

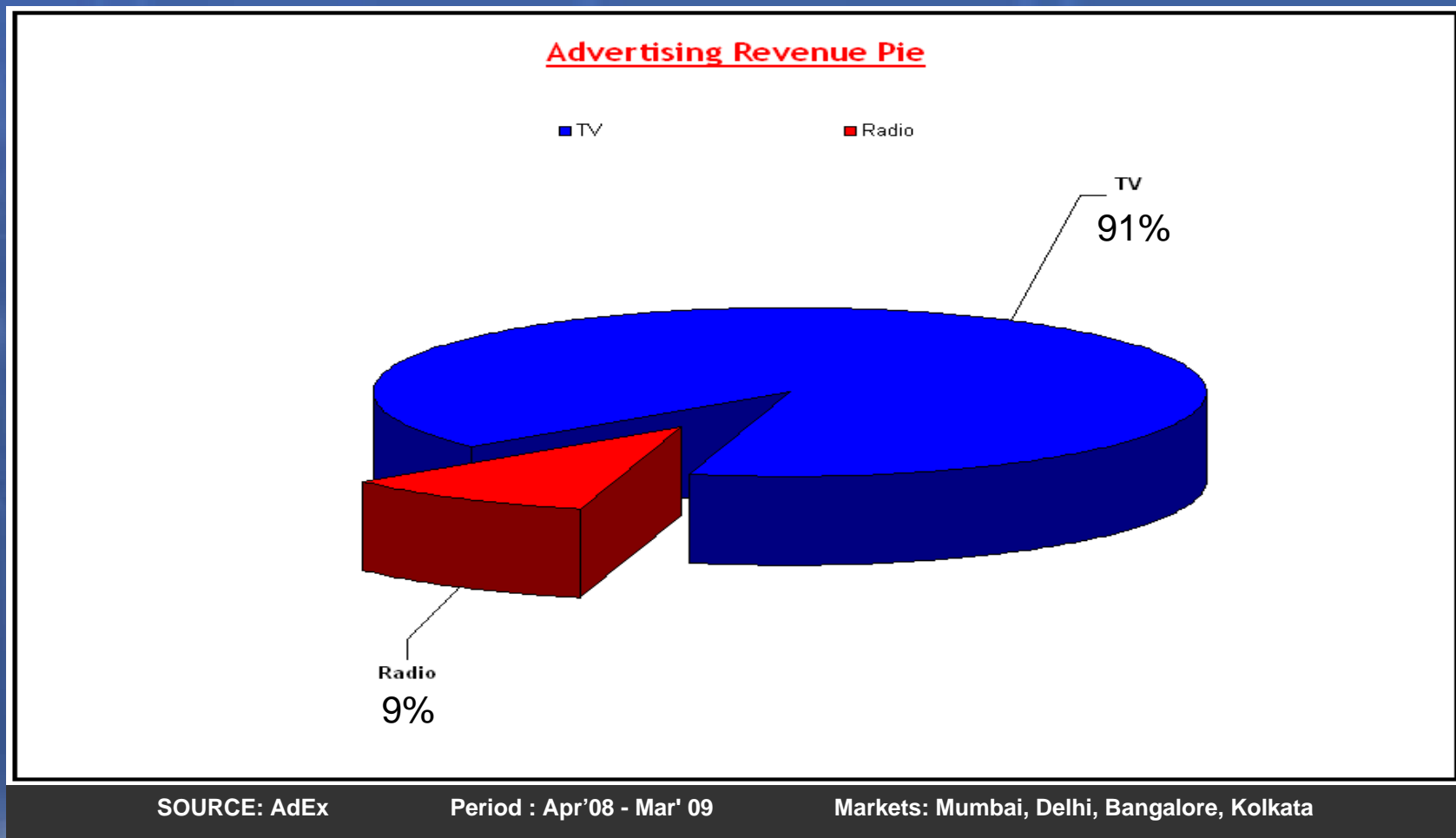


Listen.....!

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



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

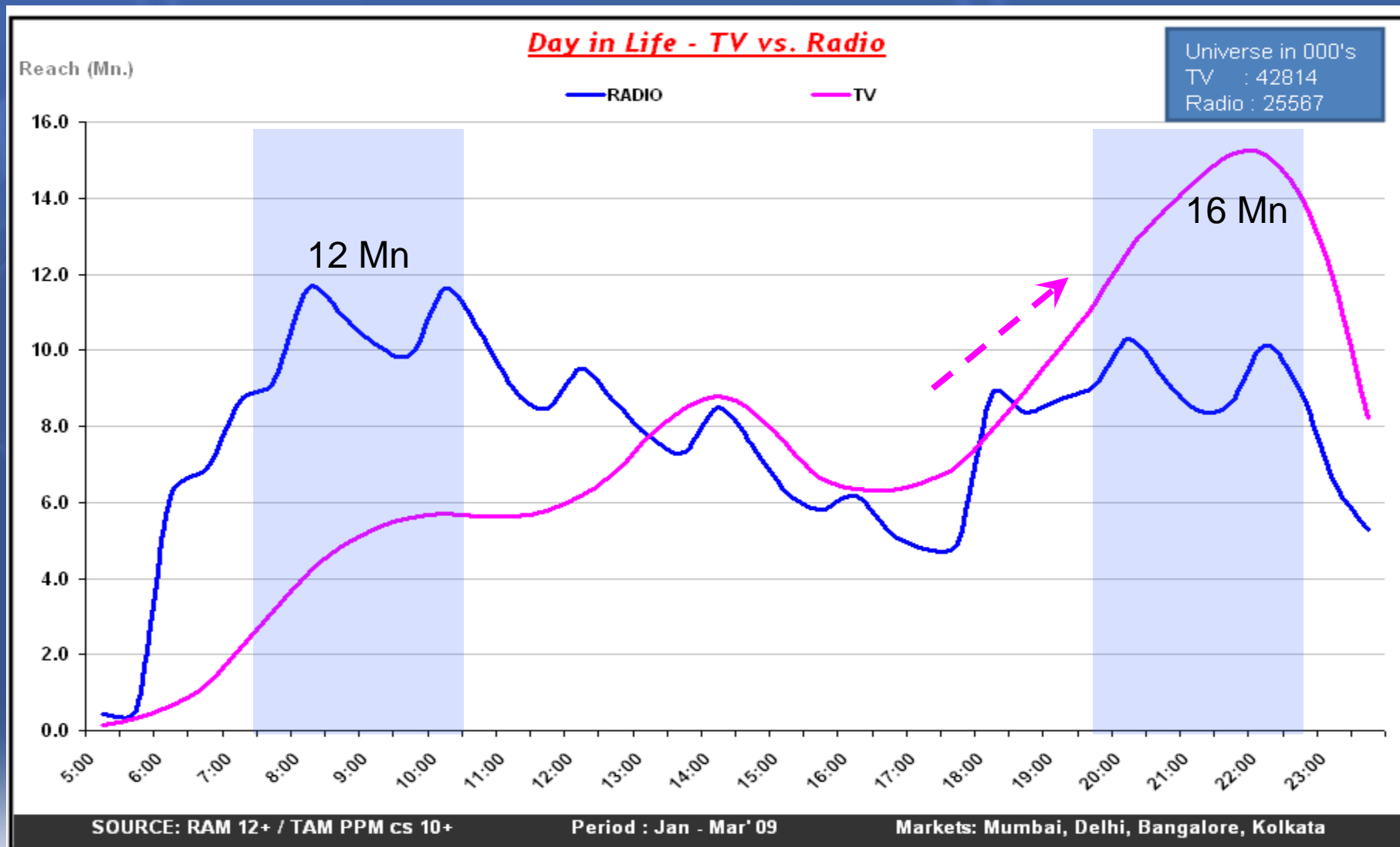
Does Radio Reach out to enough Audiences ?

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Radio attains two similar peaks in the mornings & evenings

Peaks of TV and Radio are quite comparable

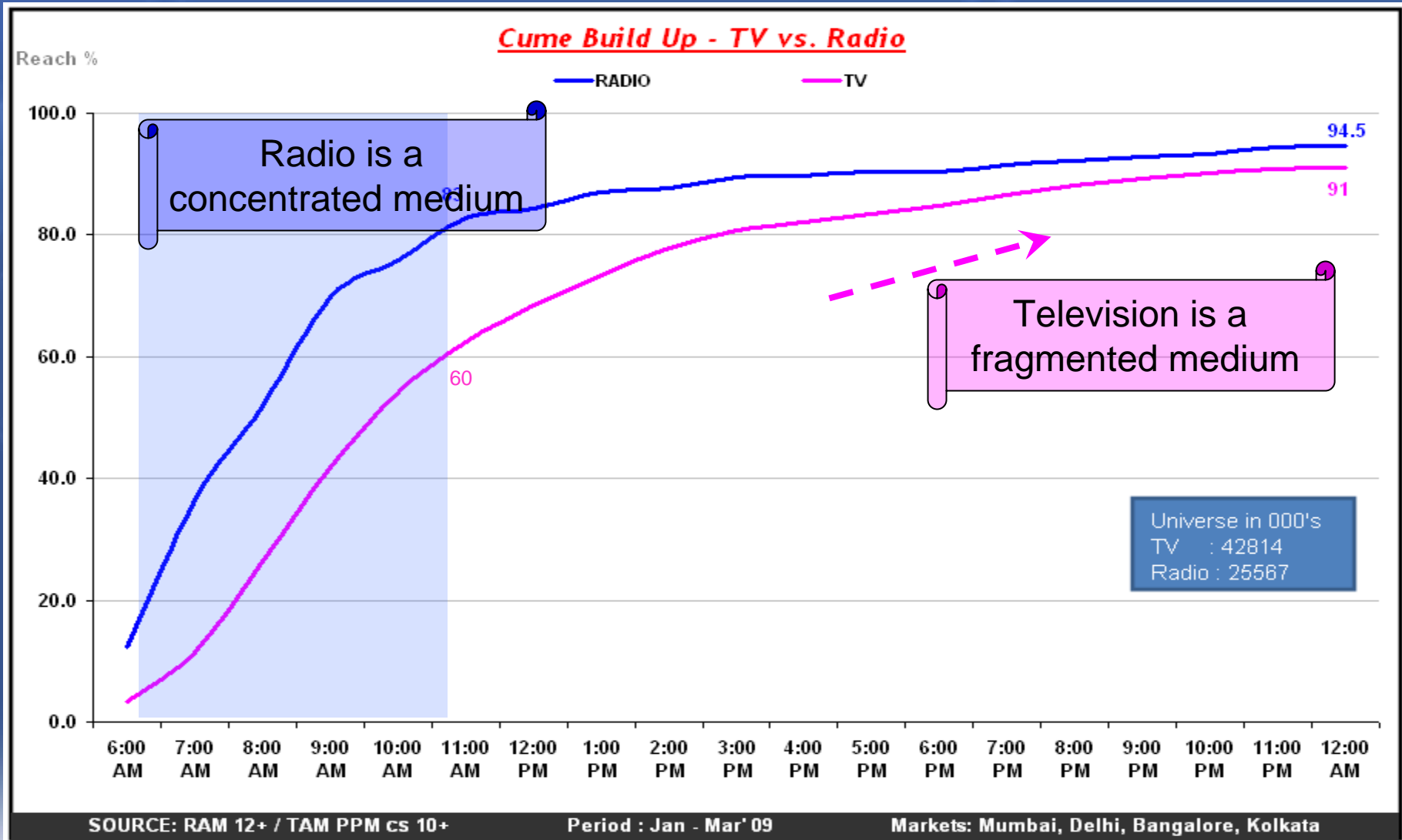


How does the audience accumulate over the day on the two mediums?

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

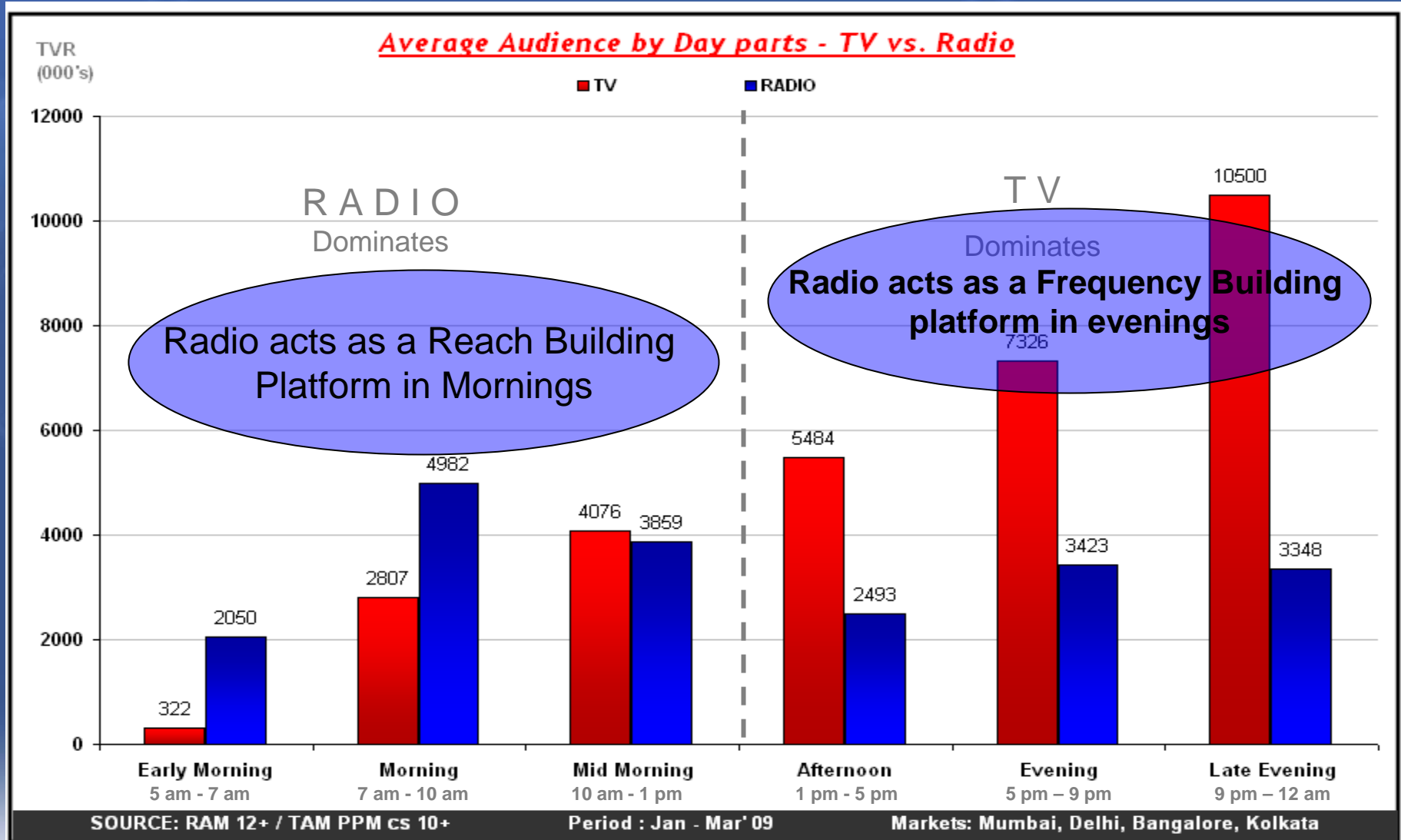


How many Audiences can we expect
on Radio & TV across dayparts?

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

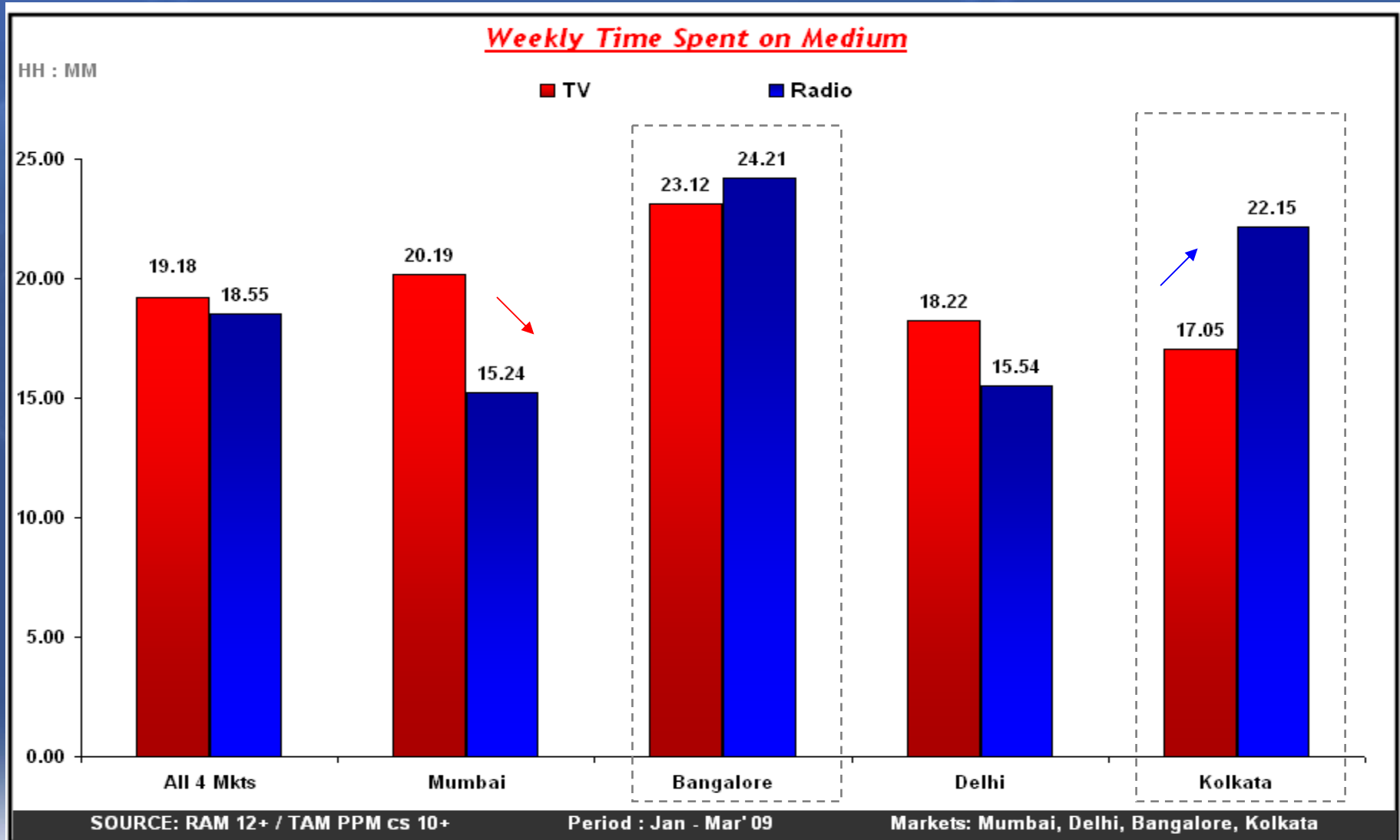


Is Radio a Low Engagement Medium ?

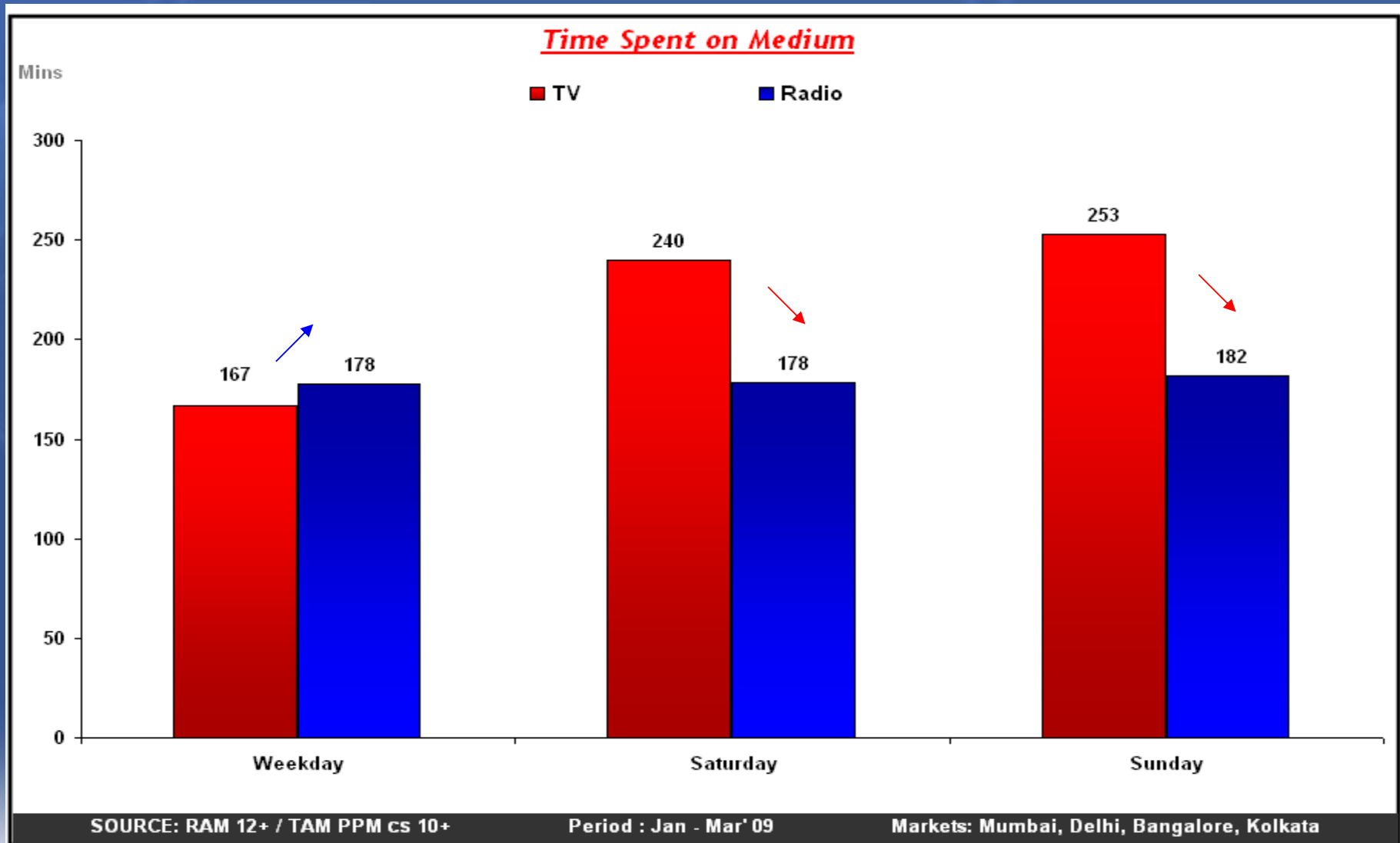
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Engagement levels on Radio are better in Kolkata & Bangalore, while TV dominates in Mumbai & Delhi



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



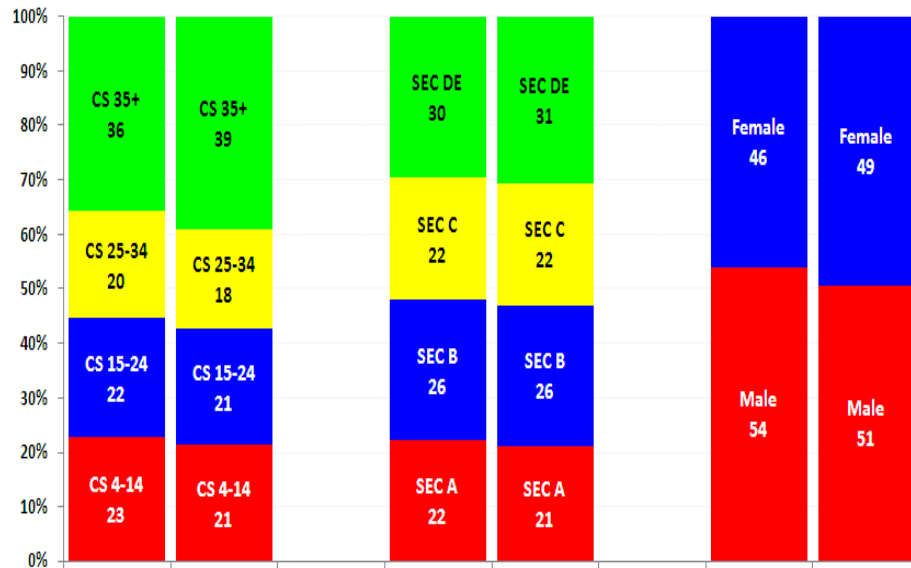
Is Radio skewed towards Male/Youth
and fails to talk to housewives?

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

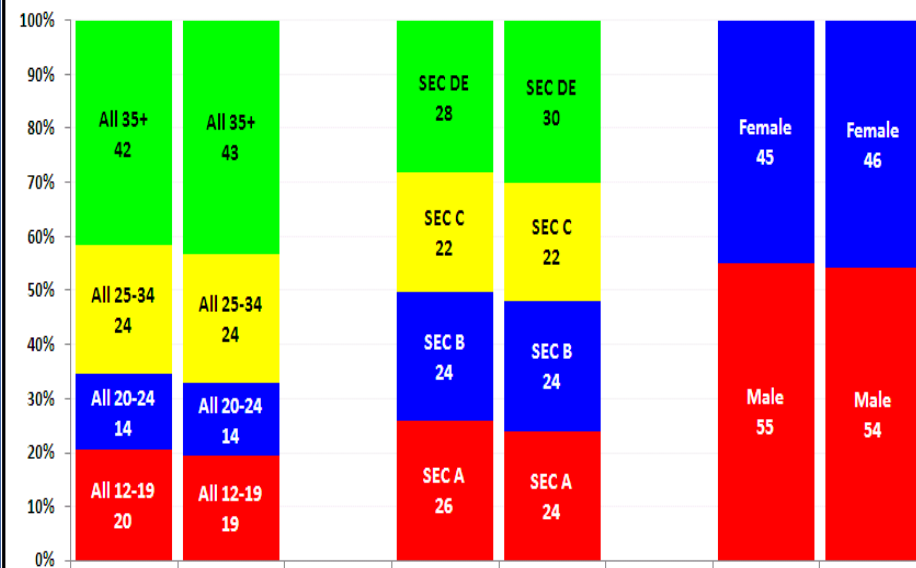
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Audience Profile of TV & Radio is very much similar and does not skew towards youth and Male audiences

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

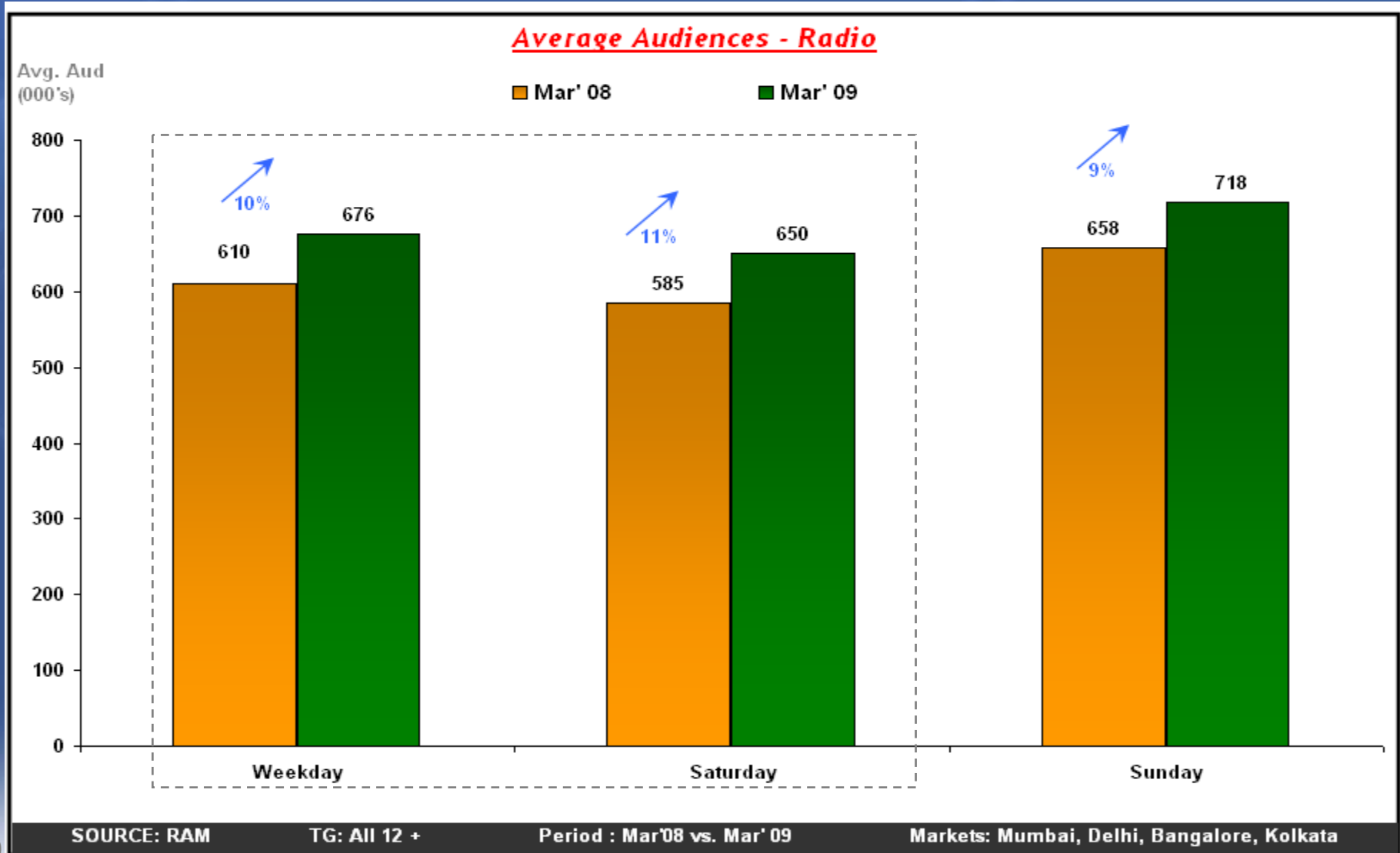


Consumption of Radio – '08 vs. '09 – RAM Markets

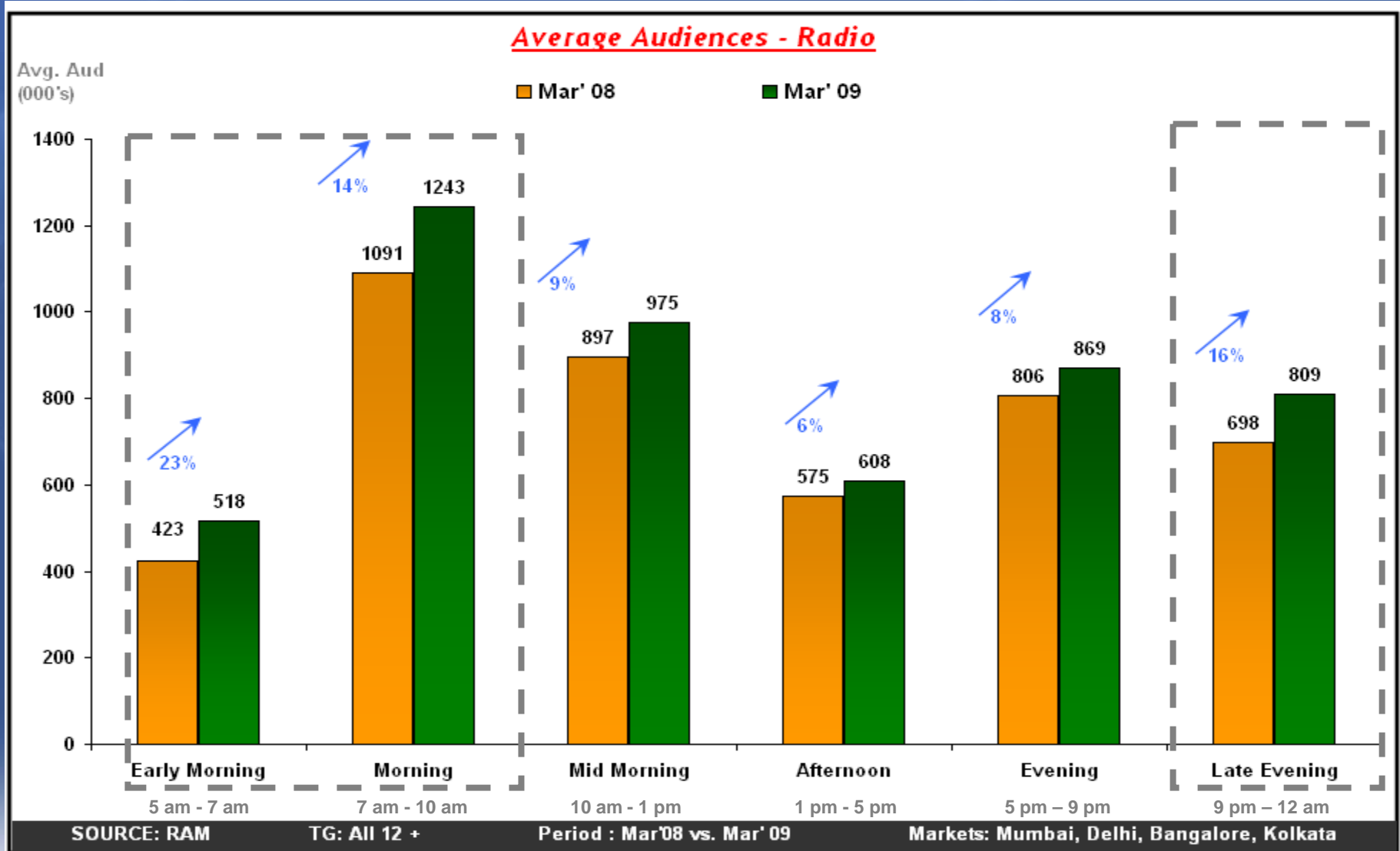
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In comparison to previous year, Radio has observed increase in listenership of 10% , at a time when C&S growth has stagnated on Television



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



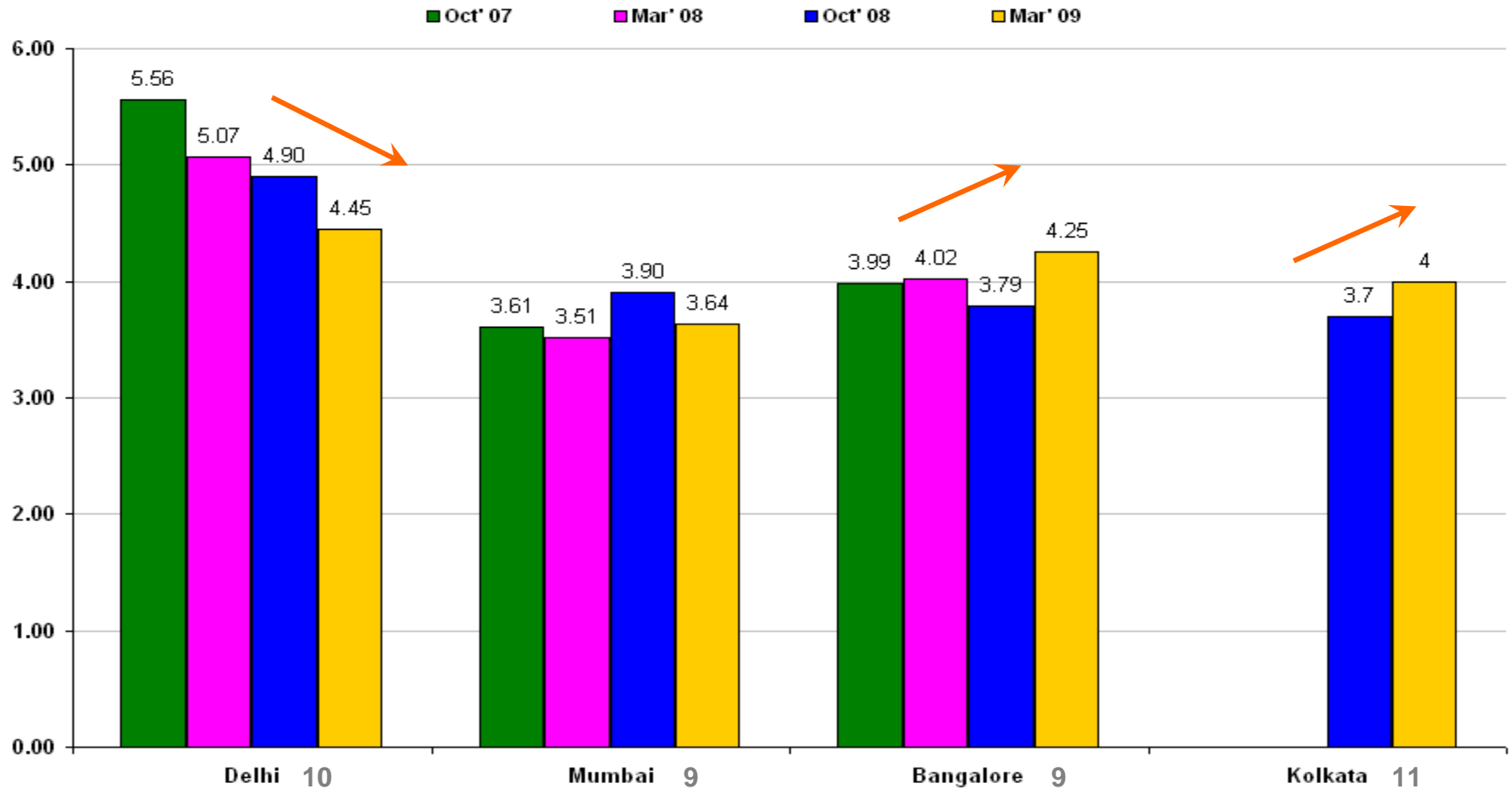
Has fragmentation on Radio increased?

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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

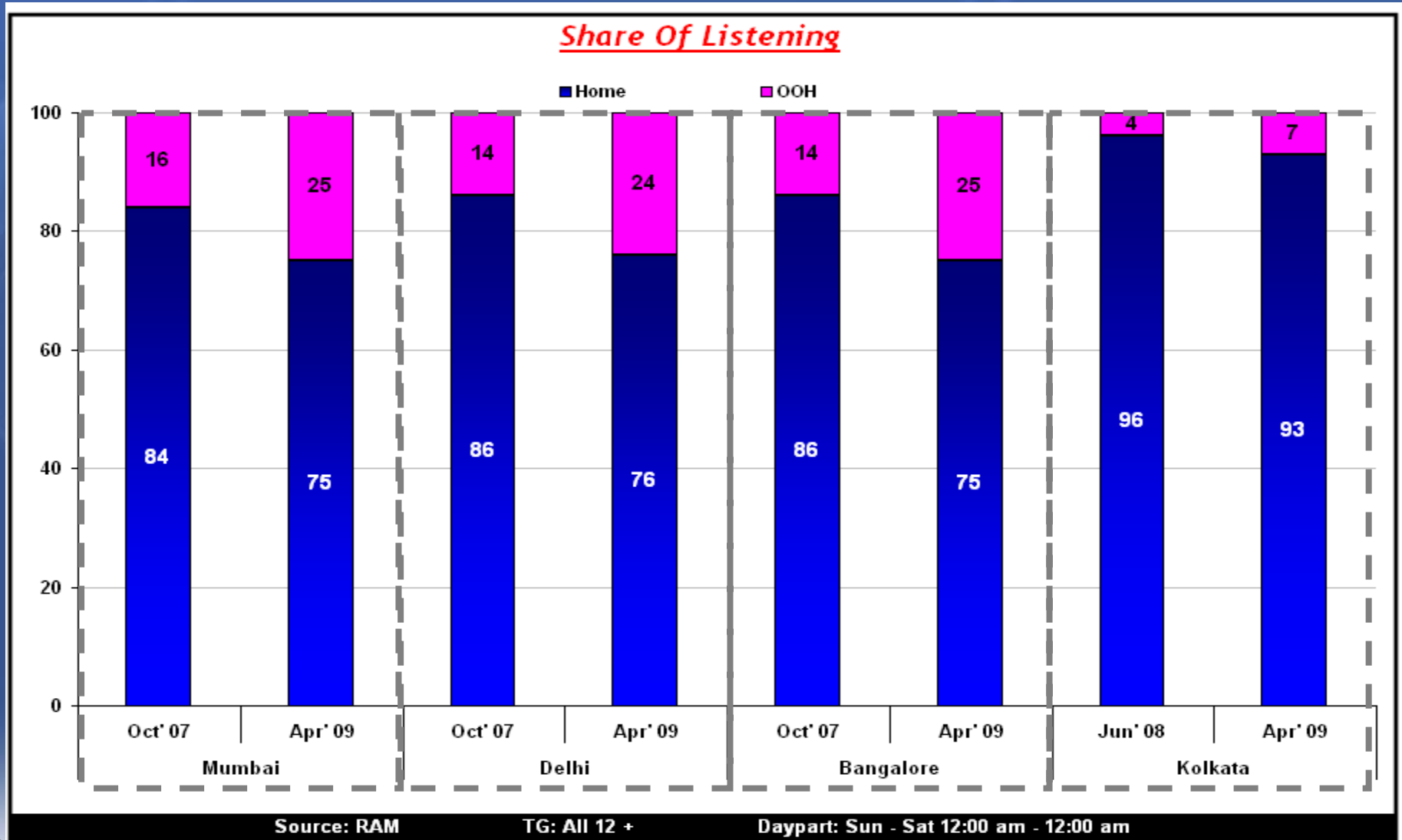


Has the listenership
“on the go” increased?

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



Who is influencing the OOH growth?

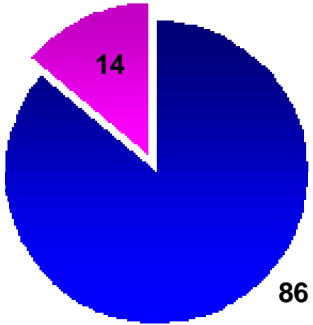
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Jun' 08

All People 12+

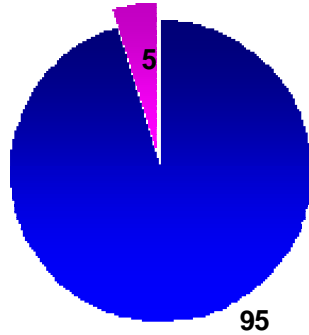
■ Home ■ OOH



Jun' 08

Housewives

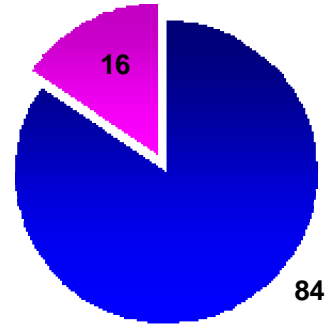
■ Home ■ OOH



Jun' 08

Youth

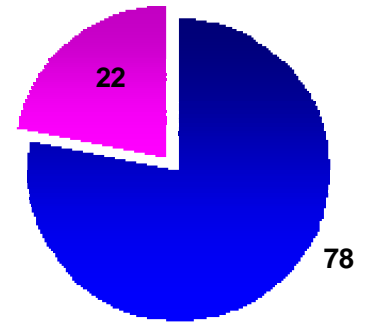
■ Home ■ OOH



Jun' 08

Male Youth

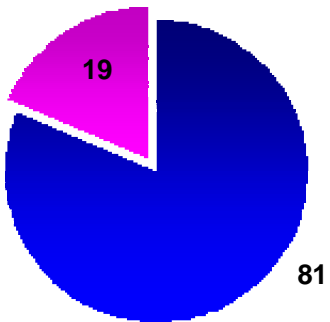
■ Home ■ OOH



Apr' 09

All People 12+

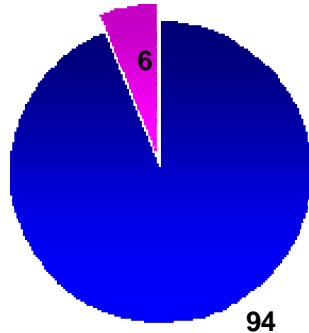
■ Home ■ OOH



Apr' 09

Housewives

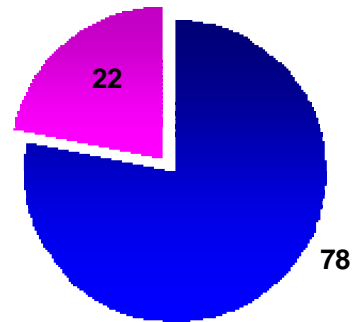
■ Home ■ OOH



Apr' 09

Youth

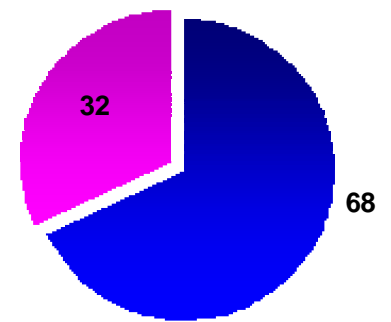
■ Home ■ OOH



Apr' 09

Male Youth

■ Home ■ OOH



SOURCE: RAM

Markets: Mumbai, Delhi, Bangalore, Kolkata

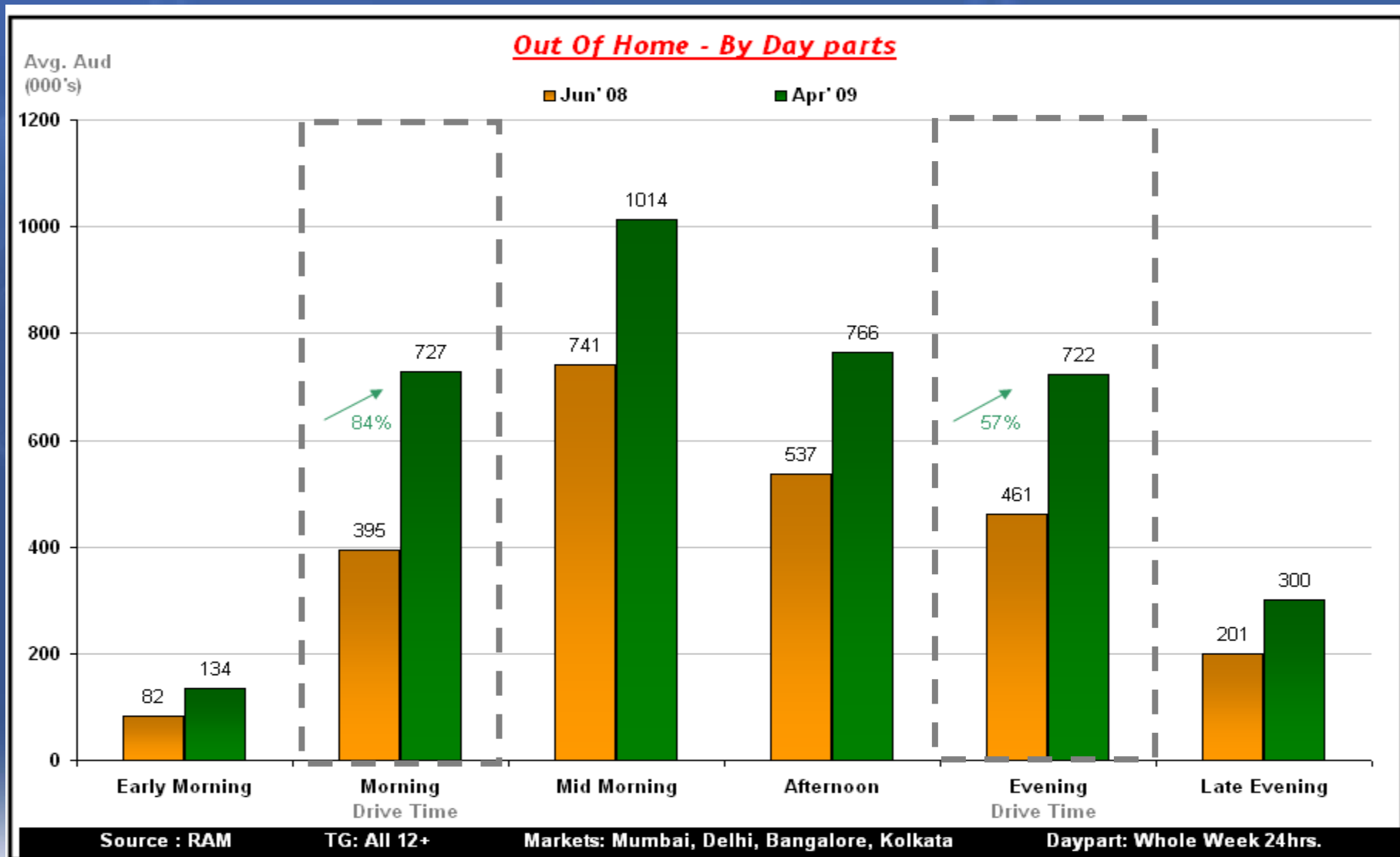
Daypart: Sun-Sat 12:00 am – 12:00 am

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..

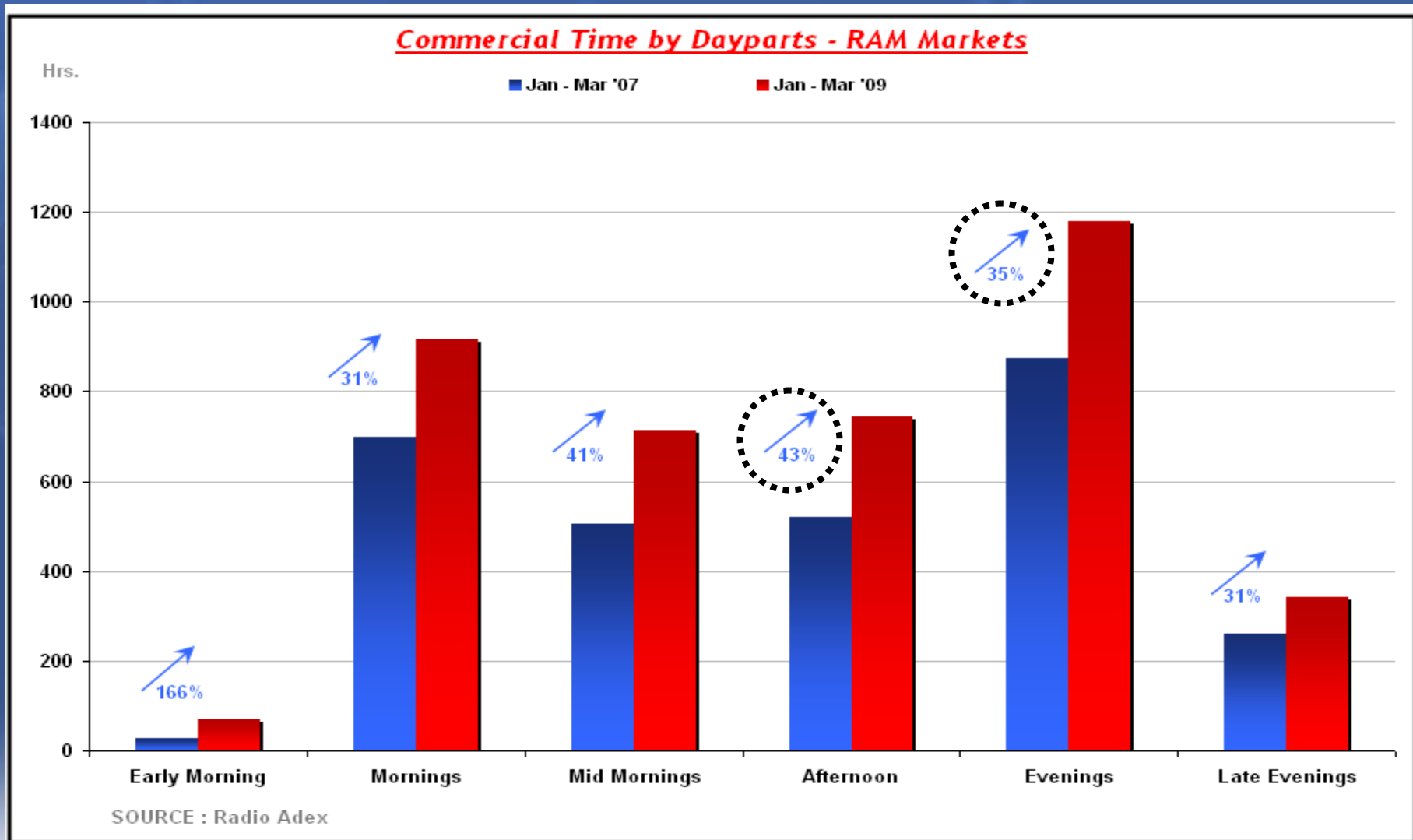
- Radio emerges as a strong contender to be considered by advertisers, in particular, FMCG brands.
- Radio in Mornings acts as a Reach builder while in evenings it's a frequency builder unlike TV which is fragmented.
- Out of home listening continues to grow rapidly, truly making Radio the only "mobile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

Is Advertising following the listenership trends?

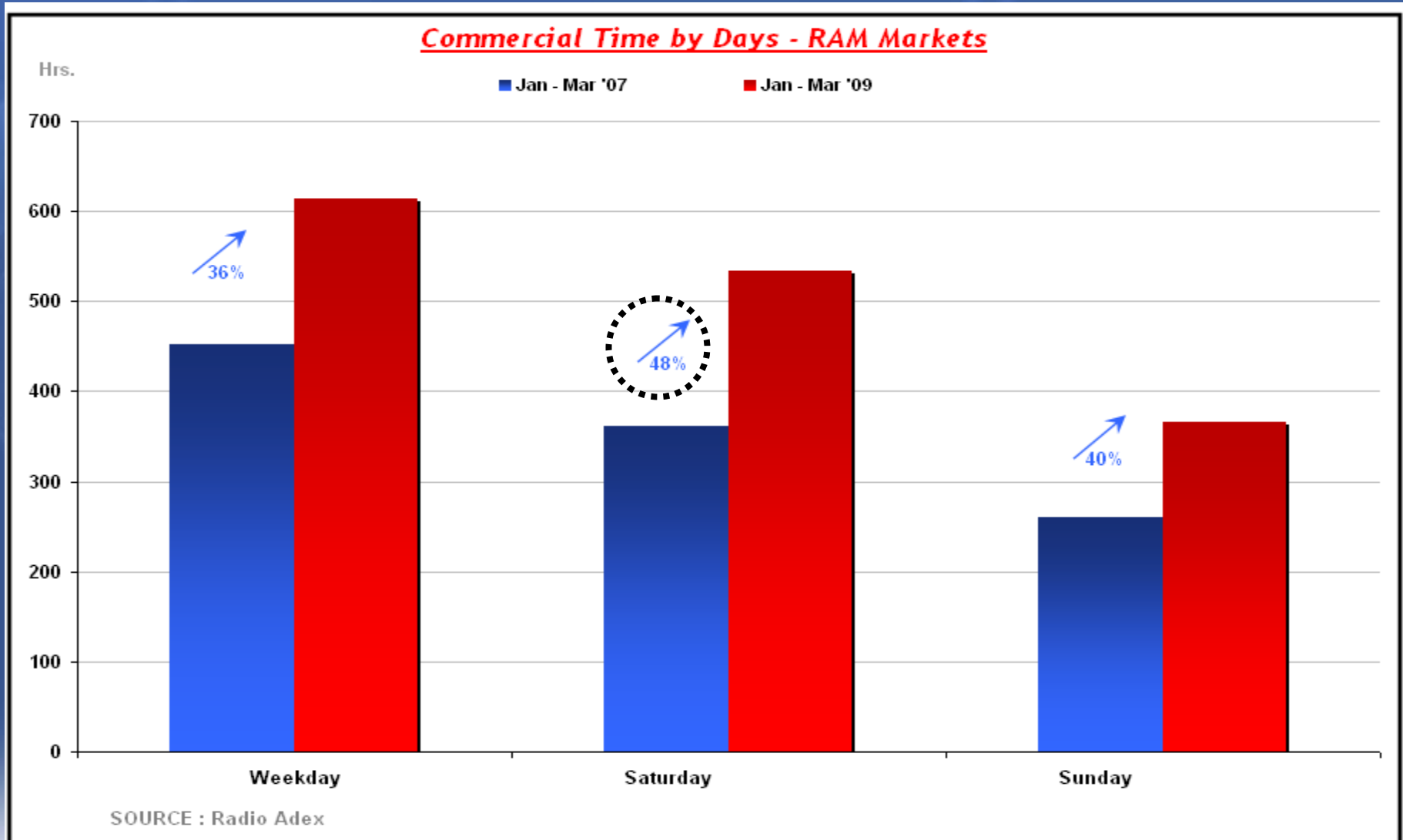
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In tune to listenership pattern, Radio advertising also has seen a similar trend over time maximum increase has been on Drive time



Weekends have also observed significant growth in Radio advertising spends

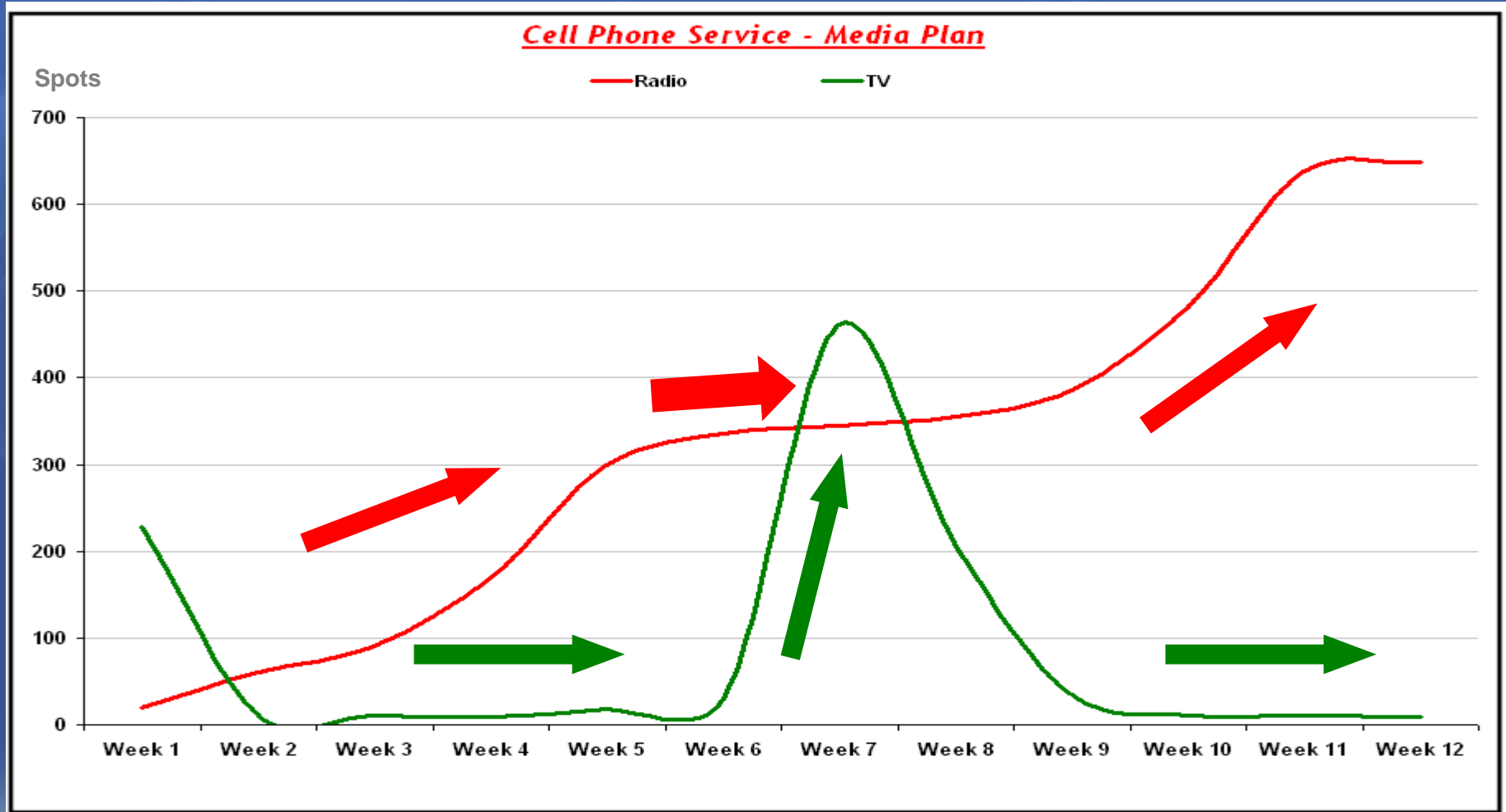


How can Radio be used to deliver effective Campaigns?

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

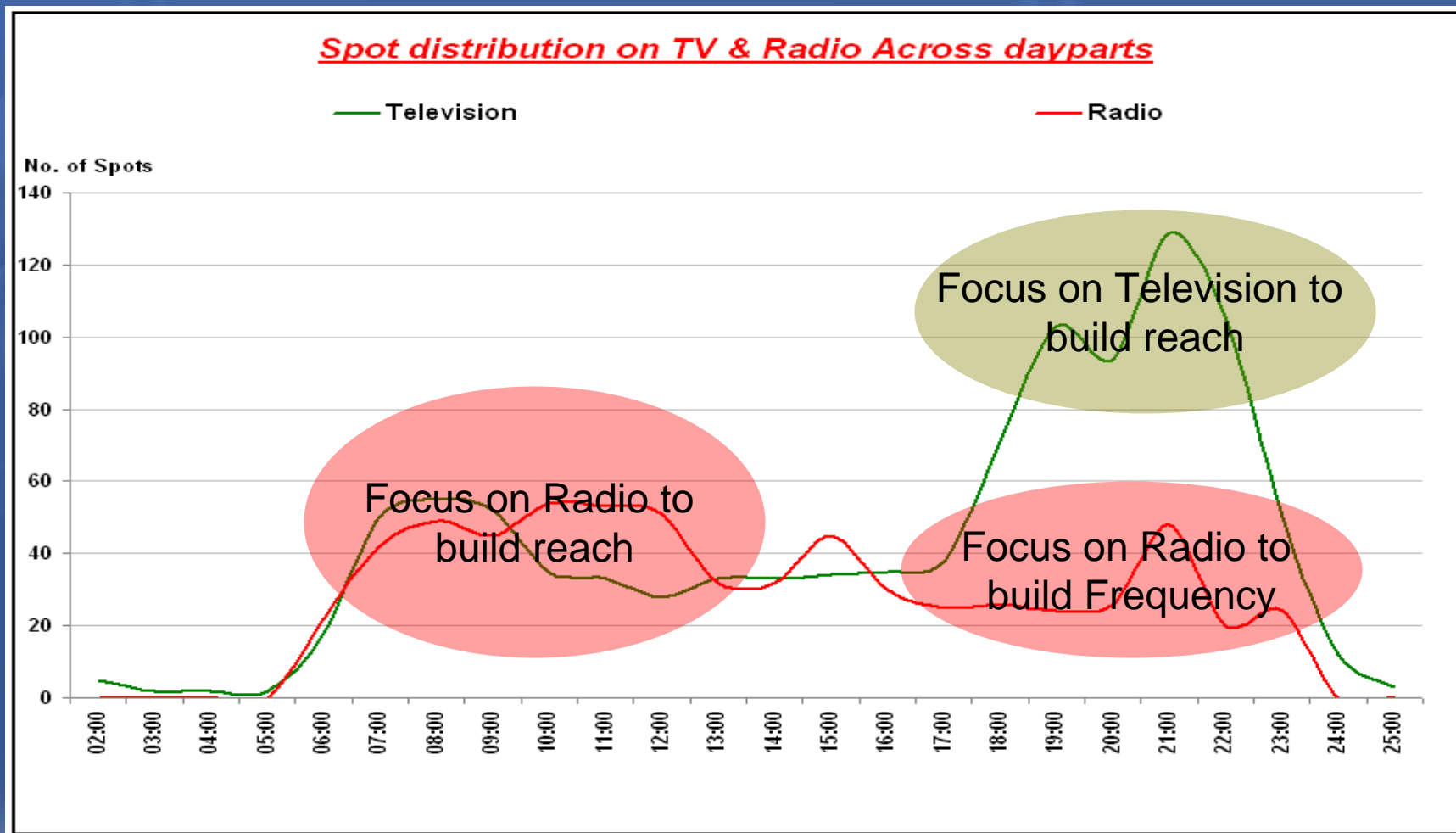


Source: Adex

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



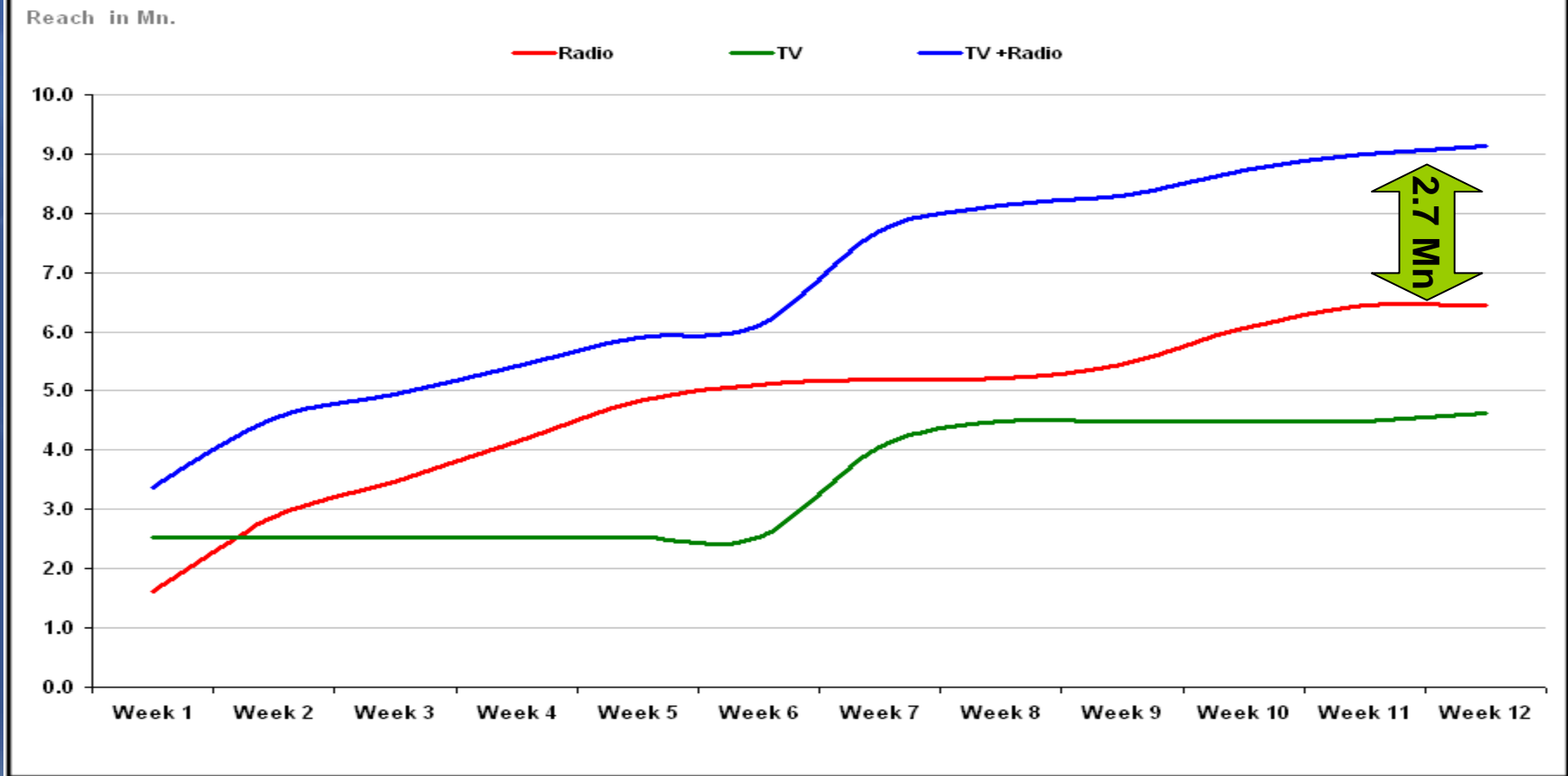
Source: Adex

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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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