



## FEATURED INSIGHTS

DELIVERING CONSUMER CLARITY

# SUPER VIEWERS: POWERING THE DESI DIGITAL REVOLUTION

- India's online video viewership has increased 100% since 2011.
- Super viewers are largely from the SEC A and B category and are typically 21 to 26 years old.
- Approximately 78% of regular internet users watch or download digital content such as videos, television shows or movies.

Just a few years ago, Internet broadband was considered a luxury restricted mostly to corporate India. Today, it's a whole different picture thanks to the advent of smartphones and a rapidly growing telecommunications industry. India is poised at the cusp of the digital revolution – be it finance, travel, ecommerce and even media and entertainment.

Online video viewership in the country has nearly doubled between 2011 and 2013. A 69% growth in unique viewers during the same period indicates that more Indians are accessing their entertainment online every day.

**ONLINE VIDEO VIEWERSHIP IN THE COUNTRY  
HAS NEARLY DOUBLED BETWEEN 2011 AND  
2013.**

## ONLINE VIDEO VIEWERSHIP IN INDIA

	UNIQUE VIEWERS (000)	VIDEOS (000)	VIDEOS PER VIEWER	MINUTES PER VIEWER
<b>MARCH 2011</b>	31,944	1,863,927	58.3	337.8
<b>MARCH 2013</b>	54,025	3,713,118	68.7	431.5
<b>2 YEAR % CHANGE</b>	69%	99%	18%	28%

March 2013 vs. March 2011  
Total India – Age 15+ Home & Work Locations  
Source: comScore Video Matrix

### THE MEDIA SUPER CONSUMER

However, Internet users cannot be grouped solely by data consumption. Two factors—consumption and engagement—categorise consumers' online behaviour. We've broken down India's Internet users into three:

- **Light:** They spend approximately 90 minutes or less online.
- **Medium:** They spend between 90 to 120 minutes online.
- **Heavy:** They spend more than more than 120 minutes online.

Consumers' online use can be gauged not only by the time they spend on the Internet but also through the medium they use to access it. Using multiple mediums could be an indication of high dependency. Heavy internet users with a corresponding high level of dependency on their connectivity are termed super viewers.

The super viewer depends very heavily on the digital medium for work, as well as play, and the absence of connectivity or a device would have a huge impact on their lifestyle. Our respondents went so far as to admit that they would feel "impaired" without access to the internet.



“HEAVY INTERNET USERS WITH A CORRESPONDING HIGH LEVEL OF DEPENDENCY ON THEIR CONNECTIVITY ARE TERMED SUPER VIEWERS.”



## SO WHO IS THE SUPER VIEWER?

Not surprisingly, the super viewer is young and affluent. They invest in gadgets and devices that enable easy and any-time access to the digital world. The average age tends to be approximately 26, but around 36% super viewers also fall into the 21-25 age group.

The SEC A and B section of a 32 million metro population between the ages of 15 to 45 years log in to the Internet at least once a week\*. With 12% or 7,60,000 consumers' Internet usage patterns mapping to those of super viewers, service providers have a clear opportunity.

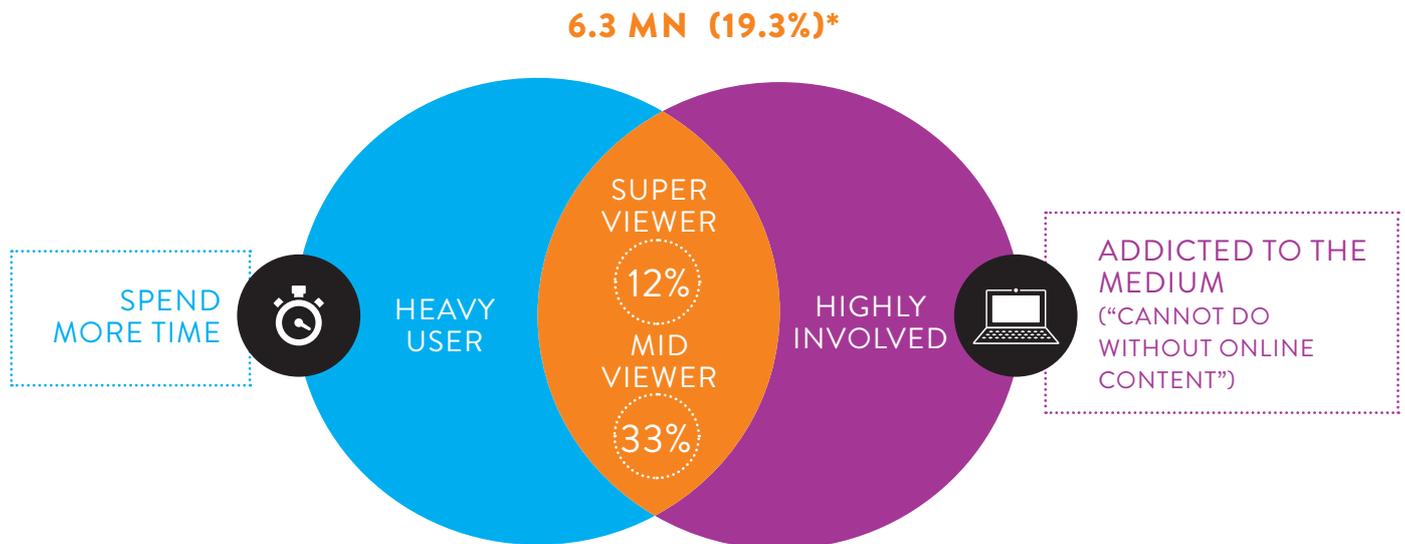
“

SUPER VIEWERS ARE LARGELY FROM THE SEC A AND B CATEGORY. THEY'RE ALSO TYPICALLY BETWEEN THE AGES OF 21 TO 26 YEARS AND LARGELY MALE (60%).

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## IDENTIFYING THE VIDEO SUPERCONSUMER

### INTERNET WEEKLY USERS



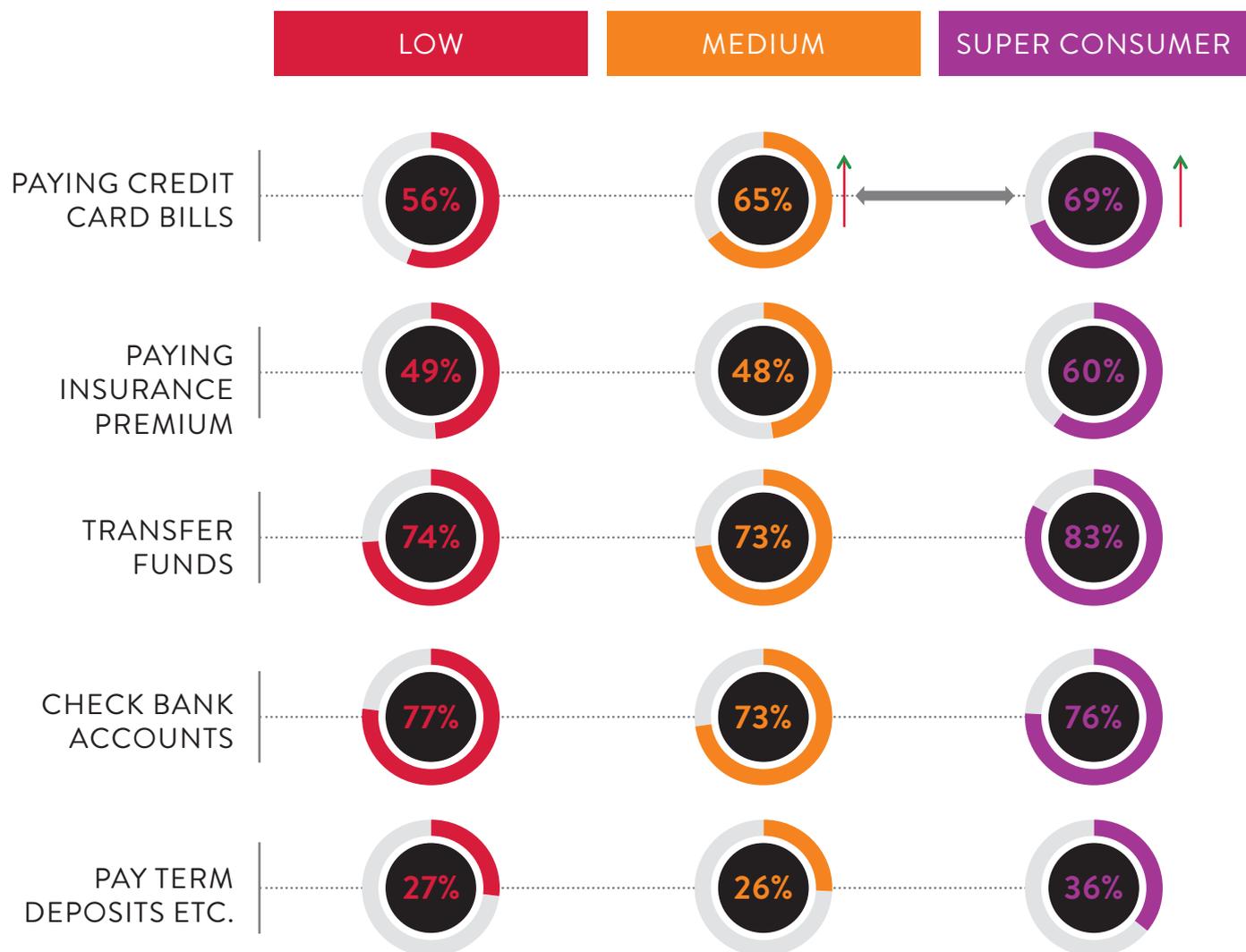
10 L + Towns, 15 -45; SEC AB, Population 32.7 mn  
Source: Nielsen

\* Indian Readership Survey 2013

## THE SUPER VIEWER ONLINE

Super viewers do not limit themselves to merely entertainment; they're comfortable with technology and know how to leverage it, taking to the Internet for many transactions.

### WHAT DO THEY DO?



Source: Nielsen

Our studies indicate that super viewers spend more than two hours a day accessing or downloading videos online. Not only do they spend more time online, they are 'hooked' on the content. The advent of smartphones have only made this easier for consumers.

## WHAT DO SUPER VIEWERS WATCH?

Super viewers are avid TV watchers. Consequently, they spend much of their time online watching and downloading videos related to music, TV shows and movies. They also play games online and access social media. Growing digital connectivity has exposed the Indian viewer to a host of international entertainment options. And that selection continues to increase. Today, many viewers prefer to download or stream videos online instead of waiting for foreign shows or movies to come to India. The super viewer downloads at least eight to 10 videos on average every week. The movie-watching super viewer is not far behind, with an average of at least three to four movie downloads every week. Nearly 73% of respondents said they mostly downloaded English or international movies.

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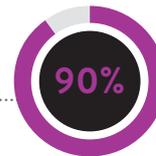
52% OF SUPER VIEWERS CLAIM THAT THEY WILL NOT WAIT FOR THE SHOW TO COME ON TV AND WILL START WATCHING IT ONLINE EVEN IF IT MEANS PAYING FOR ACCESS.

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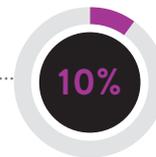
## WHAT DO THEY DO?



PREFER WATCHING TV PROGRAMS ONLINE



I LIKE WATCHING THE PROGRAMS AS AND WHEN THEY COME ON TV



Source: Nielsen

## REACHING THE SUPER VIEWER

This consumer group is relatively affluent, connected and young. They are familiar with and know how to leverage technology for their convenience. Companies can connect with this segment in two key ways:



**ADVERTISING:** This is a great avenue for FMCG retailers to support or position branded or customized video content, such as web episodes of a TV show. However, online advertising needs to be approached with care. While 36% of viewers said they would skip ads as they viewed them as irritants, 49% said they would watch advertising previously not seen.

Financial advertising could be a winner given that the super viewer is conducting most financial transactions online anyway. Going online could sway decision making in favour of the advertiser.



**UNIQUE CONTENT:** Super viewers have demonstrated a willingness to pay for their digital entertainment. There could be a market for the broadcaster creating exclusive 'online content.' Hindi tele-serials are also an area of opportunity. Going online offers a great way to connect with an audience currently not covered.

The biggest opportunity area, however, is English content. Television shows and serials currently not available in India have a potential target audience in the super viewer. Paid subscription could be a potential revenue generator.

With nearly 5 million new users taking their first step into the digital world every year, India's internet users are expected to hit the 500 million mark by 2018\*. Today's super viewer is not just a willing market for advertisers and broadcasters but also a good forecast of future consumer behaviour online. Leveraged correctly, the digital world is a new space waiting to be explored, and the super viewer is the compass with which to mark one's direction.

\* Report published by McKinsey & Co and Facebook

## THE NIELSEN QUALITATIVE VIEW

BY: SARBANI SEN AND SIMERAN SETH, NIELSEN INDIA

- The 'virtualization' of life and social interactions with the advent of social media platforms like Whatsapp groups/ Twitter/Facebook etc., have made today's consumers seek 'comfort' and convenience at the touch of a screen.
- As consumers try and create their own 'space bytes' through blogs and webpages, there is an expectation to be acknowledged and spoken to at a personal level.
- Creating a 'me-space' for super viewers by customising content and personalising marketing messages especially in the online space, is the way ahead.

## ABOUT THE STUDY

The study on super consumers in the media and entertainment sector was carried out in March 2014 and covered 650 respondents between 18 to 45 years old. The online interviews were conducted across the cities of Mumbai, Delhi, Bangalore, Chennai, Kolkata, Pune, Ahmedabad, Cochin, Pune and Hyderabad.



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## ABOUT NIELSEN

Nielsen N.V. (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers Watch and Buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services across all devices where content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen provides its clients with both world-class measurement as well as analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries that cover more than 90 percent of the world's population.

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