



BROADCAST
AUDIENCE
RESEARCH
COUNCIL
INDIA

IMPACT OF CO-VIEWING ON TV VIEWERSHIP



INTRODUCTION



 1.3bn
population

 298mn
homes

 836mn
TV owning individuals

India, a country of 1.3 billion population and 298 million homes is a land of diversity. However, the same isn't true when it comes to TV viewing habits of the 836 million TV owning individuals. As per the recent Broadcast India Survey, 98% of the 197 million TV homes in the country still have access to a single TV. This translates into an India that watches majority of the content together on TV.

The BI 2018 Survey points out that this Single TV home phenomena is as strong in Urban India as it is in Rural.

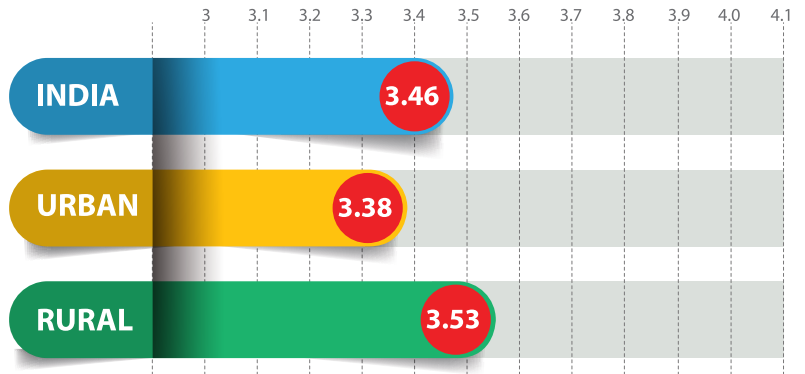
	Single TV Homes	Multi TV Homes
TOTAL	98% (192777)	02% (3954)
URBAN	97% (815161)	03% (2628)
RURAL	99% (107615)	01% (1326)

82%

OF INDIA WATCHES TV TOGETHER

The average family size of the TV owning households in India currently stands at 4.25 individuals. Of this, on an average 3.46 individuals per household prefers watching TV together.

Number of Co-Viewers

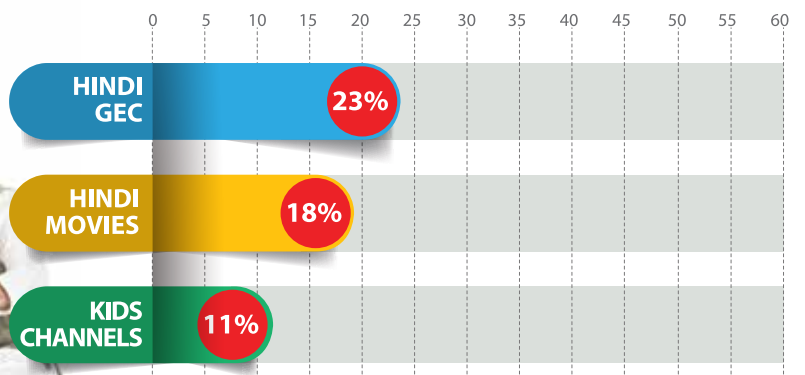


*Number of Individuals

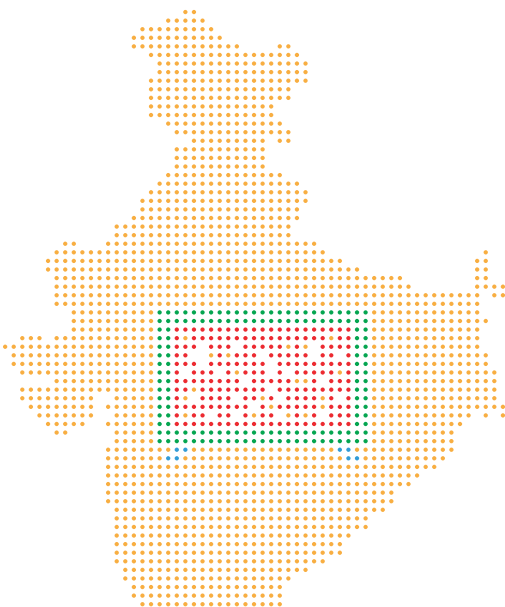
For Indians, entertainment has always meant time with family and friends and this reflects in TV viewing as well. Data shows that 82% of TV owning individuals in the country watch TV along with someone else – viz., one or more members of the household. This reflects in the TV viewership data as well. Take for instance the kids (2-14 year olds), who contribute to 23% viewership of Hindi GECs.

Many would believe that kids watch channels that cater to their content need. But, with 98% of TV homes having single TV, the instance of co-viewing increases, thus impacting the choice of content as well.

Share of Kids Viewing by Genre



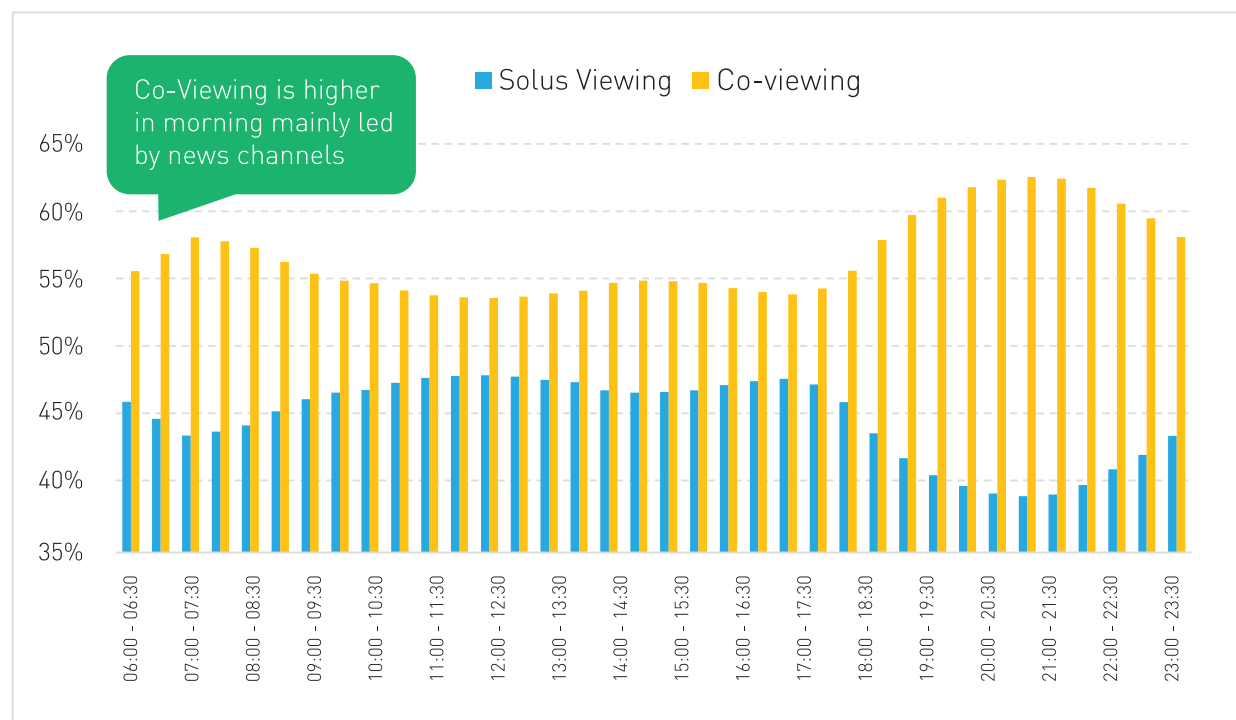
All India, 2-14/share of Impressions, wk 1-32





CO-VIEWING INCREASES DURING PRIME TIME; REMAINS SAME THROUGH THE WEEK

Evenings in India is mostly family time when the entire family is at home and watching TV. This reflects in the data as well which shows high instance of co-viewing in the Prime Time band (6-11pm).



Interestingly, the morning (6:30-8:30am) time band also sees a spike in co-viewing. This is primarily led by News channels which in the morning band airs news stories, astrology and health shows.

The fact that both morning and evening time bands see high co-viewing, TV viewing pattern does not see any change on weekends. Co-viewing instances remain the same during both weekdays and weekends.

Co-Viewing Duration

56.5%
WEEKDAYS

56.6%
WEEKENDS



AGE & GENDER

Majority of co-viewing happens between adults of opposite gender/ couples, across age-groups. A striking 40% of co-viewing is seen between male (51-60yrs) and female (41-50yrs). Even the 41-50 year old Male TV viewers and Females aged 31-40 year prefer watching TV together. This can be attributed to:

- Watching movies together
- Switching between GECs and News
- Males co-viewing GECs

GENDER/ AGE	F2T014	F151021	F22T030	F31T040	F4LT050	FSLT060	F6LPIUS
M_02 to14	25%	12%	22%	29%	09%	06%	07%
M_15 to 21	11%	21%	11%	29%	23%	06%	06%
M_22 to 30	09%	12%	26%	09%	25%	13%	06%
M_31 to 40	24%	08%	29%	31%	06%	13%	09%
M_41 to 50	14%	21%	10%	38%	26%	02%	09%
M_51 to 60	07%	14%	21%	08%	40%	18%	05%
M_61 Plus	11%	08%	19%	15%	10%	30%	23%

Co-Viewing Combinations

01

HUSBAND
WIFE

02

MOTHER
SON

03

SIBLINGS/
COUSINS

04

FATHER
DAUGHTER

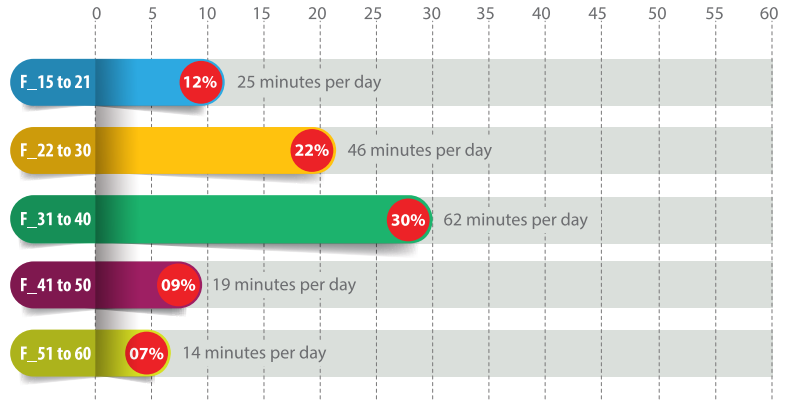


30%

FEMALES
AGED 31- 40 YRS
LIKES TO SPEND
MORE TIME
WITH KIDS

Females aged 22-40 years spend the maximum time watching TV with kids. While Females aged 31-40 spend 30% of the co-viewing time with their kids, Females aged 22-30 year spend 22% of their time watching TV with their kids.

Co-Viewing Duration of Kids

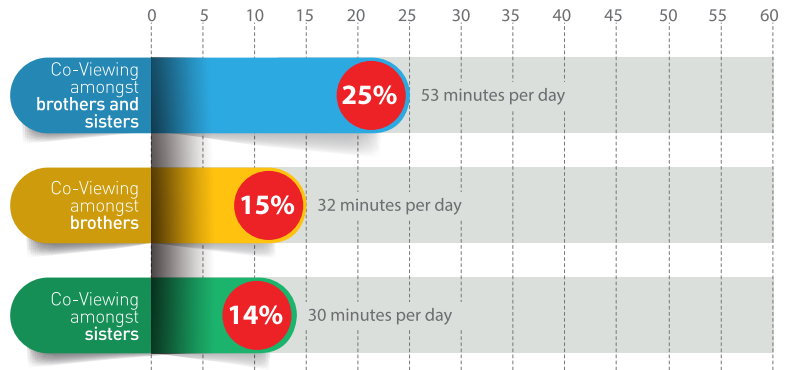


25%

HIGHEST RATIO OF CO-VIEWING AMONGST BROTHERS & SISTERS

Data also highlights the fact that maximum amount of co-viewing happens between brothers and sisters. This may be because of the difference in choice of content between the two, which then leads to increased consumption of content on TV.

Kids Co-Viewing with Siblings





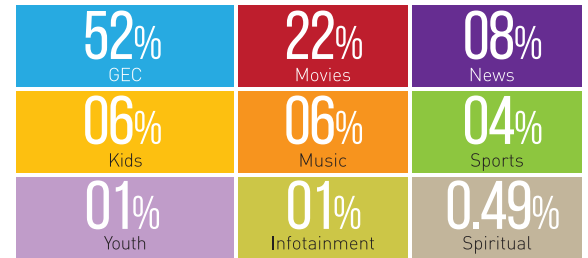
CONSUMPTION ACROSS GENRES



CO-VIEWING CONSUMPTION ACROSS GENRES

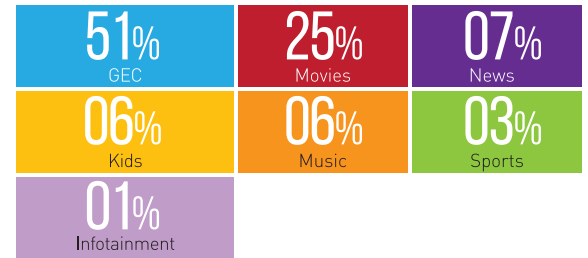
With 98% of homes in India having a single TV, viewership garnered by genres due to co-viewing is very high. GECs grab the biggest share of the pie with 52% co-viewing viewership. Movies & News closely follow with 22% & 8% viewership respectively. GECs and Movies grab highest share of eye-balls as they cater to larger group of audiences.

% of Co-Viewing Duration



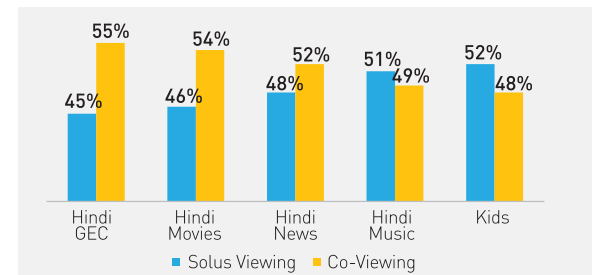
India / 2+

Viewership Share by Genres



India, 2+

However, as depicted in the graph below, over 45% of the time spent on Hindi GECs and Hindi Movies respectively comes from Solus Viewing.



HSM / 2+









SOLUS TV VIEWER

SOLUS TV VIEWER IN THE COUNTRY IS SIGNIFICANT

Of the 197 million TV homes in the country, only 2% of the homes have multi-TVs. Even Urban India has only 3% of the TV homes with multi-TVs. This translates into 18% of TV owning population watching TV alone. However, of the total time spent on watching TV, the contribution of Solus viewing is a healthy 43%. This is significant for both content creators and advertisers for better targeting.

Population vs Duration Spent Watching TV

Population	Duration
 82%	57% 
 18%	43% 

18%

TV OWNING
POPULATION
WATCHING
TV ALONE



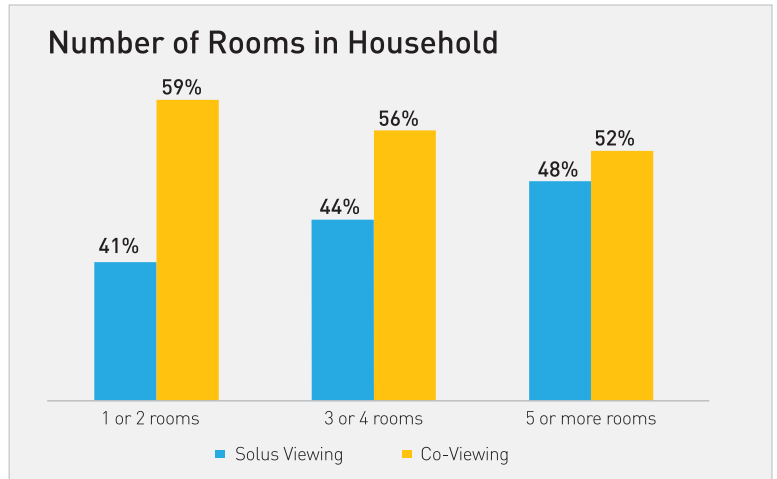


MORE THE ROOMS,
HIGHER THE PROPORTION OF SOLO VIEWING

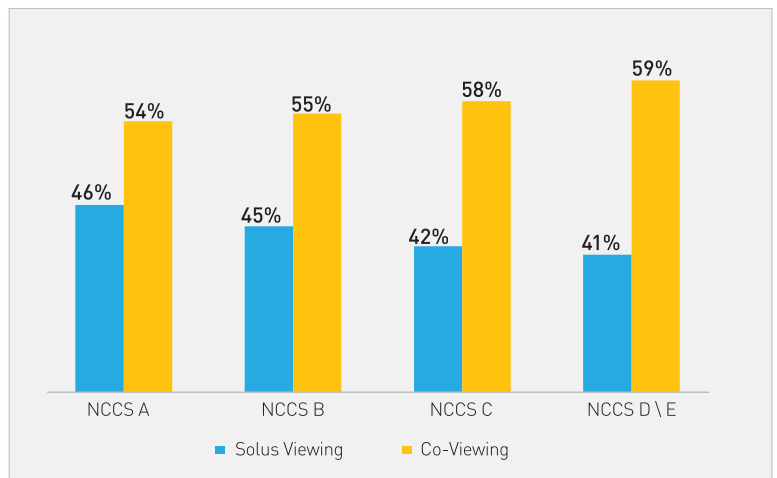
HIGHER THE NCCS,
HIGHER THE PROPORTION OF SOLO VIEWING

REASONS FOR SOLUS VIEWING

A. Number of Rooms in a Home: Data shows correlation between the number of rooms a home has and solus TV viewing. Lesser the number of rooms in a household, higher the Co-Viewing; More the rooms, higher the proportion of Solus Viewing.



B. Socio-Economic Classification of TV Owning Homes: There is also a correlation between the socio-economic classification of TV owning individual and solus Viewing. Data points out that higher the NCCS, higher the proportion of Solus Viewing. Thus, NCCS A & B see higher solus viewing as against NCCS C and D/E that has the largest co-viewing share in India.





CONCLUSION

82%
Population

spends

57%
duration

82% of the TV owning population co-views.

57% of total time spent watching TV comes from Co-viewing.

29%



Impact of co-viewing can be seen in the viewership contribution of different age groups to genres. For instance, 23% of the viewership for Hindi GECs comes from the 2-14 year olds.

LESSER ROOMS, HIGHER CO-VIEWING



Co-viewing depends on the number of rooms in a home. Lesser the number of rooms, higher is the co-viewing instance.



NCCS C & D/E have the highest share of co-viewing.

98%



With 98% of Indian TV homes having single TV, co-viewing in the country is high.

22-40 YRS



Females aged 22-40 years spend maximum time in co-viewing with their kids.



Data also highlights the fact that maximum amount of co-viewing happens between brothers and sisters.

43%



43% of time spent on TV comes from solus viewing



think@barcindia.co.in

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