

Direct To Home on our Doorstep!!!

A TAM S-Group Exclusive

*An initiative from
TAM Media Research & IMRB International*

fueling media insights that drive businesses



About The Study

- Objective
 - Understand the DTH phenomena as it stands, come Feb 2006
- Cover & Methodology
 - Structured questionnaire administered on the IMRB Household Panel
 - Covers 13 States (Urban+Rural) + Delhi + Guwahati
 - 119 Towns
 - Sample Size - 66,636 homes
- Survey Period
 - February 2006

Structure of the Presentation

- **Insights**
- TAM in the digital era
- Points to **drive** the panel discussion

1. The Media Landscape

- TV Owning Homes in India:

Δ 117 Million

- Number of Cable & Satellite Homes:

Δ 71 Million ~ 58% of TV Owning

- Number of DTH Homes:

Δ 2.26 Million

- Number of Cable operator Set-top box Homes:

Δ 0.8 Million

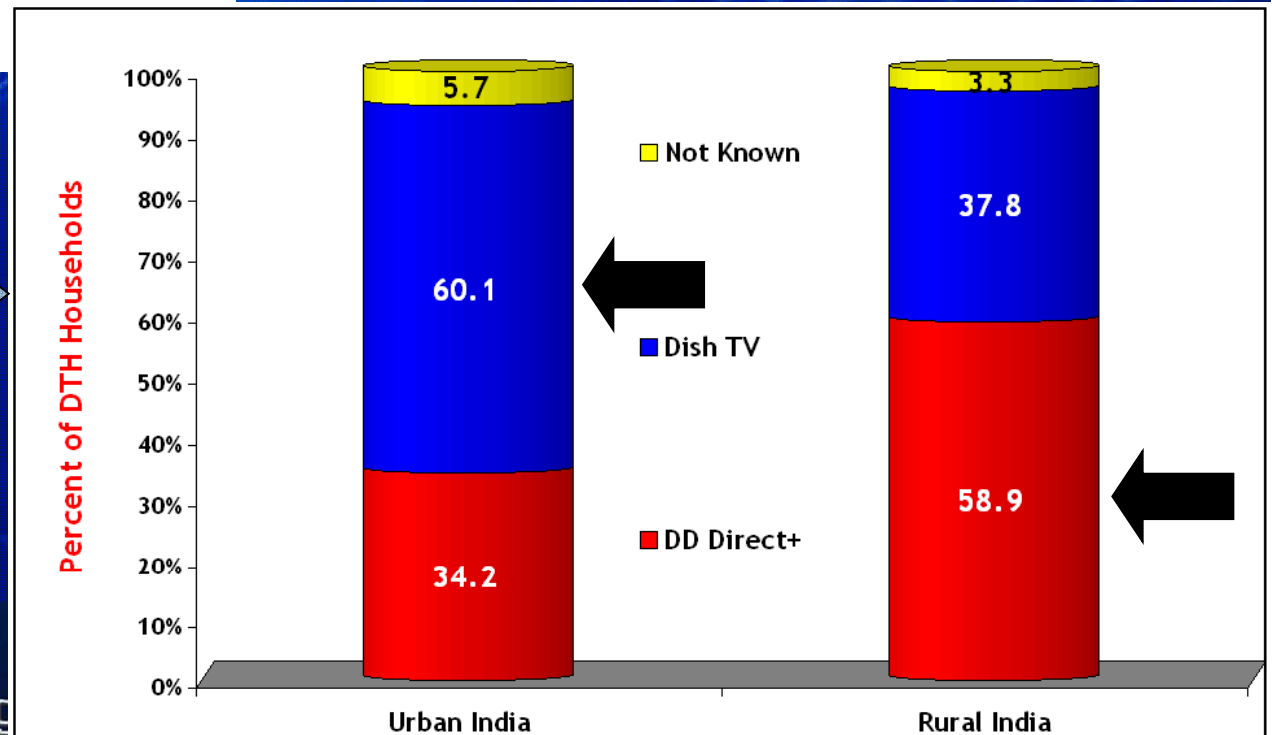
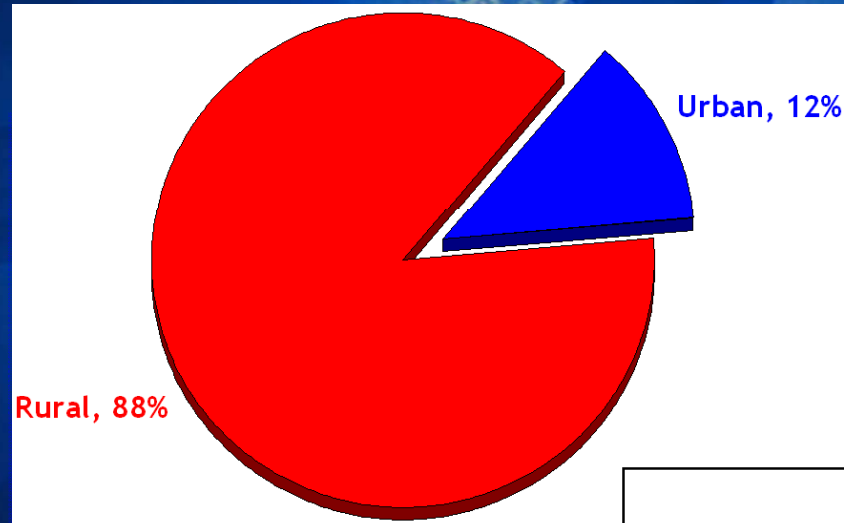


Urban OR Rural ?

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Largely Rural, Dish & DD Direct penetration contrasting



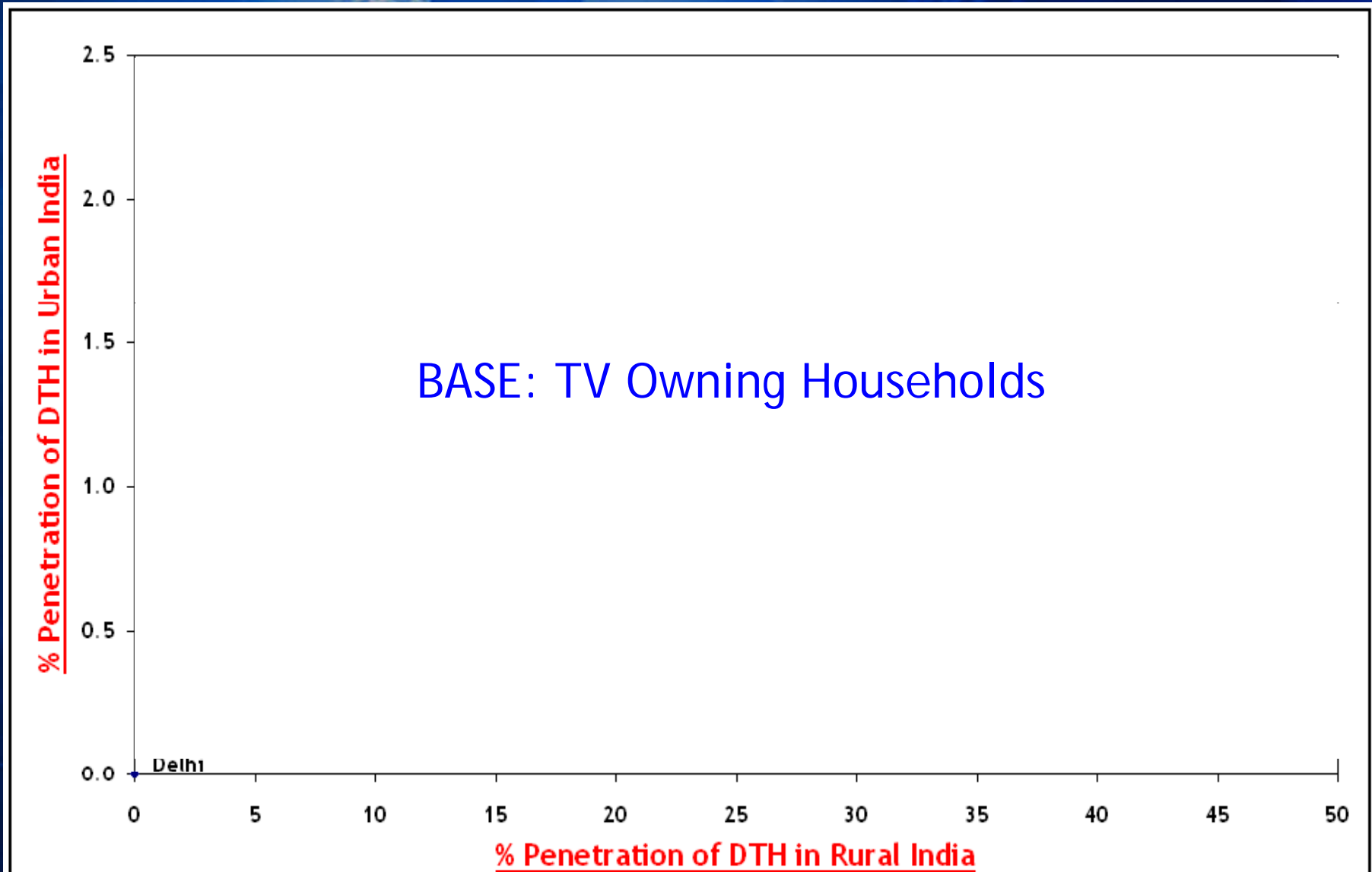
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State-wise perspective...

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DTH penetration exhibiting interesting disparities



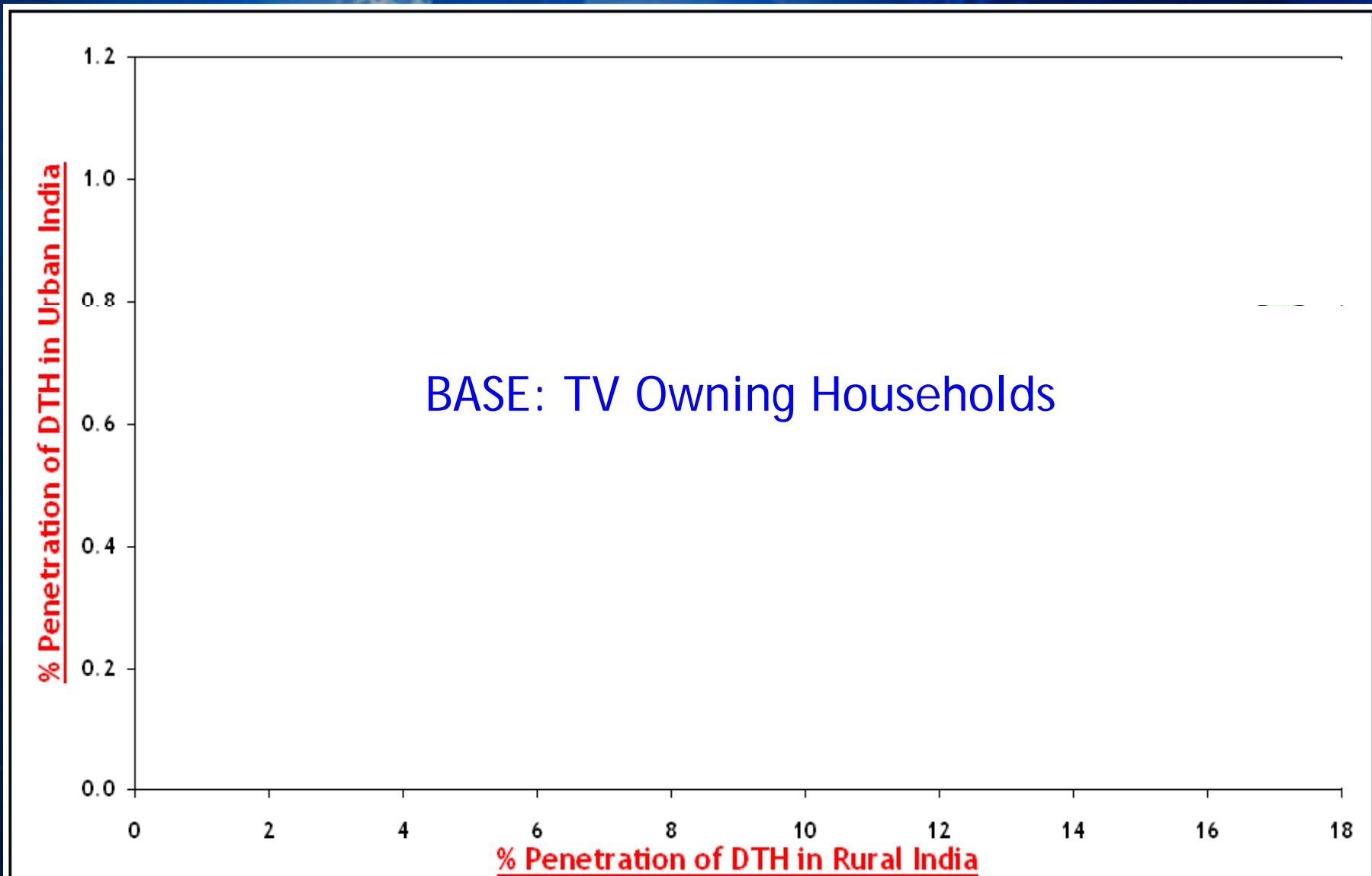
Source: IMRB & TAM S-Group Study & Estimates

Excluding the outliers...

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A large cluster of states yet to tick...



Source: IMRB & TAM S-Group Study & Estimates

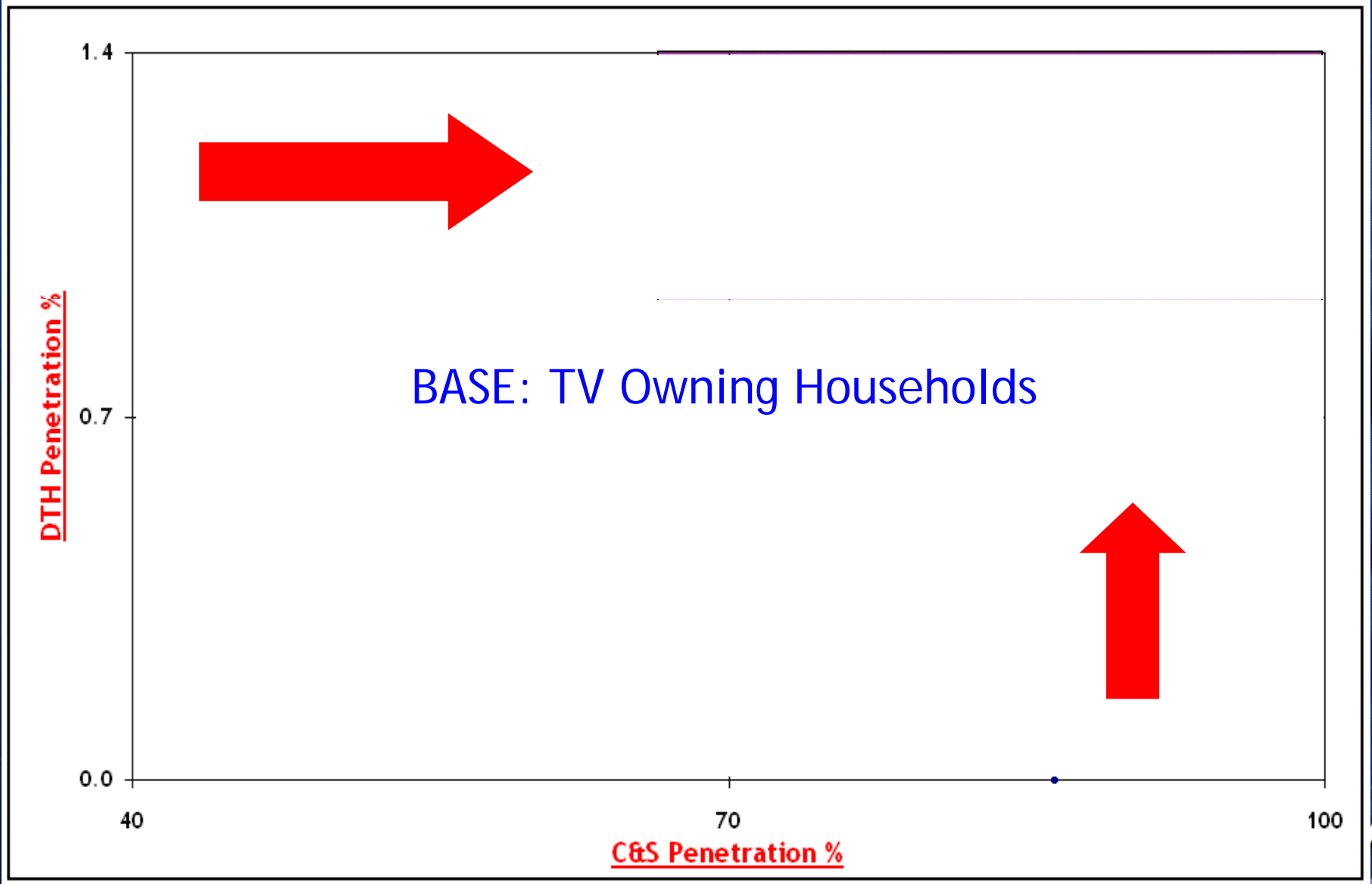
Why ?

Relationship between Cable & DTH penetrations...

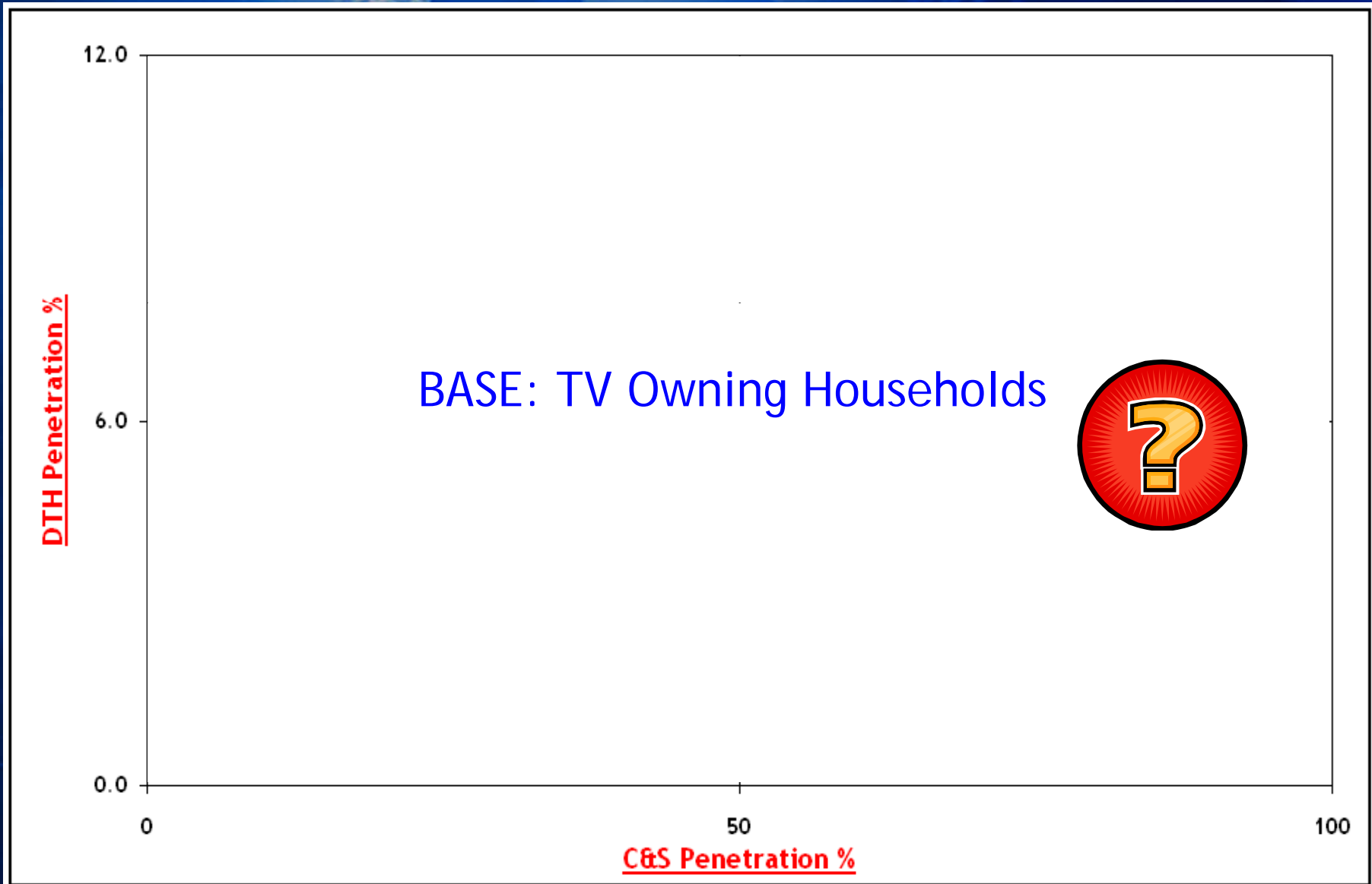
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Urban: DTH appears to dove-tail C&S



Rural: DTH is riding on its own



Why ?

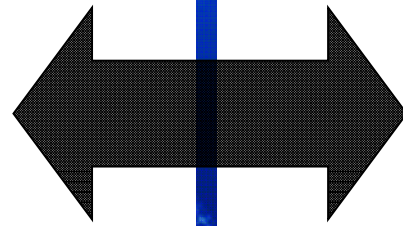
Relationship between Cable & DTH
penetrations...

Profile of DTH subscribers...

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Lower SECs lead in the urban areas while the higher SEC take command in rural...



Why ?

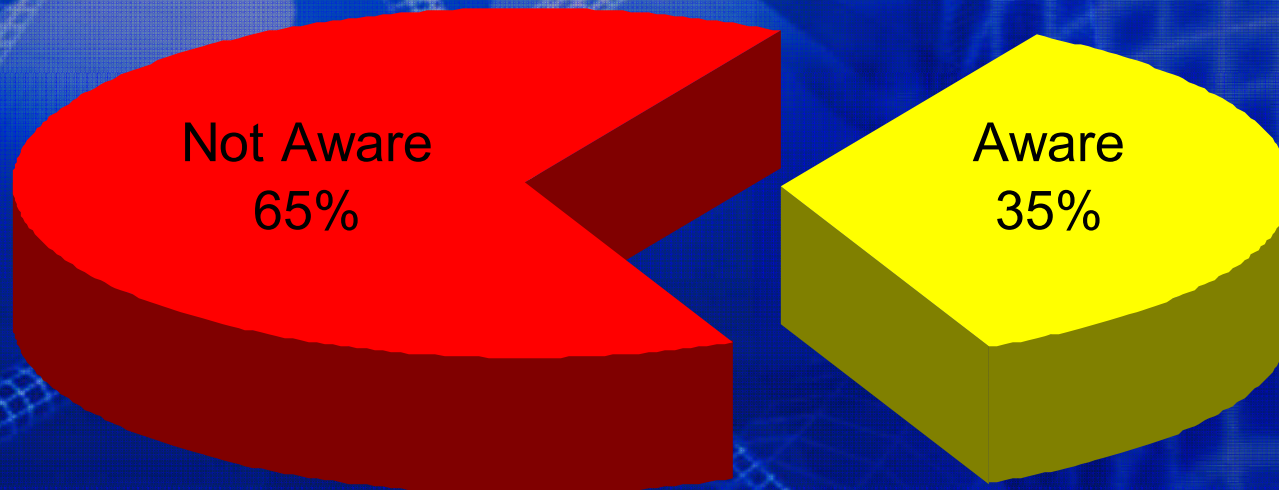
Relationship between Cable & DTH penetrations...

Profile of DTH subscribers...

Awareness...

Awareness : Miles to go...

Awareness of DTH



Base: Non-DTH, TV Homes, All India (~115Mn)

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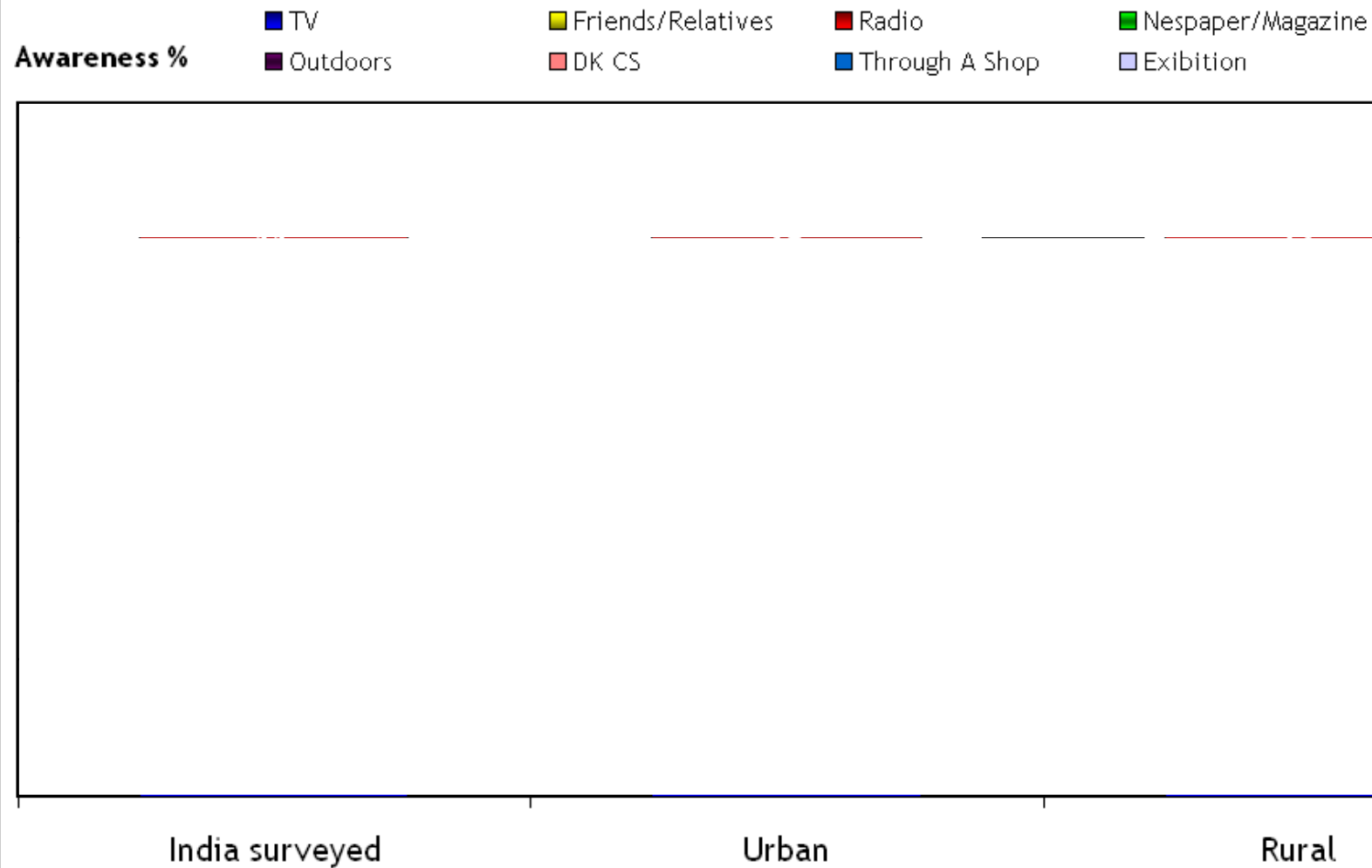
& the 'awareness drivers' ..

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Referral/Word-Of-Mouth counts...

Sources of DTH awareness - Rural vs Urban India



Source: IMRB & TAM S-Group Study & Estimates

Why ?

Relationship between Cable & DTH penetrations...

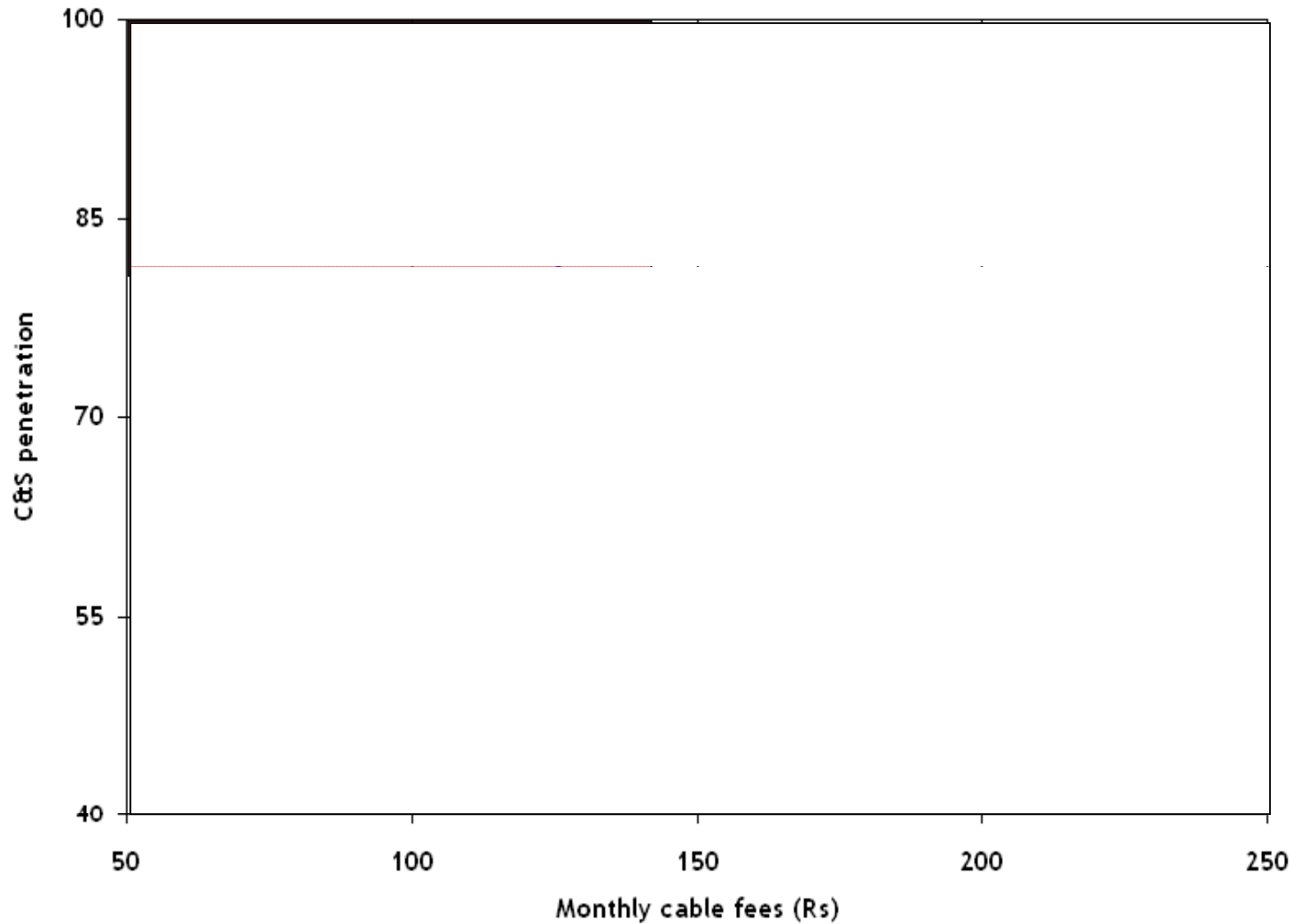
Profile of DTH subscribers...

Awareness...

Price...
(Lessons from cable..)

Price has been ONE of the factors...

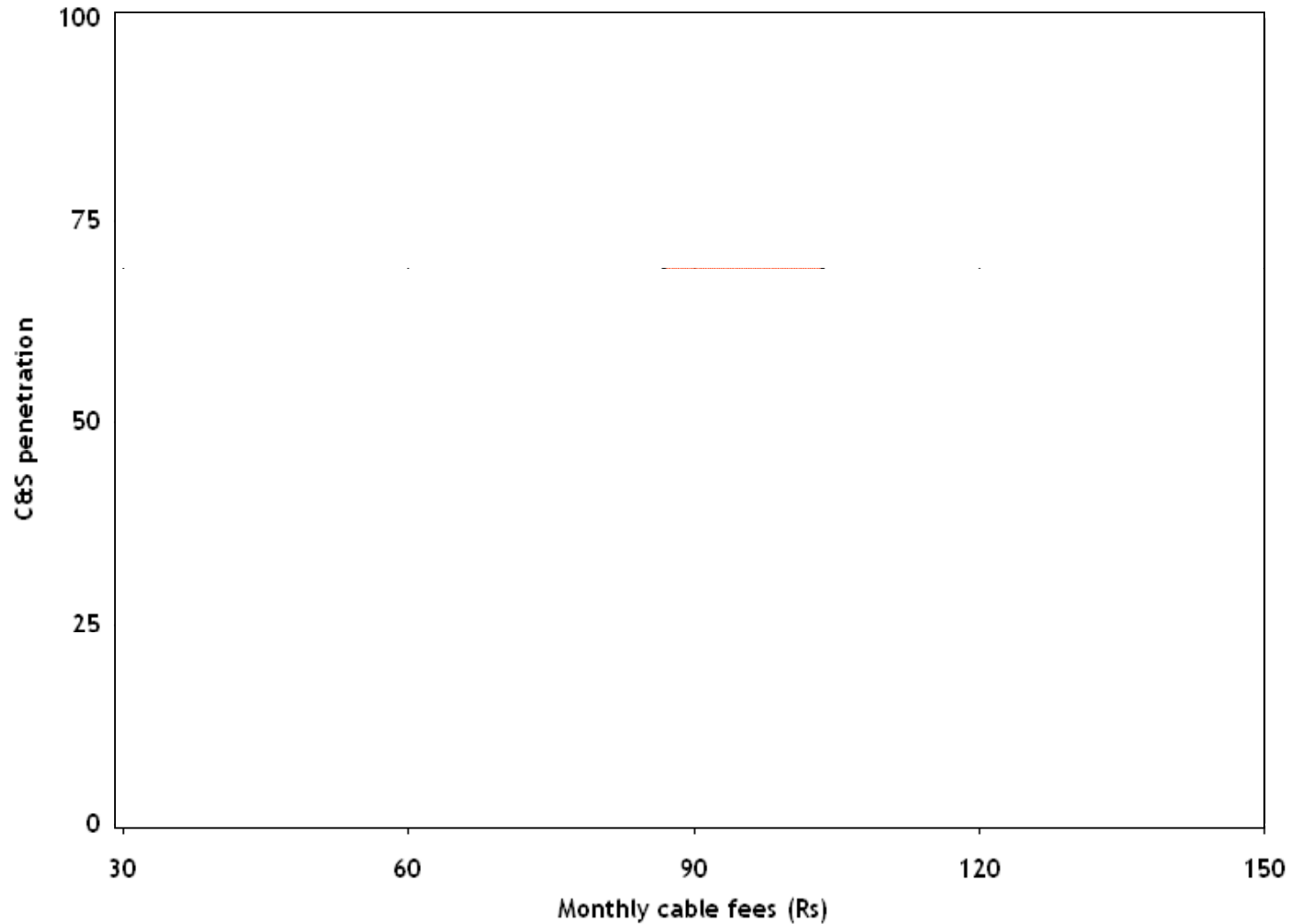
C&S penetration vs monthly fees across states : Urban



Source: IMRB & TAM S-Group Study & Estimates

Despite low(er) price, north has been slow..

C&S penetration vs monthly fees across states : Rural



Source: IMRB & TAM S-Group Study & Estimates

Insights...

- DTH is largely a **Rural phenomena** currently
- Some interesting observations to **explain disparate DTH penetration in states**
 - DTH followed cable in Urban while in Rural, it was riding on its own
 - Lower Urban SEC & Upper Rural SEC were early adopters (the 'indian middle-class'?)
 - Much ground is to be covered on the awareness front
 - Cable penetration has been impacted by price (& so is DTH)

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TAM is technology ready!!!

- TAM was expecting this digital shift...which is why it started to develop a new Peoplemeter
- It is expected that platforms like CAS, DTH, Cable & Satellite, Broadband etc. will co-exist
- Hence, TAM designed - new digital TVM5 Peoplemeters:
 - TVM5 is Technology/Platform neutral - caters to DTH, CAS, Broadband etc.
 - Compatible with both GSM and Landline Polling of data
 - Tested and successfully implemented in many countries including Mexico, South Africa, Thailand, Korea, Malaysia, etc.
 - Implemented in world's most successful DTH market - United Kingdom
 - To be implemented in India through what will be the world's first Elite TV Panel. Elite Panel is a separate parallel panel that is being set up by TAM to measure the TV viewing behavior of the Elite/Premium segment of the society.

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Thank You!!!

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