

# TAM Universe Update - 2009

# TAM Universe Update-2009

- Why are we doing the Universe update?
- How are we doing the Universe update?
- What are the changes post the Universe update?
- Implications for users

# Why is universe update necessary?

*The population represented in each market reported by TAM, organically will change either in size or structure. This change needs to be accounted for. This is why the 'Universe Update' becomes critical*

# How are we Updating the Universe : Methodology

- For 2007 Universe update
  - NRS 2006 was used and projected for 2007
- For 2009 Universe update
  - No NRS update post 2006
  - Used Census compounded annual growth rate for Population Growth
  - TAM Listing exercise used for Demographics Proportions
  - Two individual studies commissioned to IMRB and Nielsen for validating Digital penetration

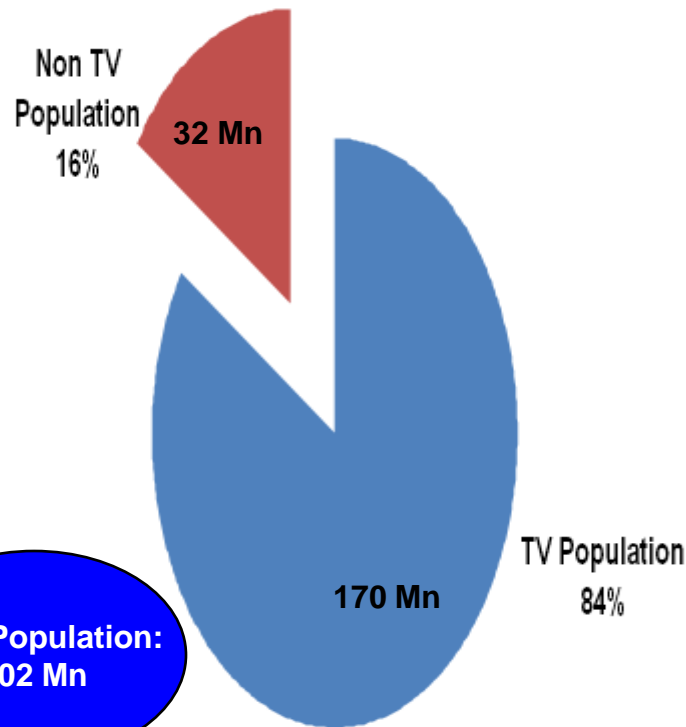
# Changes in TV Universe - 2009

# Growth in TV Ownership

Class I India

# The growth in overall population is reflected in those who have access to TV at Home.

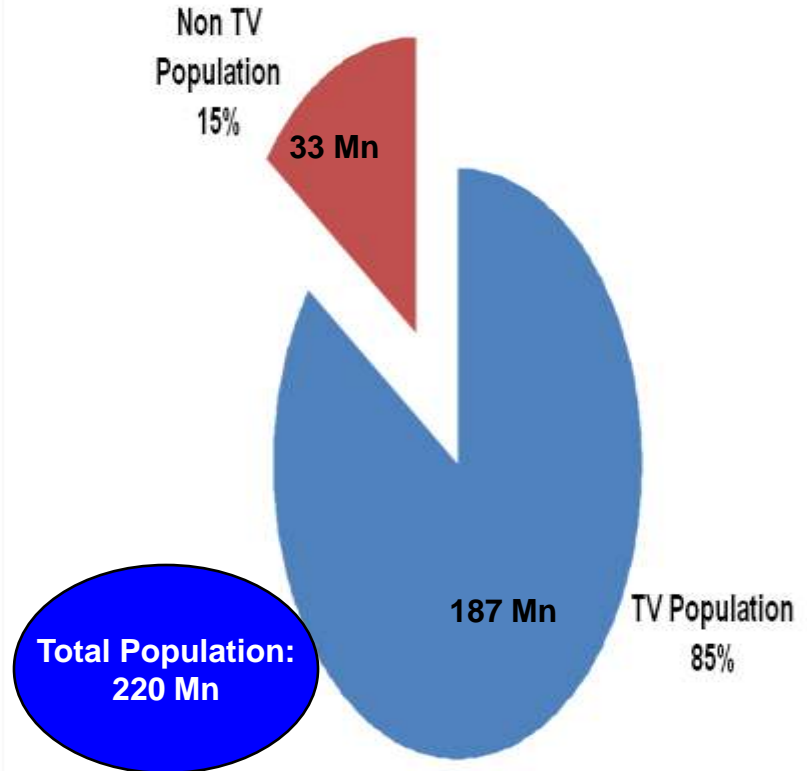
TV Universe 2007-2008



Source: NRS 2006

Markets: All India Class I

TV Universe 2009



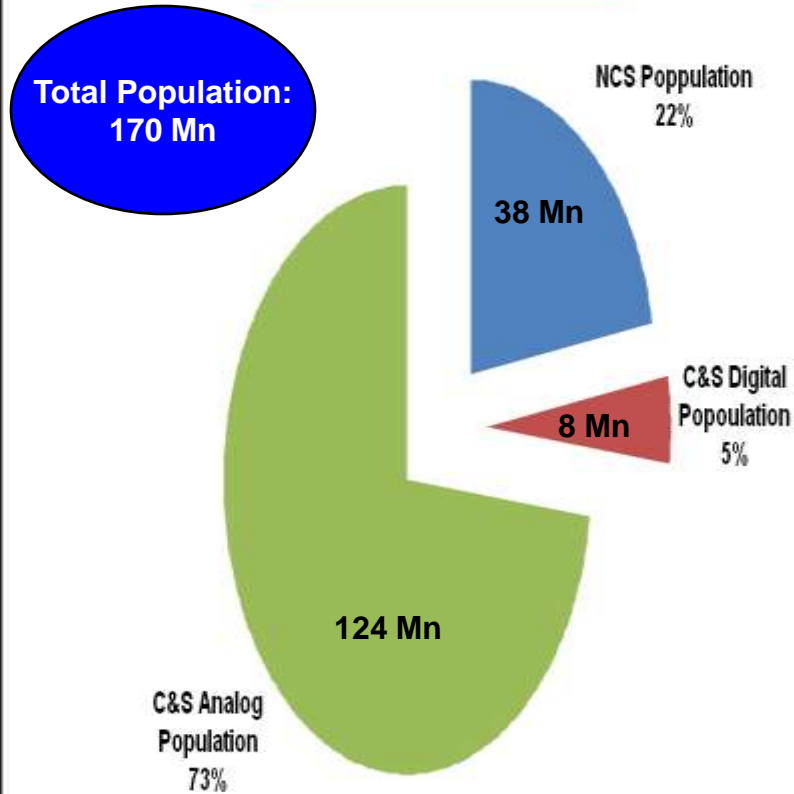
Source: TAM Listing Exercise

Markets: All India Class I (excluding Assam, Bihar, Mah<1Lac)

# Mode of TV Access - Proportions across platforms

# The growth in TV population is reflected in C&S population. NCS (Terrestrial) population has de-grown.

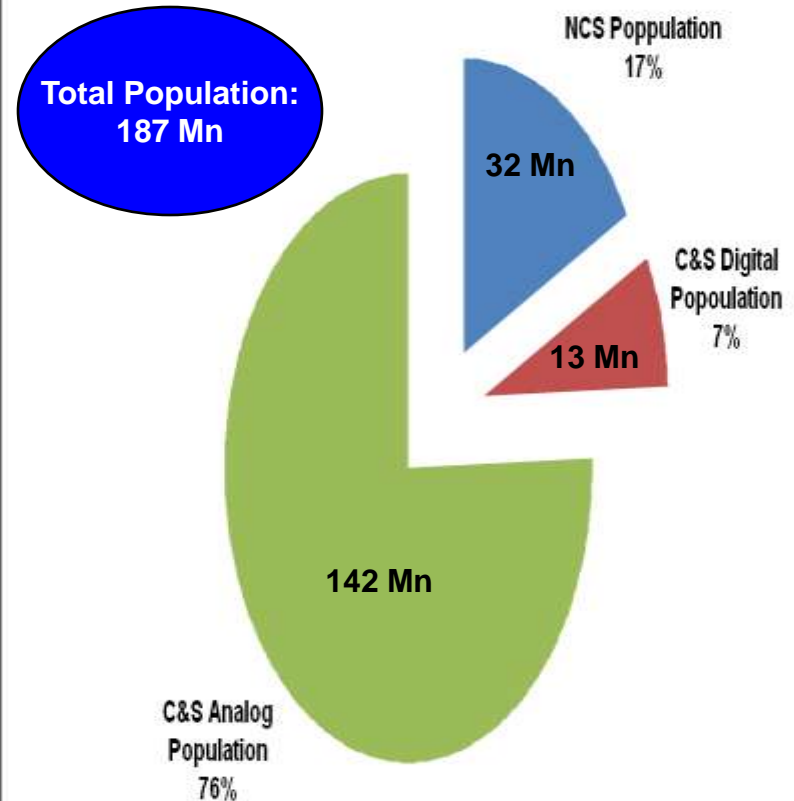
Mode of Access to TV 2007-2008



Source: NRS 2006

Market: All India Urban 11ac+ (Excluding Bihar, NE, J&K)

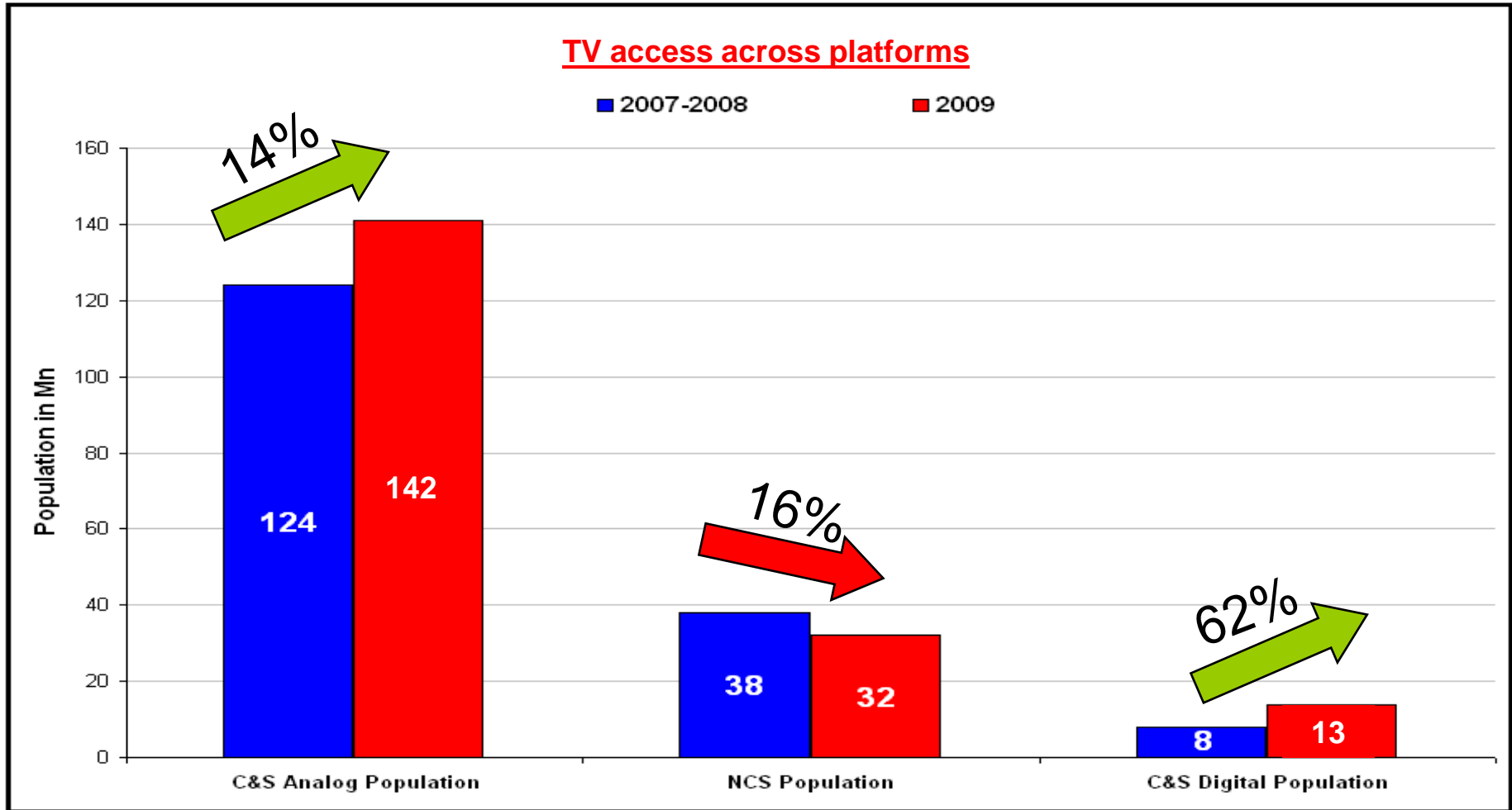
Mode of access to TV 2009



Source: NRS 2006 + TAM Listing Exercise(2008)

Market: All India Urban 11ac+ (Excluding Bihar, NE, J&K)

# Digital witnessed the maximum growth rate



How is the growth visible across markets?

Most of the markets have seen C&S penetration growth rates greater than the national average.

Markets	Total TV Owning (Individuals in Millions)		C&S Population (Individuals in Millions)		C&S Penetration(%)		Growth % of C&S
	2007 - 08	2009	2007 - 08	2009	2007 - 08	2009	%
Chennai	6.5	6.9	6.4	6.9	99%	100%	8
Rest of Tamil nadu	8.1	8.7	7.8	8.5	96%	98%	9
Hyderabad	6.0	6.6	5.7	6.4	95%	97%	12
Bengaluru	5.9	6.6	5.6	6.3	96%	96%	12
Mumbai	15.3	16.6	14.2	15.9	93%	96%	12
Rest of AP	8.7	9.3	8.1	8.9	93%	96%	10
Rest of Karnataka	5.7	6.5	4.8	5.9	84%	91%	22
Delhi	14.6	16.3	12.5	14.7	85%	90%	17
Kolkatta	11.3	12.2	9.4	10.9	83%	89%	16
PHCHP	10.5	12.0	8.4	10.4	80%	87%	24
Kerala	4.7	4.9	3.8	4.3	81%	87%	13
Rest of WB	4.6	4.9	3.5	4.0	76%	82%	15
Gujarat	13.4	15.2	9.2	11.0	68%	72%	20
Uttar Pradesh	19.6	21.4	12.1	15.2	62%	71%	25
Madhya Pradesh	7.8	8.6	4.9	5.9	63%	68%	20
Rest of Maharashtra	14.9	16.7	8.7	11.2	59%	67%	28
Orissa	2.6	3.0	1.6	1.9	59%	64%	22
Rajasthan	6.9	7.6	3.5	4.7	50%	61%	35
Chattisgarh	2.6	3.0	1.4	1.8	53%	59%	28
<b>All India (Class I Towns)</b>	<b>169.8</b>	<b>187.0</b>	<b>131.6</b>	<b>154.7</b>	<b>77%</b>	<b>83%</b>	<b>18</b>

Source: NRS 2006(For 2007 - 08) & TAM Listing Exercise (For 2009)

How is the growth across markets on the digital front?

## Chennai & Bengaluru have seen a significant change in digital platform growth

Markets	Digital Universe in Millions		% Growth
	2007- 08	2009	%
Mumbai	2.1	2.7	27
Delhi	1.5	1.9	24
Rest of Maharashtra	0.9	1.5	56
Chennai	0.4	0.9	98
Bengaluru	0.3	0.8	211
Gujarat	0.5	0.8	51
Rest of Tamil nadu	0.4	0.7	86
Kolkatta	0.5	0.6	26
Rest of Karnataka	0.2	0.6	208
Uttar Pradesh	0.3	0.6	97
Rajasthan	0.2	0.5	121
PHCHP	0.2	0.5	130
Madhya Pradesh	0.2	0.4	137
Hyderabad	0.2	0.3	22
Rest of AP	0.2	0.2	20
Kerala	0.1	0.2	71
Orissa	0.1	0.2	204
Rest of WB	0.0	0.1	68
<b>All India (Class I Towns)</b>	<b>8.1</b>	<b>13</b>	<b>63</b>

Source: NRS 2006(For 2007 - 08) & TAM Listing Exercise (For 2009)

# How is the C&S penetration in the split markets?

Pune, Ahmedabad, Punjab 1Mn+, PCHP 0.1-1Mn

## Even though the TV penetration levels are high the C&S Penetration in Pune and Ahmedabad are lower

State	Market	TV Owing Individuals (Millions)	TV Penetration(%)	C&S individuals (Millions)	C&S Penetration(%)
Maharashtra	Mumbai	16.6	86%	15.9	96%
	Mah 1Mn+ (Including Pune)	8.0	89%	5.4	67%
	Pune	4.6	91%	2.9	64%
	Mah 0.1-1Mn	8.7	77%	5.8	67%
Gujarat	Gujarat 1Mn+ (Including Ahmedabad)	10.8	85%	7.7	71%
	Ahmedabad	4.6	88%	3.0	65%
	Gujarat 0.1-1	4.4	82%	3.3	74%
PHCHP	PHCHP 1Mn+ (Including Punjab 1Mn+)	4.2	94%	4.0	95%
	Punjab 1Mn+	2.9	96%	2.7	95%
	PHCHP 0.1-1Mn (Including PCHP 0.1-1Mn)	7.7	92%	6.4	83%
	PCHP 0.1-1Mn	3.7	90%	2.9	79%

Source:TAM Listing Exercise

# Change in contribution of pop-strata to C&S Universe

Within The markets reported during 2007-2008

## No significant shift in universe contributions across Pop-strata

### Change in Universe Proportions - Pop Strata

Pop-Strata	C&S Universe (Millions)		Universe Contribution (%)	
	2007-08	2009	2007-08	2009
6 Metros	54	61	41	39
Rest of States 1 Mn+	30	36	23	23
Rest of States 0.1-1 Mn	48	58	36	37

Source: NRS 2006 (For 2007-08 Universe) & TAM Listing Exercise (For 2009 Universe)

Looking at individual market level...

Within The markets reported during 2007-2008

## Similar to pop-strata, no significant change in contributions from individual markets

Change in Universe Proportions - Pop Strata

Markets	C&S Population (Individuals in Millions)		Contribution to All India Class I C&S Universe		Difference
	2007- 08	2009	2007- 08	2009	
Mumbai	14.2	15.9	10.8	10.3	-0.5
Uttar Pradesh	12.1	15.2	9.2	9.8	0.6
Delhi	12.5	14.7	9.5	9.5	0.0
Rest of Maharashtra	8.7	11.2	6.6	7.2	0.6
Gujarat	9.2	11.0	7.0	7.1	0.1
Kolkatta	9.4	10.9	7.1	7.0	-0.1
PHCHP	8.4	10.4	6.4	6.7	0.4
Rest of AP	8.1	8.9	6.2	5.8	-0.4
Rest of Tamil nadu	7.8	8.5	5.9	5.5	-0.4
Chennai	6.4	6.9	4.9	4.5	-0.4
Hyderabad	5.7	6.4	4.3	4.1	-0.2
Bengaluru	5.6	6.3	4.3	4.1	-0.2
Madhya Pradesh	4.9	5.9	3.7	3.8	0.1
Rest of Karnataka	4.8	5.9	3.7	3.8	0.1
Rajasthan	3.5	4.7	2.6	3.0	0.4
Kerala	3.8	4.3	2.9	2.8	-0.1
Rest of WB	3.5	4.0	2.6	2.6	-0.1
Orissa	1.6	1.9	1.2	1.2	0.0
Chattisgarh	1.4	1.8	1.1	1.1	0.1
All India (Class I Towns)	131.6	154.7	100.0	100.0	-

Source: NRS 2006(For 2007- 08) & TAM Listing Exercise (For 2009)

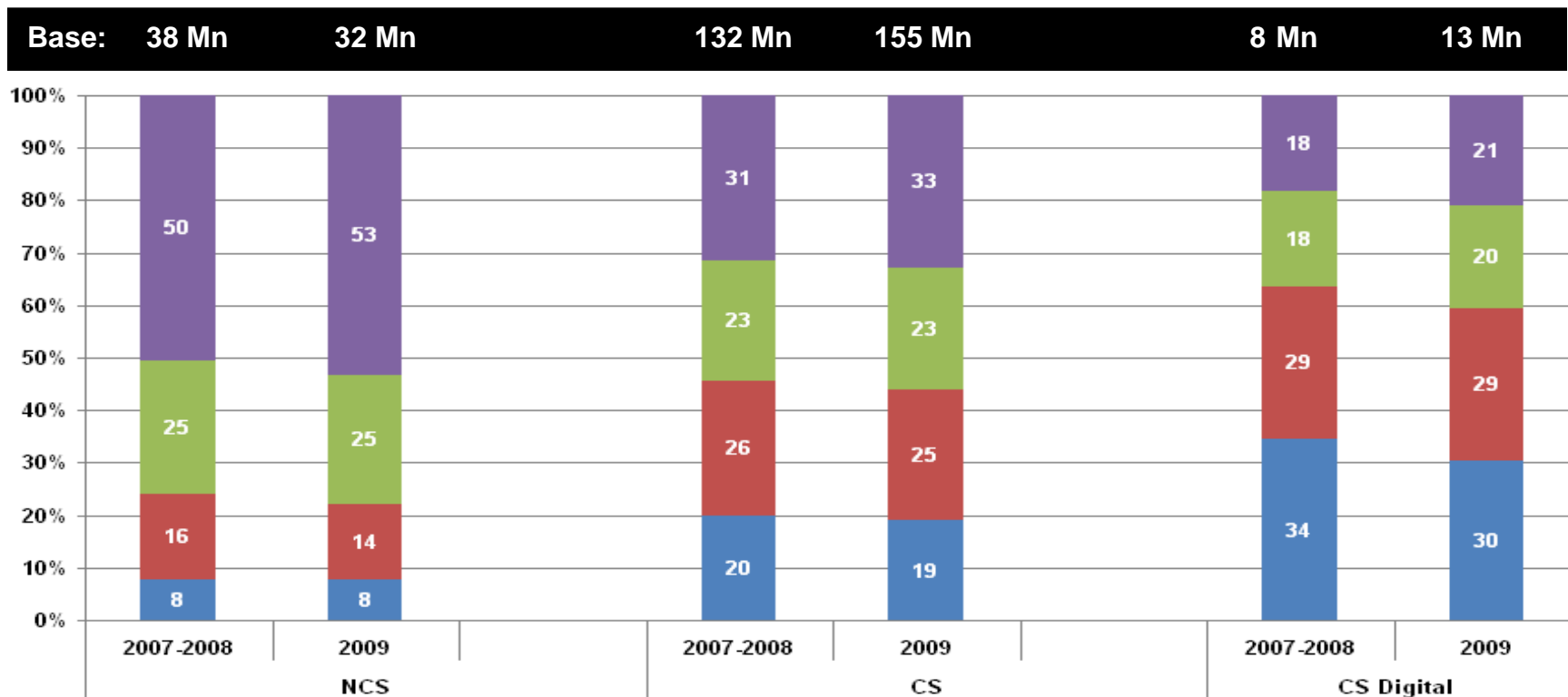
# Change in Demographic proportions - SECs

Within The markets reported during 2007-2008

# SEC DE shows growth in proportions across platforms

## SEC Proportions by Mode of Access to TV

■ SEC A    ■ SEC B    ■ SEC C    ■ SEC DE



Source: NRS 2006 (for 2007-08) and TAM Listing Exercise (For 2009)

## Non Metros and SEC's C and DE are driving the C&S growth

### Demographic composition on C&S Platform

Markets	Year	SEC A	SEC B	SEC C	SEC DE	Total
6 Metros	2007-2008	12288	13919	12103	15531	53841
	2009	13242	15303	13861	18671	61077
	Growth %	8	10	15	20	13
All India 1Mn +	2007-2008	6932	8423	6047	8419	29821
	2009	8088	9447	7595	10689	35819
	Growth %	17	12	26	27	20
All India 0.1-1	2007-2008	7109	11329	11988	17319	47745
	2009	8122	13877	14251	21588	57837
	Growth %	21	31	33	42	34
All India Class I	2007-2008	26329	33671	30138	41269	131407
	2009	29452	38627	35707	50948	154733
	Growth %	12	15	18	23	18

Source: NRS 2006 (for 2007-08 Universe) & TAM Listing Exercise (for 2009 universe)

Note: Figures above are mentioned in 000s

## SEC BCDE in non metros has witnessed a significant Digital growth

### Demographic composition on Digital Platform

Markets	Year	SEC A	SEC B	SEC C	SEC DE	Total
6 Metros	2007-2008	1698	1726	906	780	5110
	2009	2473	2237	1270	1216	7196
	Growth %	46	30	40	56	33
All India 1Mn +	2007-2008	570	349	219	227	1365
	2009	825	742	511	476	2554
	Growth %	45	113	133	110	87
All India 0.1-1	2007-2008	525	264	287	443	1519
	2009	727	855	815	1081	3478
	Growth %	38	224	184	144	129
All India Class I	2007-2008	2793	2339	1412	1450	7994
	2009	4025	3834	2596	2773	13228
	Growth %	44	64	84	91	65

Source: NRS 2006 (for 2007-08 Universe) & TAM Listing Exercise (for 2009 universe)

Note: Figures above are mentioned in 000s

# Snapshot of TAM Reported Household sizes

# 2009 Household Universe

( Urban Class-I excluding Bihar, North-East and J&K)

<b>2009 Household Universe</b>	
<b>Total Households</b>	<b>48.9 Mn</b>
<b>TV Owning Households</b>	<b>41.7 Mn</b>
<b>C&amp;S Households</b>	<b>34.6 Mn</b>
<b>C&amp;S Analog Households</b>	<b>31.7 Mn</b>
<b>C&amp;S Digital Households</b>	<b>2.9 Mn</b>

# To Sum up (Class-I towns)...

- TV Population has grown by 10%
  - Non TV population has remained stagnant
- Within TV population, C&S and Digital (within C&S) have been growing.
- Digital Platform has witnessed the maximum growth (62%).
- C&S has witnessed maximum growth in SEC C&DE homes in non-metros.
- While Digital Has witnessed maximum growth in SEC BCDE homes in Non-Metros.
- Individual market wise, Rajasthan, UP and Maharashtra, in that order have seen the highest growth rates in C&S penetration

# Implications for the Industry

- The contribution of Top 6 metros, 1Mn+ and .1-1Mn strata's in 2009 to the Total market has been similar to 2007-08.
- TV Access through digital platforms has nearly doubled making it a indispensable medium for broadcasters in reaching out to audiences
- Finer definitions of markets (Pune, Ahmedabad, Punjab 1MN+, PCHP 0.1-1Mn) enable marketers to fine tune their strategies

# Implications for TAM Software Users

*If you are a..*

- Media Planner -

- (i) The TRPs & GRPs will not be exactly comparable over 2008 & 2009, since TRPs / GRPs are %age values & the base (universe) is being updated in January 2009.
- (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 2008 to 15th Jan 2009, you will need to generate R&F for the period 15th -27th Dec 2008 (up to week 52, the last week of 2008) & 28th Dec 2008 (from week 1, the first week of 2009) - 15th Jan 2009 individually)

# Implications for TAM Software Users

*If you are a..*

-Broadcaster -

- (i) The TRPs & GRPs will not be exactly comparable over 2008 & 2009, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2009.
- (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 2008 to 15<sup>th</sup> Jan 2009, you will need to gather R&F for the period 15th - 27th Dec 2008 (up to week 52, the last week of 2008) & 28th Dec 2008 (from week 1, the first week of 2009) - 15th Jan 2009 individually)

Thank You.