

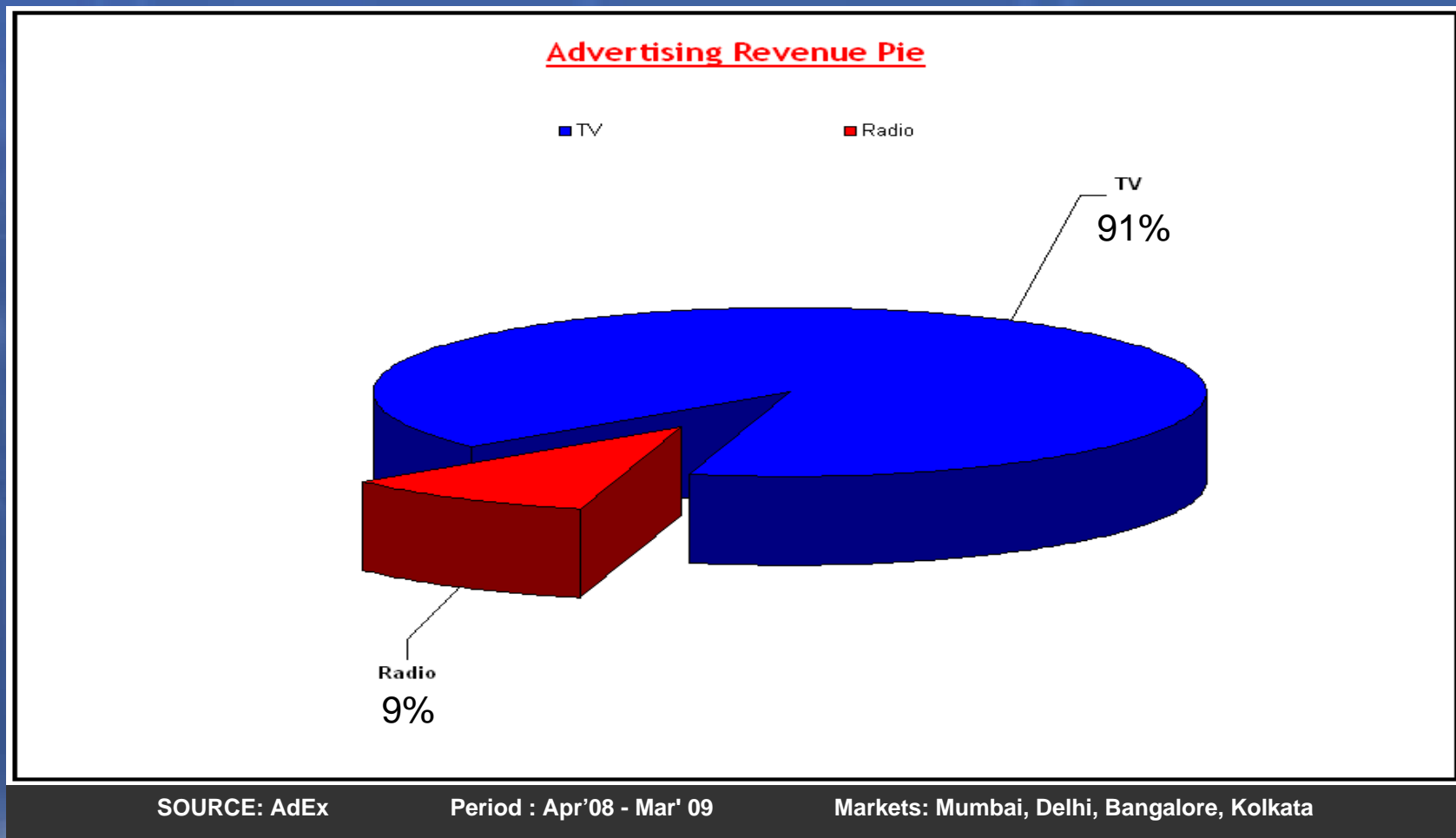


Listen.....!

Measuring the **BEAT** of Indian **RADIO** Audience

RAM
Radio Audience Measurement Service
A division of TAM Media Research

On an average, Television garners “10 times” more Advertising spends than Radio



Top Spenders on Television are from the FMCG industry: Why?

TOP 10	TV
1	Cellular Phone Service
2	Toilet Soaps
3	Insurance- Life
4	Cars / Jeeps
5	Soft Drink Aerated
6	Shampoos
7	Tooth Pastes
8	Washing Powders / Liquids
9	Two Wheelers
10	Milk Beverages

TOP 10	RADIO
1	Tv Channel Promotions
2	Cellular Phone Service
3	Independent Retailers
4	Social Advertisements
5	Properties/real Estates
6	Cars/jeeps
7	Publications/books
8	Insurance- Life
9	Jewellery
10	Educational Institutions

SOURCE: AdEx

Period : Jan - Mar' 09

Measuring the **BEAT** of Indian **RADIO** Audience



Advertising Spends / Spenders skewed towards Television....

The following perceptions have led to this kind of situation:

- FM Radio doesn't reach to enough people
- FM Radio is a youth / male dominated medium
- We can talk to housewives only through Television
- FM Radio is a low engagement medium

Changing Perception through measuring Consumption



Measuring the **BEAT** of Indian **RADIO** Audience



Questions that will get answered through this presentation.....

- How does the audience consume Media ?
 - Radio & Television
- Has the Radio Consumption changed '08 vs. '09?
- Is Advertising following the listenership trends?
- How can Radio be used to deliver effective Campaigns?

Current Scenario

- Across TV & Radio

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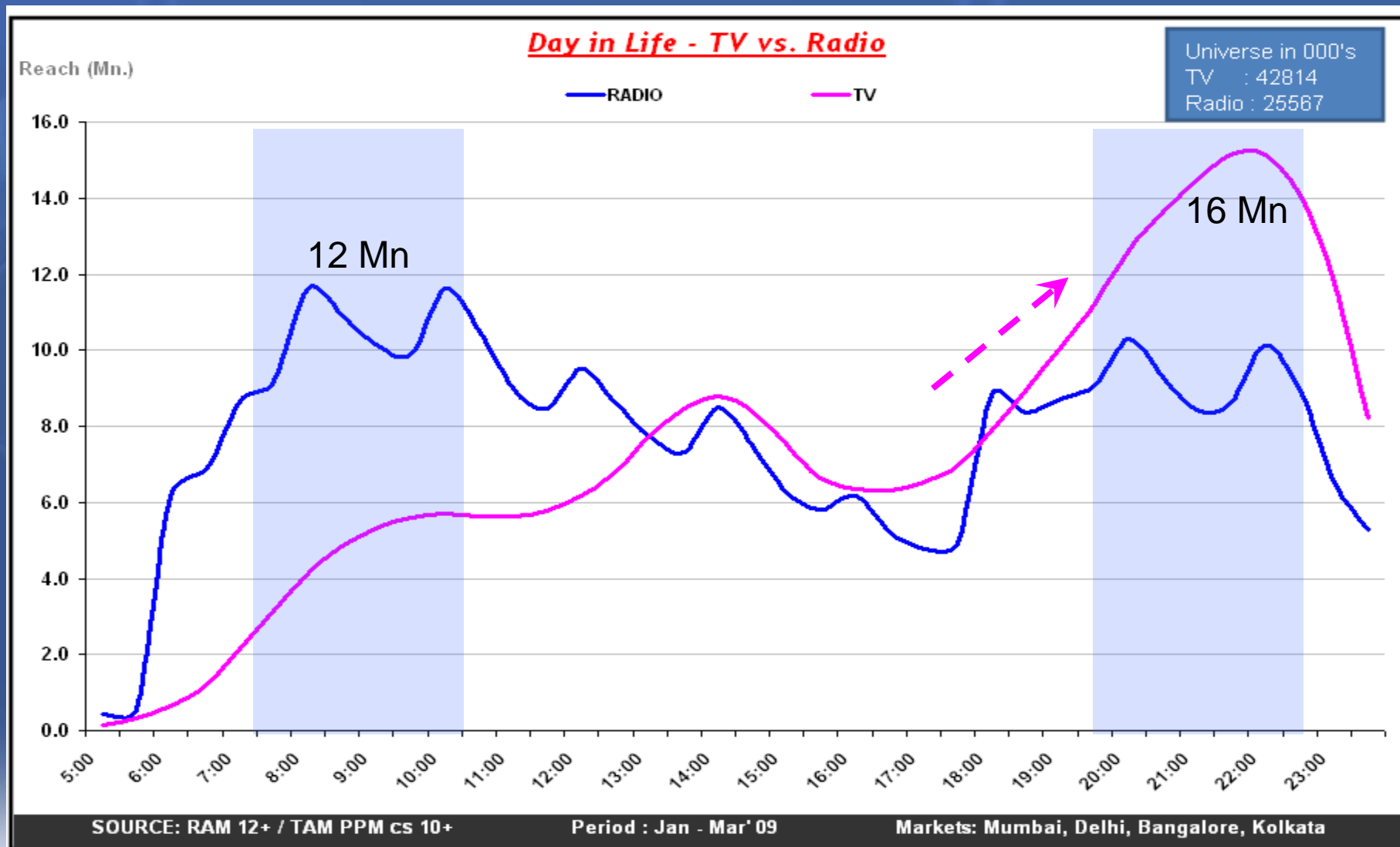
Does Radio Reach out to enough Audiences ?

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Radio attains two similar peaks in the mornings & evenings

Peaks of TV and Radio are quite comparable

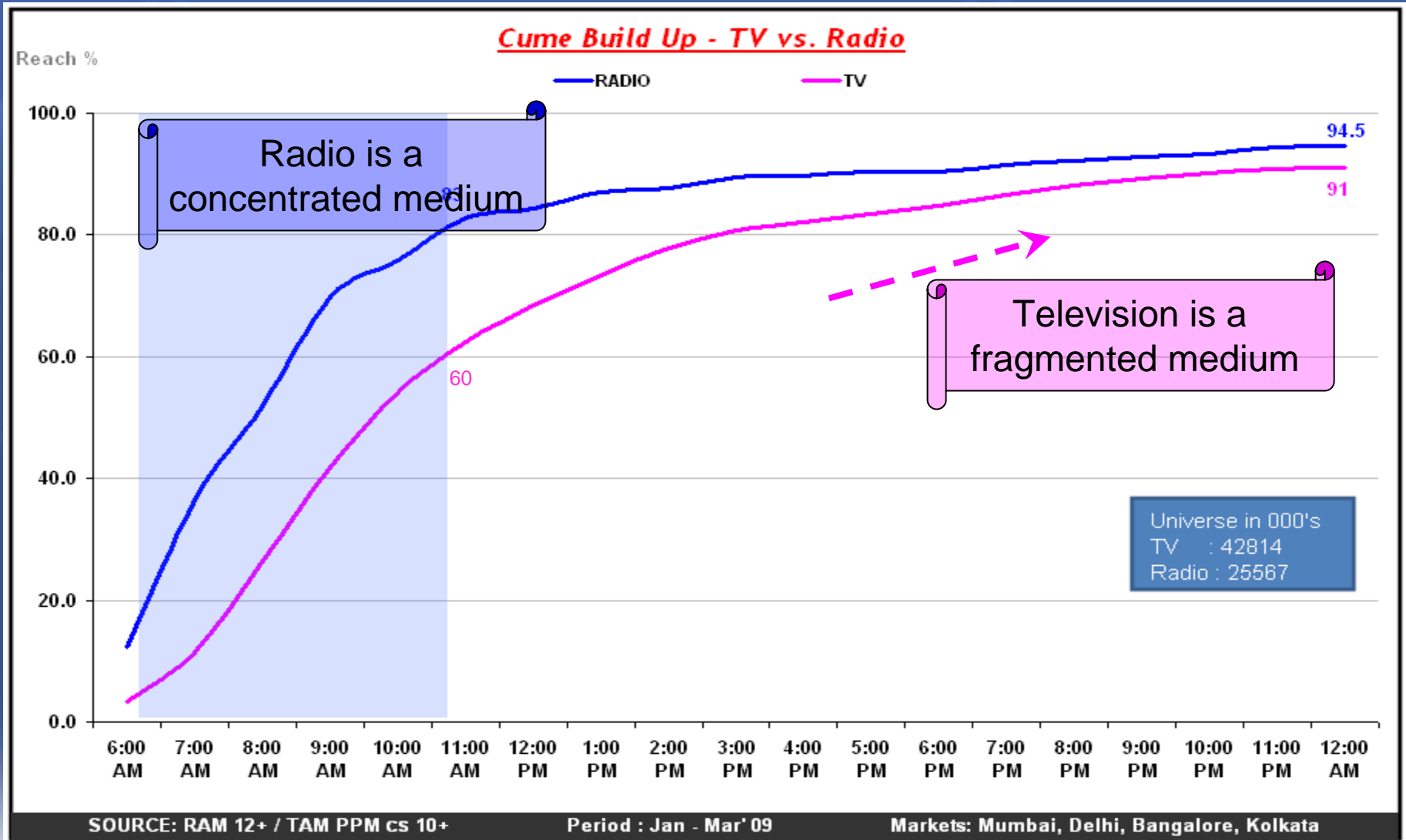


How does the audience accumulate over the day on the two mediums?

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Radio reaches 83% of it's audience by 10 AM.
 TV observes gradual build up since afternoon

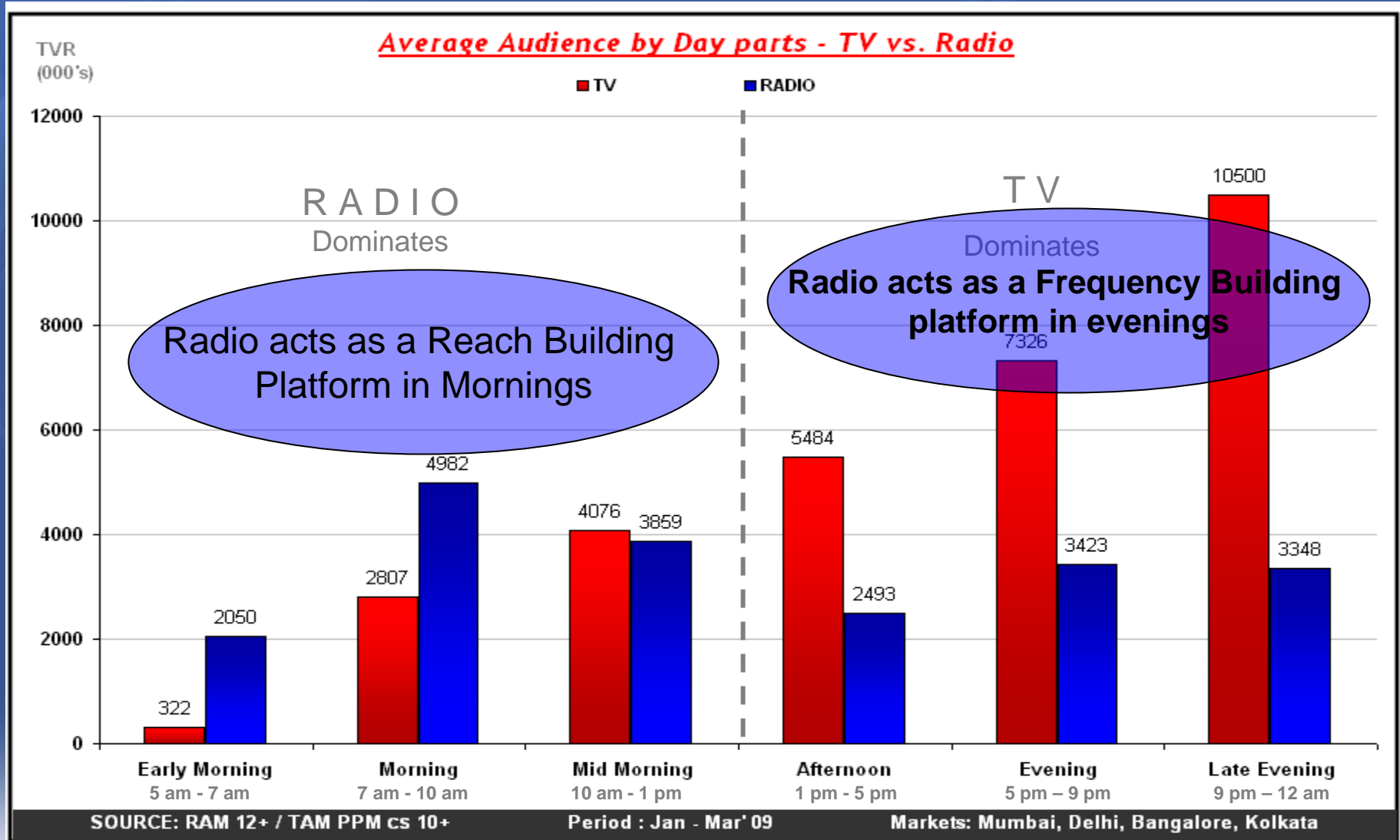


How many Audiences can we expect
on Radio & TV across dayparts?

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Radio clearly dominates its presence in Mornings; TV takes its position post afternoon

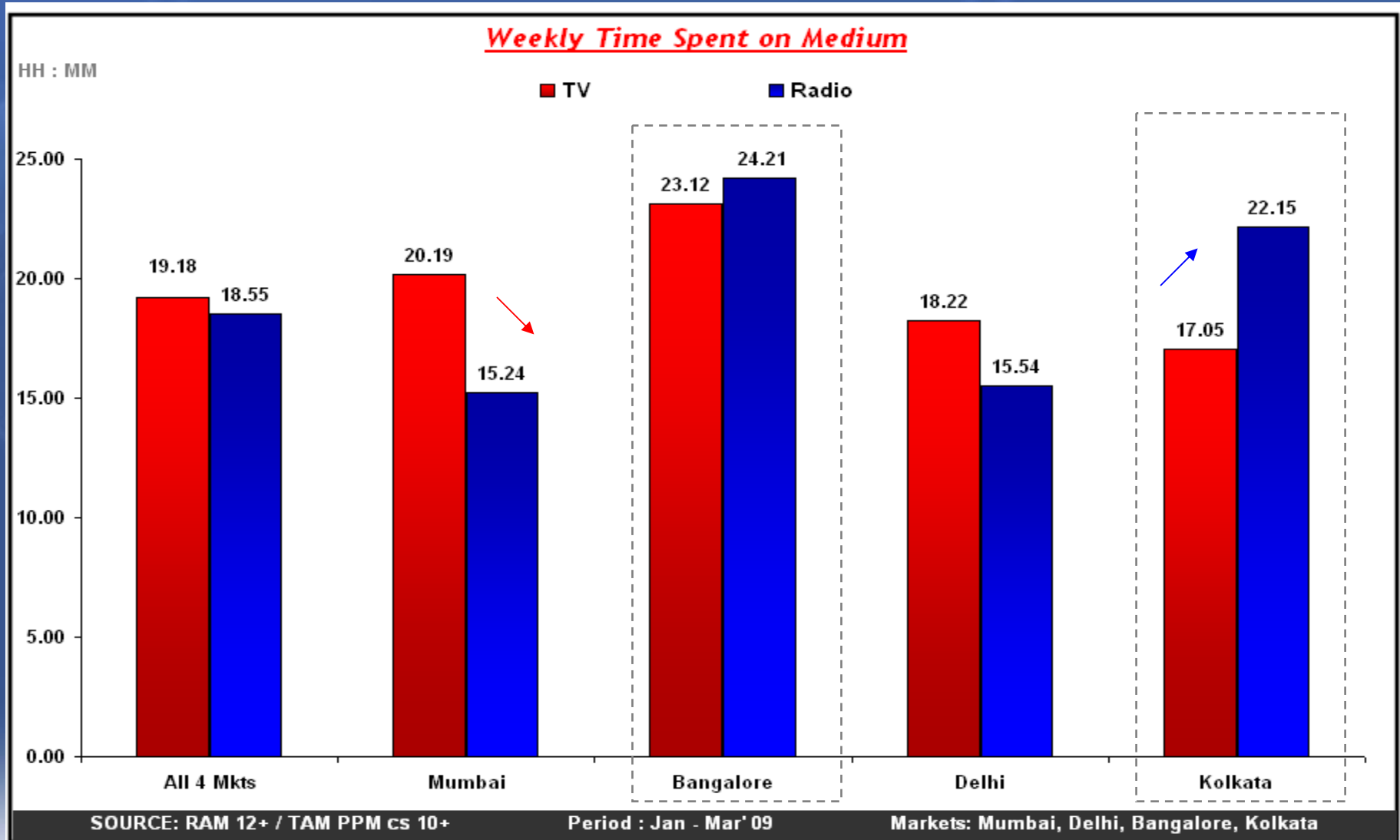


Is Radio a Low Engagement Medium ?

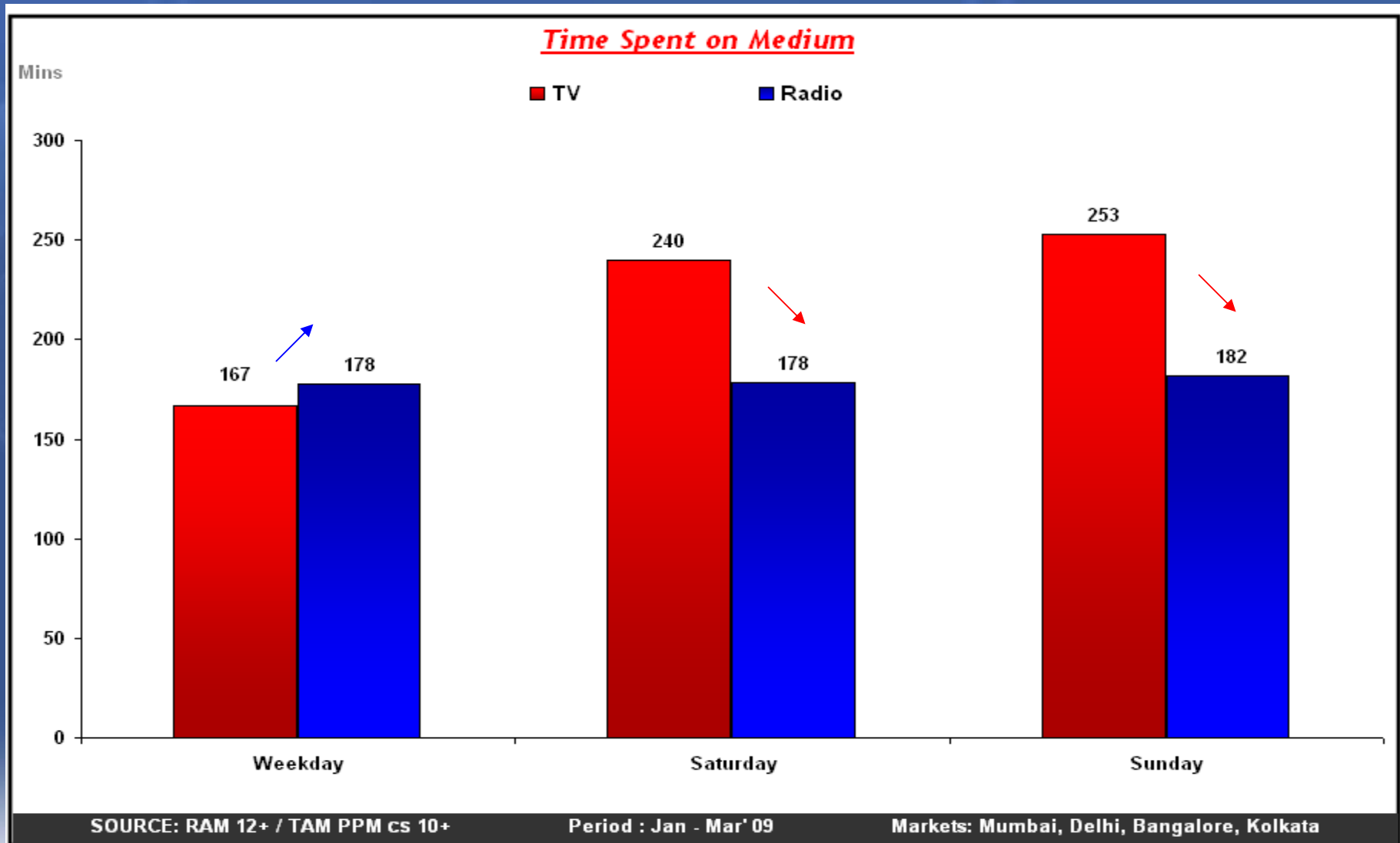
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Engagement levels on Radio are better in Kolkata & Bangalore, while TV dominates in Mumbai & Delhi



Time spent on Radio on an average weekday is more than that of TV.
However, consumption of TV increases on weekends



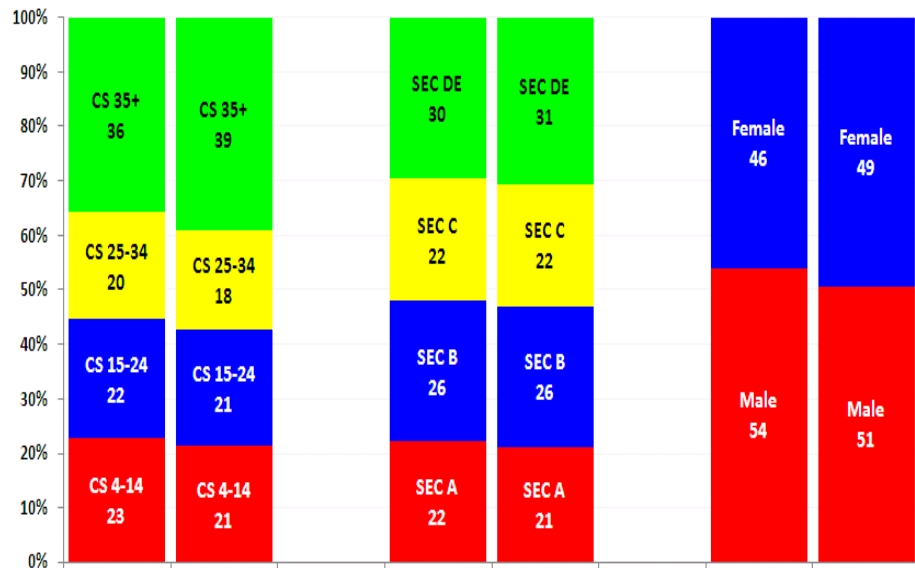
Is Radio skewed towards Male/Youth
and fails to talk to housewives?

Measuring the **BEAT** of Indian **RADIO** Audience

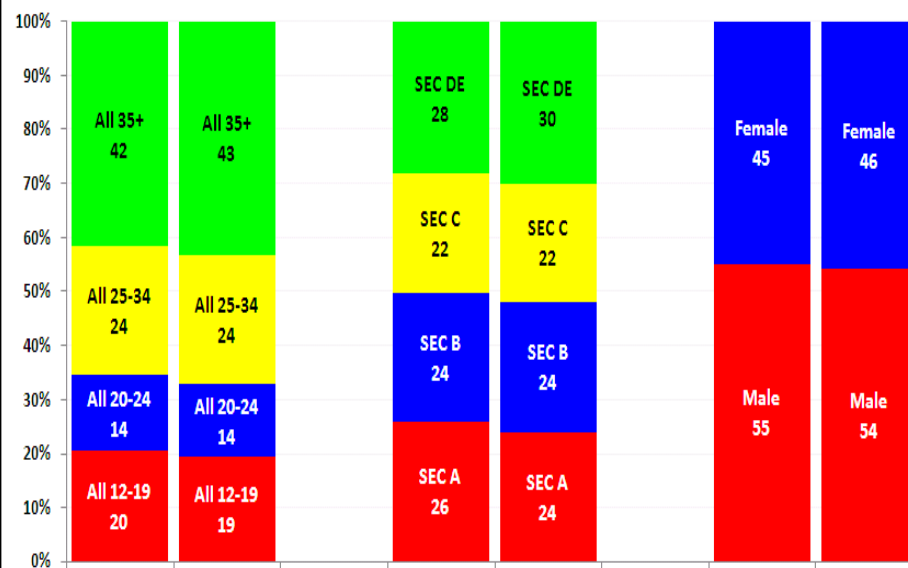
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Audience Profile of TV & Radio is very much similar and does not skew towards youth and Male audiences

Audience Profile - TV



Audience Profile - Radio



House wives in Afternoon on TV contribute 29% of viewing and on Radio their contribution is 30%

Listenership

Source: TAM Peoplemeter System

Market: RAM Markets

Time Period: Apr'09

Source: RAM

Market: RAM Markets

Time Period: Apr'09

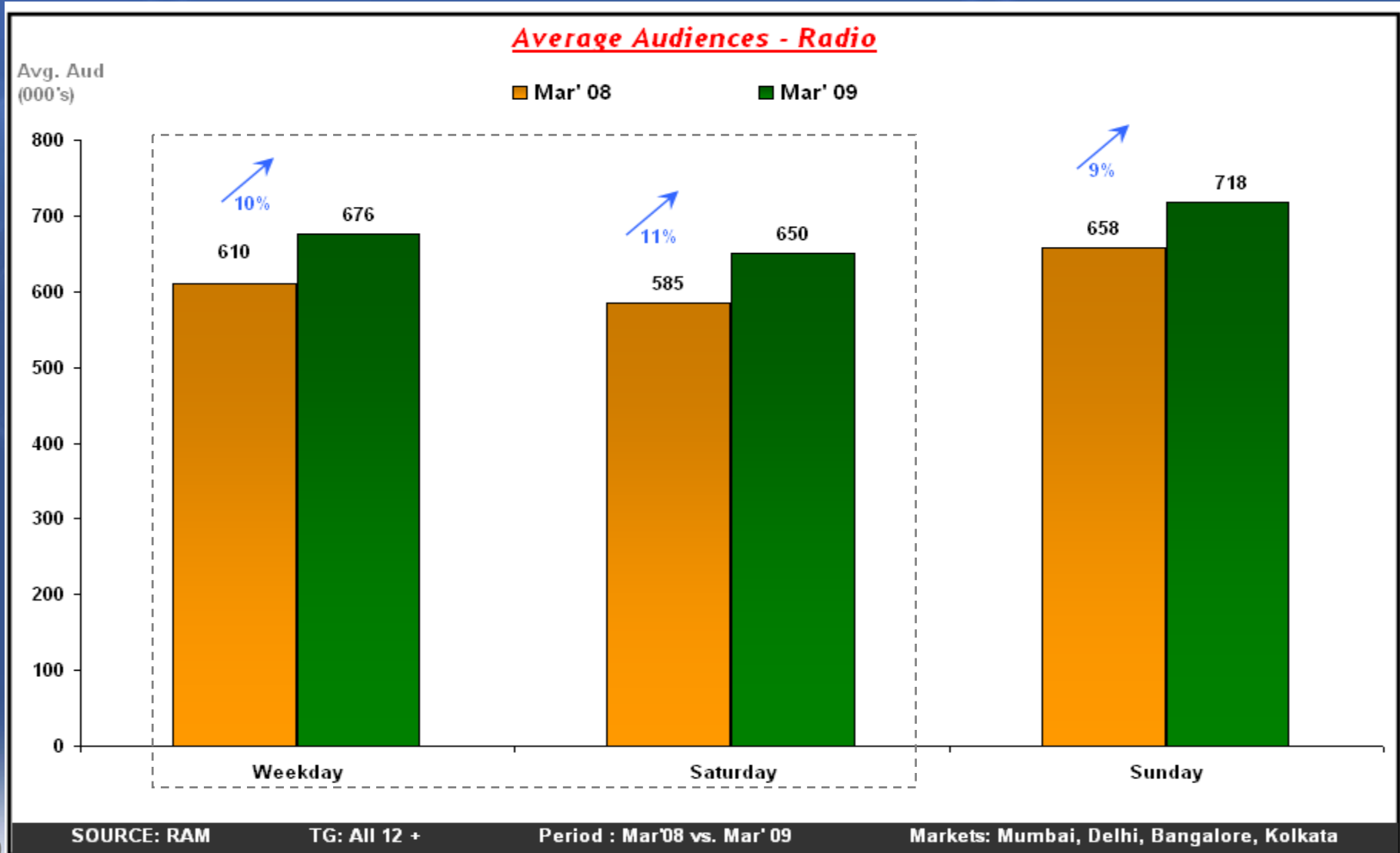


Consumption of Radio – '08 vs. '09 – RAM Markets

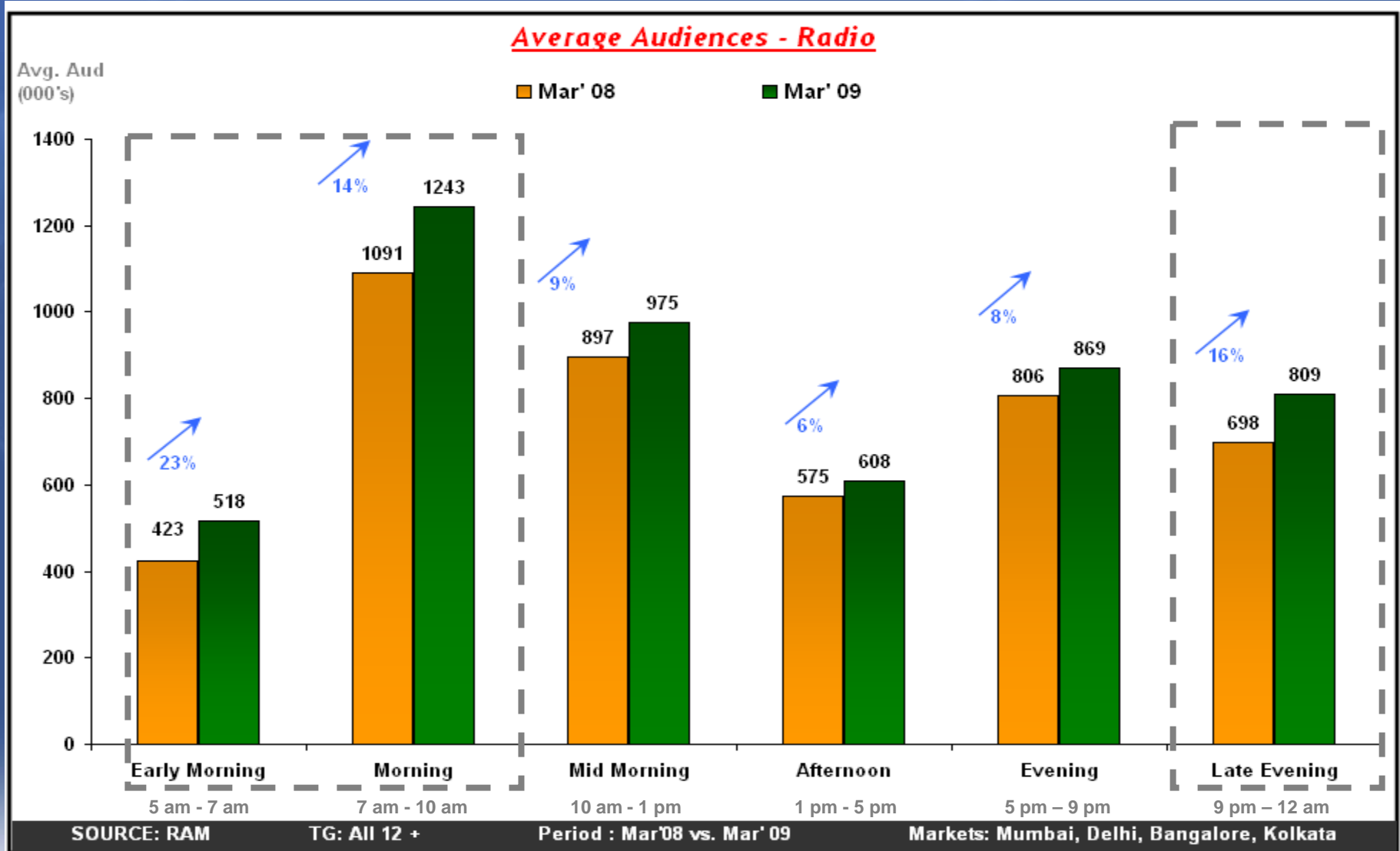
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In comparison to previous year, Radio has observed increase in listenership of 10% , at a time when C&S growth has stagnated on Television



Radio has witnessed consistent growth across all dayparts compared to last year



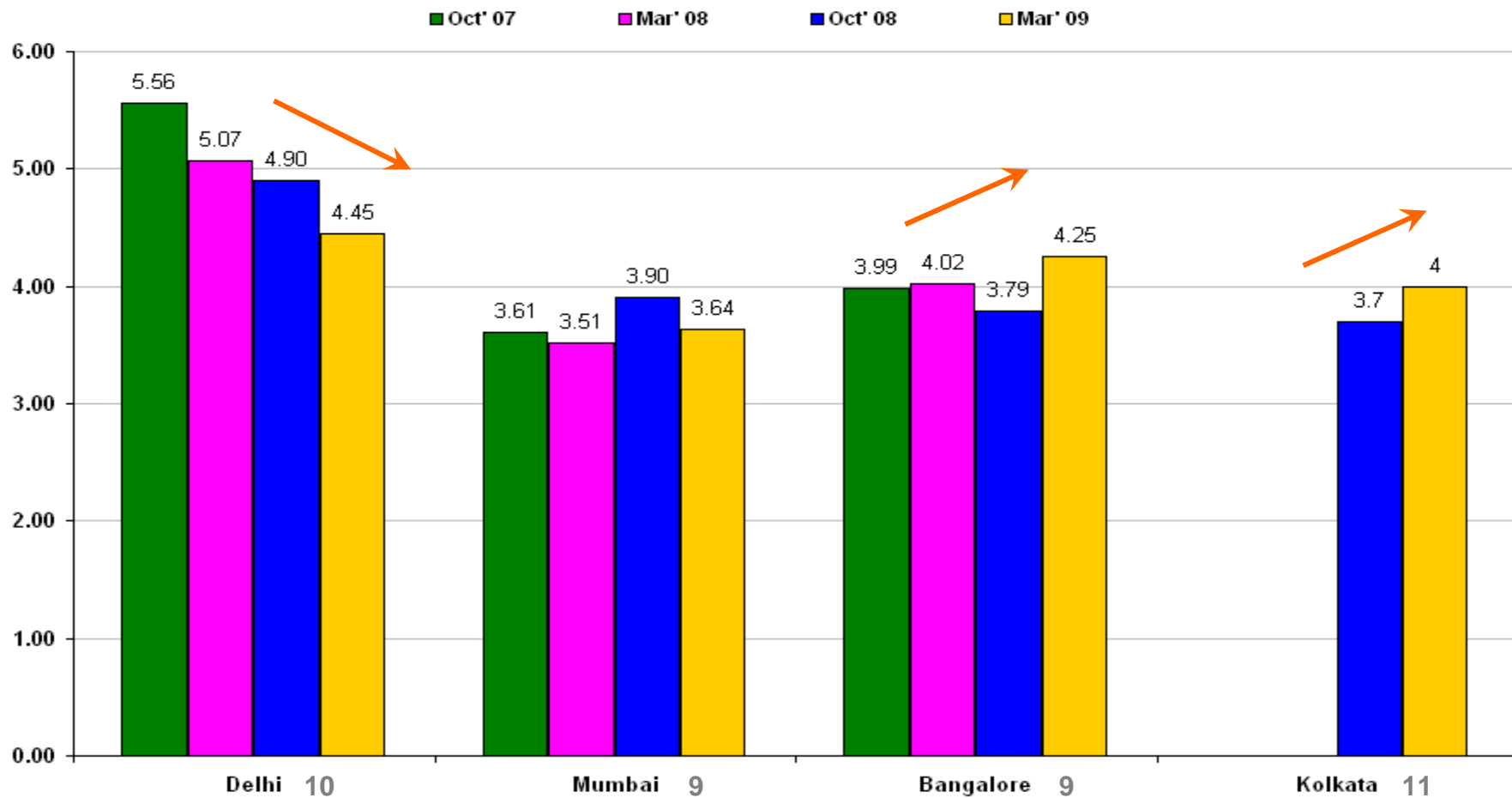
Has fragmentation on Radio increased?

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Clearly Delhi has witnessed consolidation over time, while for rest of the markets picture remains same .

Avg. No. of Radio Stations Tuned - Across Markets



SOURCE : RAM

Market : Kolkata

TG: All people 12+

Daypart : 12:00 am - 12:00 am

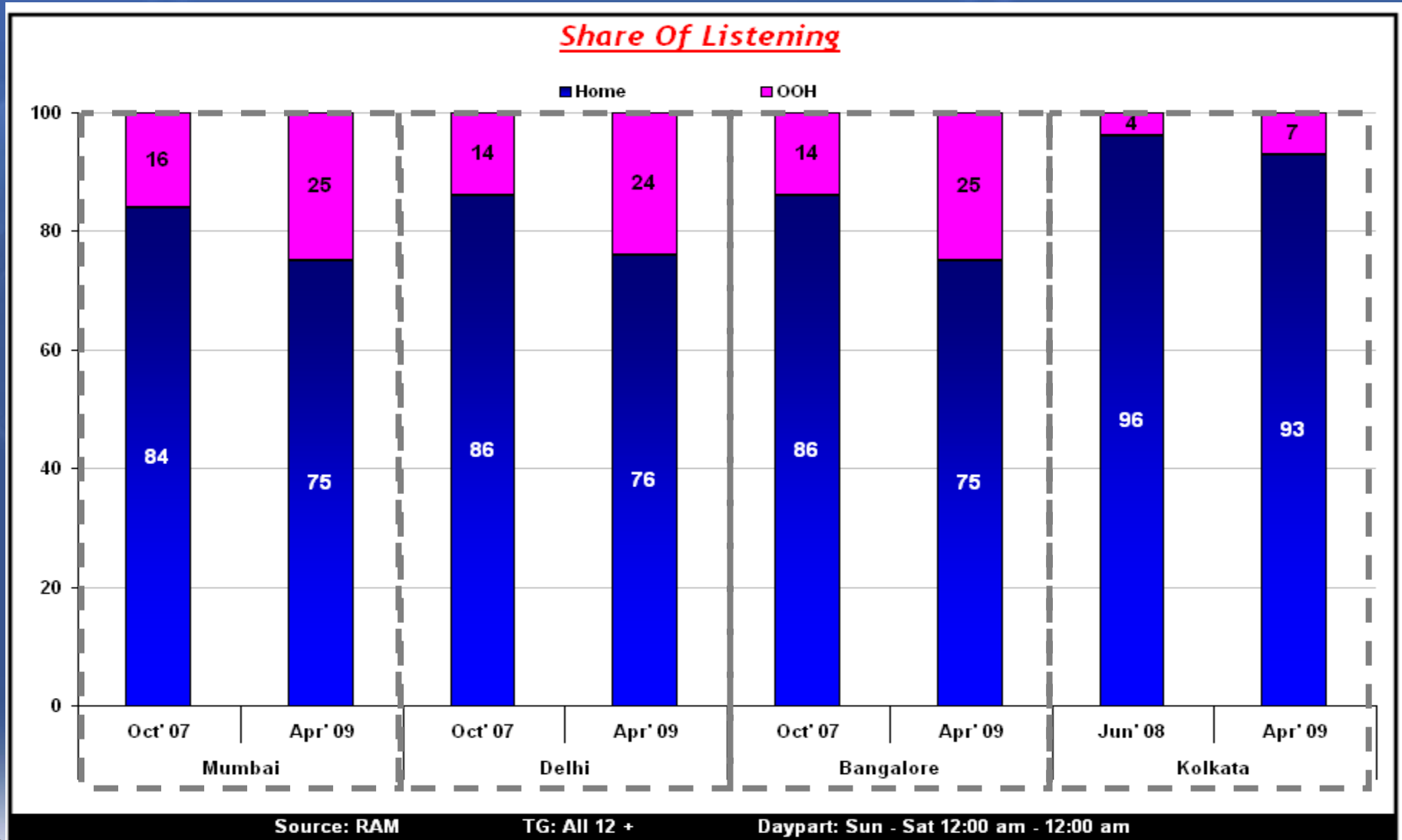


Has the listenership
“on the go” increased?

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Across Markets, Share of “Out-Of-Home” listening has been increasing over time.



Who is influencing the OOH growth?

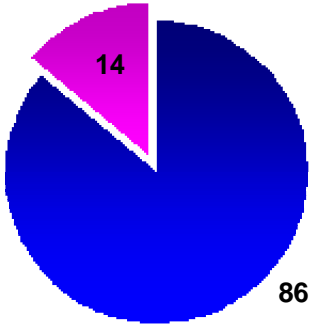
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Jun' 08

All People 12+

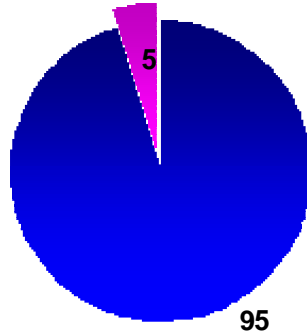
■ Home ■ OOH



Jun' 08

Housewives

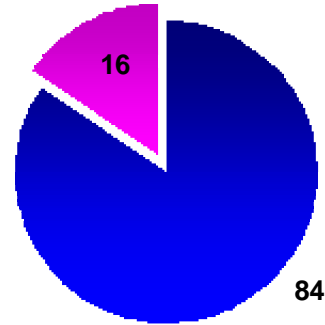
■ Home ■ OOH



Jun' 08

Youth

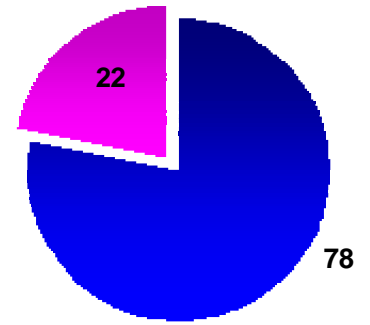
■ Home ■ OOH



Jun' 08

Male Youth

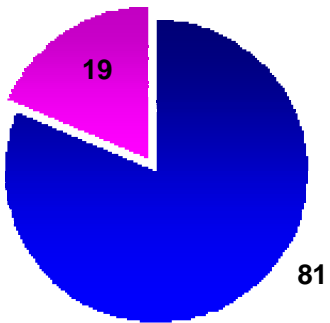
■ Home ■ OOH



Apr' 09

All People 12+

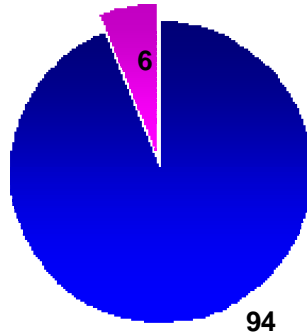
■ Home ■ OOH



Apr' 09

Housewives

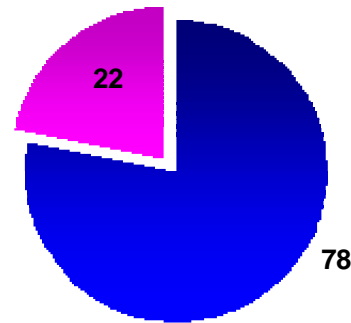
■ Home ■ OOH



Apr' 09

Youth

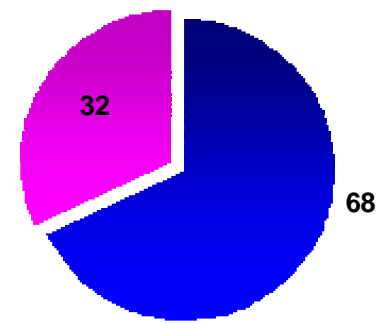
■ Home ■ OOH



Apr' 09

Male Youth

■ Home ■ OOH

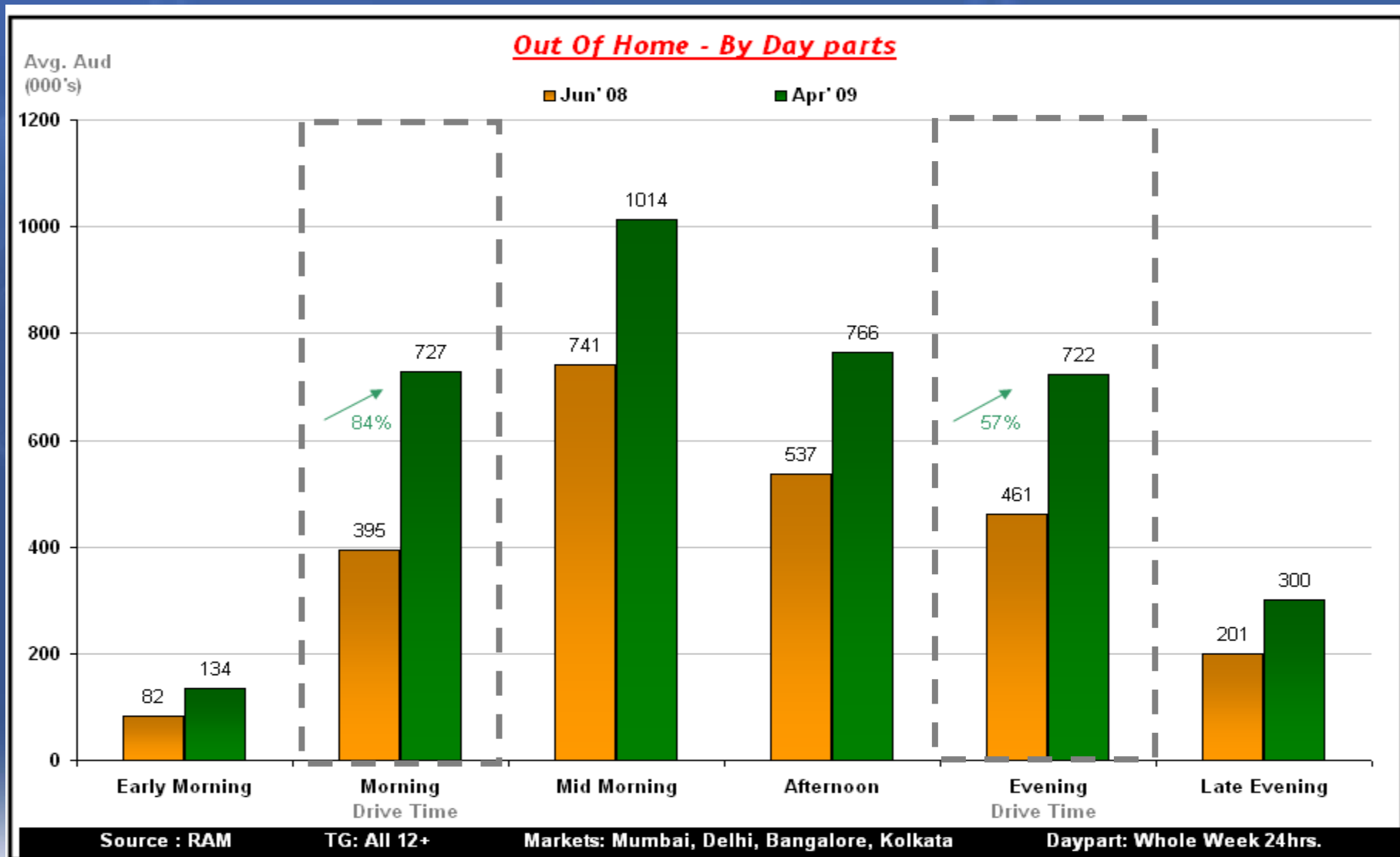


Which Day-part is contributing to the growth in OOH listenership?

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Out Of Home witnessed growth across all dayparts; but the maximum from Morning & Evening Drive Time 84% and 57% respectively



To sum up..

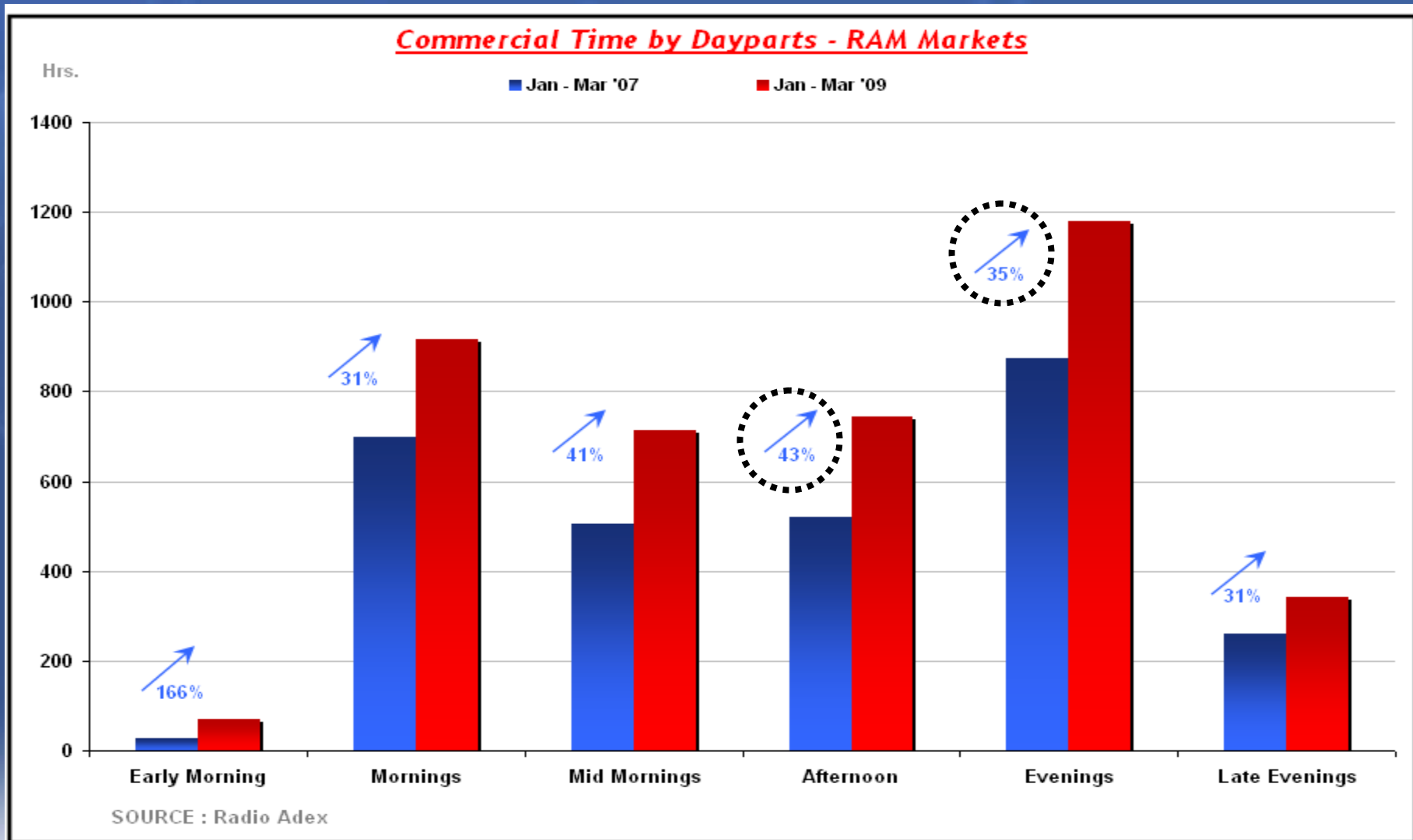
- Radio emerges as a strong contender to be considered by advertisers, in particular, FMCG brands.
- Radio in Mornings acts as a Reach builder while in evenings it's a frequency builder unlike TV which is fragmented.
- Out of home listening continues to grow rapidly, truly making Radio the only "mobile medium" unlike TV.
- House wives contribute maximum to the in home listening

Is Advertising following the listenership trends?

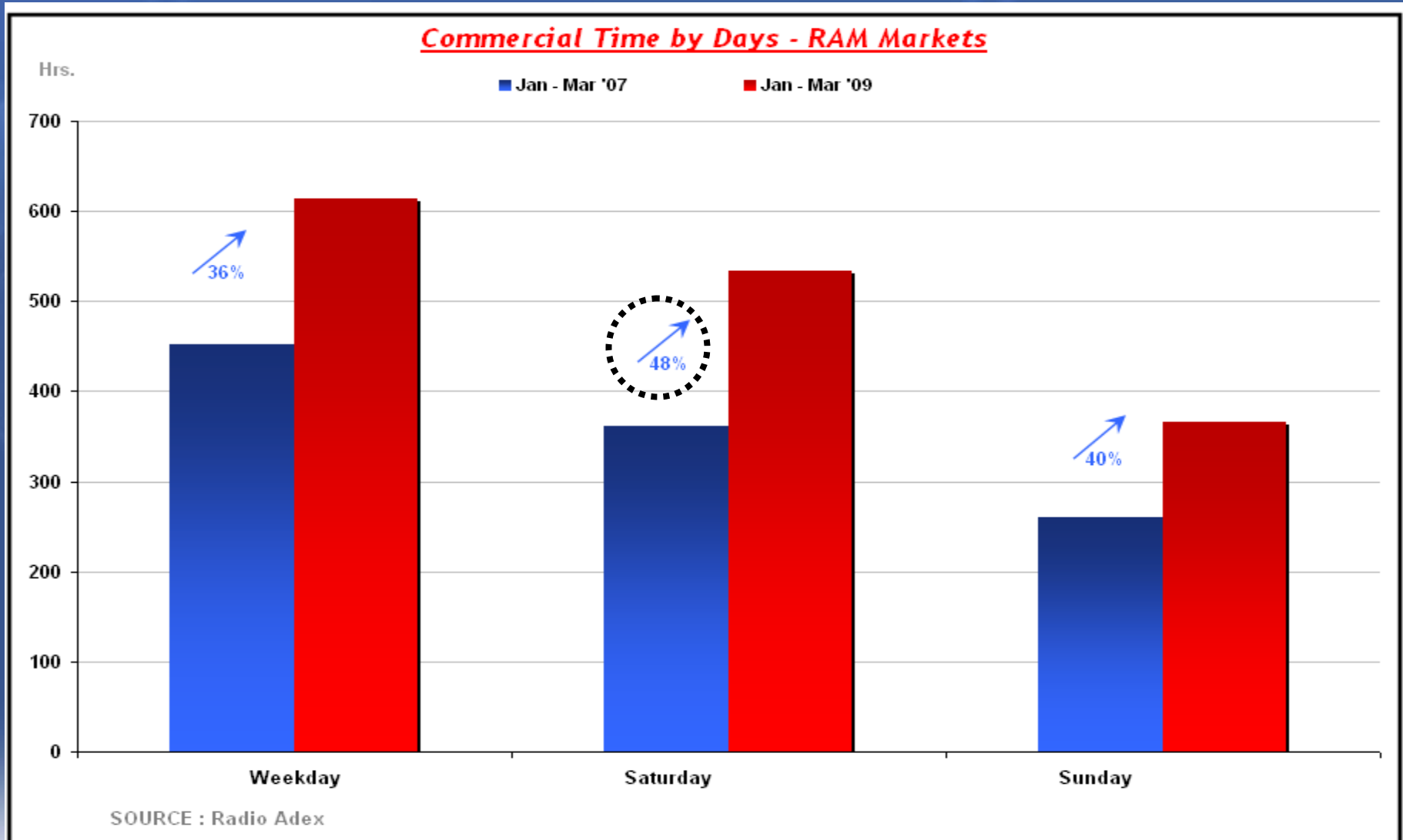
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In tune to listenership pattern, Radio advertising also has seen a similar trend over time maximum increase has been on Drive time



Weekends have also observed significant growth in Radio advertising spends

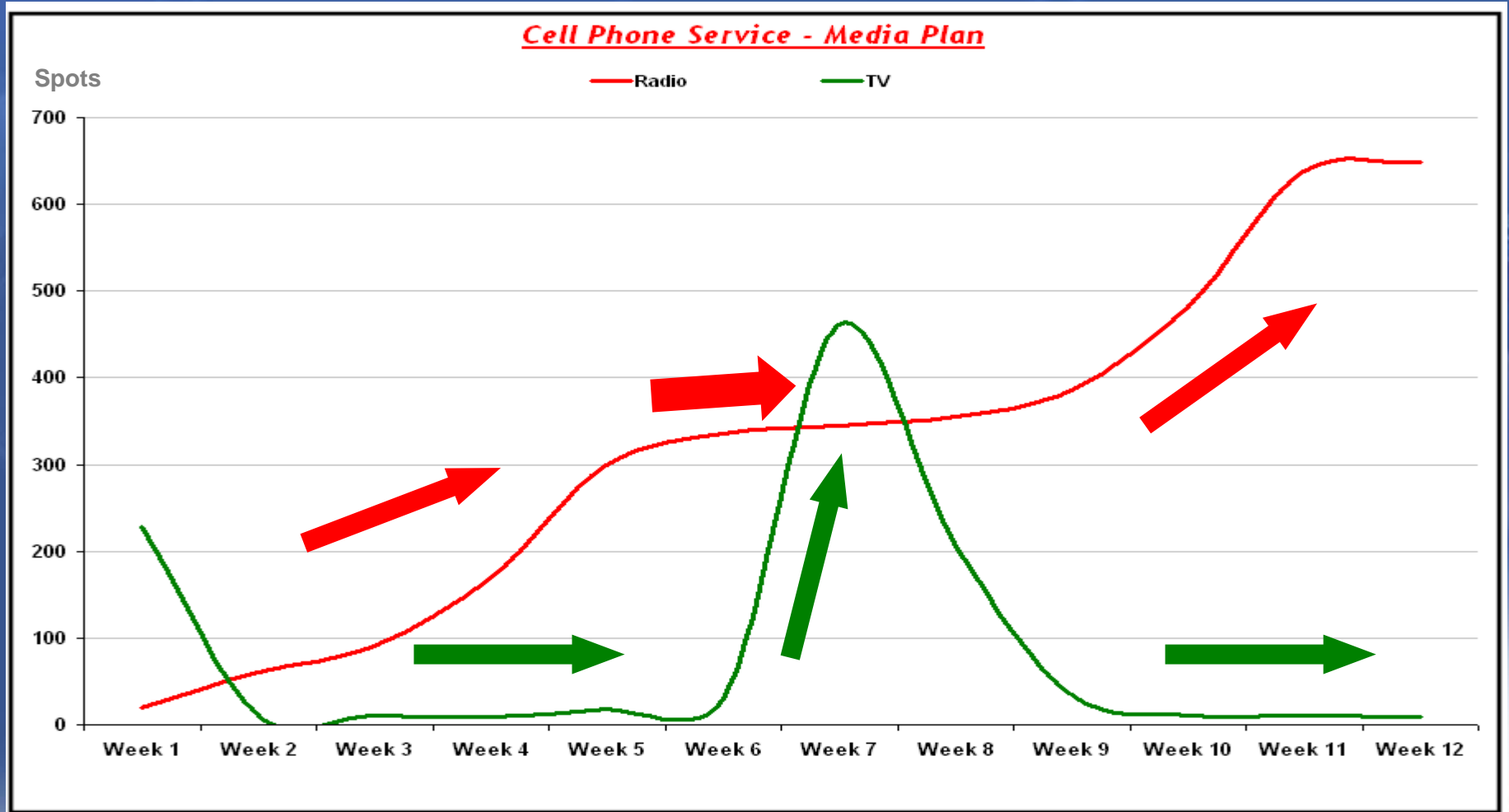


How can Radio be used to deliver effective Campaigns?

Measuring the **BEAT** of Indian **RADIO** Audience



Radio and TV have been used tactically to get maximum reach within the limited budget

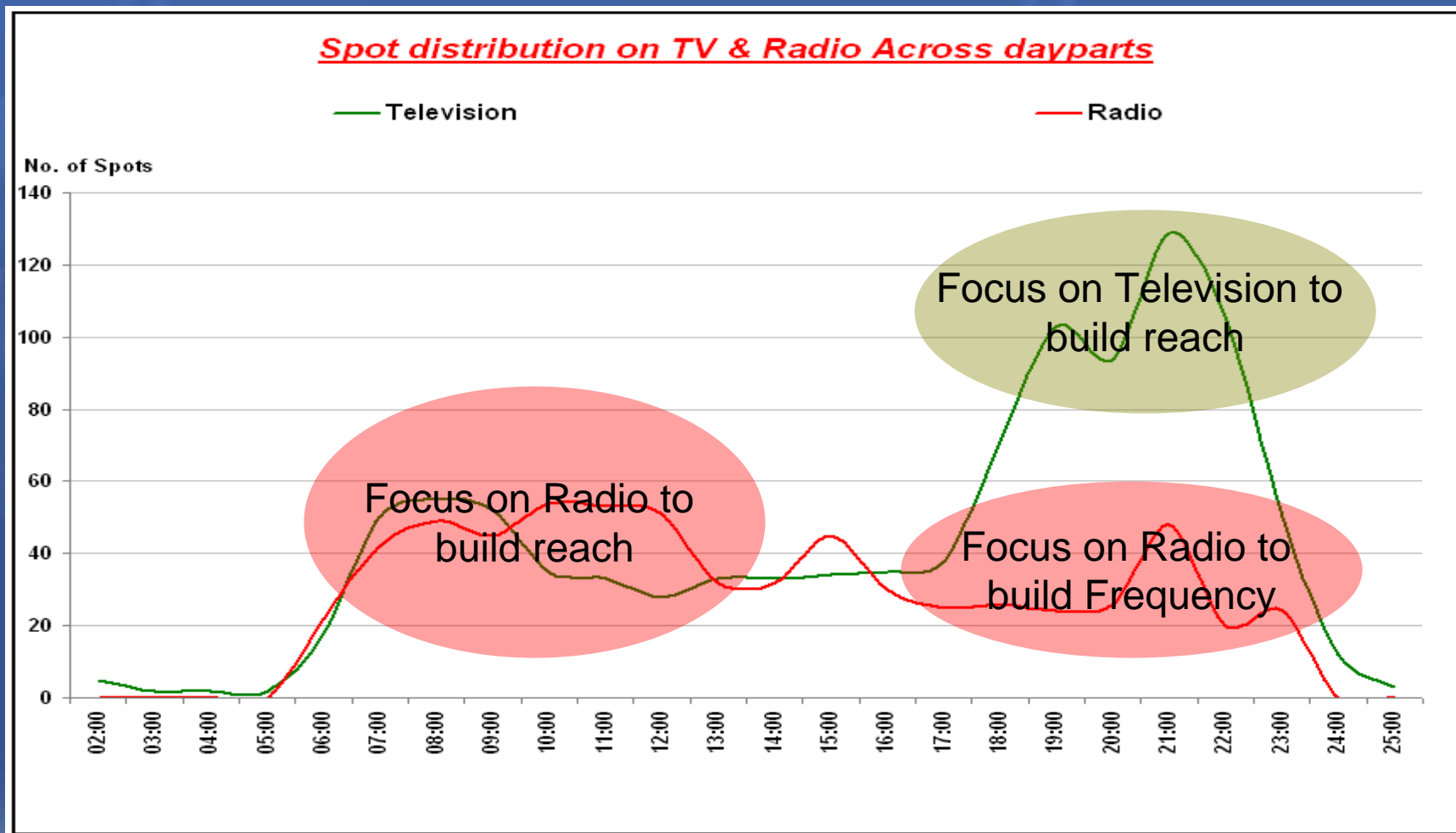


Source: Adex

Market: Mumbai

Period: week 1- week12 -2009

Radio and Television has been used to reach out to maximum audiences by focusing on the right day parts



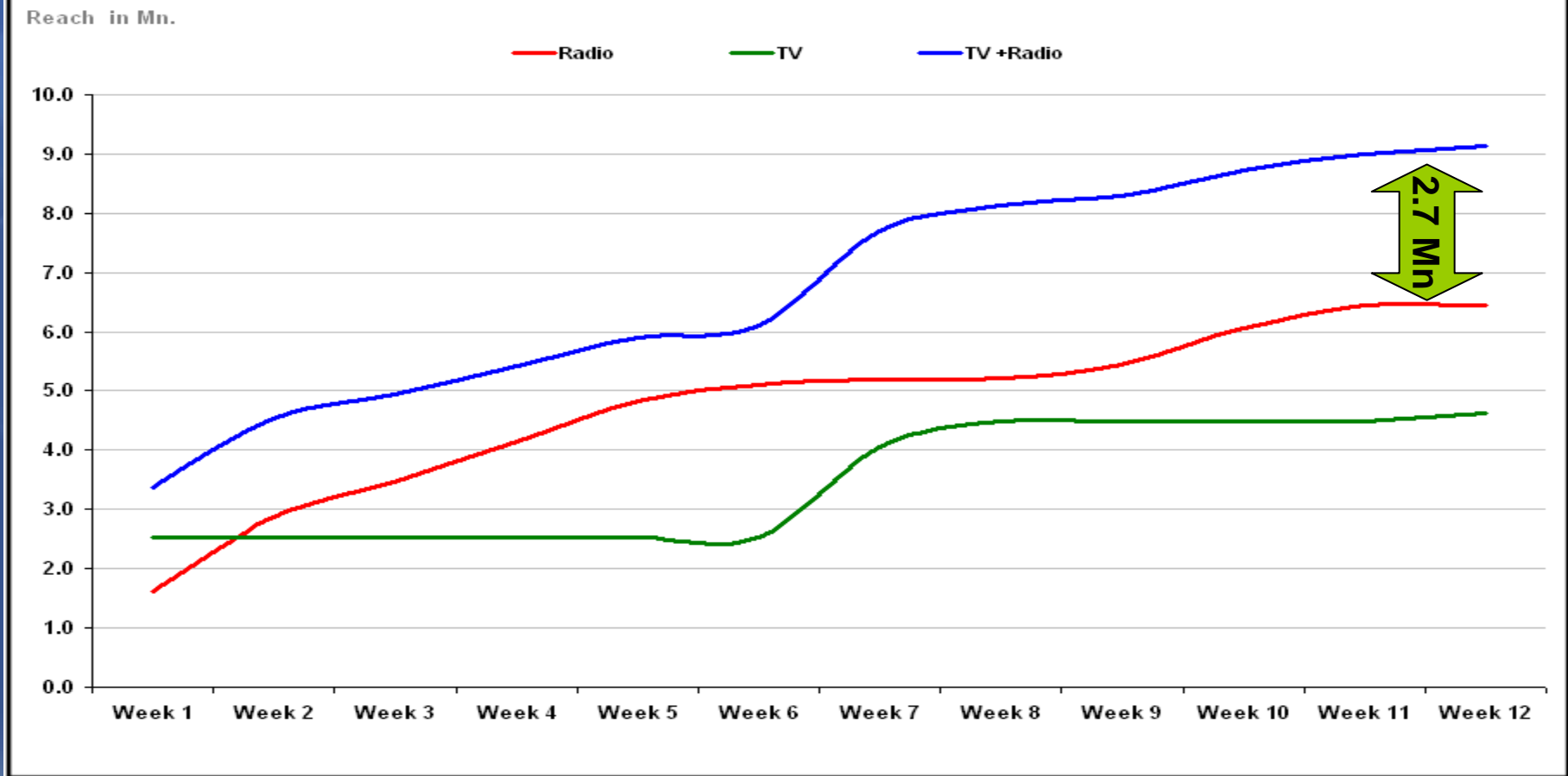
Source: Adex

Market : Mumbai

Period: week 1- week12 -2009

The plan helped the Advertiser to reach additional 2.7 Mn audiences at lower cost by including Radio in the media plan

Cell Phone Service - Media Plan Deliveries



Source: TAM & RAM

Market: Mumbai

Period: week 1- week12 -2009

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A division of TAM Media Research

To Sum Up

- Given the similar audience profile and similar consumption levels between FM Radio and TV, FM Radio Medium proves to be a must have in the Media mix of a plan.
- Learning's from the above case study can be used by the FMCG sector to exploit the potential of both mediums.
- Its not about FM Radio v/s TV.....

Slogan for 2009-10

...Its about FM Radio + TV =
More Effectiveness for FMCG campaigns