

MARCH 2006

**Madison Media**  
conducts for the first time in India  
a survey to estimate  
**Out-of-Own-Home Viewership**

# MEDIA

*matters*

## O-O-O-H VIEWING

*How much does it add to TVRs?*

*"I do not understand why we are not advertising in the India-Pakistan cricket series. Forget what viewership is reported or what cost it is... the fact is everyone I know is watching it at their office or a nearby multiplex or at someone's house. What an opportunity lost for our brands!"*

-An advertiser CEO to his brand team

*"Yes I agree that the programme is not doing as well as last year. But forget the viewership data, just look at the buzz the programme is creating. Everyone is watching it"*

-A leading channel about its top reality show

*"Niche channels never get viewership...but my channel is the most preferred channel of the youth. Go to any pub or coffee shop and you will see that it is my channel that is being tuned into everywhere"*

-A niche channel when negotiating rates

Sounds familiar?

The common thread that runs through all these comments that we hear everyday of our working lives, is that the consumer does not watch television only at home; he is also watching it OUT OF HOME. While at-home-viewing is captured in great detail by television measurement systems like TAM or aMap, out of home viewing still continues to be a grey area open to every individual's interpretation, depending upon his or her interest.

So, we at MADISON MEDIA, decided it is time to find answers to a lot of questions that plague us in the media industry on out of home viewing. To enable us to find these answers, we commissioned IMRB to do a research amongst 720 individuals over 15 years of age, residing in cable and satellite homes in Mumbai & Delhi and belonging to SEC ABC. Given the prevailing belief that only cricket drives out of home viewing, care was taken to conduct this research during an India cricket series, so as to capture and validate the influence of cricket on out of home viewing behaviour.

This newsletter will put the findings from the IMRB research in perspective, so as to enable decision-making amongst all relevant constituents - the advertiser or the channel or the agency.

For purposes of this research, anyone who views



television outside his or her own home has been treated as an "out of home" viewer or what we call O - O - O - H ( O U T O F O W N H O M E ) viewer.

## WHO WATCHES O-O-O-H?

That everyone watches television at home is a given. What is surprising is the number of people who watch television O-O-O-H- it is a whopping 18% of the population. This implies that depending on the programme telecast you can actually be reaching 21% more people at a point of time, over and above the numbers flagged by TAM or a Map!!

A closer look at the profile of O-O-O-H viewers between the two cities more than establishes the differences in the social fabric that defines Mumbai and Delhi.

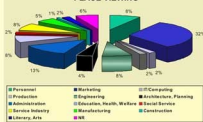
- Mumbai given its travel time is a far more potent O-O-O-H market contributing to 75% of the O-O-O-H population with Delhi making up the balance 25%.
- Mumbai has sufficient women watching O-O-O-H while in Delhi it is predominantly males; with 97% O-O-O-H males, Delhi reinforces its image of a male dominated society!
- It is the lower SEC which makes the O-O-O-H viewer in Mumbai, while in Delhi it is the upper SEC.
- The older adults watch O-O-O-H more in Mumbai while the young do so in Delhi.

The table below amply demonstrates the difference between the two cities.

	O-O-O-H viewers % dispersion	
	Mumbai	Delhi
Male	65	97
Female	35	3
SECA	24	61
SEC B	25	25
SEC C	51	14
15-24 Years	29	33
25-34 Years	28	42
35+ Years	43	25

For all those who thought that the government or the public sector do not work as hard as the private sector employees, here is an eye opener - over 80% of the working population who watch television O-O-O-H are private sector employees! And guess which department dominates viewing at the workplace? Well, it is Marketing (32%) followed by Administration (13%).

## COMPOSITION OF WORK PLACE VIEWING

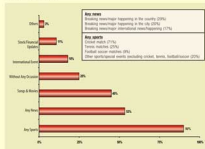


## WHAT IS WATCHED O-O-O-H?

Information was collected at three levels GENRE, CHANNEL and PROGRAMME.

### AT THE GENRE LEVEL

Occasions that mark O-O-O-H viewing are as expected cricket matches with three fourths of the sample pointing this as the key O-O-O-H occasion. However, what is interesting is that cricket, by itself does not define O-O-O-H viewing. "Breaking News" is the second largest driver attracting half the O-O-O-H viewership followed by movies/songs. What is interesting about "Breaking News" is that the consumer is more interested in news that will affect the country at large, more than local or international happenings. So, news channels that want to offer localized content as a key differentiator, do watch out as the consumer is more interested in national happenings!!



## AT THE CHANNEL LEVEL

The channels viewed reflect the genres preferred by the O-O-O-H audience. Depending on the kind of content shown, O-O-O-H viewing can increase reach by as much as 21% to as low as 1.4%, over and above at-home viewing! Sports channels garner the highest reach gains with 21% followed by news channels at 12%. Depending on the event, other Hindi general entertainment channels or the movie channels or the music channels can garner as much as 5-8% incremental reach at the overall channel level.

Everytime there is significant programming on the channels, the reach claimed by the regular audience measurement systems will hence have to be corrected as follows:

Channels	Correction factor in terms of reach %
Sports channels	8-21%
News channels	5-12%
Music channels	5-8%
Hindi general entertainment	2-7%
Hindi movie channel	2-5%

## AT THE PROGRAMME LEVEL

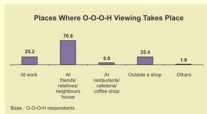
To understand the implications on normal ratings given by TAM or aMap, this research fielded some queries on programmewise viewership to understand the impact of O-O-O-H on programme viewership.

O-O-O-H viewing increased ratings of the India - Sri Lanka series in December 2005 by as much as 19%. The mass entertainment genres were however a disappointment - even top billing programmes like "Nach Baliye" and "The Great Indian Laughter Challenge" on STAR One, "Kam Ya Zyaada" on ZEE and "KBC 2" on Star Plus increased ratings by only approx 3% through O-O-O-H viewers. O-O-O-H hence continues to be a sport or newsy option and does not generate huge numbers even in the most newsy reality shows on the mass entertainment channels.

Programmes	O-O-O-H Correction factor in terms of TVR %
India - Sri Lanka test match	19.3
Award /events	7.1
Nach Baliye	3.7
Kam Ya Zyaada	3.0
The Great Indian Laughter Challenge	2.6
KBC	2.2
Indian Idol	1.5
Fame Gurukul	1.3
Deal Ya No Deal	1.0
CID	2.8

## WHERE DOES O-O-O-H VIEWING HAPPEN?

Unlike the popular belief that O-O-O-H viewing predominantly happens at work or at pubs, most of O-O-O-H actually happens at someone else's home. This could be due to a gathering of friends or occasions where there is a common interest to view a programme.

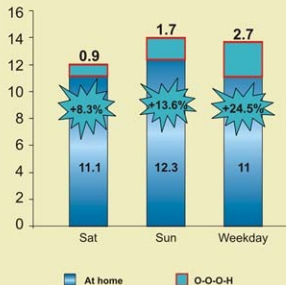


While cricket and news dominate viewership across all O-O-O-H places of viewing; movies do tend to get watched in addition at a friends/neighbours place.

## WHEN DOES O-O-O-H VIEWING HAPPEN ?

As expected O-O-O-H viewership is higher on weekdays than on weekends. On an average quarter hour basis, O-O-O-H viewing can increase by 8% to 25% as can be seen in the following graph, over and above at-home viewing.

## INCREMENTAL REACH BY DAY TYPE



## HOW DOES O-O-O-H INFLUENCE AD VIEWERSHIP ?

Contrary to popular belief, the probability of a consumer watching your ad in the O-O-O-H environment is 48% stronger than when the same consumer is watching the programme at home. This is because of two reasons:

- An O-O-O-H viewed programme is one that the consumer wants to watch so eagerly, that neither he nor the group he is watching with, want to miss a minute of it by zapping.
- Since most of O-O-O-H viewing does happen at someone's place, the consumer does not control the remote and hence is forced to watch the ads.

## TO SUM UP

### TOTAL O-O-O-H AUDIENCE AMONGST SEC ABC C&S HHs

- 18% of this segment view O-O-O-H; this translates to a whopping 2.2 mn viewers in just Mumbai and Delhi; if projected to an All India Urban level this would translate to 15.6 mn.

### LEADING THE PACK

- Sports especially cricket leads the pack with a maximum 21% incremental reach over at-home viewership followed by News (Breaking News) with a maximum 12% incremental reach.
- Despite the buzz created by reality shows, there is no significant O-O-O-H viewing generated for these shows.

### PROFILE OF O-O-O-H VIEWERS

- Can be used to reach any sex, age group or SEC depending on the city being targeted. Delhi is more young male and upmarket skewed; Mumbai is more older adult and lower SEC skewed.

### PLACE OF VIEWERSHIP

- Predominantly at someone else's home, followed by workplace and at shops.

### DAY OF O-O-O-H VIEWERSHIP

- Depending on the day, O-O-O-H viewers can add an average incremental reach of over 25% on weekdays to about 8-13% on weekends.

### AD VIEWERSHIP

- O-O-O-H viewers are likely to be 48% more exposed to ads compared to at-home viewers.