THINK

BROADCAST AUDIENCE RESEARCH COUNCIL INDIA

IPL
Over the Years

NEWSLETTER 2018 | ISSUE 4

Introduction

Indian Premier League is one of the biggest sporting properties in India. It is a format of worship in a country where Cricket is considered a religion. In this newsletter, we will examine three years of BARC India data on the Indian Premier League, and address the following questions:

- **How has IPL viewership on TV evolved year on year?**
- **Are there any changes in audience profile over the last 3 years?**
- **How does IPL impact viewership of other genres on TV?**
- **What is the level of viewership loyalty for home team versus other teams?**
- **What does it mean for marketers?**
- **How is the viewership for IPL split between English vs Regional languages?**
- **How much incremental viewership is contributed by OOH over TV home viewership?**
- **What is the performance of various advertising categories for IPL on TV?**

The following Channels & Period have been Considered for the analyses in this newsletter:

IPL 2016: 09 Apr-29 May; Sony ESPN(v), Sony ESPN HD(v), Sony Max, Sony Six, Sony Six HD

IPL 2017: 05 Apr-21 May; Sony ESPN(v), Sony ESPN HD(v), Sony Max, Sony Six, Sony Six HD

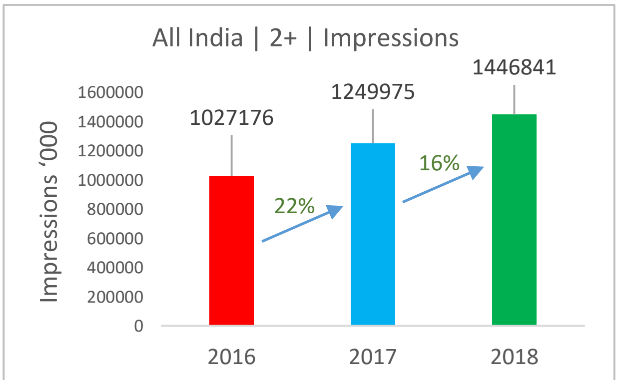
IPL 2018: 07 Apr-27 May; Asianet Movies, Star Suvarna Plus, Jalsha Movies, Star Gold HD, Star Maa Movies, Star Plus SD+HD, Star Gold, Star Pravah, Star Sports 1, Star Sports 1 HD, Star Sports 1 Hindi, Star Sports 1 HD Hindi, Star Sports 1 Tamil, Star Sports Select 1 SD + HD, DD Sport, Star Sports 2 SD + HD

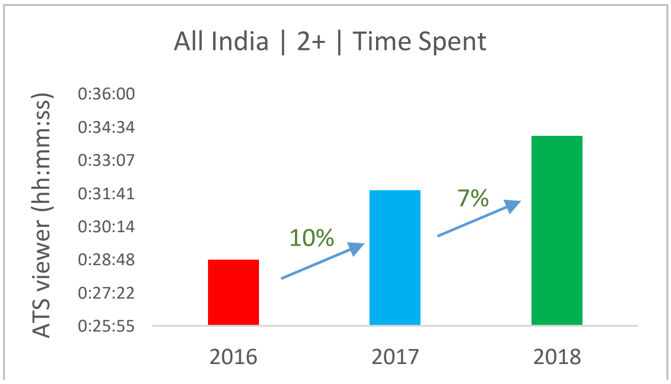
Note:
Only live telecast of IPL matches have been considered
TG: All India 2+
Viewership is basis Avg Impressions
All Ad Impressions data is normalized to 10 sec.

Overview

TV Impressions for IPL 2018 witnessed a growth of 41% over 2016 season, and grew at 16% in the 2018 edition over previous season.

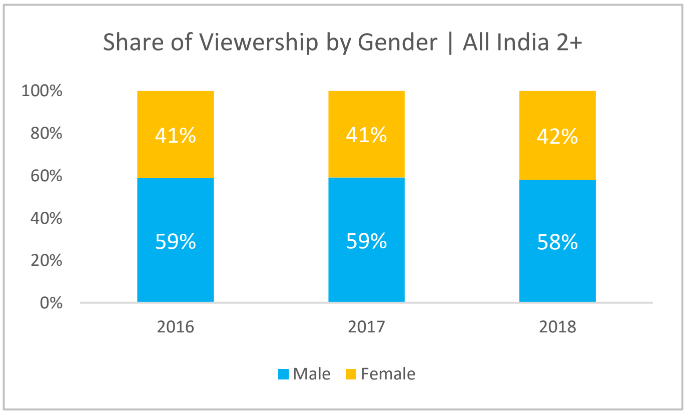
Beyond Impressions, Average Time Spent watching IPL matches too exhibits an upward trend. From an average of 28 minutes in 2016, it increased to 34 minutes in 2018.

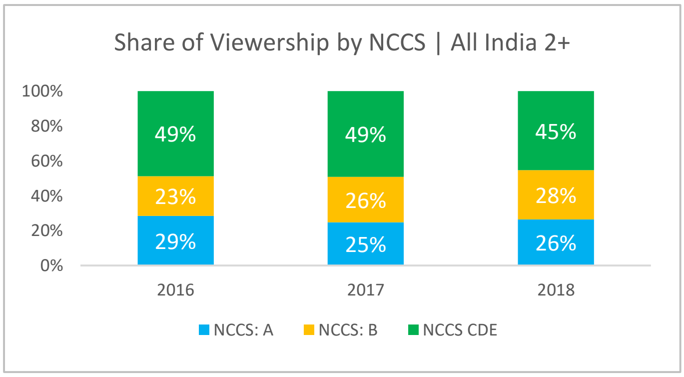


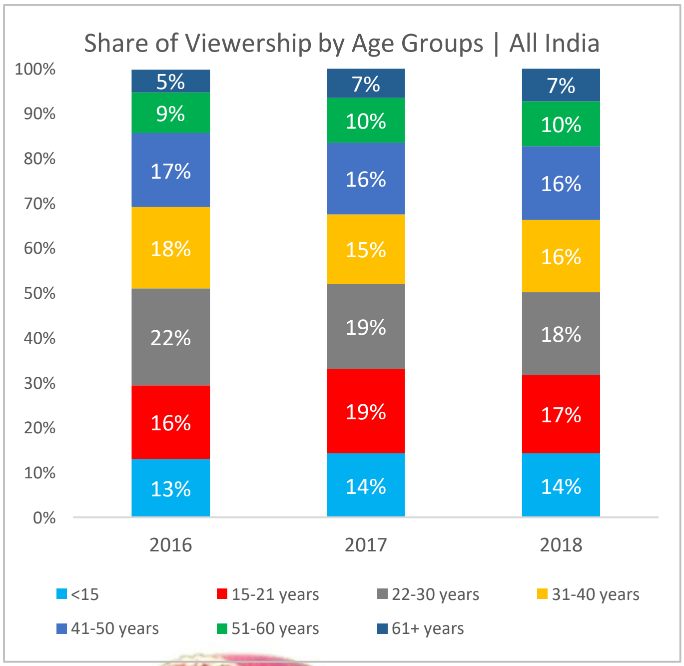


Clearly, IPL viewership continues to enjoy growth year on year, pointing to the fact that it remains a dynamic and much sought-after property on TV.

Next we have looked at how the IPL audience has evolved over the 3 years that BARC India has reported the event, (viz., demographic profile of IPL viewers)



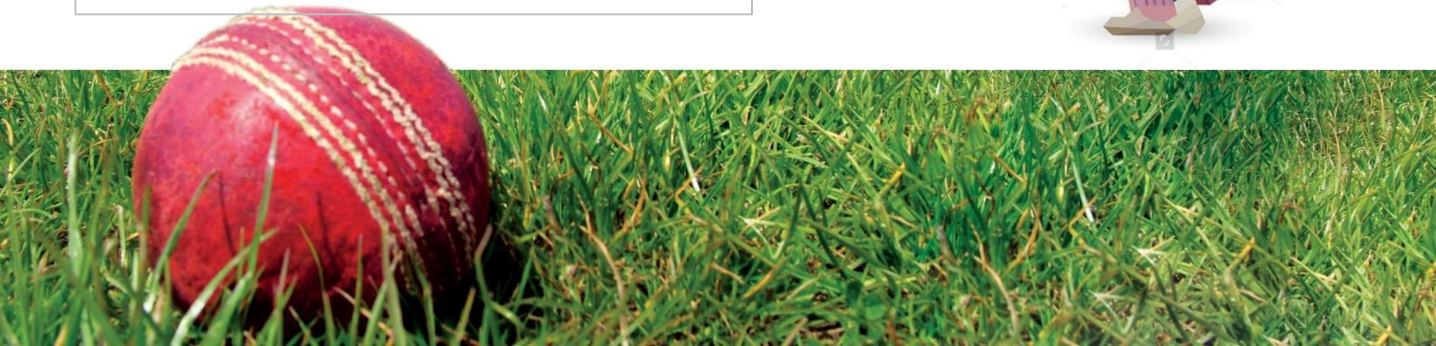




The male-female contribution to IPL has remained largely consistent, with a marginal increase in viewership share of female viewers in the 2018 edition.

It is also interesting to note that viewership share of NCCS CDE has dropped over the last 3 years, while viewership share of NCCS B has shown a growth.

Over the last 3 years, viewership of each age group has registered significant growth: Kids (<15 yrs) have registered 52% growth, that of 15-21 yrs has grown 50%, while 22-30 yrs have shown 20% growth. Within age groups however, we observe changing patterns of relative contribution to the growing IPL viewership.

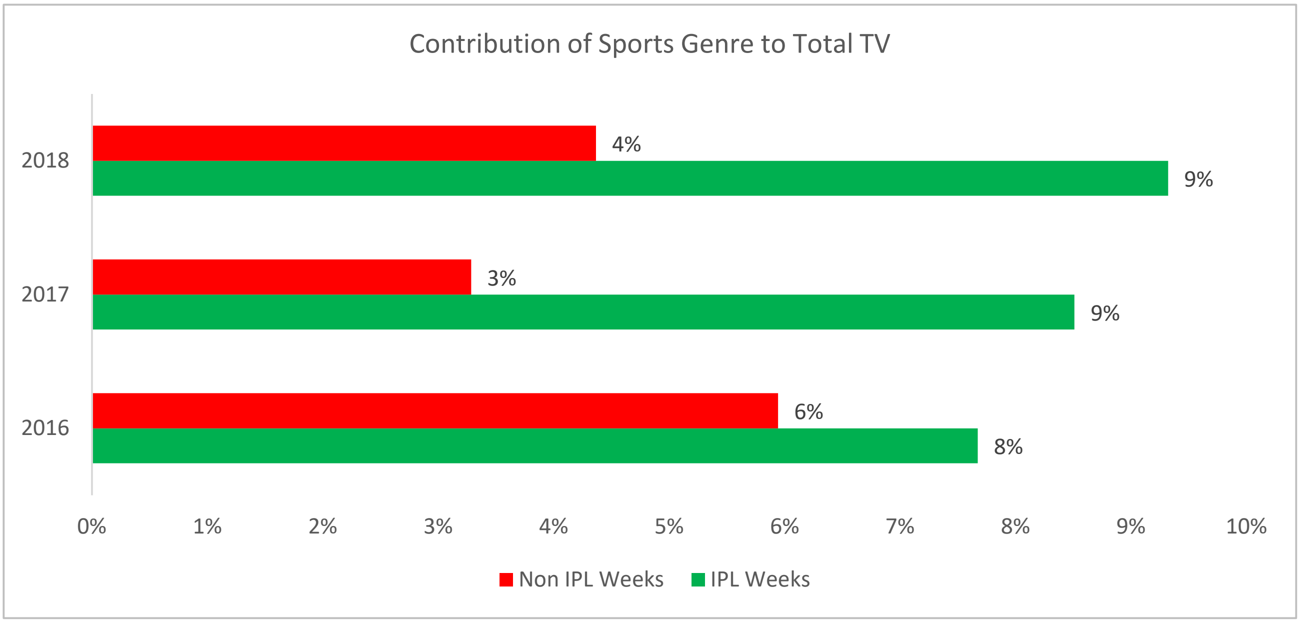


Impact of IPL on Television

To understand the impact of IPL on TV viewership at large, we mapped the impact the property has on viewership of Sports genre. IPL continues to enjoy a huge share of overall sports viewership in India. While the 2016 edition of contributed to 22% of total sports viewership, that figure has almost doubled to 43% in 2018*

Another way of examining impact of IPL is to look at how Sports Viewership relates to Total TV Viewership during IPL, and otherwise.

The following graph brings out the impact of IPL on sports viewership very clearly: share of Sports viewership jumped 2 percentage points in 2016 when IPL was on, and that scale up has only risen further over the years.



*Apart from IPL, these figures are also influenced by factors such as tournament dates, telecast of other major sporting events during the same period etc.

IPL telecast has also shown significant impact on viewing habits for other genres. We mapped viewership of various genres during IPL and non-IPL weeks, to better understand impact of the property on viewing habits. The following table – which shows change in contribution of some key genres during IPL weeks – brings out the “impact” very clearly:

	2016	2017	2018
GEC	-1%	-3%	-3%
MOVIES	+2%	+3%	-1%
NEWS	0%	-2%	0%
SPORTS	-2%	0%	+4%
OTHERS	+1%	+2%	+1%

The share of GEC genre declines marginally in all 3 years, as viewers tune in to IPL matches during prime-time when General Entertainment content otherwise rules the roost.

Across 2016 and 2017, growth in viewership of Movies genre is attributable to telecast of matches on SET Max. However, in 2018, with the IPL telecast moving primarily to Sports channels, we see a clear drop in viewership of Movies genre, and a marked increase in that of Sports genre.

IPL and Growth of HD Viewership

	Share of HD Viewership
2016	1%
2017	1%
2018	3%

IPL telecast over the last three years has also exhibited a growing contribution of HD viewership. In our earlier newsletter titled "Understanding the HD Viewership Landscape" we had shown how Sports genre performs relatively better on HD than SD – both in terms of share of Impressions as well as engagement. Also, HD has emerged as the preferred mode of viewing for Cricket.

This is reflected in our analysis of IPL viewership data as well.

Certainly, this is also driven by availability of IPL on more HD channels, higher uptake of HD subscriptions, as well as rising penetration of HD TV sets. One corollary indicator is rise in viewership share of NCCS A audience in 2018: possibly, growth of HD viewership is being driven by affluent audiences seeking a better viewing experience.

Team Loyalty and Viewership Contribution by Cities/Markets

In this section, we have looked at the interplay of viewership from specific cities/markets, for their “home IPL team” matches as against that for other teams**

Analysis of viewership contribution of specific cities/markets for home vs away teams throws up some interesting insights into impact of a team’s performance and of marquee players, as well as ‘connect’ between teams and their home cities/states.

At an all India level, games featuring Chennai Super Kings (CSK) and Mumbai Indians (MI) generated the highest viewership, while Rajasthan Royals (RR) garners the lowest.

**The analysis is basis IPL 2018 data

Team	Market	Other Teams	Home Team	Growth / De-growth for Home team (%)
	India	2295	2480	8%
	Mah / Goa	418	538	29%
	Mumbai	116	167	43%
	India	2397	2136	-11%
	Delhi	91	94	4%
	India	2376	2210	-7%
	Pun / Har / Cha / HP / J&K	117	128	10%
	India	2314	2418	5%
	Karnataka	181	284	57%
	Bangalore	41	66	63%
	India	2341	2327	-1%
	West Bengal	184	272	48%
	Kolkata	58	92	58%
	India	2320	2382	3%
	AP / Telangana	238	321	35%
	Hyderabad	37	55	49%
	India	2210	2672	21%
	TN/Pondicherry	149	308	106%
	Chennai	32	70	119%
	India	2443	2021	-17%
	Rajasthan	67	66	-2%

Chennai Super Kings emerge as a clear leader if we look at growth in viewership of "home-city/state" for matches featuring CSK versus those featuring other teams – clearly highlighting the strong connect between Dhoni's team and Chennai/TN-Pondicherry: viewership from Chennai market grew 119% when CSK played. One strong factor for this is also the return of the team to IPL after a two-year hiatus.

CSK is one of the out-performing teams in IPL and has been consistently led by one of the most popular Indian cricket stars – MS Dhoni. Both factors add to the popularity of CSK games.

The story is quite the reverse for teams like Rajasthan Royals and Delhi Daredevils – from the perspective of TV viewership of home cities/states. These two teams appear to be struggling to attract viewership of their natural fan base. This can partly be due to relatively weaker performance of the teams and their star players.

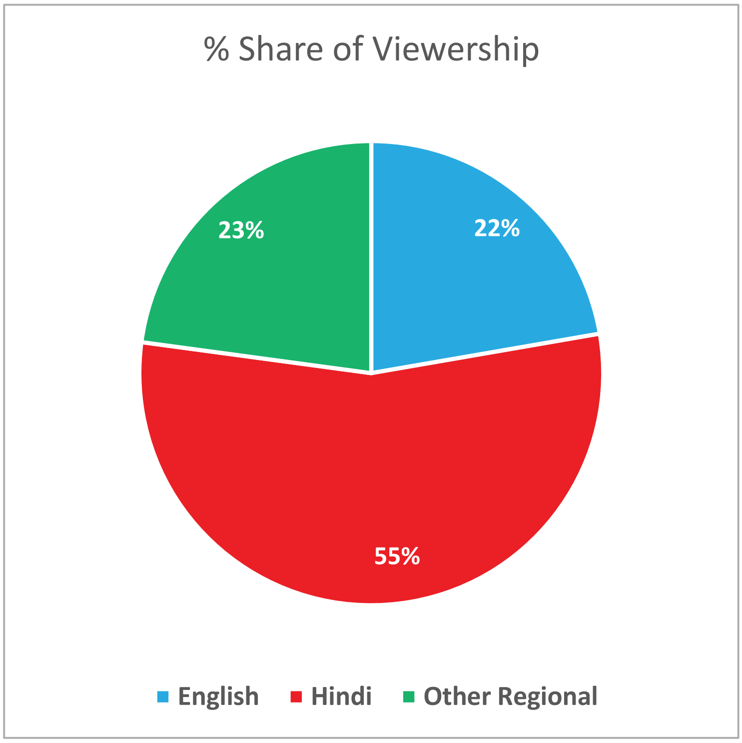
The Language Factor

IPL 2018 saw an uptake in viewership from Regional channels. Analysis of viewership share across multiple languages shows that while Hindi continues to dominate, there is a substantial viewership of telecast in Regional languages as well.

IPL 2018 generated almost equal viewership for English as well as Regional language (i.e., other than Hindi)

As TV penetrates further into semi-urban and rural areas, and TV ownership grows at a faster pace in these town-classes, uptake of IPL (and possibly other sports properties) in regional languages is likely to show a continued upward trend.

This opportunity will not be missed by brands looking to target emerging markets as well as those focusing on local markets. Broadcasts in more regional languages will further aid this process.



Out of Home Viewership

As per BARC India's OOH measurement service, which tracks viewing across 900+ establishments in Mumbai, Delhi, and Bangalore, sports emerged as the most preferred genre (accounting for 70% of the total OOH viewership) during IPL 2018. Of the 44 mn walk-ins during April-May, a record 33 mn watched IPL in the OOH space.

IPL 2018 garnered 23.7 mn Impressions from OOH viewing of live matches across 3 cities, leading to an incremental viewership of 8% over viewership from TV currency panel.

TG: 15+ , Delhi/ Mumbai/ Bangalore

Advertising

Year	# Advertisers	# Brands
2016	82	138
2017	74	135
2018	123	247

As popularity of IPL as a TV property remains buoyant, so does the number of brands that seek higher visibility through this platform. Over the last 3 years, the total number of advertised brands has grown from 138 to 247 (a growth of 79%). The 247 brands that advertised on IPL 2018 were accounted for by 123 advertisers (count of which has grown 50% since 2016). While part of this growth may be on account of increase in number of broadcasting channels, there is little doubt that IPL remains a favourite destination for brands.

If we look at spread of advertisers across channels that broadcast IPL, we see that a good 42% opted to be present across 10+ channels, while about 28% chose to advertise on a mix of 6-9 channels. The remaining advertisers were present on 5 or less channels.

	# Advertisers
Total	123
10+ channels	52
6-9 channels	34
≤5 channels	37

The following tables look at top advertised categories over the last 3 IPLs.

		2016
S.No	Category	Share of Duration
1	CELLULAR PHONES-SMART PHONES	18%
2	IS-B2C & ONLINE SHOPPING	14%
3	CELLULAR PHONE SERVICE	7%
4	AUTO-CARS/JEEPS	7%
5	AUTO-TYRES	6%
6	SPIRITS/ OTHER BEVERAGES	4%
7	SOFT DRINK AERATED	4%
8	AIR CONDITIONERS	4%
9	PAN MASALA /ZARDA /GUTKHA	4%
10	DTH SERVICE PROVIDERS	3%
11	Others	29%

S.No	Category	2017 Share of Duration
1	CELLULAR PHONES-SMART PHONES	22%
2	CELLULAR PHONE SERVICE	12%
3	IS-B2C & ONLINE SHOPPING	6%
4	AIR CONDITIONERS	5%
5	AUTO-CARS/JEEPS	5%
6	AUTO-TYRES	4%
7	AUTO-TWO WHEELERS	4%
8	SOFT DRINK NON AERATED	3%
9	BISCUITS	3%
10	WIRES & CABLES	3%
11	Others	32%

S.No	Category	2018 Share of Duration
1	CELLULAR PHONES-SMART PHONES	13%
2	CELLULAR PHONE SERVICE	11%
3	IS-B2C & ONLINE SHOPPING	6%
4	SOFT DRINK AERATED	5%
5	BISCUITS	4%
6	PAN MASALA /ZARDA /GUTKHA	4%
7	SOFT DRINK NON AERATED	4%
8	AIR CONDITIONERS	3%
9	PAINTS	3%
10	AUTO-TYRES	3%
11	Others	43%

Smartphones, Cellular Phone Services and Internet/Online Shopping categories remain the top 3 advertised categories during IPL telecast. The primary driving factor is that IPL sponsor brands fall under these categories.

In 2018, we also saw a higher number of F&B categories in the top 10 advertised categories, and lesser durables. In 2016 and 17, categories related to automobiles/tyres, air conditioners and DTH service providers featured in the top 10 (also by share of impressions). But in 2018, these categories have moved down in the ranks marginally. In their place, fast-moving F&B categories like Biscuits, Pan masala, and aerated soft drinks have not only found their way into top 10, but also improved their relative ranking.

Net Take-aways

IPL as a TV property continues to grow - in terms of viewership and engagement with audience.

IPL viewership has a male skew, but share of female viewership has marginally risen in 2018.

Young audiences (22-40 years) is major contributor to IPL viewership.

IPL drives up sports viewership, and simultaneously impacts viewership of other genres like GEC.

HD share of IPL viewership shows rising trend. This also highlights growing preference for Sports viewing on HD.

Matches featuring CSK and MI remain the big draws on TV. Both these teams not only drive up viewership in their home cities/states, but also at all India level.

IPL 2018 has witnessed huge uptake on regional language channels.

Viewership share of regional-language telecast (23%) is at par with that of English language telecast (22%). Hindi dominates with 55%

Smartphones, Cellular Phone Services and Internet/ Online Shopping are consistently the top 3 advertised categories on TV during IPL. This indicates that for marketers, IPL remains a platform to engage with young, affluent audiences.

Out of Home viewing contributes to a sizeable share of total IPL viewership. Measurement across 3 metros (Mumbai, Delhi & Bengaluru) accounted for 8% incremental audiences over TV home panel.

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