Response to the Consultation Paper on Review of Television Audience Measurement and Ratings in India

Introduction to Nielsen

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com

Globally Nielsen has offered the media industry the expertise it needs to make the best marketing decisions possible. Today, Nielsen's expansive and representative television measurement services capture video viewing across all screens: television, computers and mobile devices. National and local TV ratings help media companies and brands decide how to spend the nearly $70 billion on TV advertising in the U.S. alone. Ratings are only one of the audience measurement services we provide.

Nielsen's interest to respond to the consultation paper comes from the fact that as an independent, neutral market research agency which is an expert in media measurements worldwide, Nielsen's endeavour is to help media companies and brands make the right planning and programming decisions.

Following are the observations and suggestions that Nielsen wants to make for further enhancing the current TV audience measurement service which has evolved considerably over the years.

Observations and Suggestions

1. Any panel based system should also have certain validations in place. Since the individual viewership is captured basis the empanelled household members' compliance to pressing their designated button on remote control (to indicate their start/stop of viewing), this needs to be validated through an independent third party at regular pre-set intervals. This needs to be done through physical visits to randomly selected panel households and checking the compliance to button pressing at the time of visit. A separate report should be put together on such compliance and this report should be published to the industry stakeholders. The panel homes that have been visited by the third party then can be removed from the panel and this could be treated as a part of the yearly panel churn that is desired

2. There is also a need to validate the panel health from time to time which needs to be audited. By panel health we mean the following: -

a. The active sample on which the data is reported on week by week by all reporting breaks.
b. The representativeness of the panel at any given point in time i.e. how far is the actual panel composition from the designed one at any given point in time.
c. The panel control parameters need to be reviewed at a pre-set time period to ensure that the panel design is representative of the Universe. This frequency needs to be arrived at by a representative panel from the industry. This can be done by adding a few questions to the TV Universe Estimation Survey conducted every year.

3. Given the fast growth of OTT platforms, it can be recommended that the TV Universe establishment survey needs to be done bi-annually and the alignment of panel to universe should also happen accordingly.

4. From a reporting perspective, it is recommended that it would also be good to have standard reporting breaks by each state which apparently is not the case currently.

5. It is also not very clear from the TRAI note that if and how Time shifted viewing on TV is reported? Clarity on this would remove any variety or lack of understanding around this.

Respectfully,

Nielsen (India) Private Limited