



## India Peoplemeter Update – VI

### Universe Update 2009 and New Markets

## **I. Introduction**

As we enter 2009, there are exciting developments on the TAM front. First and foremost, we are introducing new markets that will improve your business planning and implementation. Second, we have undertaken a universe update that includes updated digital penetration estimates. This document describes these initiatives.

## **II. Universe estimates**

Whenever a user undertakes an analysis on TAM analyses software such as Media XPress, two primary outputs are generated:

- 1) The viewership estimates for the geography x demography x daypart being analyzed
- 2) The universe estimate<sup>1</sup> for the geography x demography x time being analyzed

Universe estimates help the user to put viewership estimates in context. This is especially true given that the most commonly used viewership estimates such as reach or rating are proportions. For example, media vehicles could garner 'high' ratings but on a very small sub-segment of the population i.e. a small universe. It is therefore important that analysts also carefully see what geography, demography and daypart was considered for the analysis.

## **III. TAM's universe estimates**

TAM uses estimates from the National Readership Survey (NRS) to base its universe estimates. Apart from the NRS, we also conduct our own listing exercise. The listing exercise is a large survey like the NRS, of size about 15 times that of the design TV panel size. Its fieldwork is spread throughout the year and serves:

- 1) To generate universe estimates
- 2) As a sampling frame to recruit panelists from

The last universe update was undertaken in the first week of 2007. For this update, NRS 2006 was used as the base. While ideally we would have wanted to use NRS this time too, there hasn't been a more recent NRS data release since NRS 2006. Thus we decided to use our listing exercise to estimate demographic proportions.

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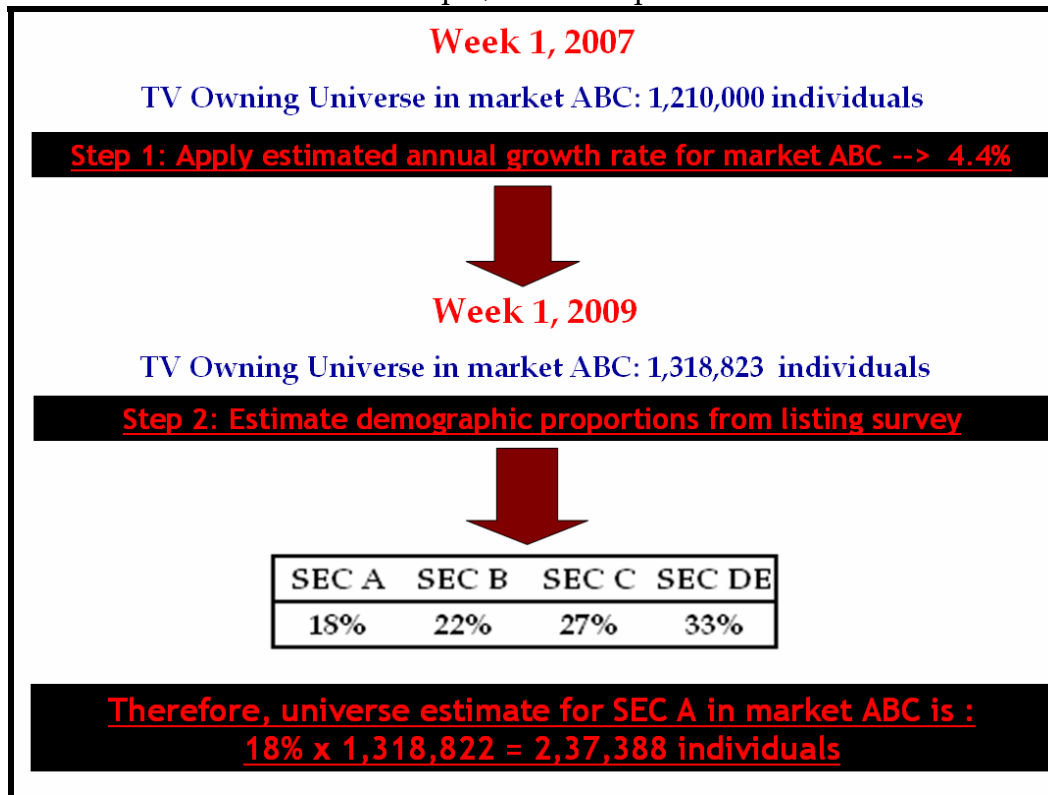
<sup>1</sup> While there is a technical difference between the words 'universe' and 'population', the industry uses the words interchangeably.

#### IV. Undertaking the universe update

There are two parts to updating the universe:

- 1) Estimating the growth in the overall universe of TV owning homes in each TAM reporting market. This step is undertaken by using census-based population growth rates.
- 2) Estimating demographic proportions in the new universe. For example, estimating that SEC A is 18% of the TV owning universe, up from 15% in 2007. This estimate comes to us from the listing exercise.

For a concrete example, see the representation below.



#### V. New markets in 2009!

2009 will also see the commencement of data release for new markets. These new markets are:

a) **New states in existing strata**

These are Bihar and Assam. We are covering 1Mn+ town in Bihar and 0.5Mn+ town in Assam as a start in these states and will progressively move ahead.

b) **New strata in existing states**

Currently, TAM reports data for the Class I strata; formed by carefully selecting towns to represent the TV consumption in towns with a population

greater than 100,000 individuals. The big news here is that for the first time ever, industry will have data for the “Less than Class I” strata. We are starting off with Maharashtra and will move into other states in the coming months.

**c) Local markets in existing reporting markets**

Non-top-6 metros have seen considerable economic growth<sup>2</sup> and advertising spends have grown. This means the need for more local measurement to aid better planning and implementation. In line with this need, we have selected two 1 Mn.+ cities that will be reported separately: Pune and Ahmedabad. Based on industry feedback, we will extend local measurement capability to more cities.

**d) Splitting reporting states finer**

The broadcast business has become more area-specific and advertisers are keen to use these focused vehicles for planning. We will therefore split existing ‘combined’ states into finer reporting units. The current reporting states to be split are : PHCHP and MP-Chattisgarh

**VI. How will the new markets be reported?**

Since there are a number of new markets being released, to ensure clarity in analysis, we are providing a separate tab in Media XPress called ‘2009 markets’ in the area where users specify markets for analysis. In this tab you will see the following additions/modifications:

i) New additions:

- Maharashtra LC I (i.e Less than Class I)
- Bihar 1 Mn.+
- Assam 0.5Mn+
- Pune
- Ahmedabad
- P (Punjab) 1 Mn.+
- PCHP 0.1 – 1 Mn.
- MP 0.1 – 1 Mn.
- Chattisgarh 0.1 – 1 Mn.

ii) While Pune and Ahmedabad will be reported separately, they are still included in the respective 1 Mn.+ strata. Thus, the definitions of ‘MAHrest 1 Mn.+’ and ‘Guj. 1 Mn.+’ remain unchanged.

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<sup>2</sup> <http://www.livemint.com/2008/10/30125639/Pune-to-become-7th-metro-city.html>

- iii) Similarly the definitions of 'PHCHP 1 Mn.+' and 'PHCHP 0.1 – 1 Mn.' remain unchanged and will be seen in the markets tab.
- iv) Note that MP 0.1 – 1 Mn. in 2009 is different from the MP 0.1 – 1 Mn. till 2008. The latter had Chattisgarh included in it.

ii) and iii) need to borne in mind while making market groups, even though the software will try to avoid 'double counting'

You might see universe estimates in certain split markets (eg. 'P 1 Mn.+') varying for some weeks in early 2009. This is because, while we are splitting markets we are also simultaneously boosting sample sizes in the split markets to ensure sufficient sample size. Till such time the process of boosting is not complete, we will use the earlier combined market for the weighting process. For example, while we report P 1 Mn.+ separately, its universe will be derived from the combined weighting unit, PHCHP 1 Mn.+.

#### **VII. An earlier India Peoplemeter Update<sup>3</sup> said one should avoid undertaking runs where the analysis period is across universe updates. Does that still hold?**

Yes, the guideline about not undertaking cross-universe updates still holds. The extract from that Indian Peoplemeter Update is given below:

*Every analysis conducted on TAM has a certain universe size and profile associated with it. It is important that every sample individual in a target group that contributes to the data is associated with a unique 'Contribution to universe' figure.*

*For all analysis modules producing a reach estimate, it is necessary to split an analysis run that has an analysis period across universes into two: One analysis period corresponding to Pre-Universe update and one corresponding to Post-universe update. The reason for this is that Media XPress uses the Middle Day of the analysis period as the sample basis for its calculations and in order to conform to the 'Contribution to Universe' principle stated above, the runs would thus need to be split. This must especially be kept in mind while running Reach and Frequency runs.*

Apart from this, as stated earlier, the markets for 2009 are in a separate tab that precludes cross-universe-update runs as a safety measure.

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<sup>3</sup> India Peoplemeter Update – IV, June 2005

### **VIII. What about digital universes?**

Estimating digital universes can work in the same fashion as described early in this document. However, given that the medium is relatively new, in order to ensure maximum precision, we commissioned IMRB and Nielsen to undertake independent surveys to estimate digital penetration. You will therefore find updated digital universes too in the new 2009 universes. This is in line with our previous announcement on Digital Establishment Surveys (DEs) to give the industry the best data possible.

### **IX. Summary**

With these changes, the number of reporting markets has gone up to 36 from 28. These new data streams have been introduced to provide the industry with more and better information leading to more informed business decisions. In addition to the new markets, universe estimates have also been updated. Mention should specially be made of the updated digital estimates, reinforcing our promise made at the TAM digital conference in August 2008 and our commitment in providing the industry the latest and the best.

As always, for any assistance that you may require, please do not hesitate to contact your friendly neighbourhood TAM representative. You can also mail us any doubts/clarifications on - **[expansion\\_questions@tamindia.com](mailto:expansion_questions@tamindia.com)**

Please also consider giving us your feedback – we value it!