



MEASURING What India Watches THE BARC JOURNEY

10th Oct 2019

ITU - TRAI International Training Programme
on
“Emerging Trends in Broadcasting”

In India,

INNOVATION

is encoded in our
collective DNA

At **BARC** India,
we live by that **CODE**



The CHALLENGE & COMPLEXITY of Measuring What India Watches

SIZE
X
DIVERSITY
X
MEDIA HABITS



B

A

R

C

Breadth and Depth of BARC India Panel truly Captures the Diversity of Audience



- 17 Markets
- x 4 Town Classes
- x Gender
- x 9 Age Cuts
- x 5 SEC Profiles



836 Mn

Individuals

600+

Measured TV Channels

Wide Disparity

in TV Penetration



In India,
TELEVISION
is **BIG!**

...and will remain **BIG**
for some time to
come

Can you match the following?

93% of video content consumption in India happens on TV (all OTT combined forms 7%) ...



173
MN



Total Daily Newspaper Readership

250
MN



Active Social Media users

598
MN






Daily TV Tune-ins

... And yet, There is Huge Headroom for Growth

Huge Headroom for Growth



	TV Penetration	Daily Tune-ins	Daily Time Spent
	92%	69.6%	04:30:28
	93%	68.2%	03:32:00
	66%	73.3%	03:46:07

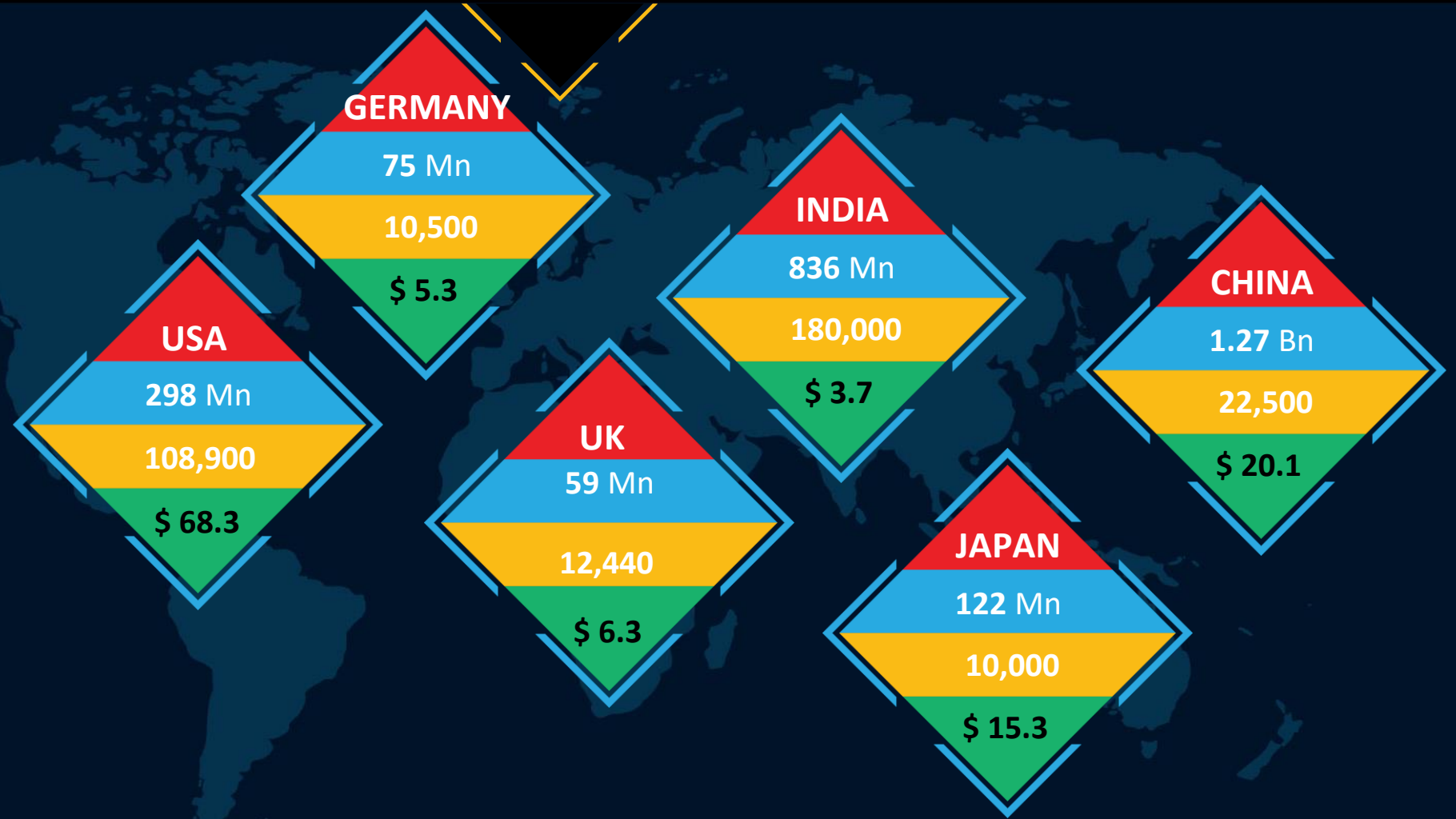
Making it Happen with Innovation

TV AdEx	Panel Size (Individual)
\$ 69.8 Bn	108,900
\$ 6.3 Bn	12,440
\$ 3.7 Bn	180,000



India: One of the Largest TV Panels

but with Low TV AdEx



- TV Universe (Individuals)
- Panel Size (Individuals)
- TV Adex (US\$ in Bn)



How Do We DO IT ?

TECH
At the Heart of
BARC India



Huge Investment and Commitment to Technology

\$ 25 mn

Through bank borrowings backed by key Stakeholders

\$ 39 mn

BARC India's start-up investment in a future-proof audience measurement system

\$ 14 mn

Invested by Broadcasters in Water-marking technology

Near Real-Time Processing of 10 Mn+ events EVERY DAY



Techno Focus Investments



Software & Automation



Big Data Management

Innovations allowed us achieve scale at an unparalleled cost levels !

B A
R C



Helping us to scale as planned

33K → 44K → 55K



Granular INSIGHTS

We have evolved into a
Tech-led Research
company

Wide Range of Data & Insights Products that drives efficient media spends



BARC INDIA
MEDIA
WORKSTATION



PREVIEW



SPOT
TREK



YUMI
MARKETING



SELF
SERVICE
PORTAL

The BIO Suite



From Data to
Actionable
Insights

Out of Home



Premium Homes

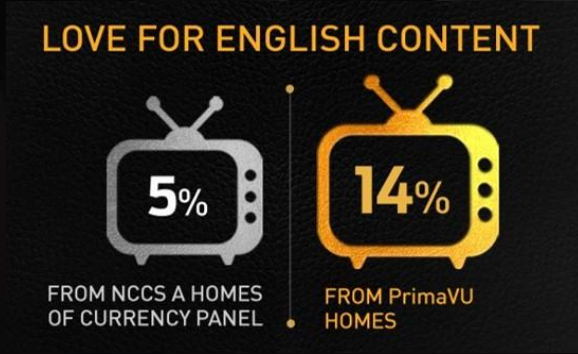
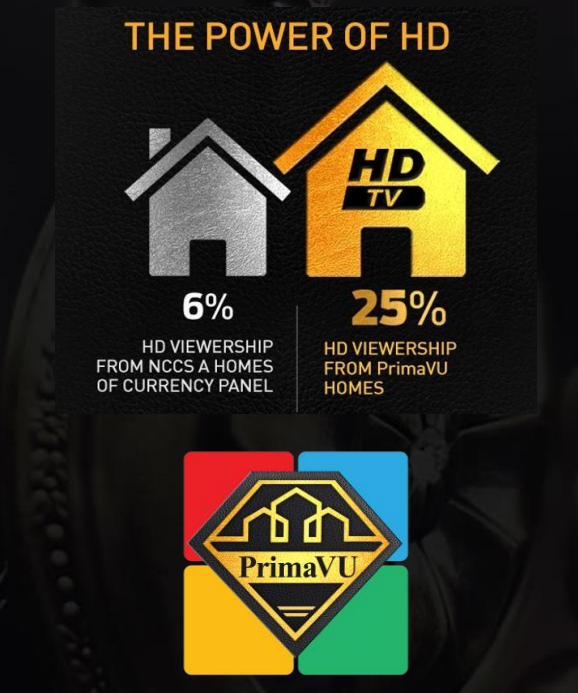
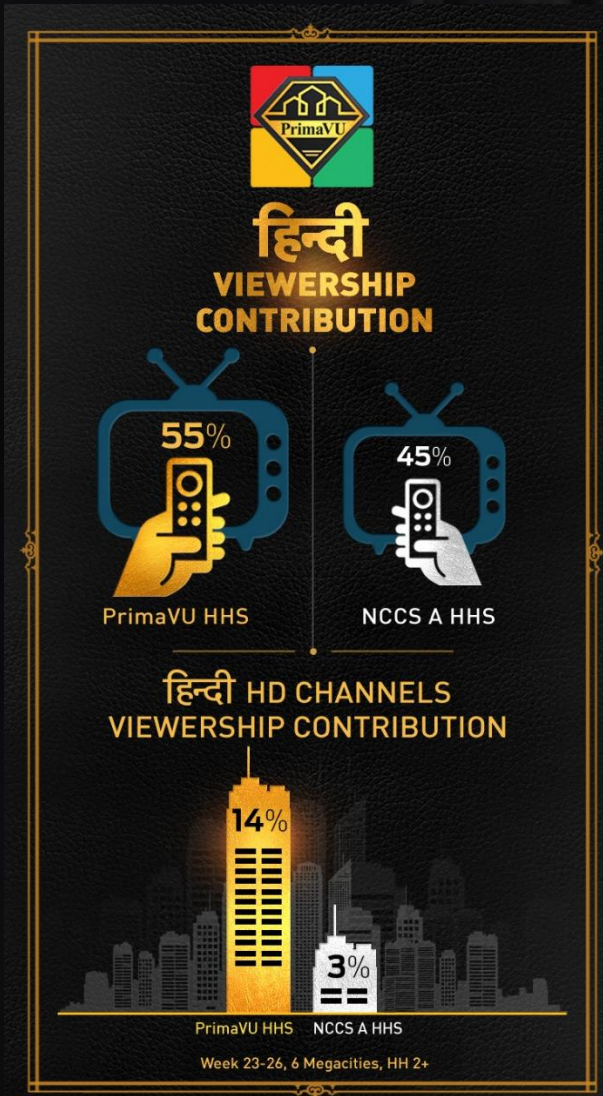


PreView



PrimaVU: Viewing Behaviour of Premium Homes

B A
R C





BARC OOH: First of its kind integration of out of home viewing with TV viewership at home



TV Viewership at Home

+



TV Viewership at Eateries

=



TV Viewership of Individuals at Home & Eateries

1000+ Restaurants

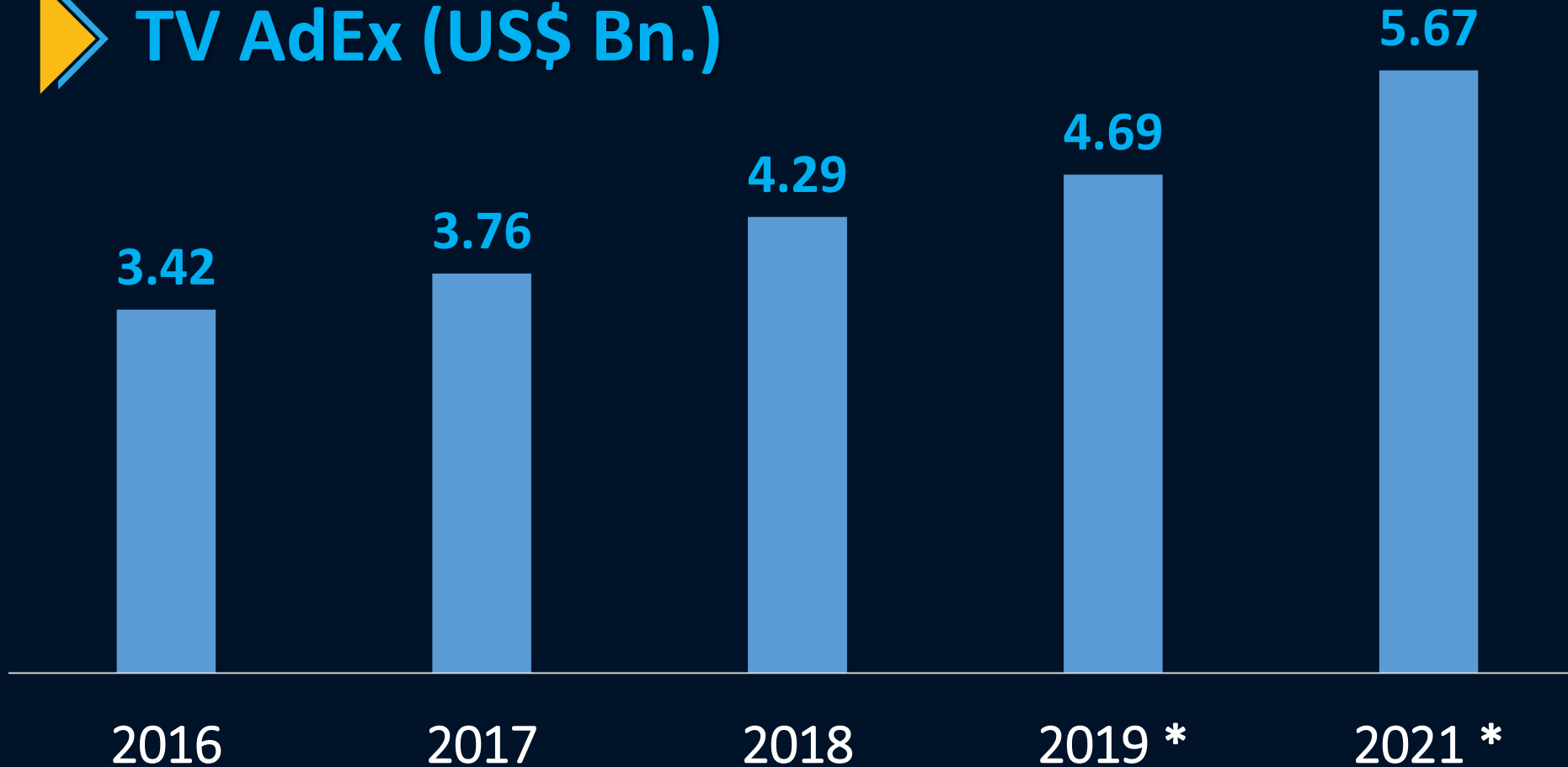
~120 + towns covered

1500 meters Installed

BARC India Data & Insights has been powering growth of the Sector



TV AdEx (US\$ Bn.)

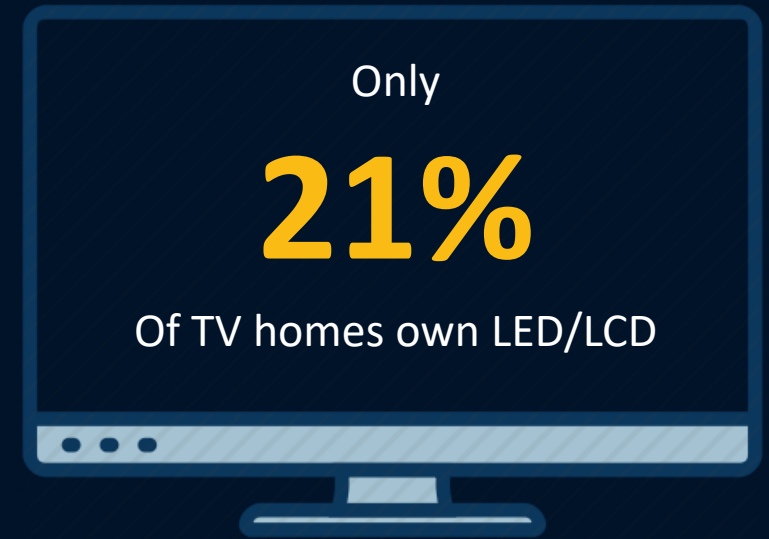




Looking into the FUTURE



Looking Ahead: Continue to strengthen TV measurement



- ▶ Traditional TV still has a long way to go
 - ▶ Panel is being scaled up to 50,000
 - ▶ Further growth in sample planned via Sample RPD route

Expansion of Panel: Beyond 'metered' sample

Current Panel Expansion


Achieved
40K
Q1-2019


Target
50K
2020



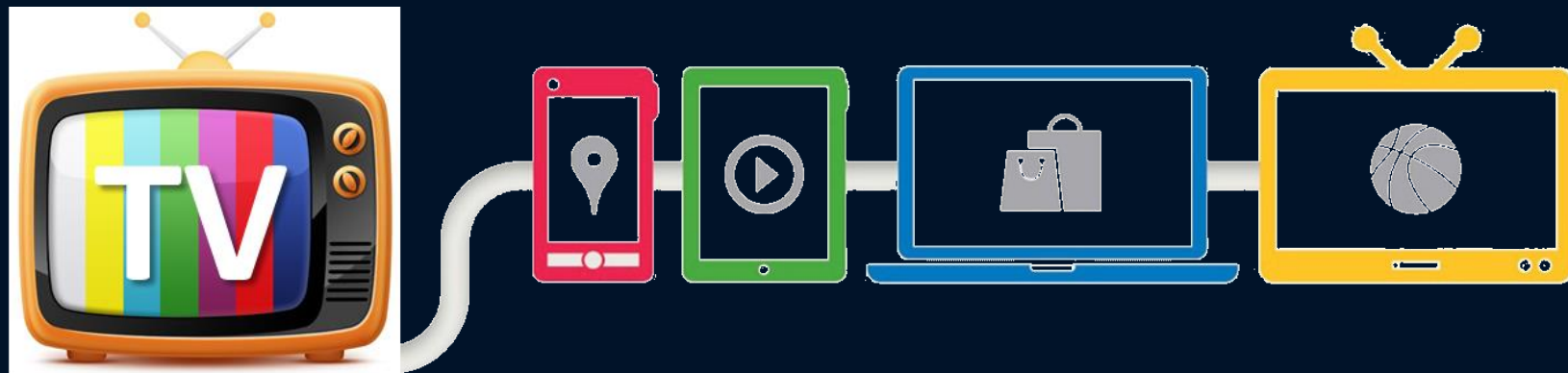
Sample Return Path Data (SRPD)

- Will scale up panel size significantly
- Global first in terms of integration as part of currency
- Large Key platforms involved
- Household level measurement

Tele**V**ision to T**o**tal**V**ideo

Data costs are falling rapidly, and although there are headwinds relating to Coverage and Connectivity , Digital Video Consumption will grow and co-exist with Traditional TV

BARC India is ready from Tech standpoint to measure Total Video viewing, across Traditional and non-Linear TV



India is a market of un-paralleled Diversity and hence needs Unique approach to Digital Measurement



29 States,
7 Union Territories,
22 Official
Languages 500+
dialects



47% Local
Language
Internet use
across Urban &
Rural India



Less than 3%
houses with Wi-Fi
Router or Smart
TVs



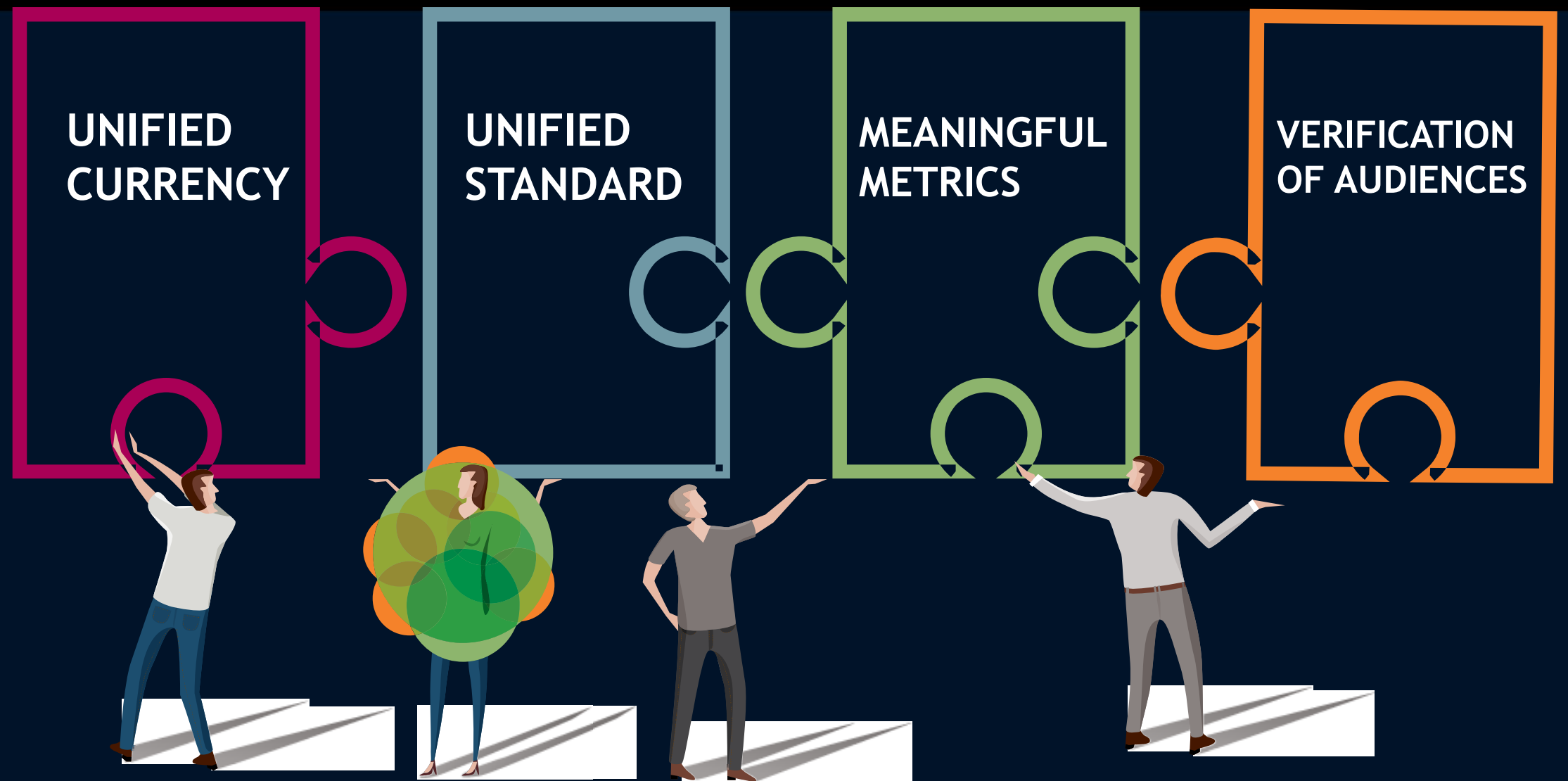
40% of data is
driven by Online
Video on
Mobiles



Global standard
solutions are not
fitting the
landscape

If you solve for India, you solve for the World

Cornerstones of BARC India's Total Video Measurement





Contributing to Measurement Initiatives globally



GAMMA

Global Alliances for the Measurement of Media Audiences



Mediametrie

France



Japan



Canada

TV & DIGITAL

In discussions with Leading broadcasters in a SE Asian market for Digital + TV fusion data

In talks with industry bodies and regulators in several markets in South and SE Asia for setting BARC like JIBs for measurement solutions

OTHERS

Multiple enquiries from International markets for Supply of Meters, Technology and process consultancy

Custom RPD solutions to leading platform operator in Asia



The Science of Measurement

Experience
Expertise
Transparency
Accountability

What Makes for Robust & Credible Measurement



Scientifically Designed
Representative Sample

Fail-safe tech that captures
every second of viewing

Contains Accurate
Demographic Information

Reports basis All India &
Highly Granular Coverage

Shows Co-viewing,
Simulcast, DVR, HD/SD



A family of four is sitting on a patterned couch in a living room. The father is in the center, holding a smartphone and pointing at the screen. The mother is to his right, smiling. A young girl is on the left, also smiling and looking at the phone. Another young girl is behind the father, looking over his shoulder. The scene is dimly lit, suggesting evening or night. A large, light blue diamond shape is overlaid on the image, framing the text.

Some Points to Ponder...

Is it the machines, or Expertise that runs the system?



Size of Sample or Size + Representativeness + Accuracy?





Lets Talk !



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