

India Peoplemeter Update

2013



1. There are four points to note with the release of the TAM Week 1, 2013 data (week beginning December 30, 2012):
 - a. General universe update
 - b. Universe update for the four DAS markets
 - c. The release of new “Less than Class I” (LC1) markets
 - d. The release of individual news channels’ viewership data

The above points are described below.

2. Universe update

- a. As every year, all reporting markets have undergone a universe update starting week 1 of the new year.
- b. The source for these estimates is the annual Establishment Survey (ES) across 65,000 homes in Urban and Rural India and TAM estimates.
- c. SEC, Gender and Age proportions have not seen much change but C&S penetration and Digital penetration within C&S households have seen change. C&S penetration for current TAM reported markets has increased slightly from 91% to 93% while digital penetration in these markets has zoomed up from 23% to 41% (a large DAS effect) as compared to the week 1, 2012 estimates.
- d. As always, runs across the universe update date (December 30, 2012), are not allowed by the software.
- e. Since the ES was a pan-India exercise, we are able to provide an all-India overview of the television scenario. For example, All India Digital penetration is now at 42% with the Urban and Rural estimates at 37% and 46% respectively.
- f. Please refer to this document’s companion presentation “Overview_Universe update- 2013” for details of the new universe estimates.

3. Universe updates for the four DAS markets

- a. The four DAS markets see a second revision in estimates after the last one which was effective October 28, 2012 (week 44, 2012)
 - b. The last update in week 44, 2012 saw:
 - A large change in the digital universe on account of DAS
 - A shrinkage in the overall C&S universe on account of those homes which became/were considered TV dark in the DAS area due to non-existence of a STB
- Note that the DAS ES was done between November 16, 2012 and December 3, 2012 and the digital status of TAM households for data processing was as on December 8, 2012.
- c. This latest update takes into account those homes which took a digital connection after December 8, 2012 as well as those who have migrated to a C&S connection from a Terrestrial status.
 - d. As a result, taking the Week 1, 2012 universes as a base, the shrinkage in C&S universe has reduced to 1%, 1% and 8% for Mumbai, Delhi and Kolkata respectively while it was 5%, 3% and 10% for these cities in the week 44, 2012 update.

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4. The release of new “Less than Class I” (LC1) markets

- a. In 2013, we will release data of five new LC1 markets: Gujarat, Madhya Pradesh, Uttar Pradesh, PHCHP and Rajasthan. Please note that MP does not include Chhattisgarh but UP includes Uttaranchal.
- b. With the release of these markets, we will be covering **92% of the HSM urban market** from the earlier 74%.
- c. For these markets, we will follow the policy adopted when we released the Maharashtra LC1 market i.e the data for these markets will be released together for a cumulative five weeks from the release date. This means new LC1 market data for weeks 1-5, 2013 (December 30, 2012 – February 2, 2013) will be visible to users on February 7, 2013 when data for week 5, 2013 will be released.

5. The release of individual news channels’ viewership data

- As users would know, as a temporary measure no individual news channel data was visible for weeks 41, 2012 onwards.
- As scheduled as per prior agreement amongst the industry bodies, we will now release individual news channel data retrospectively from week 41, 2012 (Week beginning October 7, 2012). Viewing will be reported as per regular norms continuing week 1, 2013.

Please do get in touch with your client representative for any questions you may have. We’d be glad to help.