



DAS Phase-2 Universe Update

May 15th 2013

Backgrounder:

April 1, 2013 was the deadline for the second phase of DAS implementation (DAS P2). By this date ideally all homes desirous of viewing C&S channels on their TV set would need a set-top box with a valid subscription - provided either by the cable operator or the DTH operator. Following the deadline, the government extended a fifteen day grace period to encourage those consumers who had not transited to digital. Also, there were high court stay orders on DAS P2 that lasted for some time in certain states.

This meant a relatively slow growth in digital penetration in the initial few weeks. In such a scenario, we decided to watch the ground situation before taking a decision to update the universes.

This wait-and-watch approach has paid off. After the initial few weeks, the transition from analog to digital reception of C&S signals in DAS P2 markets has rocketed. In the light of such a dramatic change in the base, it is prudent that a major universe update be implemented.

DAS Phase-2 Universe Update:

Given the dramatic change in the base post DAS-II implementation, the Universe will be updated in week 19, 2013 (week beginning May 5, 2013).

We are also using this opportunity to update not only those markets that are under the purview of DAS P2 but also non-DAS markets that may have registered a significant increase in digital penetration - for e.g. Kerala 0.1-1Mn. which has seen a 4% increase in digital penetration from week 1, 2013 (from 28% to 32%).

With this update, we will be adding a significant 11 Mn. digital households within the TAM surveyed markets (a base of 60 Mn. TV owning households). This update now tips the C&S universe profile towards digital: Digital now accounts for more than half the TV owning households (56%) within the TAM surveyed markets.

The advent of DAS has also encouraged consumers to leap into digital C&S from a non-C&S status. For e.g. the C&S penetration in UP 0.1-1Mn. has increased by 3% and that in Rajasthan 1Mn.+ by 4%. We have therefore updated the C&S penetration across markets wherever required.

As always with a universe update, a lock in the software will prevent users from analyzing data across the universe update week. Analyses that span the update date (May 5, 2013) will have to be broken up into two separate runs: "start analysis date - May 4, 2013" and "May 5 2013 - analysis end date". This is being done since the composition of the universe will undergo an update and therefore the bases before May 5, 2013 and those starting May 5, 2013 will not be comparable.

Penetration of **Digital homes** in Cable & Satellite homes

Market	Total		SEC A		SEC B		SEC C		SEC DE	
	Week 1, 2013	Week 19, 2013	Week 1, 2013	Week 19, 2013	Week 1, 2013	Week 19, 2013	Week 1, 2013	Week 19, 2013	Week 1, 2013	Week 19, 2013
TAM India Surveyed markets	41%	59%	51%	73%	44%	63%	38%	56%	37%	53%
Top 8 metros										
Mumbai	79%	92%	80%	93%	81%	96%	79%	91%	76%	90%
Delhi	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Calcutta *	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Chennai	21%	41%	39%	75%	23%	45%	15%	25%	11%	25%
Bangalore	36%	89%	47%	96%	34%	96%	34%	85%	28%	78%
Hyderabad	20%	80%	28%	95%	24%	88%	19%	69%	14%	75%
Pune	44%	94%	55%	95%	43%	90%	40%	95%	39%	95%
Ahmedabad	39%	75%	51%	96%	40%	71%	33%	65%	34%	71%
North										
Bihar 1Mn.+	20%	29%	24%	49%	20%	23%	23%	24%	15%	21%
Jharkhand .5Mn.+	23%	30%	20%	36%	21%	25%	28%	28%	25%	30%
Gujarat 1 Mn.+	40%	87%	44%	96%	42%	86%	34%	84%	41%	85%
Gujarat 0.1 to 1 Mn.	30%	35%	44%	46%	26%	32%	44%	50%	20%	24%
Gujarat LCI	28%	32%	24%	36%	25%	34%	29%	31%	29%	32%
RoMaharashtra 1 Mn.+	34%	95%	41%	95%	35%	95%	34%	96%	27%	96%
Maharashtra 0.1 to 1 Mn.	38%	62%	43%	59%	35%	76%	36%	66%	39%	50%
Maharashtra LCI	33%	35%	39%	43%	35%	38%	28%	31%	34%	34%
MP 1 Mn.+	39%	78%	45%	90%	42%	88%	36%	90%	35%	59%
MP 0.1 to 1 Mn.	35%	35%	40%	40%	30%	32%	35%	35%	35%	35%
MP LCI	33%	33%	28%	28%	29%	29%	32%	32%	37%	37%
Chattisgarh 0.1 to 1 Mn.	39%	43%	39%	54%	35%	43%	40%	40%	40%	40%
PHCHP 1 Mn+	57%	94%	75%	95%	61%	97%	48%	91%	43%	92%
PHCHP 0.1 to 1 Mn.	38%	60%	44%	60%	47%	67%	34%	56%	30%	57%
Punjab 1Mn.+	57%	96%	75%	97%	61%	97%	48%	92%	43%	96%
PHCHP LCI	25%	29%	31%	37%	24%	25%	23%	34%	24%	25%
Rajasthan 1 Mn+	42%	92%	49%	99%	46%	95%	40%	73%	32%	96%
Rajasthan 0.1 to 1 Mn.	20%	28%	21%	30%	18%	36%	20%	25%	22%	25%
Rajasthan LCI	39%	40%	37%	42%	39%	39%	37%	37%	42%	42%
UP 1 Mn.+	20%	85%	28%	96%	20%	83%	15%	80%	14%	78%
UP 0.1 to 1 Mn.	23%	41%	25%	60%	25%	33%	20%	35%	20%	40%
UP LCI	36%	54%	43%	60%	47%	52%	32%	56%	31%	54%
East										
Assam 0.5Mn.+	43%	45%	43%	50%	45%	45%	40%	40%	45%	45%
Orisa 0.1 to 1 Mn.	25%	26%	35%	38%	29%	29%	21%	21%	16%	16%
RoWB 1 Mn.+	13%	15%	12%	16%	12%	12%	19%	24%	11%	11%
WB 0.1 to 1Mn.	10%	12%	12%	15%	11%	11%	5%	8%	11%	14%
South										
RoAP 1 Mn.+	10%	20%	17%	40%	16%	30%	5%	5%	7%	15%
AP 0.1 to 1 Mn.	11%	12%	14%	21%	10%	11%	10%	10%	11%	11%
Karnataka 0.1 to 1Mn.	21%	28%	24%	35%	23%	35%	23%	26%	17%	23%
Kerala 1 Mn+	36%	39%	54%	70%	35%	35%	40%	40%	25%	25%
Kerala 0.1 to 1Mn.	28%	32%	45%	45%	30%	32%	30%	30%	24%	30%
RoTN 1 Mn.+	19%	22%	22%	35%	23%	25%	16%	16%	16%	16%
TN 0.1 to 1 Mn.	11%	12%	17%	17%	12%	13%	13%	13%	10%	10%

*Calcutta figures as on week 14-2013

Penetration of Cable & Satellite homes in TV owning homes										
Market	Total		SEC A		SEC B		SEC C		SEC DE	
	Week 1, 2013	Week 19, 2013	Week 1, 2013	Week 19, 2013	Week 1, 2013	Week 19, 2013	Week 1, 2013	Week 19, 2013	Week 1, 2013	Week 19, 2013
TAM India Surveyed markets	93%	94%	98%	98%	96%	97%	94%	95%	90%	91%
Top 8 metros										
Mumbai	97%	99%	98%	100%	96%	100%	95%	98%	98%	99%
Delhi	95%	97%	99%	100%	97%	99%	92%	94%	89%	92%
Calcutta	89%	93%	96%	97%	94%	97%	93%	94%	82%	87%
Chennai	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Bangalore	98%	98%	99%	99%	98%	98%	98%	98%	98%	98%
Hyderabad	99%	99%	100%	100%	100%	100%	99%	99%	97%	97%
Pune	94%	95%	97%	97%	94%	94%	94%	97%	91%	91%
Ahmedabad	84%	87%	90%	93%	86%	88%	83%	88%	79%	81%
North										
Bihar 1Mn.+	87%	87%	95%	95%	88%	88%	95%	95%	77%	77%
Jharkhand .5Mn.+	92%	92%	96%	96%	96%	96%	95%	95%	83%	83%
Gujarat 1 Mn.+	85%	87%	94%	96%	89%	91%	86%	88%	79%	80%
Gujarat 0.1 to 1 Mn.	93%	93%	99%	99%	98%	98%	92%	92%	90%	90%
Gujarat LCI	99%	99%	99%	99%	98%	98%	99%	99%	99%	99%
RoMaharashtra 1 Mn.+	91%	92%	95%	95%	92%	94%	91%	93%	87%	89%
Maharashtra 0.1 to 1 Mn.	88%	90%	95%	95%	91%	93%	84%	87%	86%	89%
Maharashtra LCI	91%	91%	98%	98%	94%	94%	91%	91%	88%	88%
MP 1 Mn.+	88%	90%	96%	97%	94%	96%	89%	91%	81%	83%
MP 0.1 to 1 Mn.	87%	87%	97%	97%	96%	96%	89%	89%	81%	81%
MP LCI	91%	91%	99%	99%	96%	96%	91%	91%	88%	88%
Chattisgarh 0.1 to 1 Mn.	89%	89%	99%	99%	99%	99%	93%	93%	81%	81%
PHCHP 1 Mn+	98%	98%	100%	100%	100%	100%	98%	98%	95%	95%
PHCHP 0.1 to 1 Mn.	95%	95%	99%	99%	97%	97%	96%	96%	91%	91%
Punjab 1Mn.+	98%	98%	100%	100%	100%	100%	98%	98%	95%	95%
PHCHP LCI	97%	97%	99%	99%	99%	99%	99%	99%	93%	93%
Rajasthan 1 Mn+	86%	91%	92%	94%	88%	91%	83%	88%	82%	89%
Rajasthan 0.1 to 1 Mn.	91%	91%	98%	98%	92%	92%	90%	90%	87%	87%
Rajasthan LCI	92%	92%	95%	95%	96%	96%	93%	93%	88%	88%
UP 1 Mn.+	89%	91%	96%	97%	93%	95%	89%	89%	78%	81%
UP 0.1 to 1 Mn.	87%	89%	95%	97%	93%	95%	87%	91%	76%	79%
UP LCI	97%	97%	99%	99%	99%	99%	99%	99%	95%	95%
East										
Assam 0.5Mn.+	93%	93%	97%	97%	95%	95%	92%	92%	86%	86%
Orisa 0.1 to 1 Mn.	86%	86%	95%	95%	89%	89%	87%	87%	78%	78%
RoWB 1 Mn.+	87%	87%	97%	97%	92%	92%	89%	89%	82%	82%
WB 0.1 to 1Mn.	96%	96%	98%	98%	98%	98%	95%	95%	94%	94%
South										
RoAP 1 Mn.+	99%	99%	100%	100%	100%	100%	99%	99%	99%	99%
AP 0.1 to 1 Mn.	97%	97%	100%	100%	100%	100%	98%	98%	96%	96%
Karnataka 0.1 to 1Mn.	95%	95%	99%	99%	96%	96%	94%	94%	94%	94%
Kerala 1 Mn+	98%	98%	99%	99%	99%	99%	99%	99%	96%	96%
Kerala 0.1 to 1Mn.	99%	99%	99%	99%	100%	100%	99%	99%	99%	99%
RoTN 1 Mn.+	100%	100%	100%	100%	100%	100%	100%	100%	99%	99%
TN 0.1 to 1 Mn.	99%	99%	100%	100%	100%	100%	99%	99%	99%	99%