TAM Annual Universe Update – 2012

TAM Annual Universe Update-2012

- 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: For Universe Update 2012

- Census growth rates are impending and therefore have not been applied for estimation of Total Population, therefore the Total Population estimates remain the same for 2012

- TAM Base line study conducted in July-Nov 2011 to establish latest demographic proportions and Universe changes

- The 6th 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
  - DES V: Field work: Nov-Dec 2010; utilized for 2011 universe update
  - DES VI: Field work: July-Nov 2011; utilized for 2012 universe update

- Sample size of ***over 5,14,000*** face-to-face interviews
- Conducted across Urban and Rural India

Methodology: An example

Week 1, 2011

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

Step 1: Impending growth rate therefore the estimates remain the same

Week 1, 2012

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

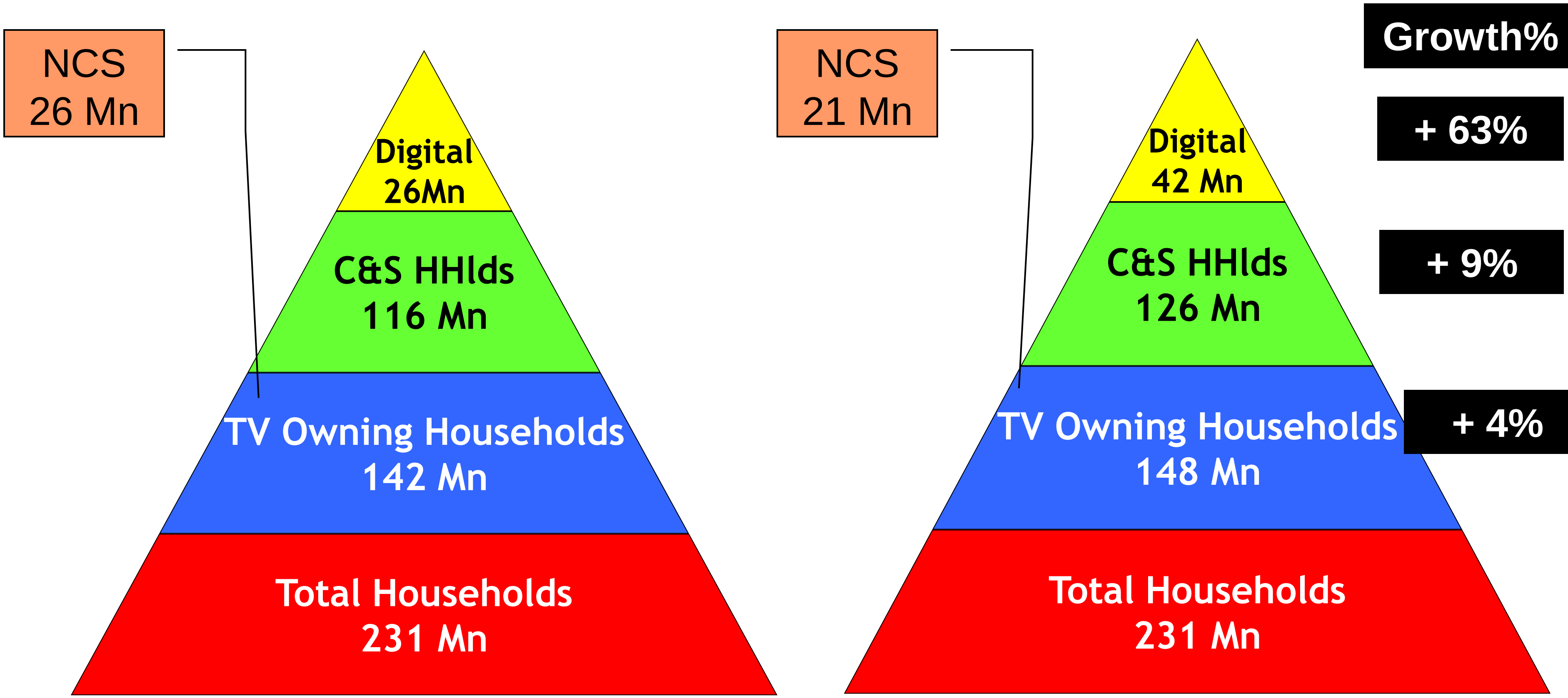
Step 2: Estimate demographic proportions from Establishment Survey

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



2011

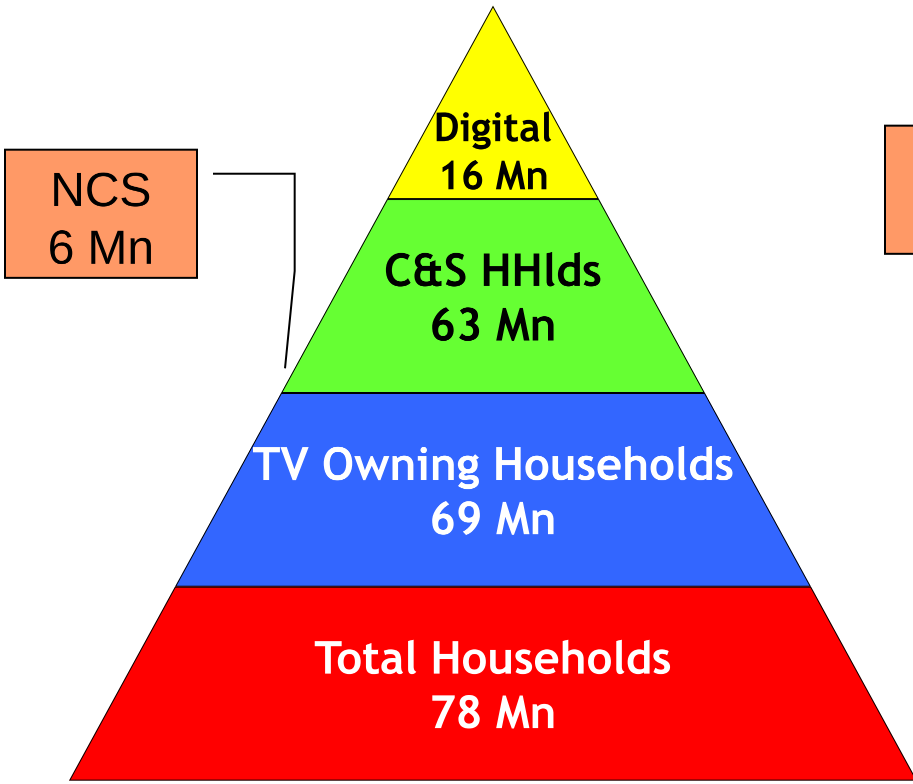
All India Household figures in Millions

2012

All India Household figures in Millions

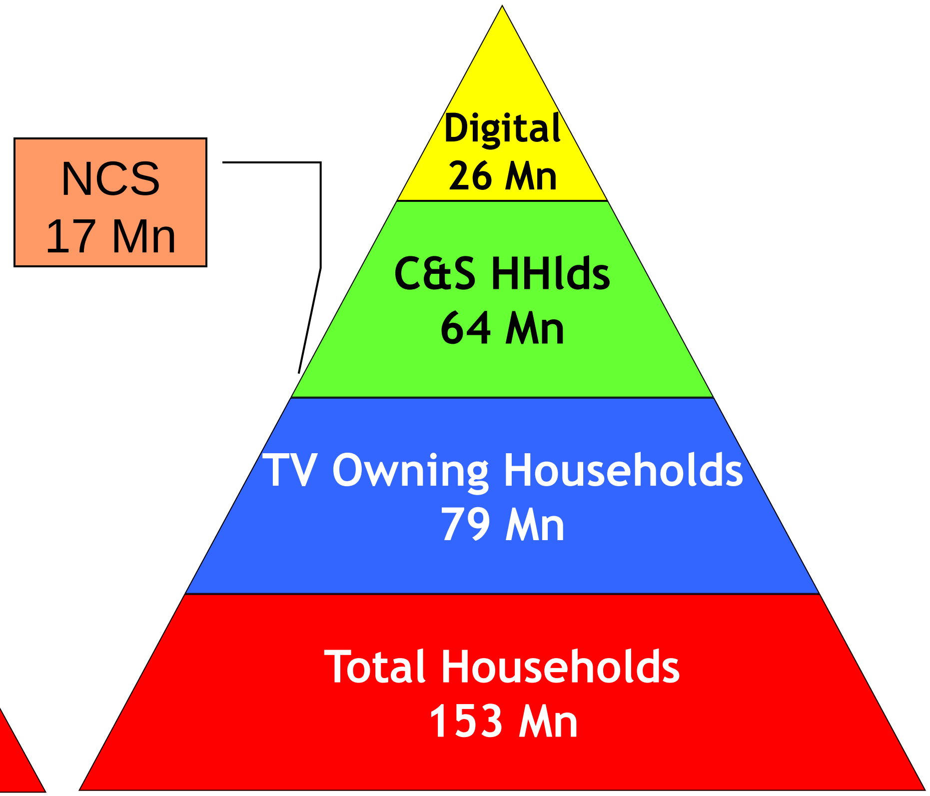
The Urban & Rural Divide…

Urban Vs Rural 2012



Urban- 2012

Household figures in Millions



Rural -2012

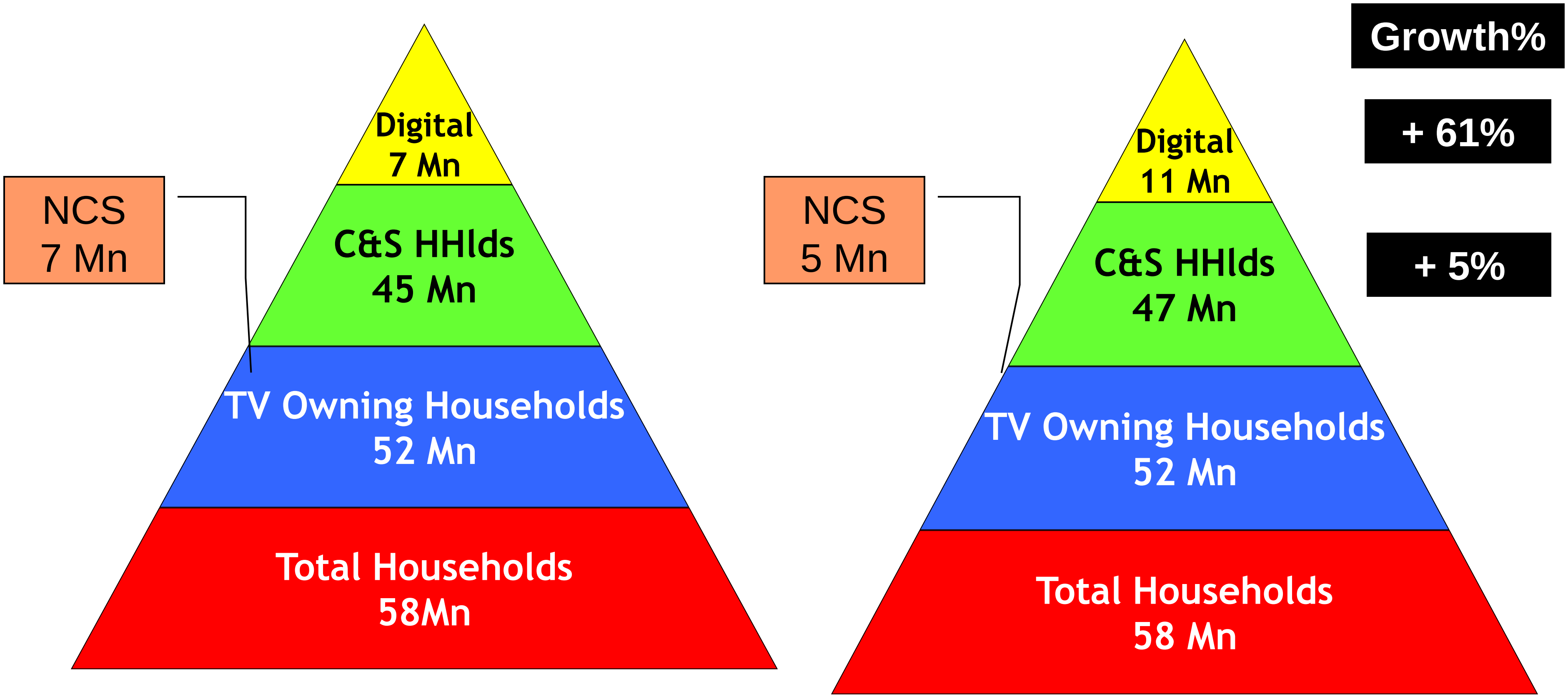
Household figures in Millions

Changes in "TAM Markets"

(Urban Class I + Maharashtra Less than Class I + Jharkhand 0.5Mn+)

2011 Vs 2012

TAM Coverage at a Glance



2011

All India Household figures in Millions

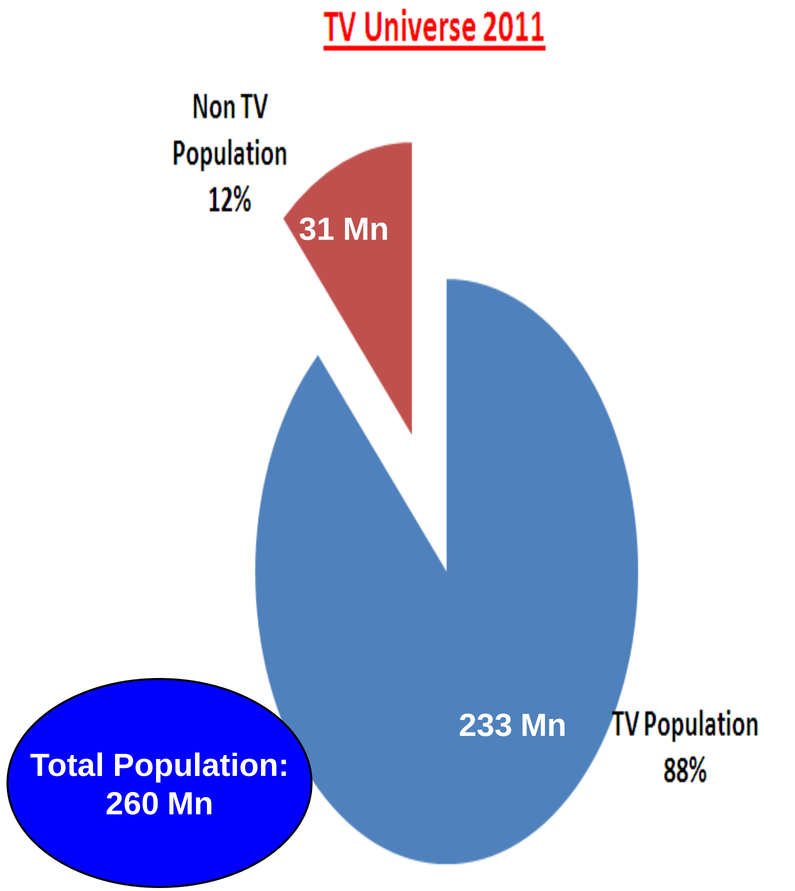
2012

All India Household figures in Millions

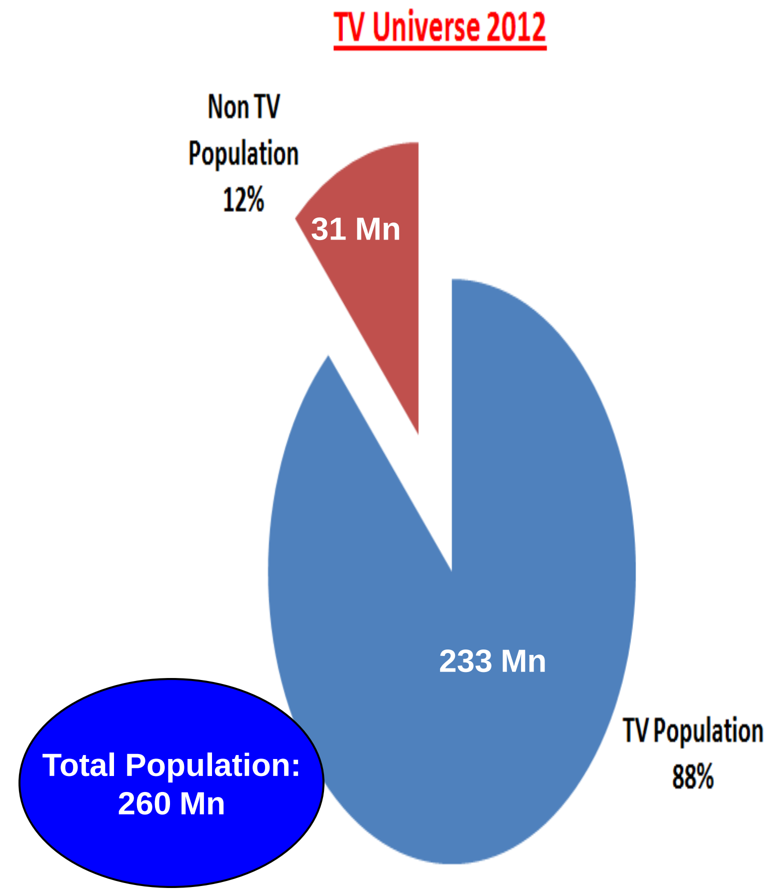
Change in TV Universe 2012

TAM Markets – Individuals (mn)

Given the impending Census Numbers Total Population and TV population has been kept constant



Source: TAM + IMRB Baseline Study Market: Urban 1lac+ & Mah LC1 + Jarkhand.5 Mn+ Period: Nov-Dec 2010

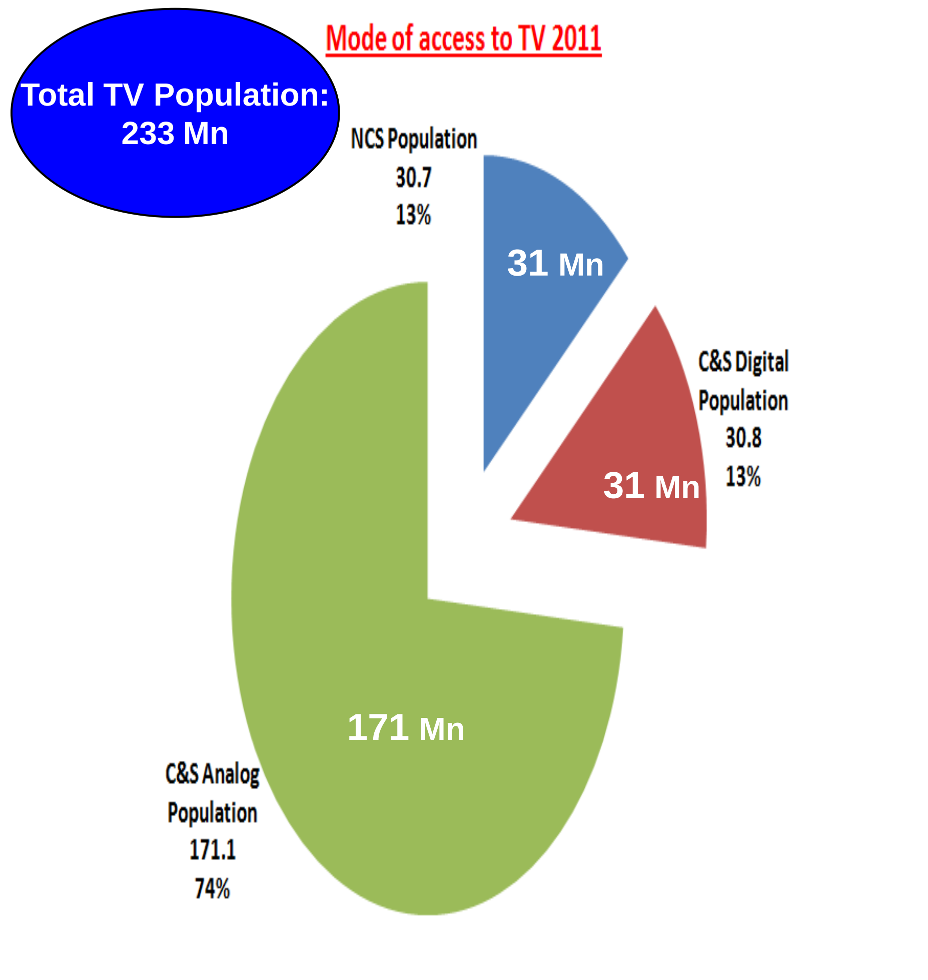


Source: TAM Baseline Study Market: Urban 1lac+ & Mah LC1 Period: July to Nov 2011

All Figure are Individuals in millions

Mode of TV Access – Proportions across platforms

The migration from NCS & Analog has led to the growth in Digital population …



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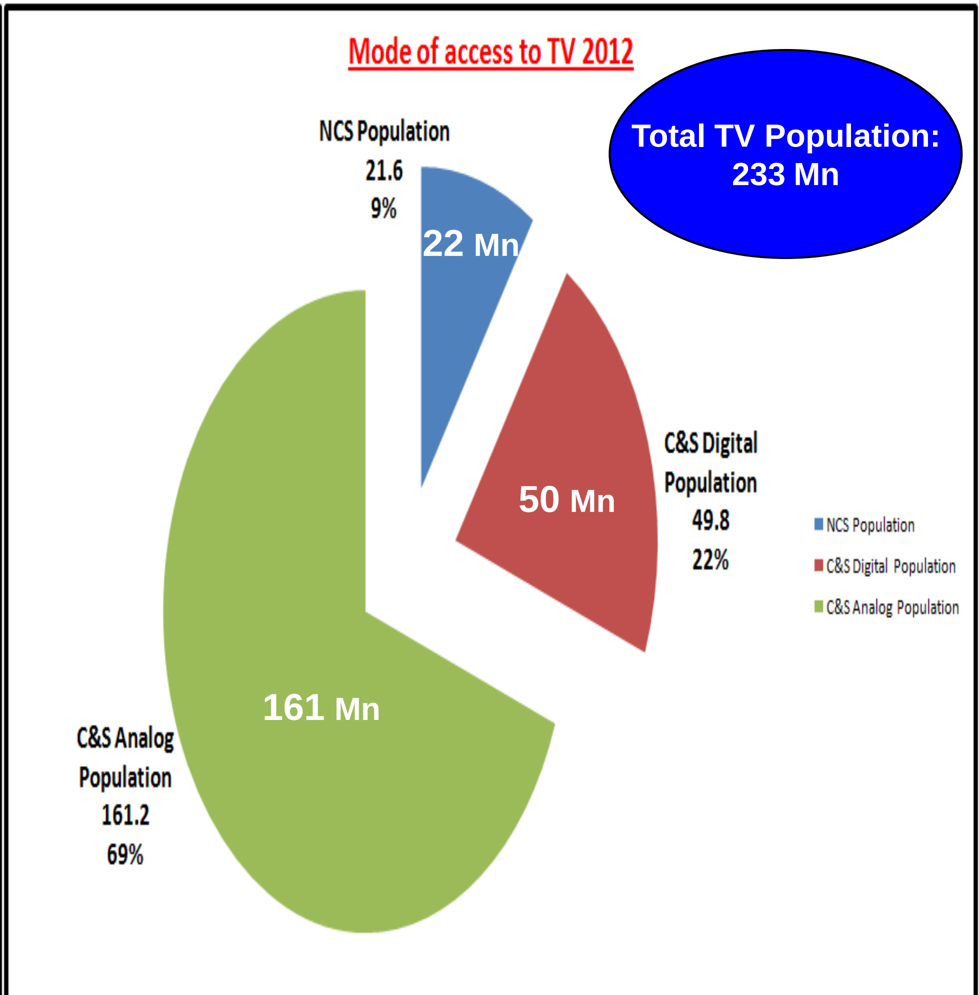
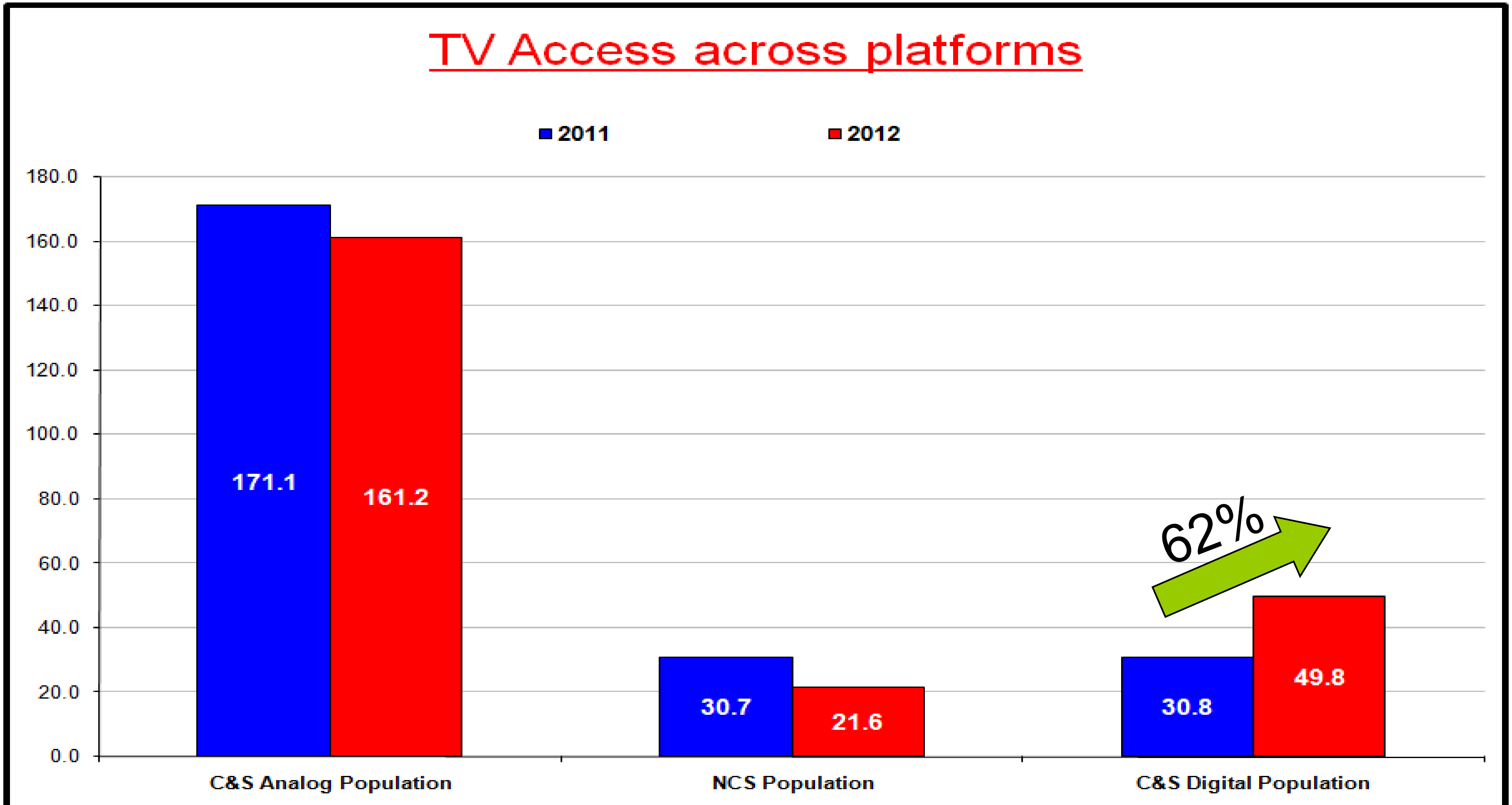


Source: TAM Baseline Study Market: Urban 1lac+ & Mah LC1 Period: July to Nov 2011

Digital Population witnessed phenomenal growth



Source: TAM Baseline Study | Market: Urban 1lac+ & Mah LC1 | Period: July to Nov 2011

All Figure are Individuals in millions

Changes across Pop-strata…

TV, C&S and Digital

Across platforms growth is higher for .1-1Mn Markets, among mode of access, Digital is growing fastest…

Pop Strata wise growth across C&S and Digital Platform						
Pop Strata	Cable & Satellite		Growth %	Digital		Growth %
	Year 2011 (in Millions)	Year 2012 (In Millions)		Year 2011 (in Millions)	Year 2012 (In Millions)	
6 Metros	71	72	1	12	16	34
Rest Of State 1 Mn+	47	50	5	8	13	73
0.1-1Mn+ & 0.5Mn+ & Mah Lc1	83	89	7	11	20	84
All India Surveyed	202	211	5	31	50	62

Source: TAM Baseline Study　　Market: Urban 1lac+ & Mah LC1　　Period: July to Nov 2011

All Figure are Individuals in millions

Growth at State level…

Central belt consisting of Jharkhand , Bihar, MP, UP have witnessed a significant growth in the Digital population…

Markets	All 4+ TV Population Individuals in Millions	C&S 4+ Individuals in Millions		Growth%	Digital 4+ Individuals in Millions		Growth%
	Year 2011-12	Year 2011	Year 2012		Year 2011	Year 2012	
Mumbai	19.3	19.0	19.0	0.0	4.3	5.1	18.9
Delhi	19.2	18.1	18.3	1.4	3.0	4.2	40.8
Calcutta	13.5	12.3	12.8	4.3	1.3	2.2	72.9
Chennai	7.7	7.7	7.7	0.0	1.2	1.4	15.3
Bangalore	7.3	7.1	7.1	0.0	1.8	2.3	30.4
Hyderabad	7.3	7.1	7.1	0.1	0.7	1.2	74.3
Bihar 1Mn.+	2.2	1.8	1.8	0.0	0.1	0.4	183.3
Jharkhand 0.5Mn.+	3.5	2.8	3.1	11.5	0.2	0.7	259.7
Gujarat	18.1	14.3	15.0	4.9	2.9	5.2	78.1
Ro Maharashtra	29.3	22.2	24.6	10.7	5.1	8.0	57.3
Madhya Pradesh	13.8	10.8	11.6	7.2	1.6	4.1	163.9
PHCHP	14.1	12.6	13.2	4.8	1.2	2.1	77.3
Rajasthan	8.9	6.8	7.5	10.1	1.2	2.0	65.5
Uttar Pradesh	25.3	19.4	21.5	10.4	2.2	4.2	92.7
Assam 0.5Mn.+	1.0	0.8	0.9	8.6	0.2	0.4	105.4
Orissa 0.1 to 1 Mn.	3.4	2.6	2.8	5.6	0.5	0.7	38.3
Ro West Bengal	5.6	4.8	5.0	4.9	0.3	0.4	42.6
Ro Andhra Pradesh	10.4	10.0	10.0	0.0	0.7	1.0	48.9
Karnataka 0.1 to 1Mn.	7.3	6.7	6.8	2.6	0.8	1.3	54.9
Kerala	5.6	5.2	5.4	3.6	0.5	1.5	236.5
Ro Tamil Nadu	9.8	9.7	9.7	0.5	1.2	1.3	12.6
All India TAM Surveyed	232.6	201.9	211.0	4.5	30.8	49.8	61.5

Source: TAM Baseline Study   Market: Urban 1lac+ & Mah LC1   Period: July to Nov 2011

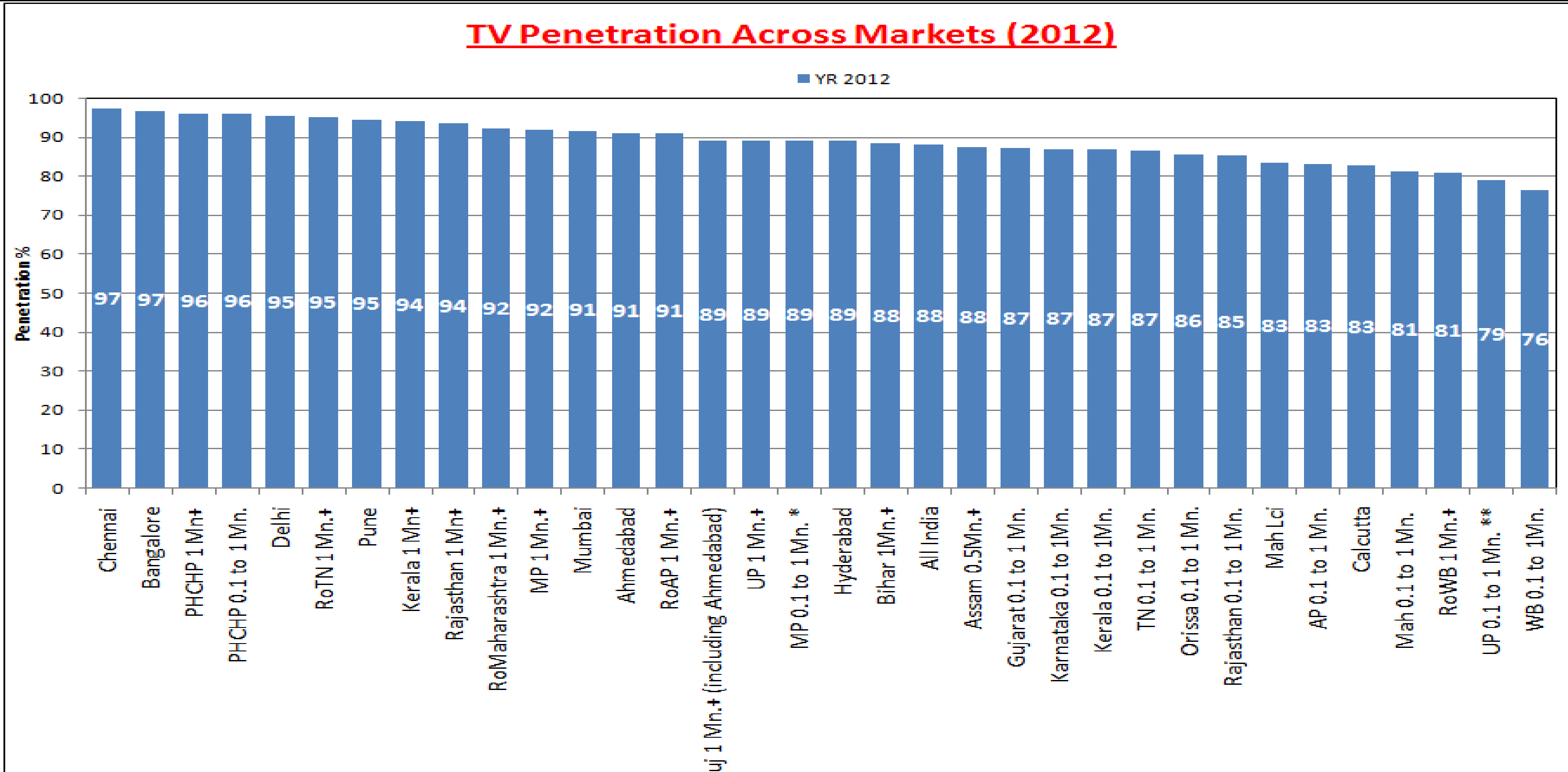
All Figure are Individuals in millions

States highlighted have higher growth rate than All India average

How is the growth across individual markets?

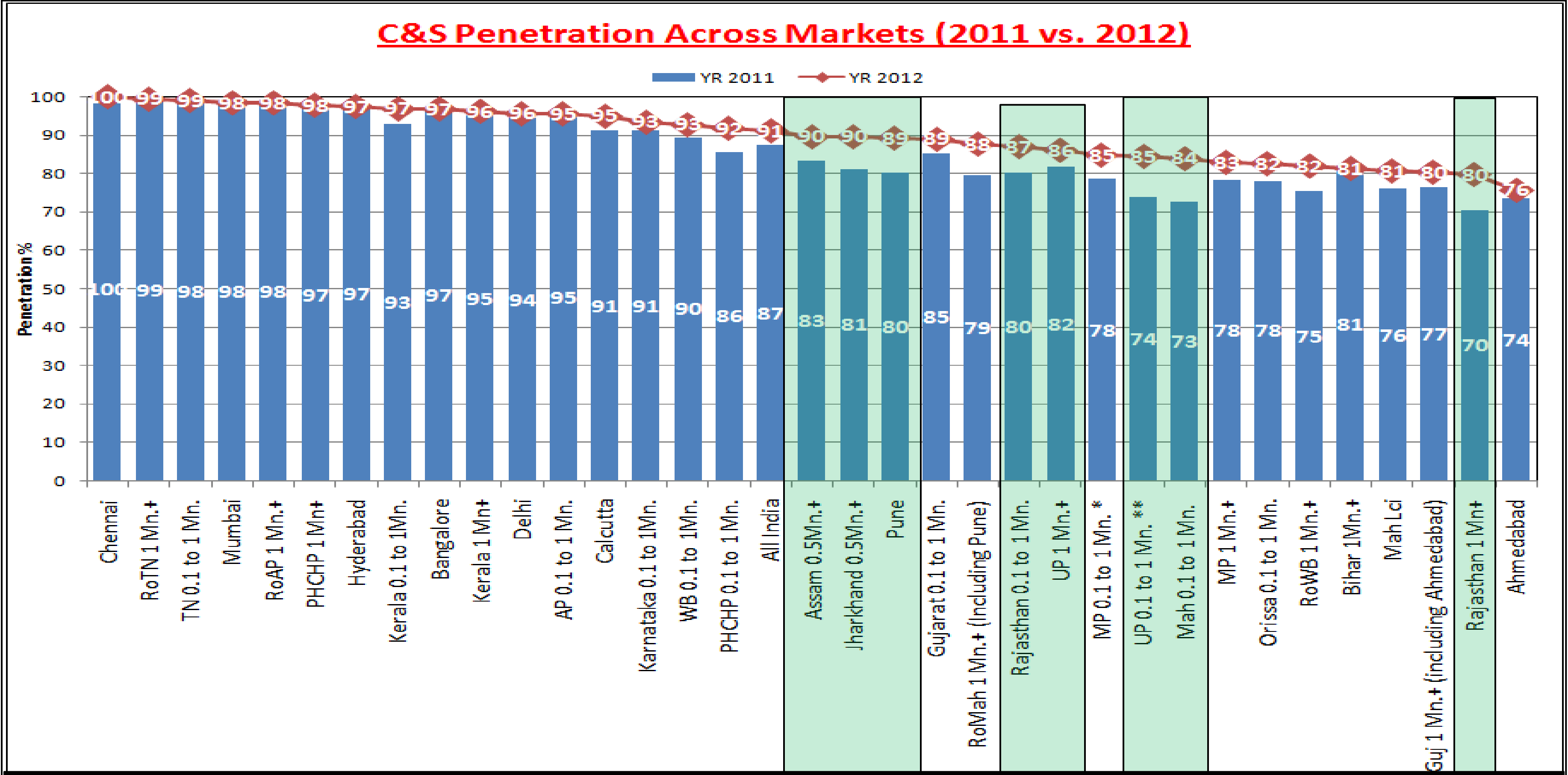
TV/CS/Digital penetration

TV penetration at All India Level (Impending census data)



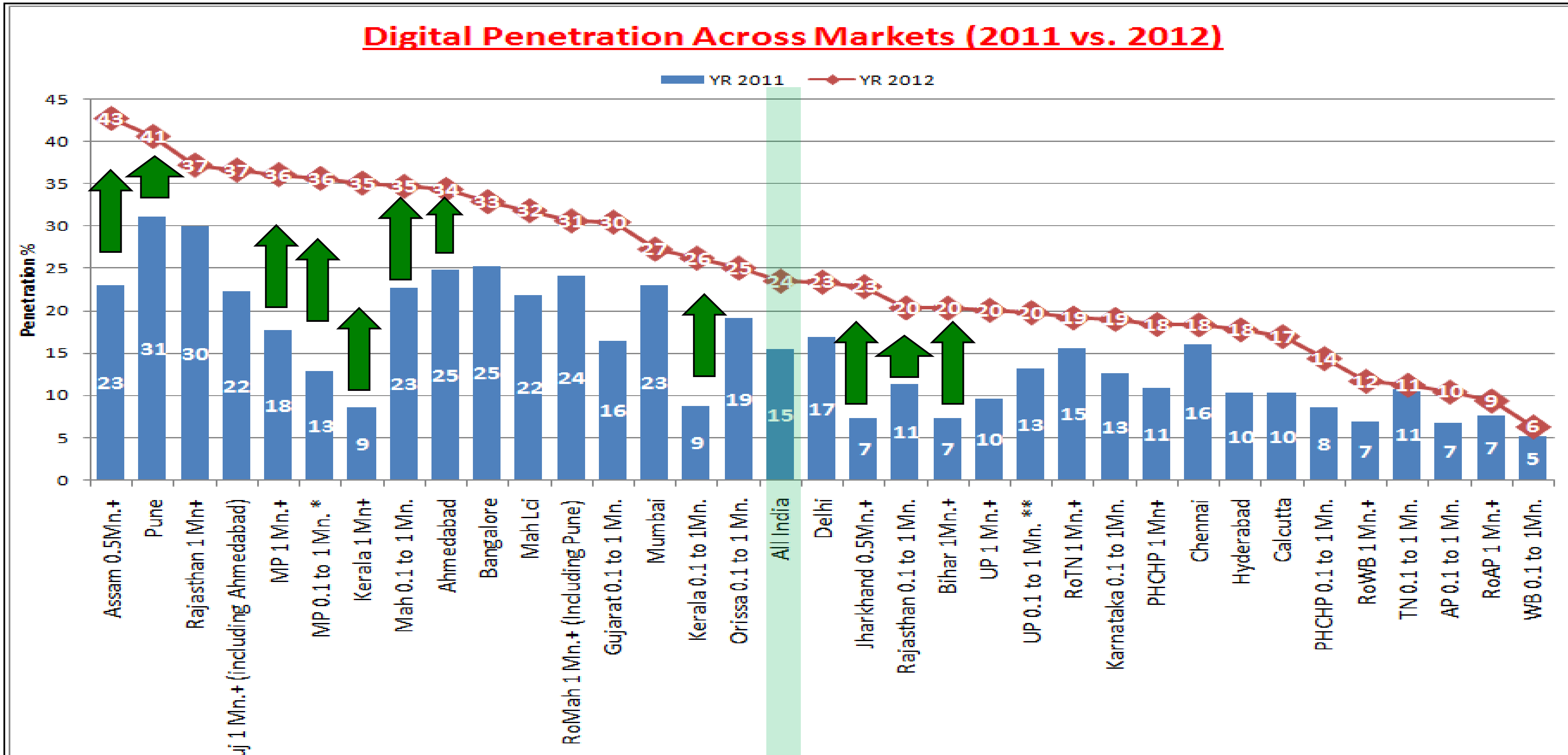
Source: TAM Baseline Study | Market: Urban 1lac+ & Mah LC1 | Period: July to Nov 2011

Though at All India Level C&S growth is 4%,but Markets like UP, Rajasthan, Jharkhand and Assam have observed a growth rate of over 7%



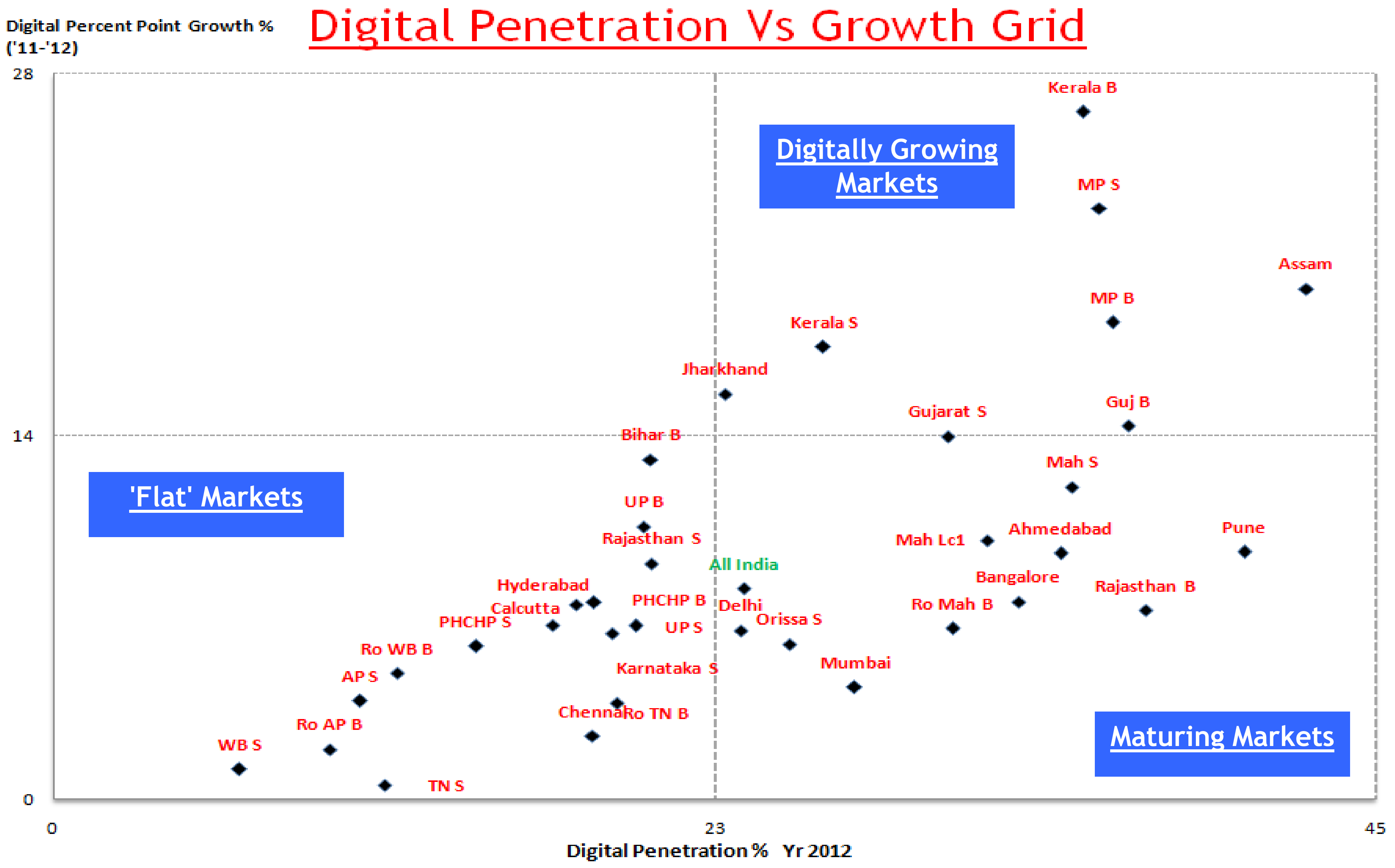
Source: TAM Baseline Study | Market: Urban 1lac+ & Mah LC1 | Period: July to Nov 2011

Growth in digital is driven by MP, smaller states *(Bihar, Jharkhand, Rajasthan, Kerala)* and 2 Metros *(Pune & Ahmedabad)*



Source: TAM Baseline Study | Market: Urban 1lac+ & Mah LC1 | Period: July to Nov 2011

Digital Penetration Vs Growth Grid



Source: TAM Baseline Study | Market: Urban 1lac+ & Mah LC1 | Period: July to Nov 2011

B - 1Mn+ strata
S - 0.1-1Mn strata
Percent Point Growth = (Penetration in 2012)- (Penetration in 2011)

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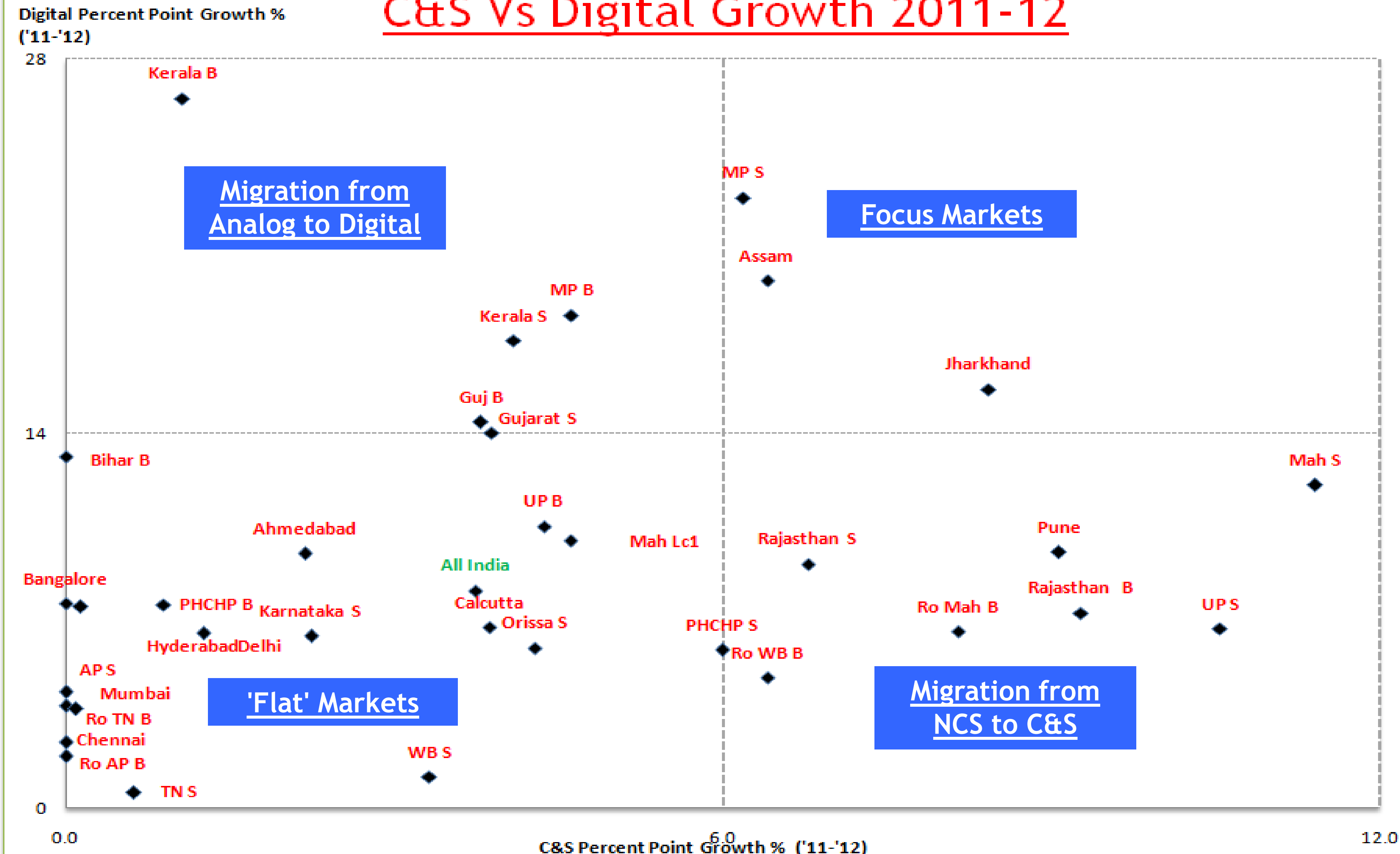
C&S Vs Digital Growth 2011-12



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B - 1Mn+ strata
S - 0.1-1Mn strata
Percent Point Growth = (Penetration in 2012)- (Penetration in 2011)

Change in Demographic proportions - SECs

Digital

Less than 1 Mn+ Strata has witnessed a significant Digital growth at SEC DE level…

Demographic Composition on Digital Platform						
Markets	Year	SEC A	SEC B	SEC C	SEC DE	Total
6 Metros	2011	4.0	3.5	2.4	2.4	12.3
	2012	5.1	4.9	3.1	3.4	16.5
	Growth%	27.8%	38.9%	30.5%	42.1%	34.3%
Rest of States 1 Mn+	2011	2.1	1.9	1.5	2.1	7.7
	2012	3.5	3.3	2.8	3.7	13.3
	Growth%	67.6%	70.8%	78.8%	77.6%	73.4%
0.1-1Mn + Mah LC1 + Jharkhand 0.5 Mn+	2011	2.1	2.9	2.6	3.3	10.9
	2012	3.2	4.8	5.0	7.0	20.0
	Growth%	54.8%	65.0%	91.1%	113.2%	83.9%
India Surveyed	2011	8.2	8.3	6.5	7.8	30.8
	2012	11.8	13.0	10.8	14.1	49.8
	Growth%	44.7%	55.5%	66.2%	81.6%	61.5%

Source: TAM Baseline Study Market: Urban 1lac+ & Mah LC1 Period: July to Nov 2011

All Figure are Individuals in millions

In Sum…

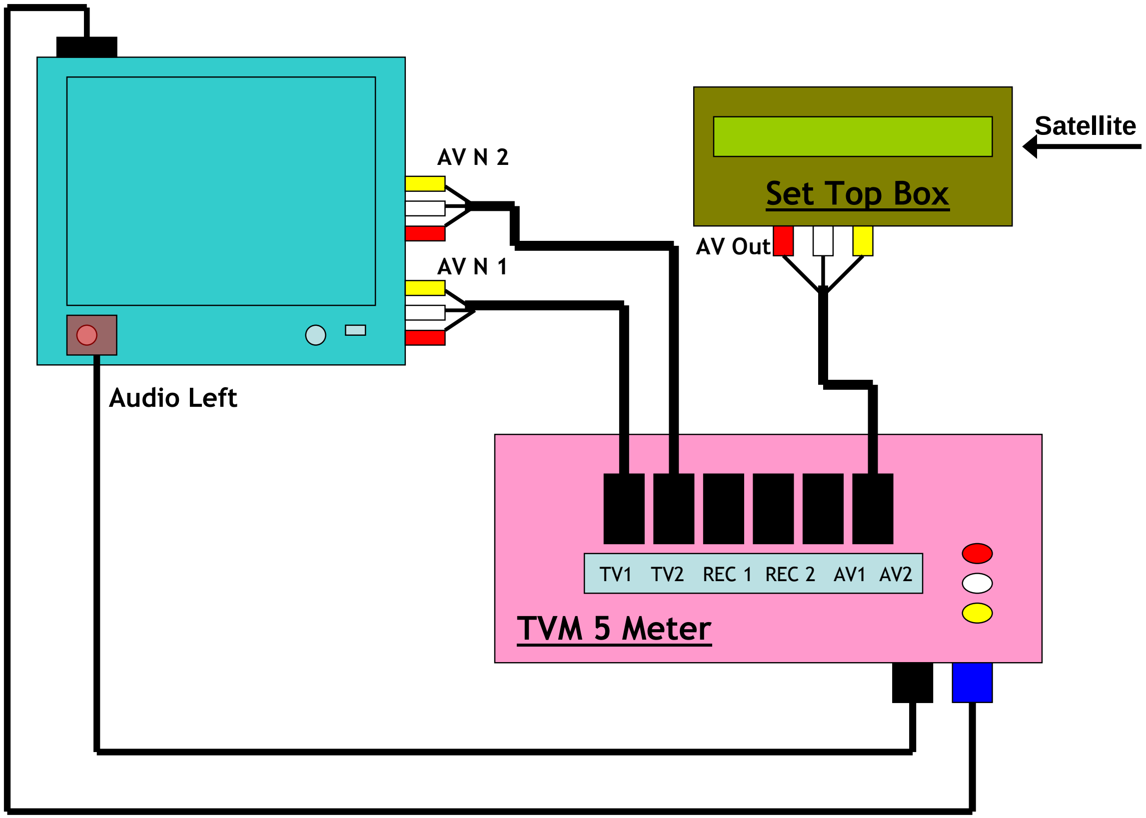
- C&S at All India level is currently 126 million Hhlds ,Digital Hhlds (42 Mn) have grown @ 63%.
- C&S and Digital grew by 5% and 61% respectively in TAM reported markets.
- All India Digital penetration is 24% in TAM reported markets
- Growth in Digital has come primarily from Madhya Pradesh, smaller states *(Bihar, Jharkhand, Rajasthan, Kerala)* and 2 Metros *(Pune & Ahmedabad)*
- *Lower SECs in smaller Strata top the Digital Population estimates*

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 2011 & 2012, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2012.

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

(iii) If you have a 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 2011 to 15th Jan 2012, you will need to gather R&F for the period 15th - 31st Dec 2011 (up to week 53, the last week of 2011) & 1st Jan 2012(from week 1, the first week of 2012) - 15th Jan 2012 individually)

Implications for TAM Software Users

If you are a..

-<u>Broadcaster –</u>

(i) The TRPs & GRPs will not be exactly comparable over 2011 & 2012, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2012.

(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 Promo plan is scheduled to air between 15th Dec 2011 to 15th Jan 2012, you will need to gather R&F for the period 15th - 31st Dec 2011 (up to week 53, the last week of 2011) & 1st Jan 2012(from week 1, the first week of 2012) - 15th Jan 2012 individually)

For Digital estimates of 2007, 2008, 2009, 2011 and 2012 please check Blink I & II presentations and India Peoplemeter Updates on www.tamindia.com

Thank You.