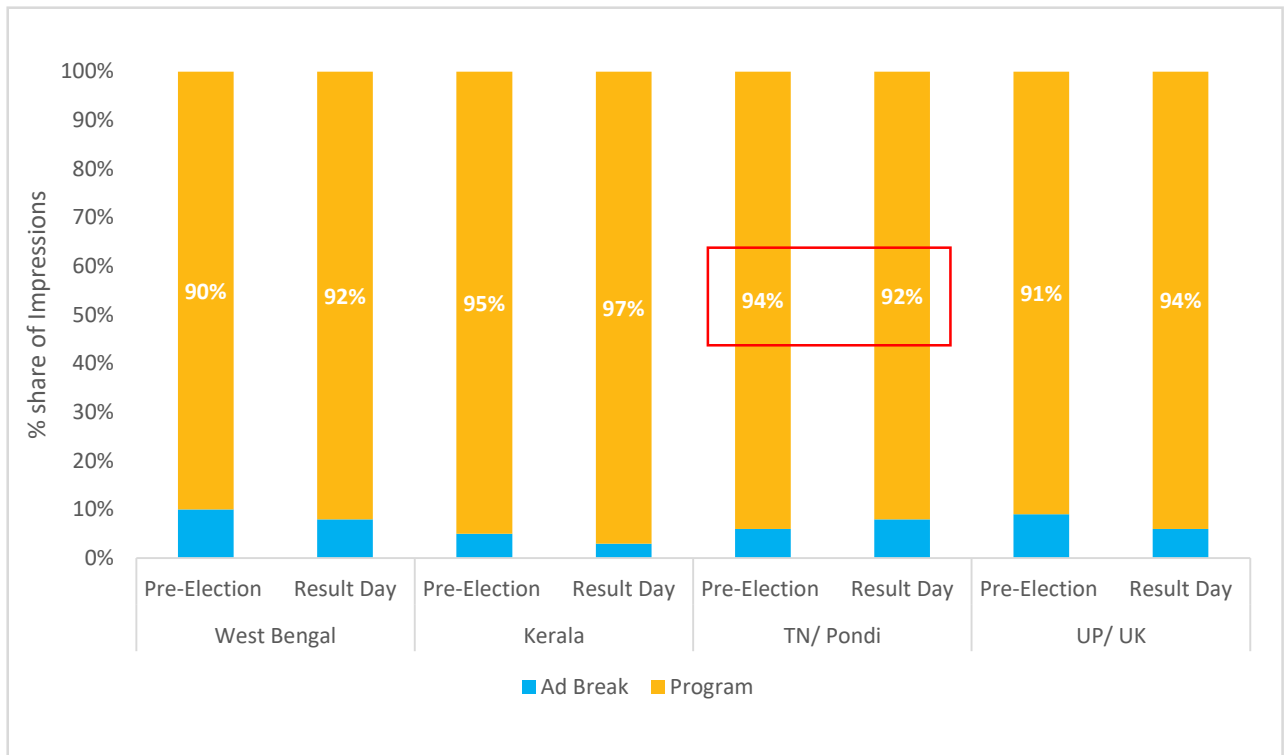
The graph presented above tells us that on an election result day, the break duration on the channels on an average goes down, and the programming increases. The channels would perhaps be covering the results from multiple perspectives and angles to keep the viewers hooked, and taking lesser breaks.

While this is true for the West Bengal, Kerala and UP/UK markets, TN/ Pondicherry surprisingly exhibits the reverse pattern. Here we see an increase in the break duration on the day of the election results coverage. Perhaps the broadcasters may be capitalizing on the huge viewership of the election result coverage, as seen in the previous analysis, and increasing ad inventory for potential advertisers.

VIEWERSHIP ANALYSIS OF UNSCHEDULED EVENTS

Unscheduled events cannot be predicted and hence are very immediate and sudden in nature. They may occur at any time and are covered by news channels as the story breaks.

In this section, we will try and analyze the impact of a major unscheduled event on television viewership. While both Demonetization and Demise of Jayalalitha were events with significant impact on news viewership, we will analyze Demonetization in depth as it had an impact on everyone in the country, while the demise of Jayalalitha is of more significance at a regional level.

Demonetization

On the night of 8th November 2016, the Prime Minister of India appeared before the nation in an unscheduled live TV address, and announced the demonetization of all Rs.500 and Rs.1000 bank notes with immediate effect. The sudden and economic nature of the announcement had far-reaching repercussions on & became a widely discussed & viewed event due to this.

1) All Day Trends (by Time band)
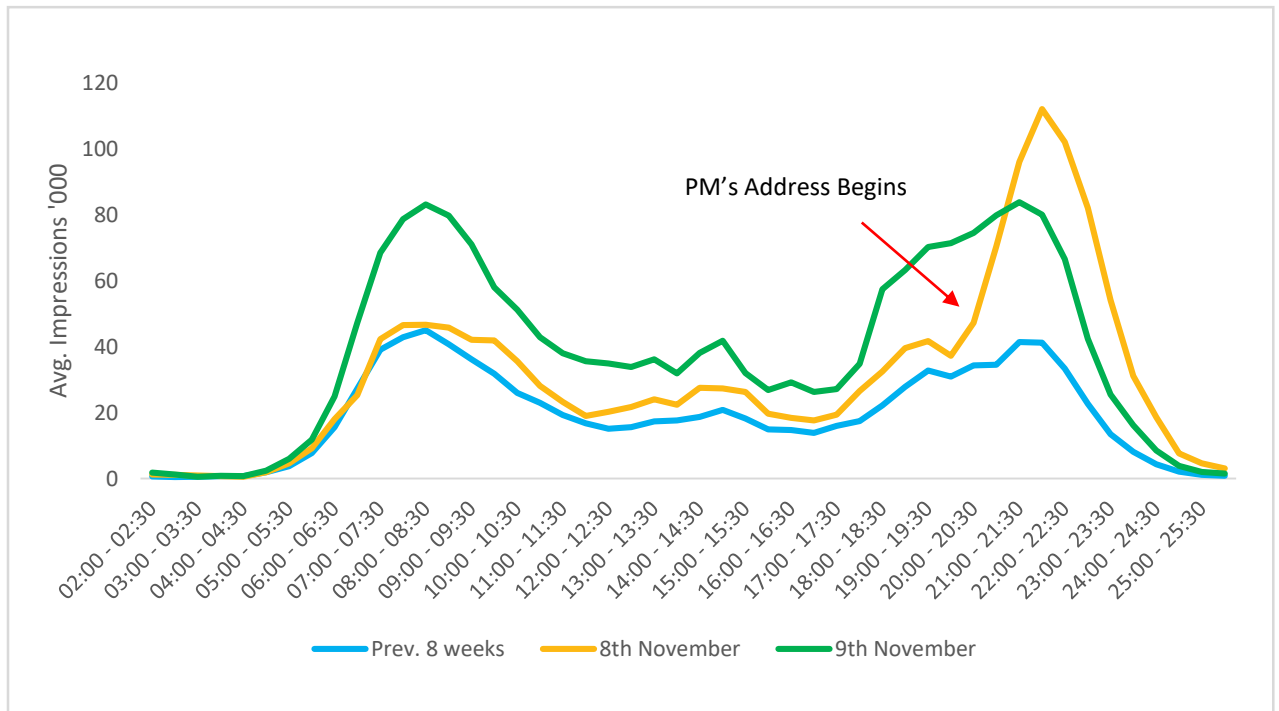
On 8th November, 2016, the day viewership does not deviate significantly from the previous weeks average, until 8:00 pm. The viewership starts rising sharply post 8:00 pm, as this is when the PM appeared on TV to announce demonetization.

In the aftermath of the announcement, on 9th November, 2016 we see that the viewership of News genre remains substantially higher through the day than the previous weeks average, as people would tune in for updates and implications of the situation.

Interestingly though, the overall viewership trend across various dayparts is in line with the regular viewership pattern i.e. while more people viewed News on 9th November, the viewing trends remained constant.

Since the event took place on a weekday, this could likely be due to the lifestyle of our core TG, M 22+, who have a fixed daily schedule and catch news updates before going to work in the morning, and then again in the night once they are home. This is substantiated by the viewership peaks once in the morning between 8:00-8:30 am and in the night between 9:00-9:30 pm. A slight increase in viewership is also observed in the afternoon between 2:30 – 3:00pm.

2) Genre Trends

Let us also see how the genre composition on television changes on the day when a big story like demonetization was covered extensively on news channels versus the previous weeks.

GENRE	Prev 8. Weeks	9th Nov, 2016	Difference
GEC	54%	49%	-5%
MOVIES	22%	18%	-4%
NEWS	11%	21%	10%
MUSIC	4%	3%	-1%
KIDS	4%	4%	0%
SPORTS	2%	3%	0%
INFOTAINMENT	1%	1%	0%
BUSINESS NEWS	0%	0%	0%
OTHERS	1%	1%	0%

% share of Impressions

Others includes Youth, Devotional, Lifestyle and Tele-Shopping

As expected, the news genre witnesses a substantial increase in viewership over previous weeks, and we see it jump ranks from the third to the second most watched genre on 9th November.

While GEC continues to remain the most watched genre, we also see a relative movement of viewers from General Entertainment and Movie channels to News channels, to catch updates on the story.

Interestingly, most of the traditionally Male genres (i.e. Sports, Infotainment, Business News) did not see any movement in viewership. It may be likely that the increased viewership on News genre, along with the concurrent drop from Movies and GECs, may be indicative of the core News TG taking over control of the remote on that day.

3) Viewership by Programme Genre

PROGRAMME GENRE	VIEWERSHIP SHARE	
	PREV. WEEKS	9TH NOVEMBER
NEWS BULLETIN	75%	78%
INTERVIEWS/PORTRAITS/DISCUSSION	8%	10%
REVIEWS/REPORTS	8%	6%
RELIGIOUS/DEVOTIONAL/ASTROLOY	4%	2%
TALK SHOWS/CHAT SHOW	1%	1%
OTHERS	4%	2%

% share of Norm. Impressions

Looking at the consumption of news across various formats on 9th November, 2016, we see that News Bulletins are the most popular format with 78% viewership share, followed by Interviews and Discussions.

When compared with the viewership of programme genres of previous weeks, we see a relative increase in consumption of news bulletin and interviews/ discussions, while all other story formats have seen a relative drop in share.

As the story may have unfolded throughout the day and various aspects of demonetization were being covered, viewers may be tuning in and taking a quick bulletin update rather than consuming lengthy formats such as discussions/ reviews/ talk shows etc.

If we compare this with the programme genre viewership for scheduled event (election result day) where we saw higher preference for lengthy formats viz. interviews/ discussions and reviews/ reports across most markets, it could be said that in case of unscheduled events viewers prefer quick takeaways while in case of scheduled events, viewers may also be interested in more detailed formats.

4) Impact on Advertising

Since Demonetization had a significant economic impact and led to cash crunch in the country, let us also see how this impacted advertising on television.

To understand this impact we will consider a 15 day period before and after demonetization:
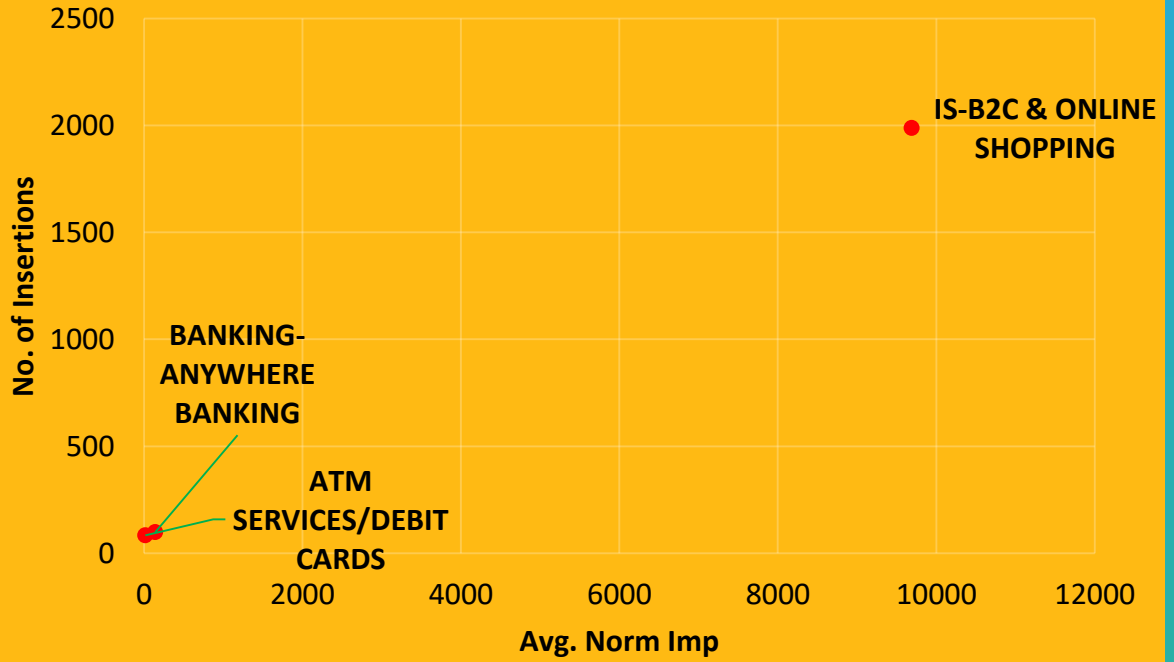**Pre Demonetization: 23rd Oct 2016 – 8th Nov 2016**
Post Demonetization: 9th Nov 2016 – 25th Nov 2016

An analysis of the Total advertising FCT pre and post demonetization shows that ad FCT went down by a staggering 10% for Total TV and by 13% on the News genre.
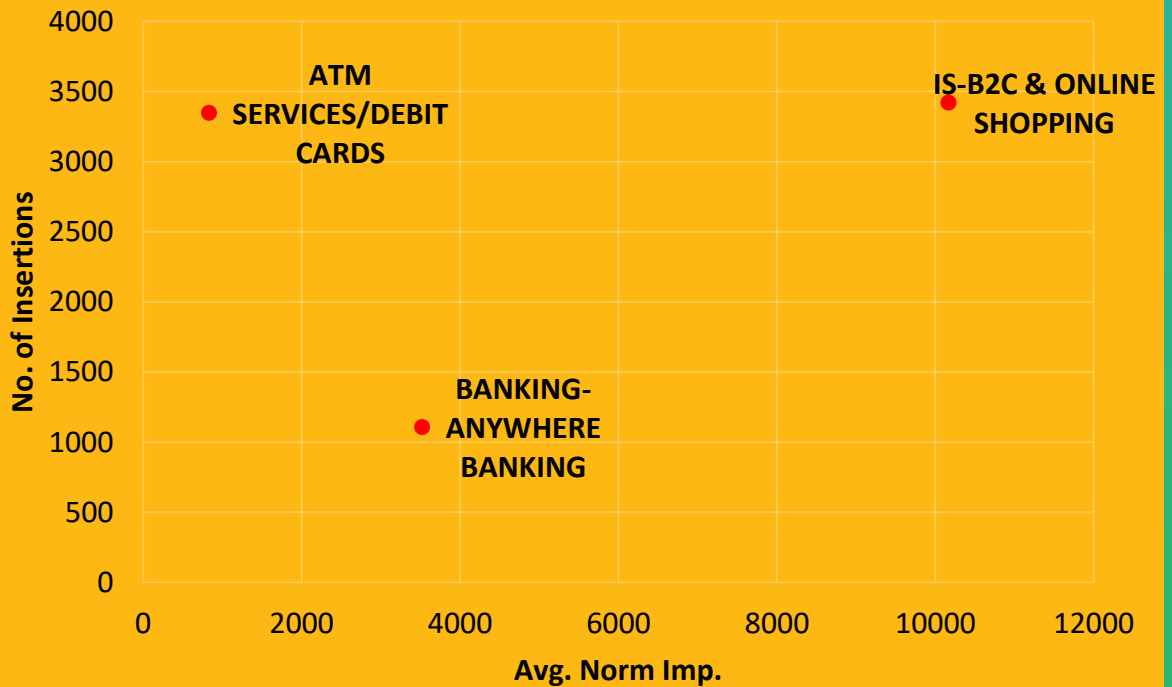
Keeping in mind the economic nature of the event, it will be interesting to look at the how the advertising changed for Banking/ Finance and Online shopping related categories, on the News genre.

PRE DEMONETIZATION

No. of Insertions (y-axis): 0, 500, 1000, 1500, 2000, 2500
Avg. Norm Imp (x-axis): 0, 2000, 4000, 6000, 8000, 10000, 12000

IS-B2C & ONLINE SHOPPING

BANKING-ANYWHERE BANKING

ATM SERVICES/DEBIT CARDS

POST DEMONETIZATION

No. of Insertions (y-axis): 0, 500, 1000, 1500, 2000, 2500, 3000, 3500, 4000
Avg. Norm Imp. (x-axis): 0, 2000, 4000, 6000, 8000, 10000, 12000

ATM SERVICES/DEBIT CARDS

IS-B2C & ONLINE SHOPPING

BANKING-ANYWHERE BANKING

An Insertions v/s Impressions analysis of ATM service, Anywhere Banking services and Online shopping services shows us how a news event can also change and shape up television advertising.

While most categories put their advertising on hold, we see a drastic increase in the no. of ad insertions for both ATM and Anywhere Banking players, to promote their services. Their impressions have also witnessed an increase post demonetization versus in the pre-demonetization period. News channels would be an ideal platform for this as this is where viewers get live and new updates on the story.

Interestingly, we also see an increase in both the insertions and impressions for Online Shopping categories. While this may seem surprising, it may likely be an effort by Online retail players to leverage the economic situation of cashlessness and encourage viewers to shop online.

SUMMARY

News is the **3rd largest genre on television** in terms of viewership, with 160+ channels across English, Hindi and Regional languages.

The News genre has witnessed an **overall growth of 15% in the number of channels** from previous year. English News channels have witnessed the maximum increase compared to Hindi and Regional News channels.

As compared to Total TV viewership, News Genre audience is **skewed towards Males, age group of 22+ years and NCCS A & B.**

News is a dynamic and event driven genre. Politically significant, scheduled events, such as **State election results have consistently led to spikes in news viewership**.

Some unforeseen events also lead to massive spikes in news viewership, due to high intensity and impact. For example- Demonetization, demise of Jayalalitha, Surgical Strike Operation.

The immediate effect of a big news story can be gauged by the corresponding rise in viewership. But, **while more number of people tune in, the viewing trend by daypart remains similar to the general trend.** i.e. Viewership peaks once in the morning and once in the night. A slight increase is also observed in the afternoon.

It appears **that in the case of unscheduled events, viewers prefer quick takeaways and therefore consume short formats such as news bulletins, but in case of scheduled news events, viewers may also be interested in more detailed formats** viz. Interviews/ studio discussions etc.

The breaking of a big news story impacts the genre composition on Television, as viewers start moving to news channels for updates. **In case of demonetization, News genre gained 10% share of eyeballs and became the second most viewed genre** on the day following the announcement.

News events also have varied impact on advertising.

In some markets, **the programming share on news channels increased on election result day, to keep viewers hooked. However, in one market, an increase in break duration was also observed.** This may be a strategy of increasing ad inventory for advertisers to reach the high number of audiences that tune in.

In case of an economic event such as demonetization, **Total ad FCT on news channels went down by 13%.** However, some categories such as ATM, Anywhere Banking Services, and Online Shopping benefitted from the situation and increased their ad insertions to promote their services.

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