TAM Annual Universe Update – 2010

TAM Annual Universe Update-2010

- The necessity of Annual Universe Updates
- The methodology employed
- The top-lines of Universe changes
- Implications for users

The Necessity of Universe Update

- The population represented in each market reported by TAM, organically will change either in size or structure.
  - Growth in TV owning households
  - Growth in C&S penetration
  - Explosion of new ways of accessing TV such as Digital platforms
  - Difference in rate of growth across markets
  - Organic change in demographics

- Universe estimates are the base of all viewership estimates that an audience measurement company produces. Hence the need for regular high quality universe estimates to capture the dynamic changes and produce Gold Standard viewership estimates

Methodology: Previous Universe Updates

- For 2009 Universe update
  - Used Census compounded annual growth rate for Population Growth
  - Establishment survey used for Demographics Proportions
    - Field Work by TAM, IMRB & Nielsen
  - Two individual studies commissioned to IMRB and Nielsen for validating Digital penetration

Methodology: For Universe Update 2010

- Census growth rates applied for annual growth rate of population growth rate

- TAM + IMRB + Nielsen Base line study conducted in Nov-Dec 2009 to establish latest demographic proportions and Universe changes

- The 4th round Digital Establishment Survey (DES)
  - DES I: Field work: Jan – Feb 2007; Release: April 2007
  - DES II: Field work: Oct-Nov 2007; utilized for 2008 universe update
  - DES III: Field work: Nov 2008; utilized for 2009 universe update
  - DES IV: Field work: Nov-Dec 2009; utilized for 2010 universe update

- Sample size of ***over 1,00,000*** face-to-face interviews
- Conducted across Urban and Rural India

Methodology: An example

Week 1, 2009

TV Owning universe in Market ABC: 197,323,000 individuals

Step 1: Apply estimated annual growth rate for Market ABC →8.9%

Week 1, 2010

TV Owning universe in Market ABC: 214,839,502 individuals

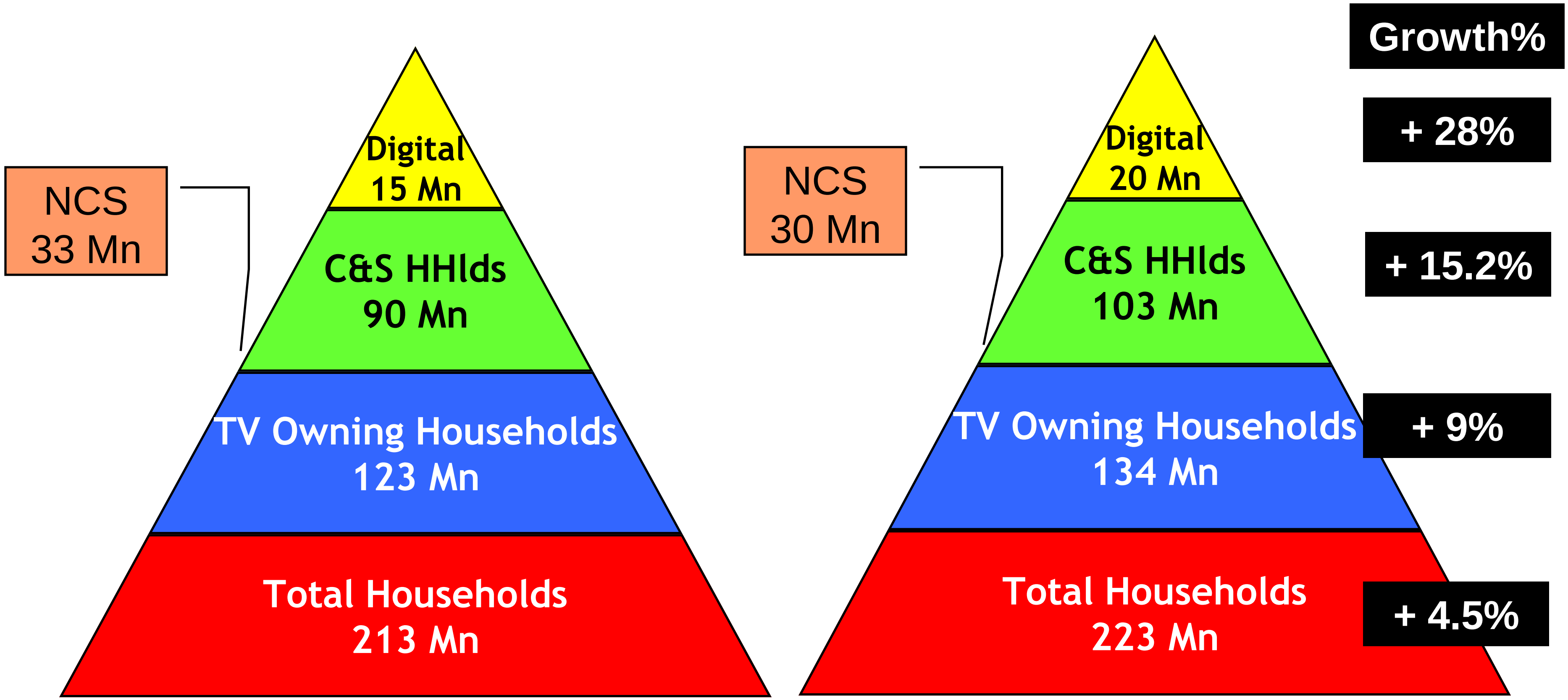
Step 2: Estimate demographic proportions from Establishment Survey

SEC A	SEC B	SEC C	SEC DE
17	23	23	37

Therefore, universe estimate for SEC A in market ABC is:
17% x 214,839,502 = 36,197,567 individuals

Changes in Overall Household Numbers

India at a Glance



2009

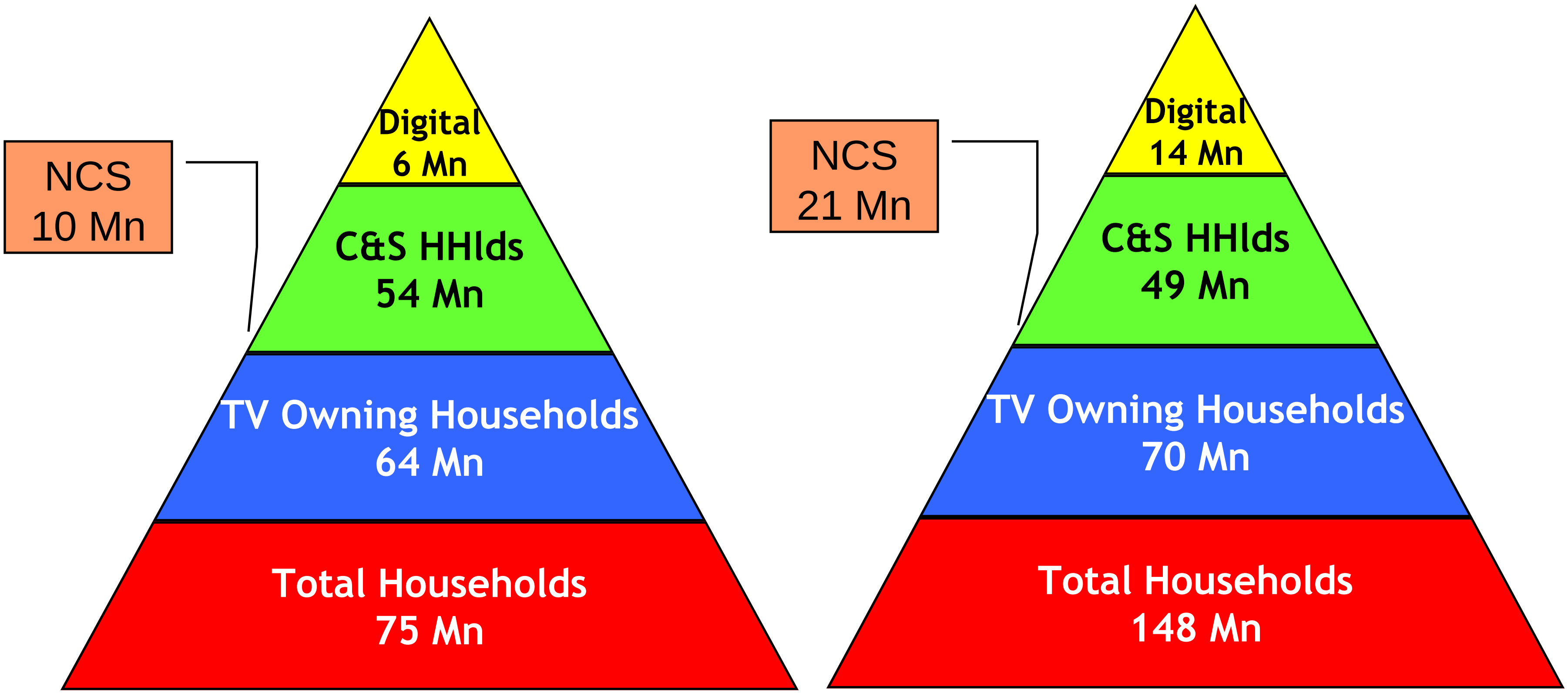
All India Household figures in Millions

2010

All India Household figures in Millions

The Urban & Rural Divide…

Urban Vs Rural 2010



Urban- 2010

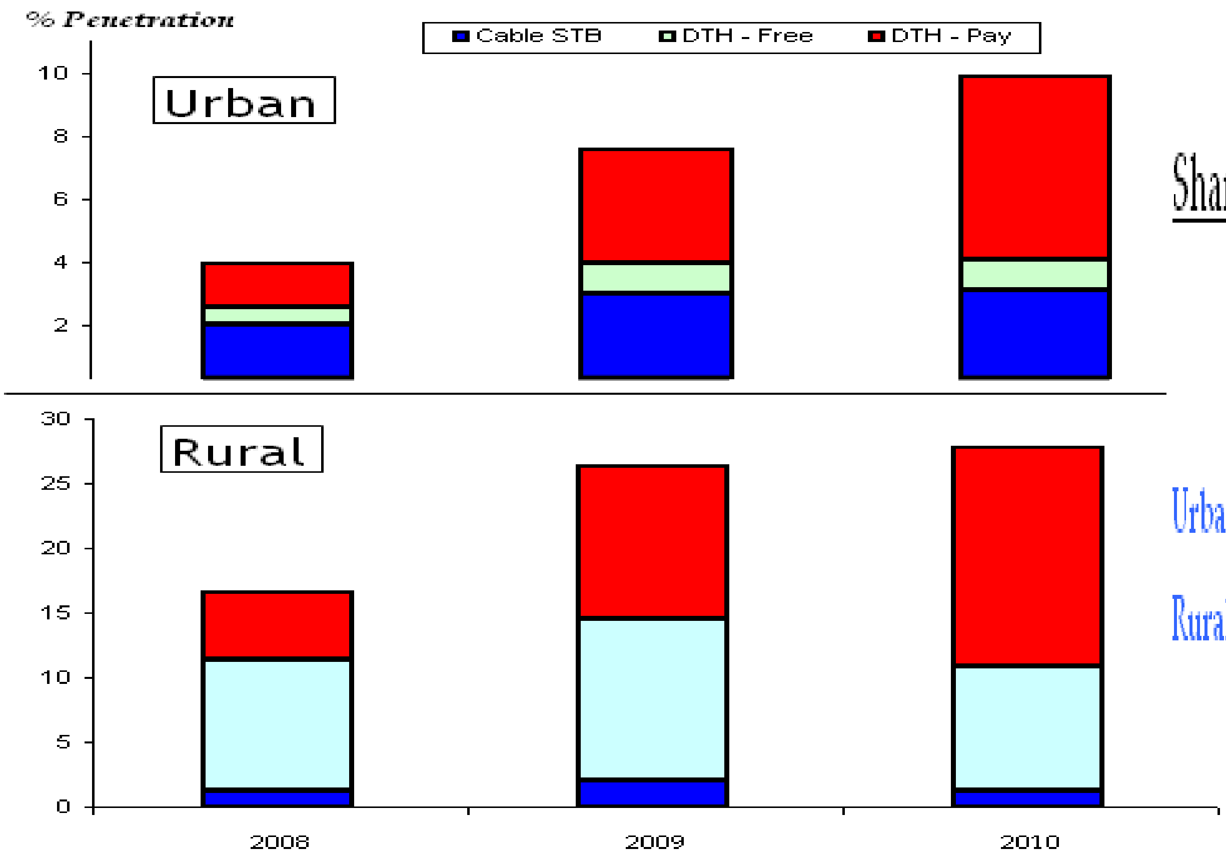
Household figures in Millions

Rural -2010

Household figures in Millions

What's driving digital growth?

Both Urban and Rural's digital growth is primarily coming from Pay DTH, growth rate of the same is higher in Rural…



Share of pay-DTH among all DTH households

Digital Establishment Survey

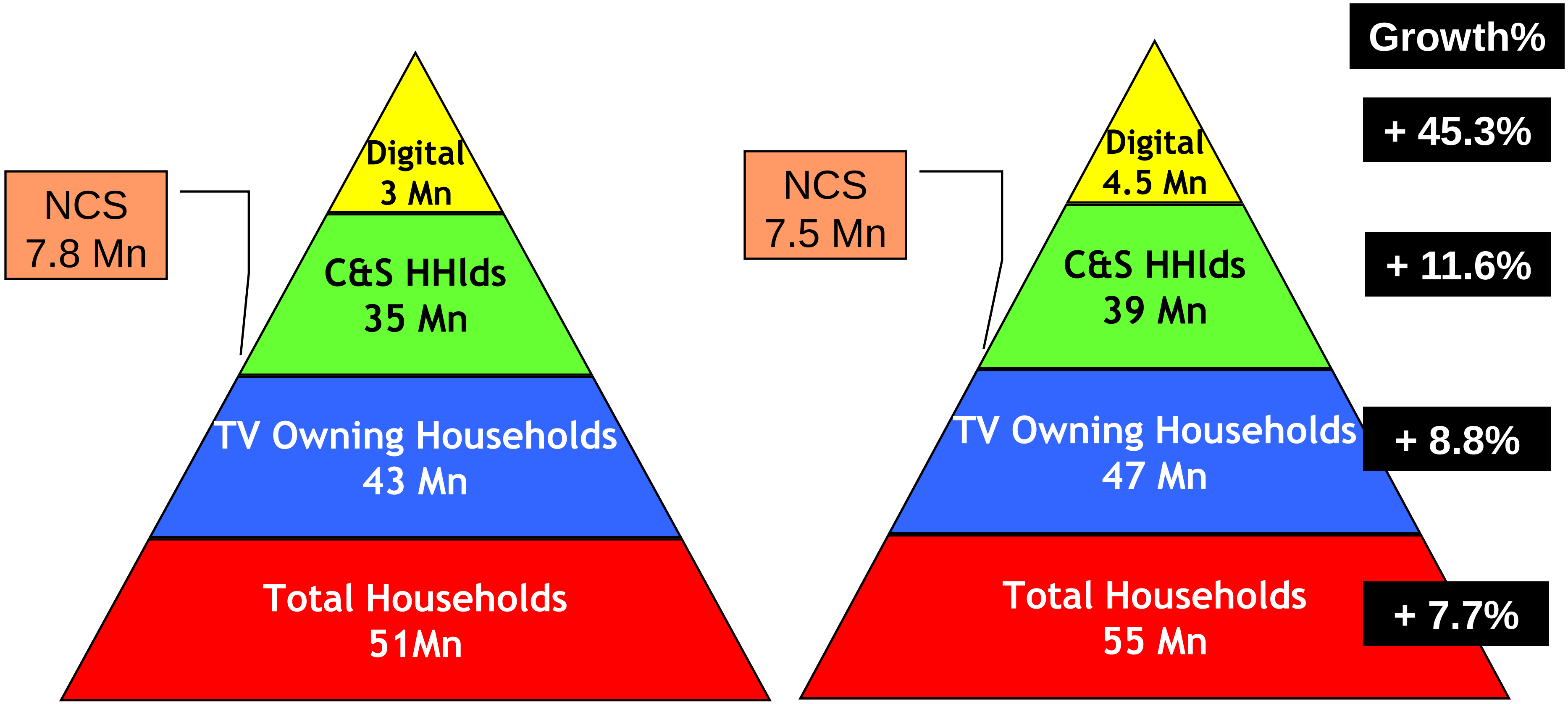
	2008	2009	2010
Urban	73%	79%	86%
Rural	34%	49%	64%

Changes in “TAM Markets”

(Urban Class I + Maharashtra Less than Class I)

2009 Vs 2010

TAM Coverage at a Glance



2009

All India Household figures in Millions

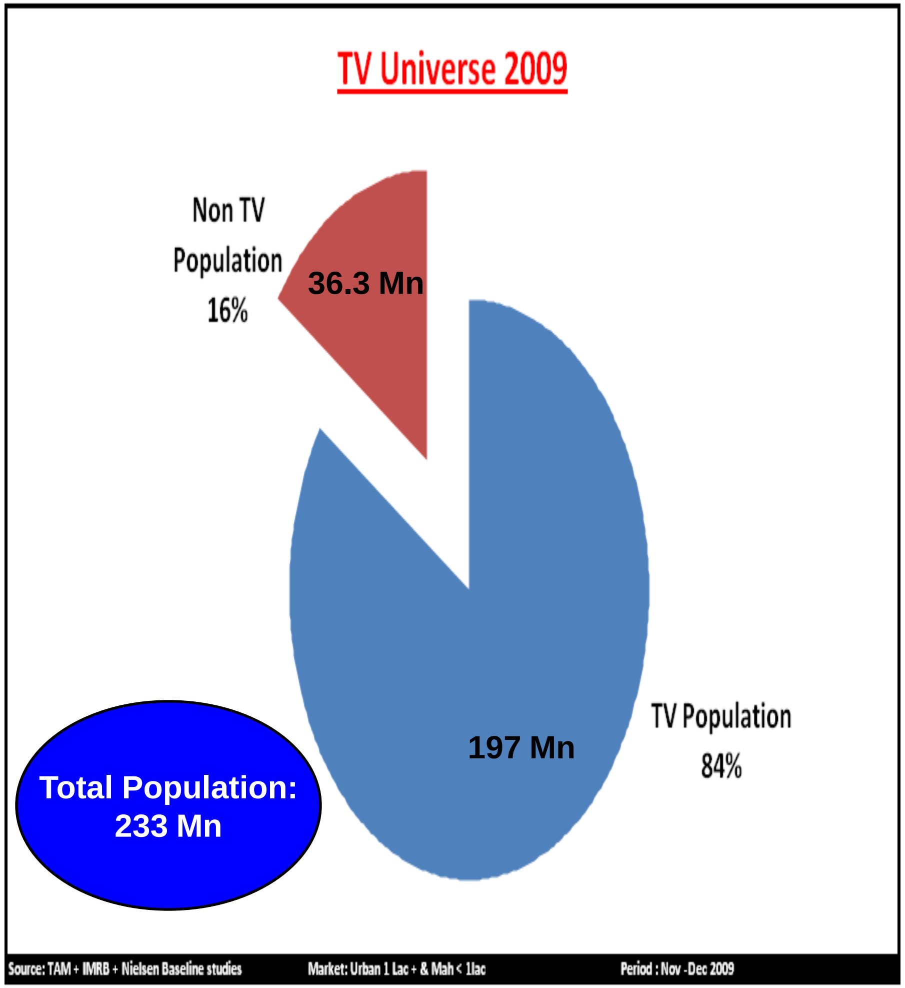
2010

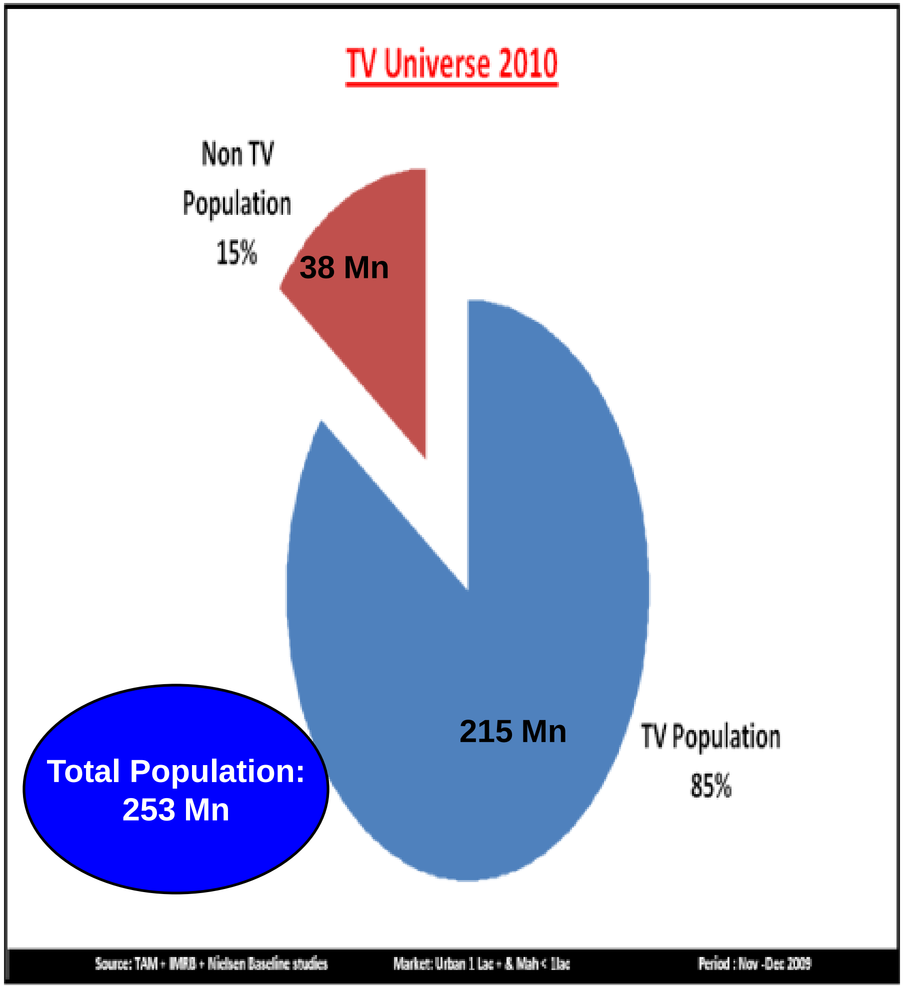
All India Household figures in Millions

Change in TV Universe 2010

TAM Markets – Individuals (mn)

Growth in TV population is marginally ***higher*** than that of Total Population…

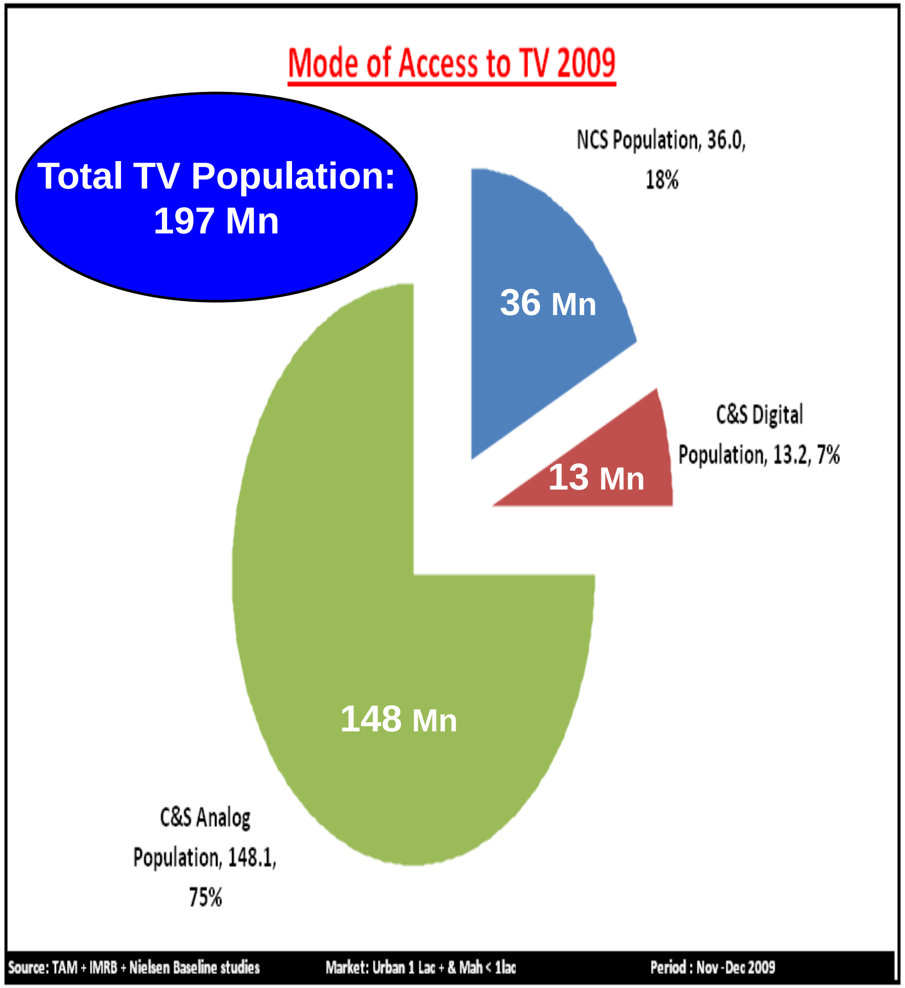


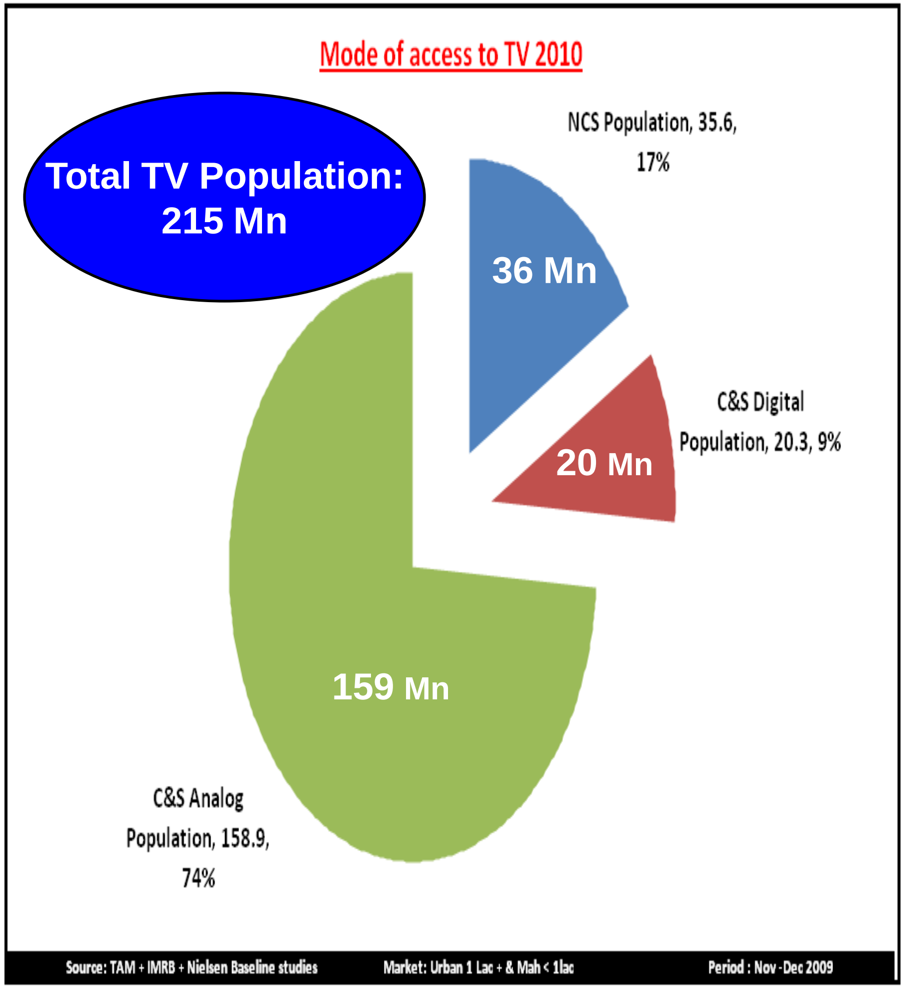


All Figure are Individuals in millions

Mode of TV Access – Proportions across platforms

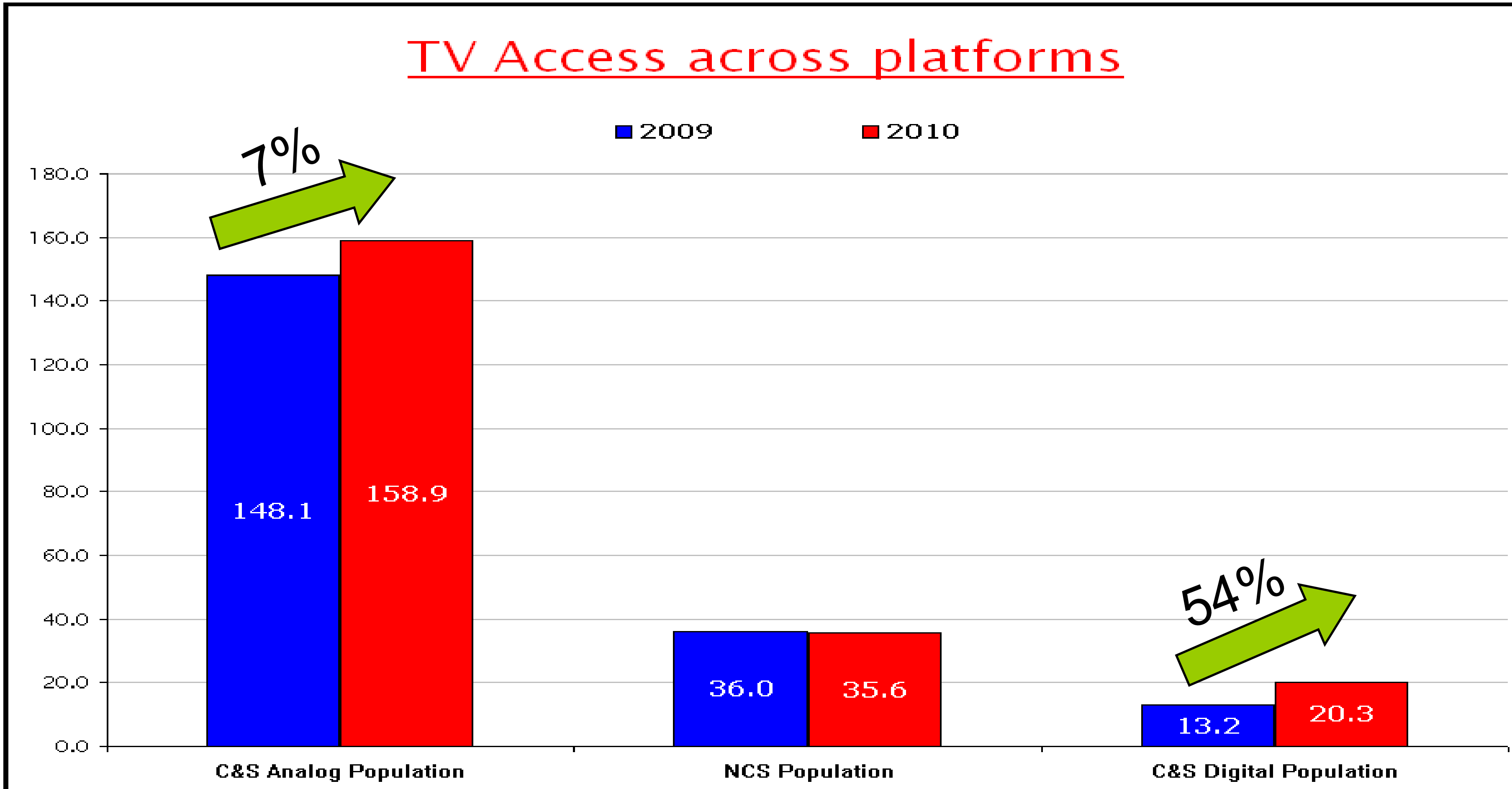
The growth in TV population has mainly come from Digital and followed by C&S analog…





All Figure are Individuals in millions

Digital witnessed the maximum growth rate, terrestrial access have remained almost constant…



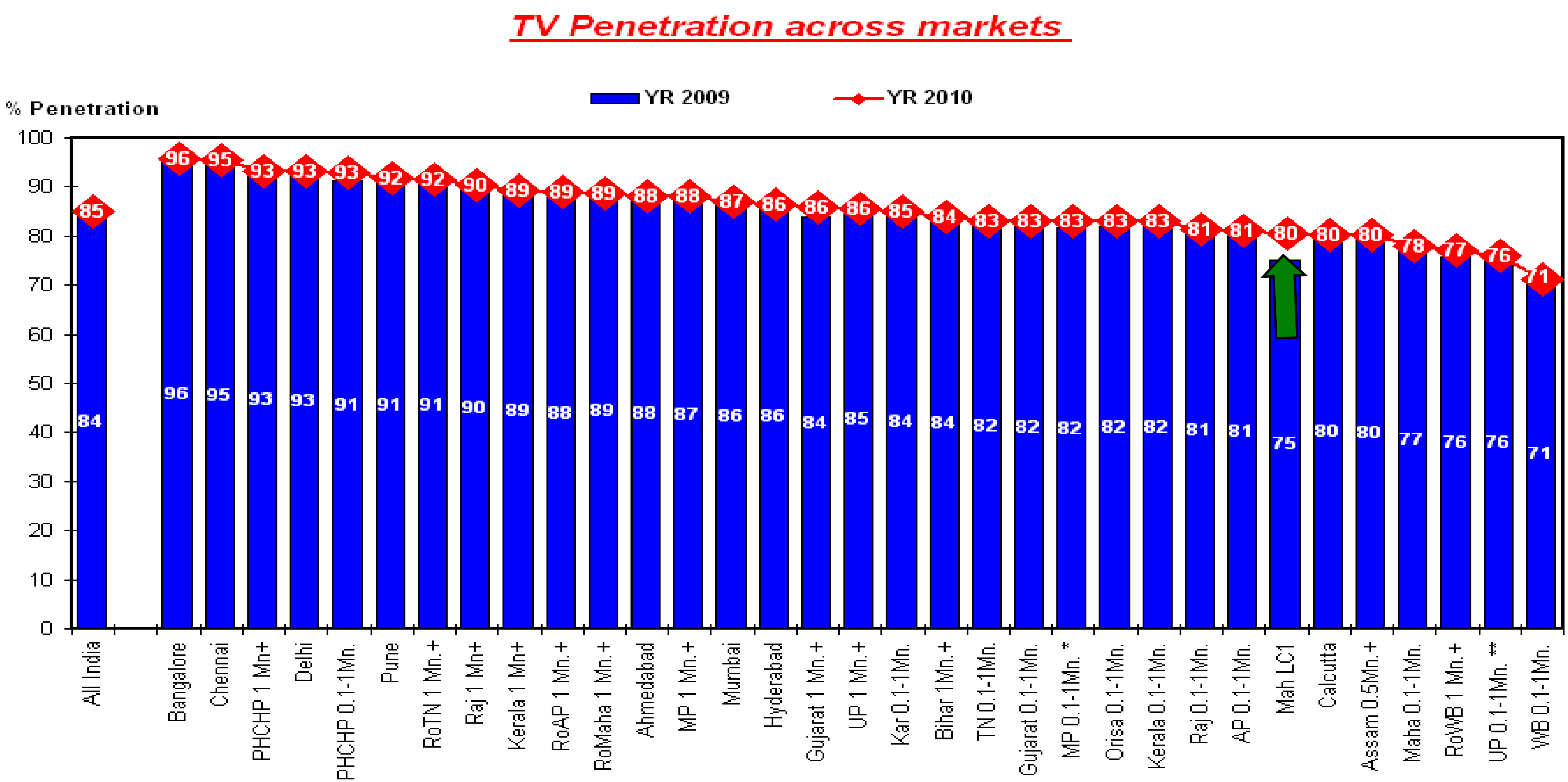
Source: TAM + IMRB + Nielsen Baseline studies Market: Urban 1 Lac + & Mah < 1lac Period : Nov -Dec 2009

All Figure are Individuals in millions

How is the growth visible across markets?

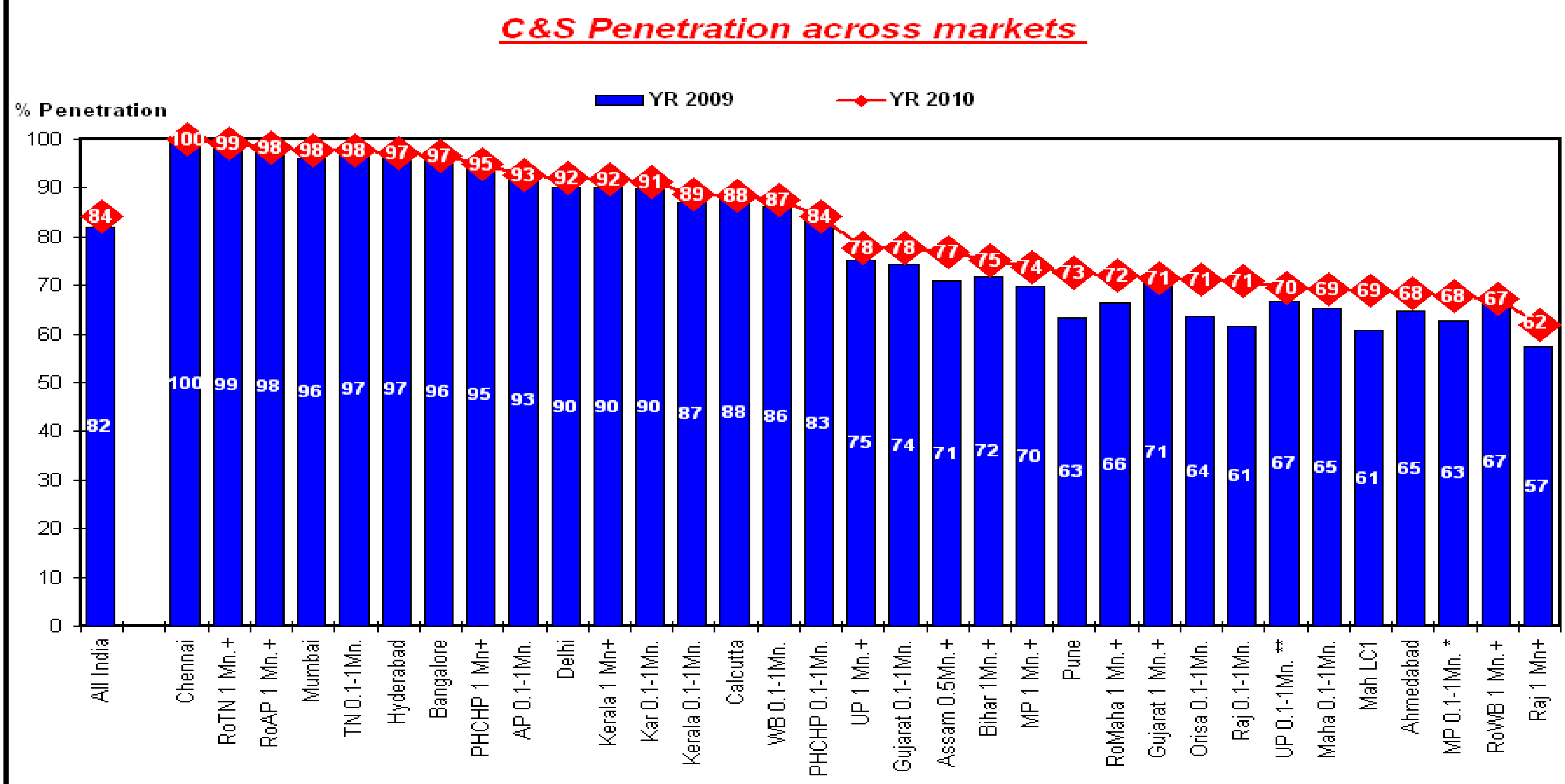
TV/CS/Digital penetration

With smaller increases across markets, TV penetration at All India increased by 1%, significant increase witnessed in Mah LC1 (5%)…



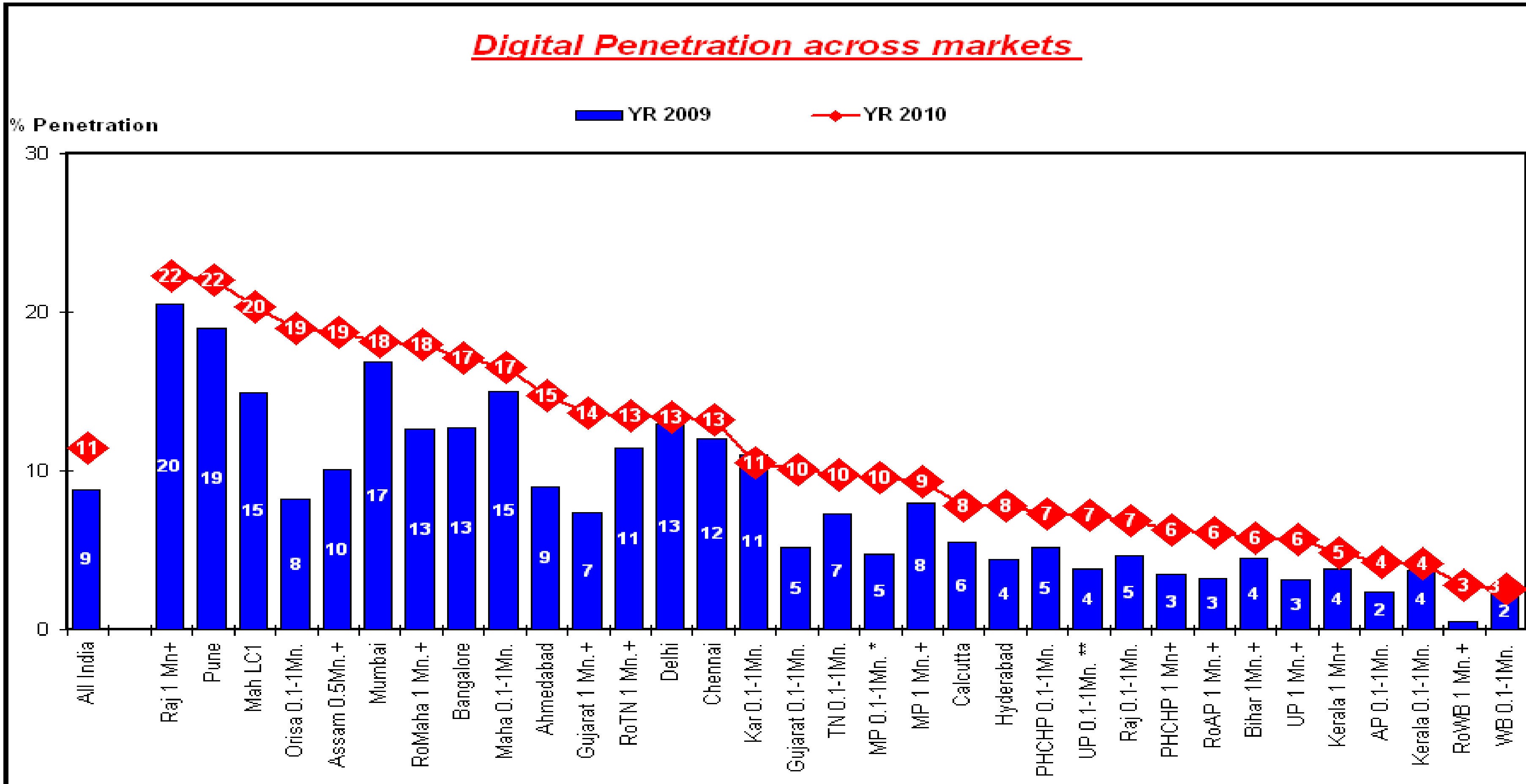
Source: TAM + IMRB + Nielsen Baseline Study Market: All India Urban Class 1 + Mah LC1 Period: Nov-Dec 2009

All India CS penetration increase by 2%, majority of 0.1-1mn markets have witnessed increase…



Source: TAM + IMRB + Nielsen Baseline Study Market: All India Urban Class 1 + Mah LC1 Period: Nov-Dec 2009

All India Digital penetration stand at 11%, increase in penetration is in Non-Metro markets…



Source: TAM + IMRB + Nielsen Baseline Study Market: All India Urban Class 1 + Mah LC1 Period: Nov-Dec 2009

Changes across pop-strata…

TV, C&S and Digital

Across platforms growth is higher as we go from Metros to Smaller Towns, among mode of access, Digital is growing fastest…

Pop-strata wise growth rates across TV, C&S and Digital platforms									
Pop-Strata	TV Owning			C&S			Digital		
	YR 2009 (in Millions)	YR 2010 (in Millions)	Growth%	YR 2009 (in Millions)	YR 2010 (in Millions)	Growth%	YR 2009 (in Millions)	YR 2010 (in Millions)	Growth%
6 Metros	65	70	8%	61	66	9%	7	9	23%
Rest of States 1 Mn+	49	53	9%	37	41	11%	3	4	74%
0.1-1 Mn + Mah LC1	83	91	10%	63	71	13%	3	7	102%
All India	197	215	9%	161	179	11%	13	20	54%

Source: TAM + IMRB + Nielsen Baseline Study Market: All India Urban Class 1 + Mah LC1 Period: Nov-Dec 2009

All Figure are Individuals in millions

Change in Demographic proportions - SECs

Digital

Non-Metros have witnessed a significant Digital growth, at All India level SEC CDE showing higher growth rate…

Demographic composition on Digital platform						
Markets	**Year**	**SEC A**	**SEC B**	**SEC C**	**SEC DE**	**Total**
6 Metros	2009	2.5	2.2	1.3	1.2	7.2
	2010	3.0	2.7	1.7	1.5	8.9
	Growth%	**20.5%**	**19.0%**	**32.8%**	**26.9%**	**23.3%**
Rest of States 1 Mn+	2009	0.8	0.7	0.5	0.5	2.6
	2010	1.5	1.2	0.8	1.0	4.4
	Growth%	**78.5%**	**62.2%**	**52.3%**	**105.6%**	**73.6%**
0.1-1Mn + Mah LC1	2009	0.7	0.9	0.8	1.1	3.5
	2010	1.5	1.8	1.6	2.1	7.1
	Growth%	**103.0%**	**114.5%**	**98.6%**	**98.0%**	**103.3%**
All India	2009	4.0	3.8	2.6	2.8	13.2
	2010	5.9	5.7	4.1	4.7	20.4
	Growth%	**47.3%**	**48.6%**	**57.3%**	**68.1%**	**54.0%**

Source: TAM + IMRB + Nielsen Baseline Study Market: All India Urban Class 1 + Mah LC1 Period: Nov-Dec 2009

All Figure are Individuals in millions

Growth at State level…

Maharashtra, Gujarat, UP, MP, PHCHP and Delhi have increased with a higher growth rate than All India in TV and C&S, among only C&S Assam, Orissa and Chattisgarh have a higher growth rate…

Markets	All 4+ Population Individuals in Millions			C&S 4+ Population Individuals in Millions			Digital 4+ Population Individuals in Millions		
	Year 2009	Year 2010	Growth%	Year 2009	Year 2010	Growth%	Year 2009	Year 2010	Growth%
Mumbai	16.6	17.9	8.2	15.9	17.5	10.2	2.7	3.2	18.3
Kolkatta	12.2	12.8	4.6	10.9	11.3	3.9	0.6	0.9	43.2
Delhi	16.3	18.1	10.8	14.7	16.6	13.0	1.9	2.2	15.8
Chennai	6.9	7.4	7.3	6.9	7.4	7.4	0.9	1.0	17.5
Bangalore	6.6	7.1	7.7	6.3	6.8	7.8	0.8	1.2	45.5
Hyderabad	6.6	6.9	5.0	6.4	6.7	5.0	0.3	0.5	74.0
Andhra Pradesh	9.3	9.9	6.4	8.9	9.5	6.4	0.2	0.5	215.6
Gujarat	15.2	16.8	10.4	11.0	12.3	11.7	0.7	1.5	101.1
Krn .1-1Mn	6.5	7.0	7.4	5.9	6.3	7.6	0.6	0.7	15.5
Kerala	4.9	5.3	7.2	4.3	4.7	9.9	0.1	0.2	48.6
Madhya Pradesh	8.6	9.5	9.9	5.9	6.9	16.1	0.4	0.8	112.6
Chatt .1-1Mn	3.0	3.3	8.7	1.8	2.1	15.8			
ORI .1-1Mn	3.0	3.2	6.9	1.9	2.3	18.6	0.2	0.4	162.8
PHCHP	12.0	13.2	10.0	10.4	11.5	10.6	0.4	0.8	99.7
Rajasthan	7.6	8.3	9.4	4.7	5.6	20.6	0.4	0.7	72.9
Tamil Nadu	8.7	9.3	6.3	8.5	9.1	6.8	0.7	1.0	52.5
Uttar Pradesh	21.4	23.6	10.2	15.2	17.1	12.9	0.5	1.1	119.5
West Bengal	4.9	5.1	6.0	4.0	4.2	5.6	0.1	0.1	59.3
Maharashtra	24.2	27.3	12.7	15.8	19.1	20.7	1.8	3.5	98.0
Bihar 1Mn+	1.9	2.0	5.7	1.4	1.5	10.0	0.1	0.1	41.9
Assam .5Mn+	0.9	0.9	5.0	0.5	0.7	27.5	0.1	0.1	160.0
All India TAM	**197**	**215**	**9**	**161**	**179**	**11**	**13**	**20**	**54**

Source: TAM + IMRB + Nielsen Baseline studies   Market: Urban 1 Lac + & Mah < 1lac   Period : Nov -Dec 2009

All Figure are Individuals in millions

States highlighted have higher growth rate than All India average

In Sum…

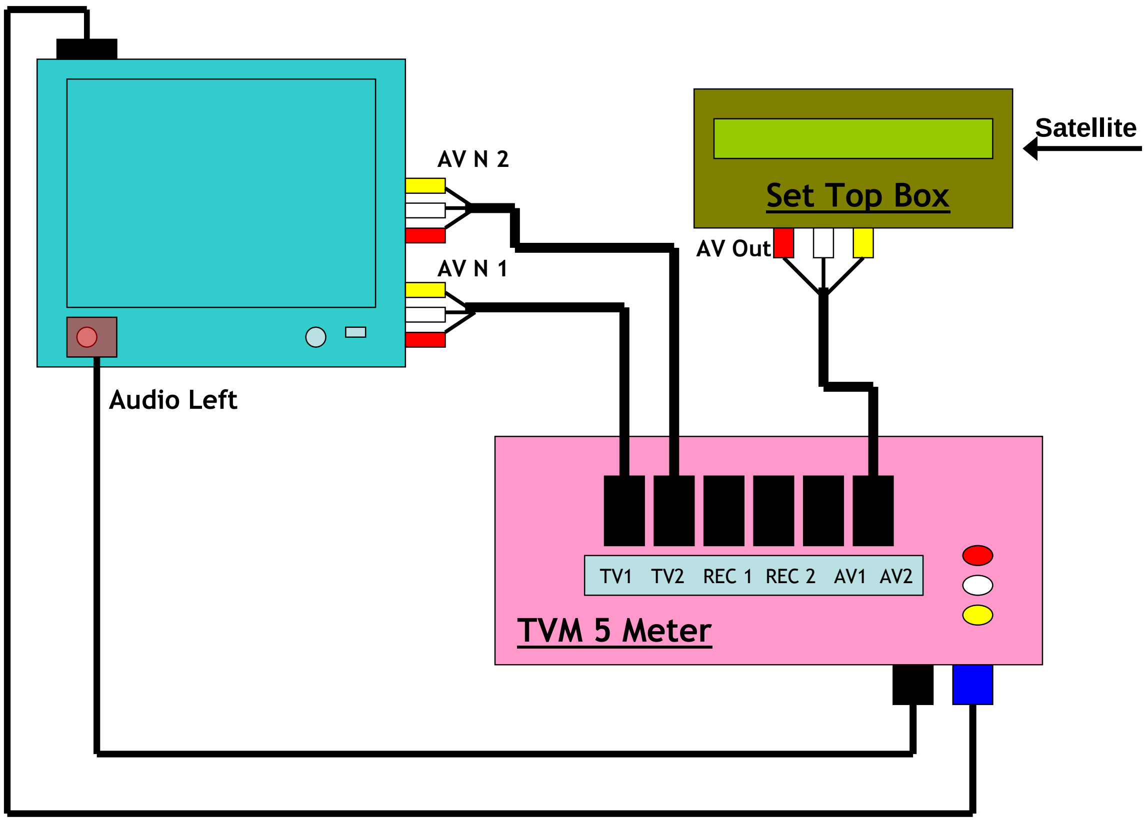
- C&S crossed ***100 million*** mark at All India level, currently 103 million C&S Hhlds
- TV, C&S and Digital grew by 9%,11% and 54% respectively in TAM reported markets
- All India Digital penetration is 11% in TAM reported markets
- Growth in TV, C&S and Digital has come primarily from Non-Metro markets

How is Digital TV consumption measured by TAM?

Click for Video Demo

TVM 5: Explained

- Picks data packets encoded within digital signals
- Non intrusive on TV set
- Compatible with
  - DTH
  - CAS
  - IPTV
  - Gaming device
- Any kind of TV
  - Plasma TV
  - LCD TV
  - HDTV
  - Normal TV set
    - (Col & B/W)



Implications for TAM Software Users

If you are a..

- Media Planner -

(i) The TRPs & GRPs will not be exactly comparable over 2009 & 2010, since TRPs / GRPs are %age values & the base (universe) is being updated in January2010.

(ii) Share Of Voice Analysis will however be unaffected over the two universe periods.

(iii) If you have plan with a burst crossing over the universe change weeks, you will need to split the burst & evaluate the plans over two different universe periods (e.g. If your campaign is scheduled to air between 15th Dec 2009 to 15th Jan 2010, you will need to generate R&F for the period 15th -26th Dec 2009 (up to week 52, the last week of 2009) & 27th Dec 2009 (from week 1, the first week of 2010) - 15th Jan 2010 individually)

Implications for TAM Software Users

If you are a..

-Broadcaster –

(i) The TRPs & GRPs will not be exactly comparable over 2009 & 2010, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2010.

(ii) As universes across markets are getting updated, depending upon your channels' reliance on markets, the aggregate TVR/Share at a group market level might change.

(iii) If you have promo plan with a burst crossing over the universe change weeks, you will need to split the burst & evaluate the plans over two different universe periods (e.g. If your campaign is scheduled to air between 15th Dec 2009 to 15th Jan 2010, you will need to gather R&F for the period 15th - 26th Dec 2009 (up to week 52, the last week of 2009) & 27th Dec 2009 (from week 1, the first week of 2010) - 15th Jan 2010 individually)

Appendix: Marketwise Peoplemeter Distribution

Metro	Total Meters
Mumbai	540
Delhi	540
Kolkata	370
Bangalore	300
Chennai	290
Hyderabad	290
Pune	180
Ahmedabad	180
Top 8 metros Total	2690

Market	Total Meters
Assam	150
RoAP	400
Bihar	165
Gujarat	550
PHCHP	520
RoKar	250
Kerala	300
RoMah	970
MP	300
Chattisgarh	150
Orissa	170
Rajasthan	400
RoTN	380
UP+	700
RoWB	265
States/RoStates Total	5670

Total Meters	8000

Notes:

1. **RoMah includes Maharashtra Less than Class1 Strata**
2. **UP includes Uttaranchal**
3. **Pune and Ahmedabad are included in Maharashtra and Gujarat resptively**

For Digital estimates of 2007, 2008 and 2009, please check Blink I & II presentations and India Peoplemeter Updates on www.tamindia.com

Thank You.