TAM Annual Universe Update – 2014

TAM Annual Universe Update-2014

- 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 2014

- 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 2014
- TAM Base line study conducted in Nov - Dec 2013 to establish latest demographic proportions and Universe changes
- The 8th 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
  - DES VII: Field work: Oct- Dec (first week) 2012; utilized for 2013 universe update
  - DES VIII: Field work: Nov-Dec 2013; utilized for 2014 universe update
- Sample size of 65,000 face-to-face interviews.
- Conducted across Urban and Rural India

Methodology: An example

Week 1, 2013

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

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

Week 1, 2014

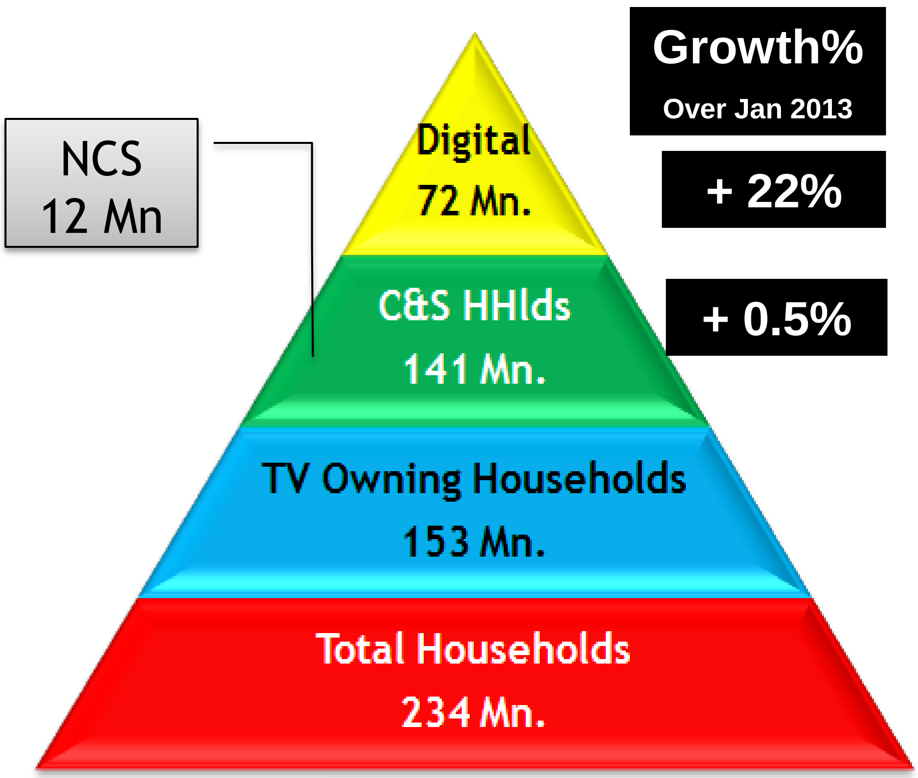
TV Owning universe in Market ABC: 214,839,502 individuals

Step 2: Estimate demographic proportions from Establishment Survey

SEC A	SEC B	SEC C	SEC DE
17	23	23	37

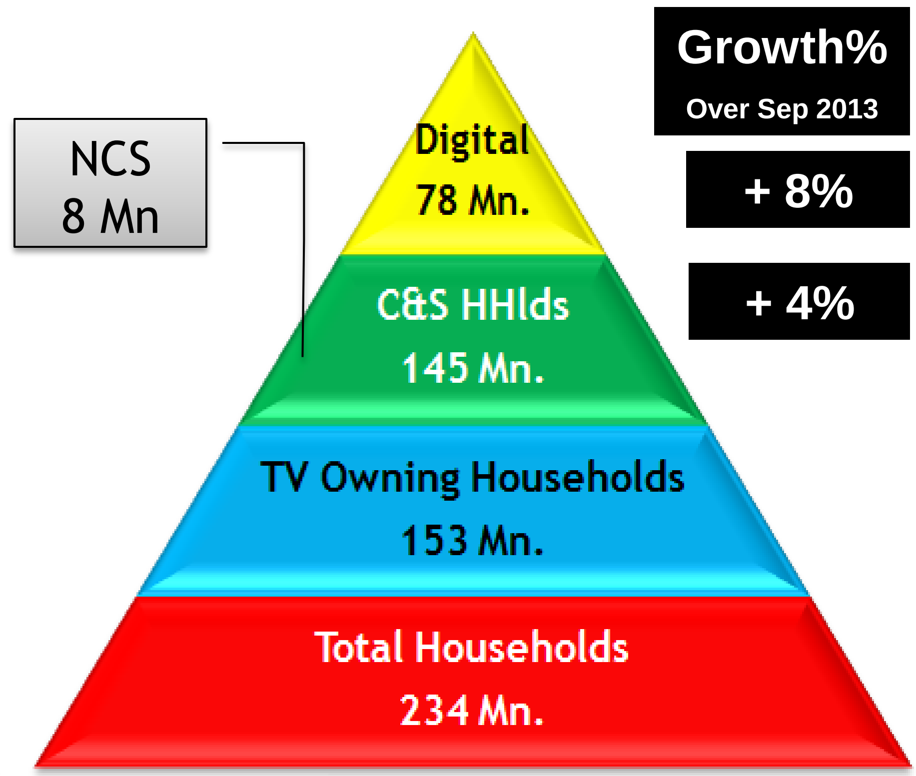
Therefore, universe estimate for SEC A in market ABC is:
17% x 214,839,502 = 36,197,567 individuals

India at a Glance
(Urban & Rural)



Sep 2013

All India Household figures in Millions

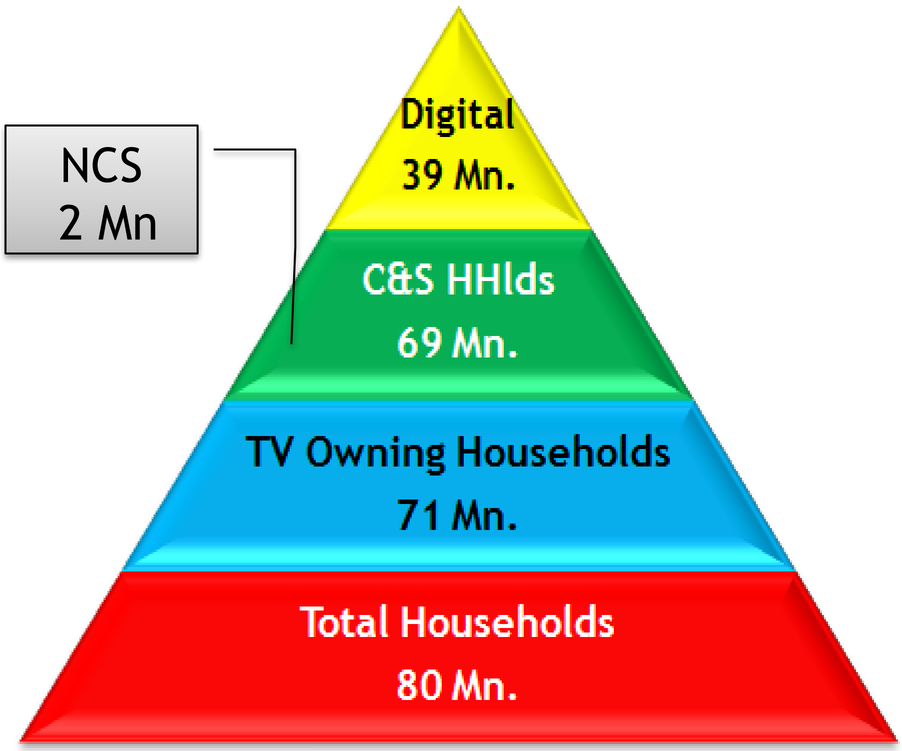


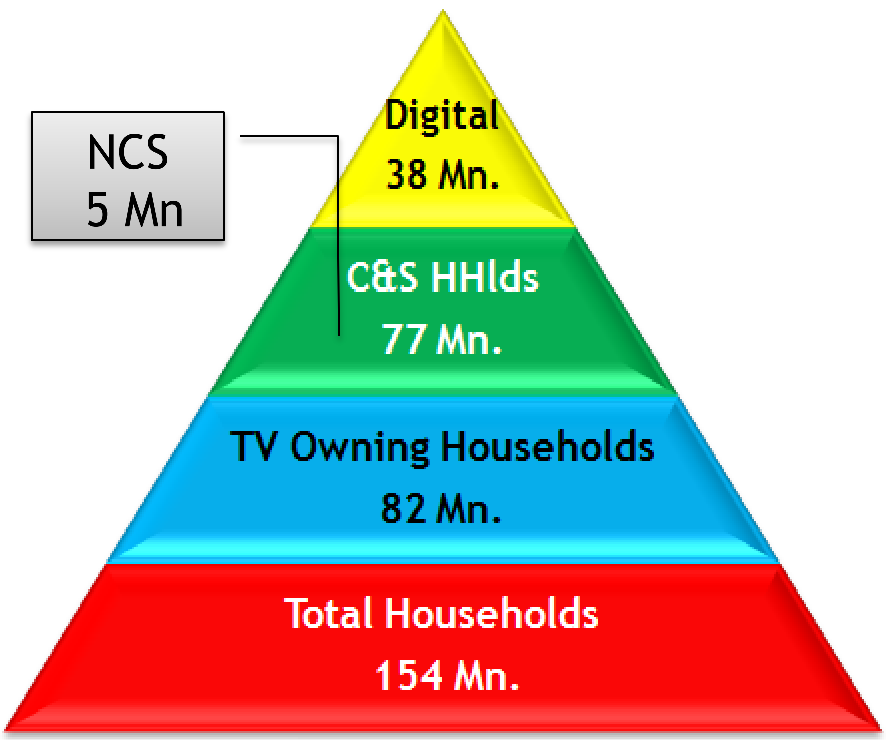
Jan 2014

All India Household figures in Millions

The Urban & Rural Divide…

Urban Vs Rural 2014





Urban- 2014

Household figures in Millions

Rural -2014

Household figures in Millions

Universes in "TAM Surveyed Markets*"

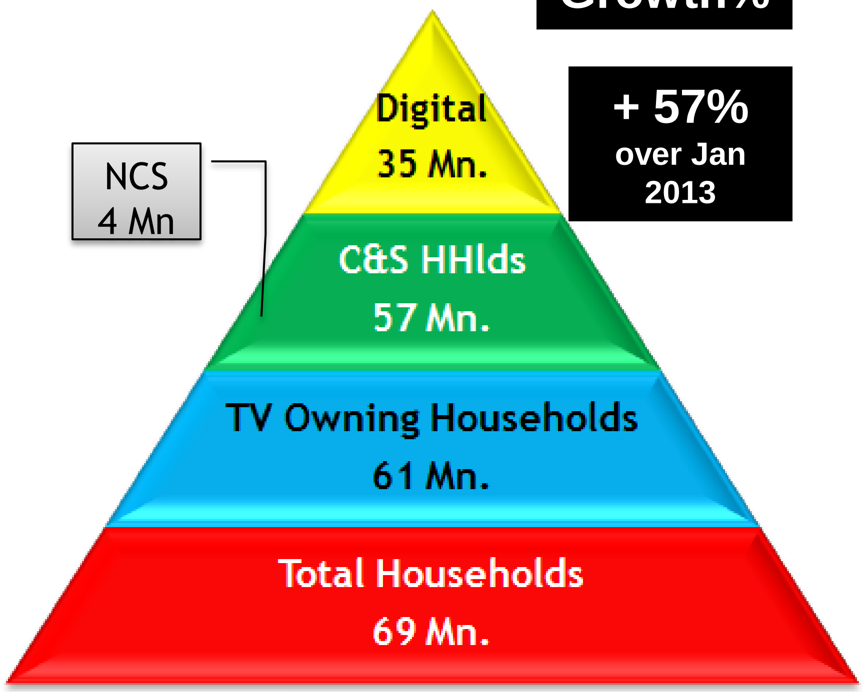
2013 Vs 2014

(*Urban Class I + Mah, UP, MP, Guj, Raj, PHCHP LC1 excluding J&K and North Eastern States)

TAM Coverage at a Glance

Growth%

+ 57%
over Jan 2013

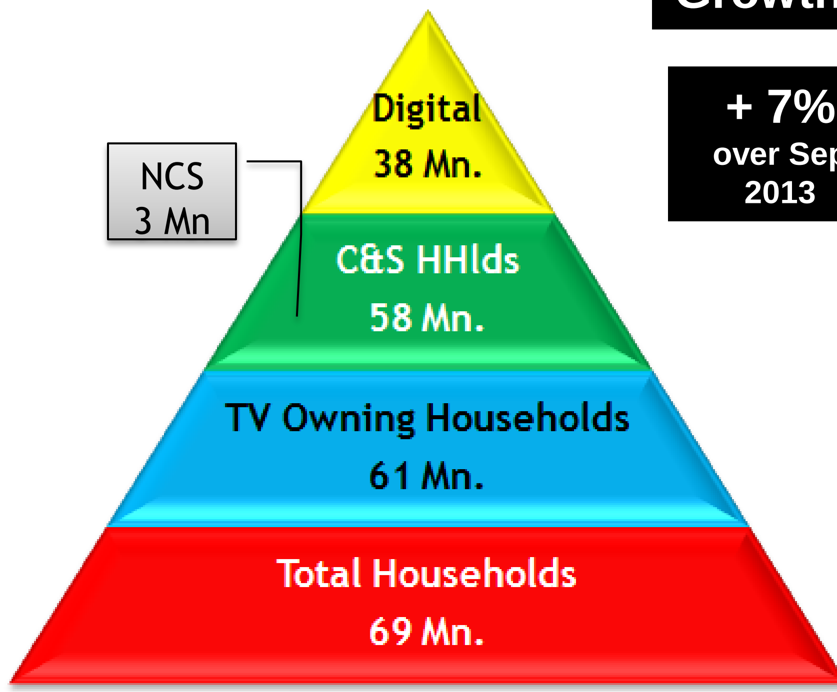


Sep 2013

All India Hhld figures in Mn.

Growth%

+ 7%
over Sep 2013



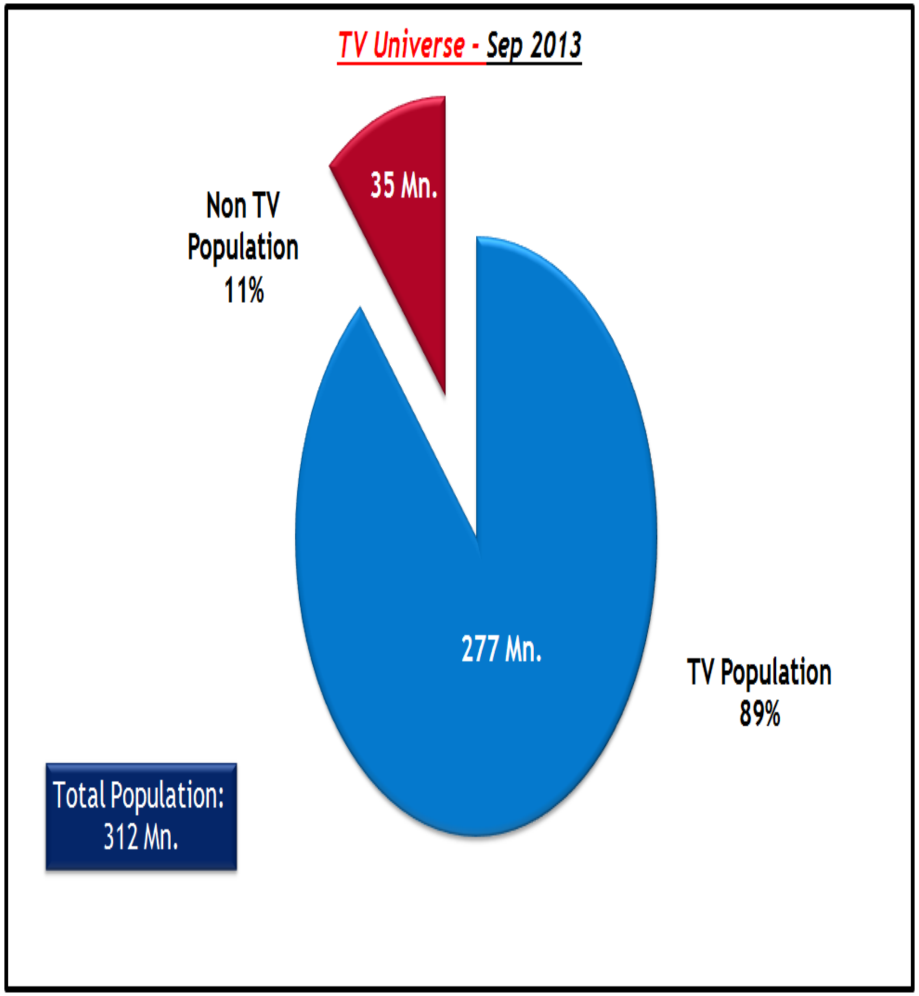
Jan 2014

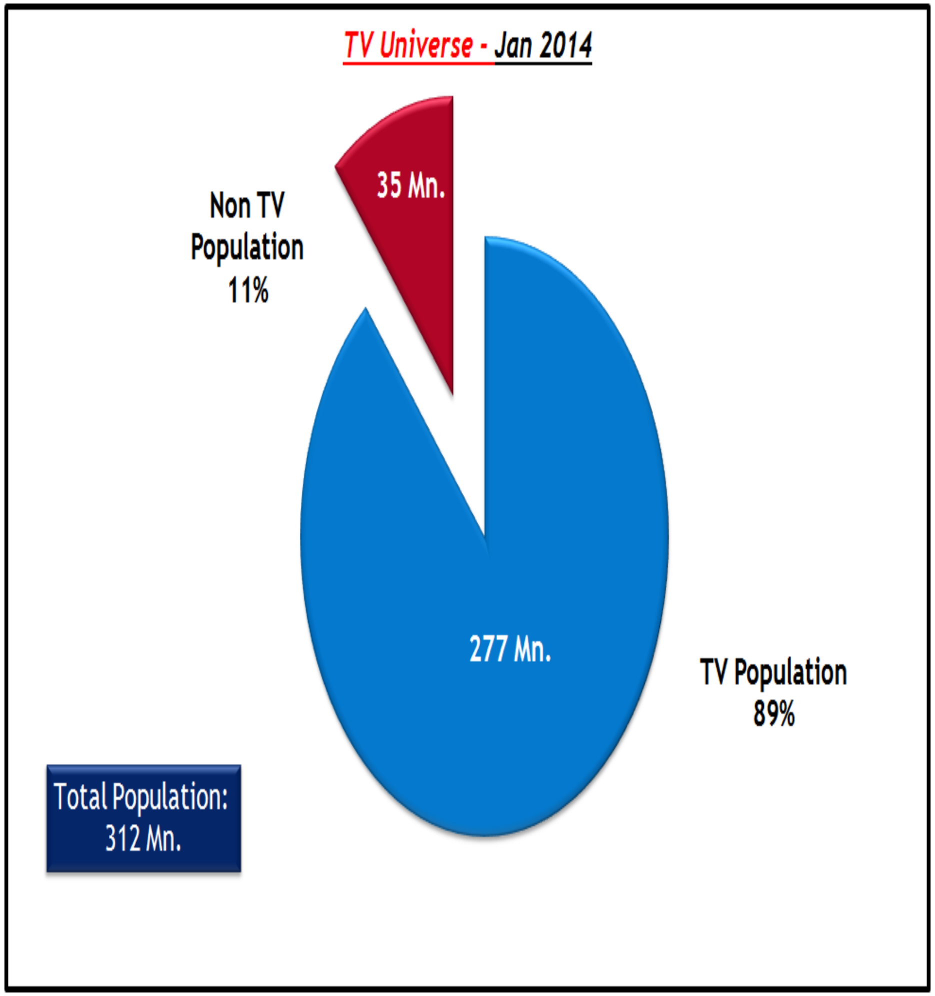
All India Hhld figures in Mn.

TV Universe 2014

TAM Markets – Individuals (in Millions)

Total Population and TV population has not witnessed any change

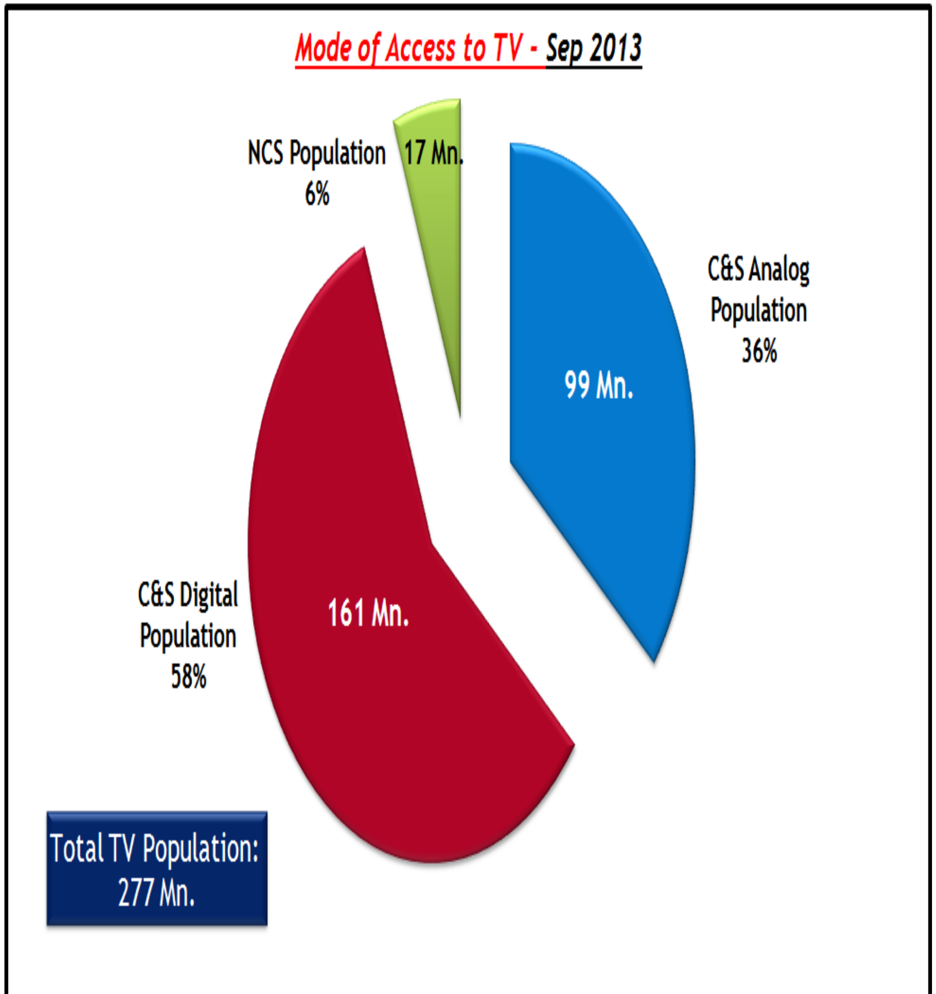


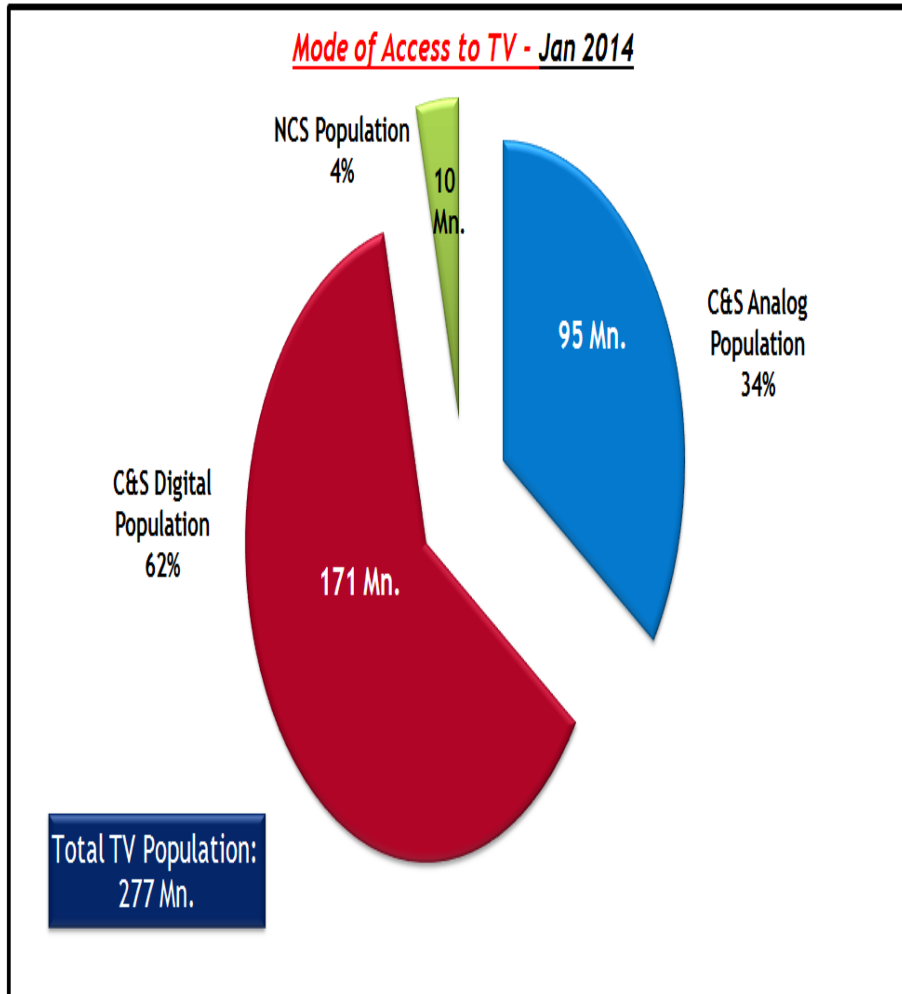


All Figure are Individuals in millions

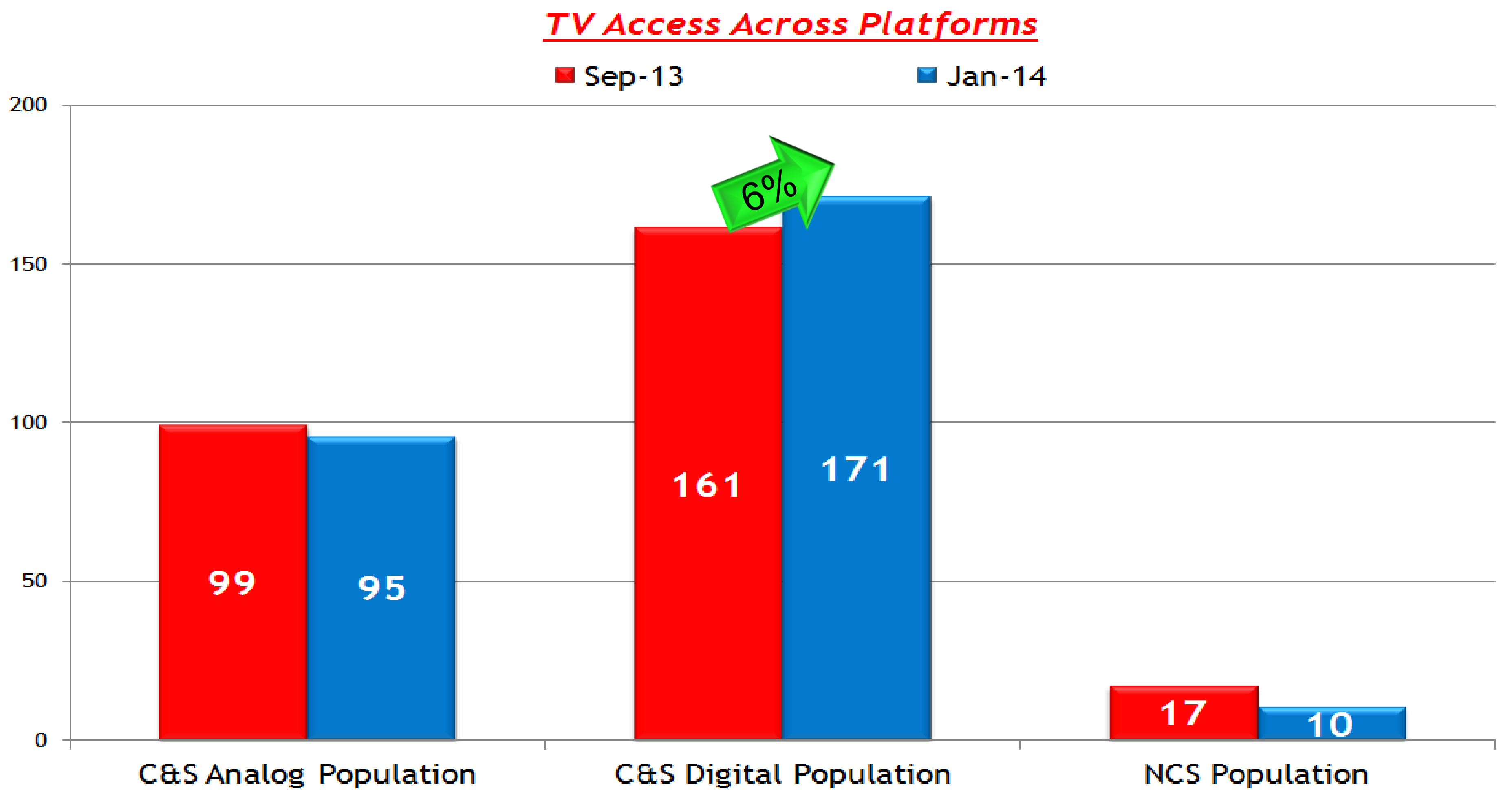
Mode of TV Access – Proportions across Platforms

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





Digital Population witnessed growth owing to DAS mandate



All Figure are Individuals in millions

Universes Across Pop-Strata…

C&S and Digital

DAS mandate led to the growth in Digital footprint in 1 Mn.+ Markets in 2013, whereas organic growth is witnessed in 0.1-1 Mn. & LC1 Markets

Pop Strata	Cable & Satellite		Growth%	Digital		Growth%
	Sep 2013 (in Millions)	Jan 2014 (in Millions)		Sep 2013 (in Millions)	Jan 2014 (in Millions)	
6 Metros	72	73	1.2	65	66	2.7
Rest of State 1 Mn.+	52	54	2.2	45	49	8.1
0.1-1 Mn. & 0.5 Mn.+	85	87	2.6	30	33	7.3
LC1	50	52	3.8	21	23	10.4
All India TAM Surveyed	**260**	**266**	**2.3**	**161**	**171**	**6.1**

All Figure are Individuals in millions

Growth at State level…

AP, Bihar & Rajasthan witnessed a significant growth in the Digital population…

Market	All 4+ TV Population	C&S 4+ Individuals in Millions		Growth%	Digital 4+ Individuals in Millions		Growth%
	Jan-14	Sep-13	Jan-14		Sep-13	Jan-14	
Uttar Pradesh	42.0	38.8	39.6	2.0	23.8	25.2	5.4
Delhi	19.2	18.5	18.8	1.7	18.5	18.8	1.7
Ro Maharashtra	29.3	26.7	28.0	4.9	17.3	18.7	7.4
Mumbai	19.3	19.2	19.2	0.3	17.8	18.2	1.9
Gujarat	22.8	20.7	21.5	4.1	14.1	15.2	7.8
PHCHP	21.3	20.5	20.9	1.7	12.1	13.1	8.0
Calcutta	13.5	12.7	13.1	3.4	12.7	13.1	3.3
Madhya Pradesh	22.4	20.1	20.8	3.4	9.9	10.3	4.0
Rajasthan	15.8	14.3	15.0	4.7	6.8	7.9	13.4
Bangalore	7.3	7.2	7.3	0.6	6.8	7.3	6.7
Hyderabad	7.3	7.2	7.2	0.0	5.7	5.8	2.1
Chennai	7.7	7.7	7.7	0.0	3.2	3.3	2.7
Ro Andhra Pradesh	10.4	10.2	10.3	1.1	2.0	2.7	25.6
Karnataka 0.1-1 Mn.	7.3	7.0	7.0	1.1	2.4	2.5	4.3
Kerala	5.6	5.5	5.5	0.0	2.0	2.1	7.4
Bihar 1 Mn.+	2.2	1.9	2.0	2.7	1.7	2.0	16.0
Ro Tamil Nadu	9.8	9.8	9.8	0.0	1.4	1.4	0.5
Jharkhand 0.5 Mn.+	3.5	3.2	3.2	0.0	1.1	1.2	3.9
Orissa 0.1-1 Mn.	3.4	2.9	3.1	5.8	0.7	0.9	18.7
Ro West Bengal	5.6	5.2	5.4	3.9	0.7	0.7	9.2
Assam 0.5 Mn.+	1.0	0.9	1.0	4.5	0.4	0.4	5.8
All India TAM Surveyed	**277**	**260**	**266**	**2.3**	**161**	**171**	**6.1**

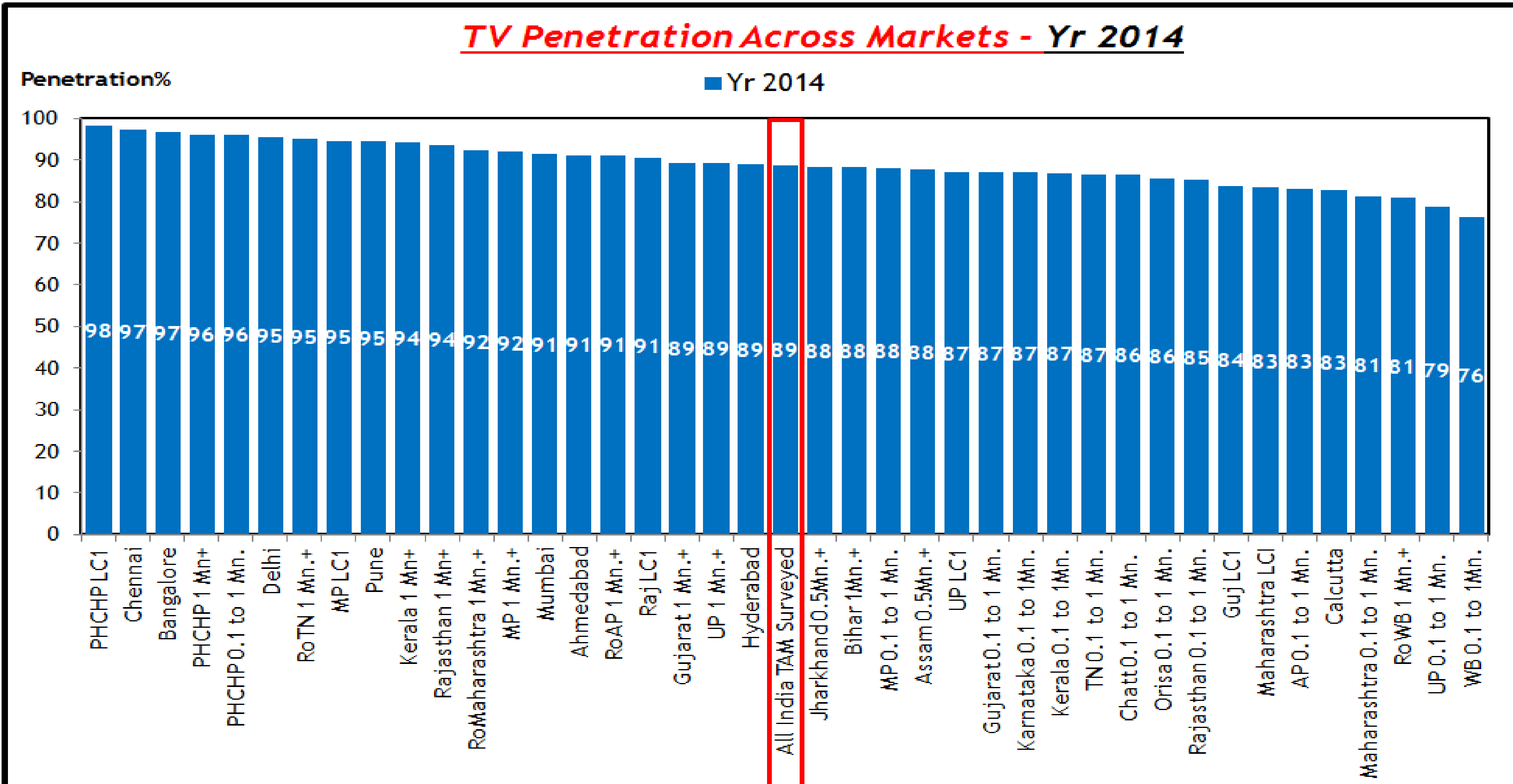
All Figure are Individuals in millions

States highlighted in green have higher growth rate than All India average

How is the growth across individual markets?

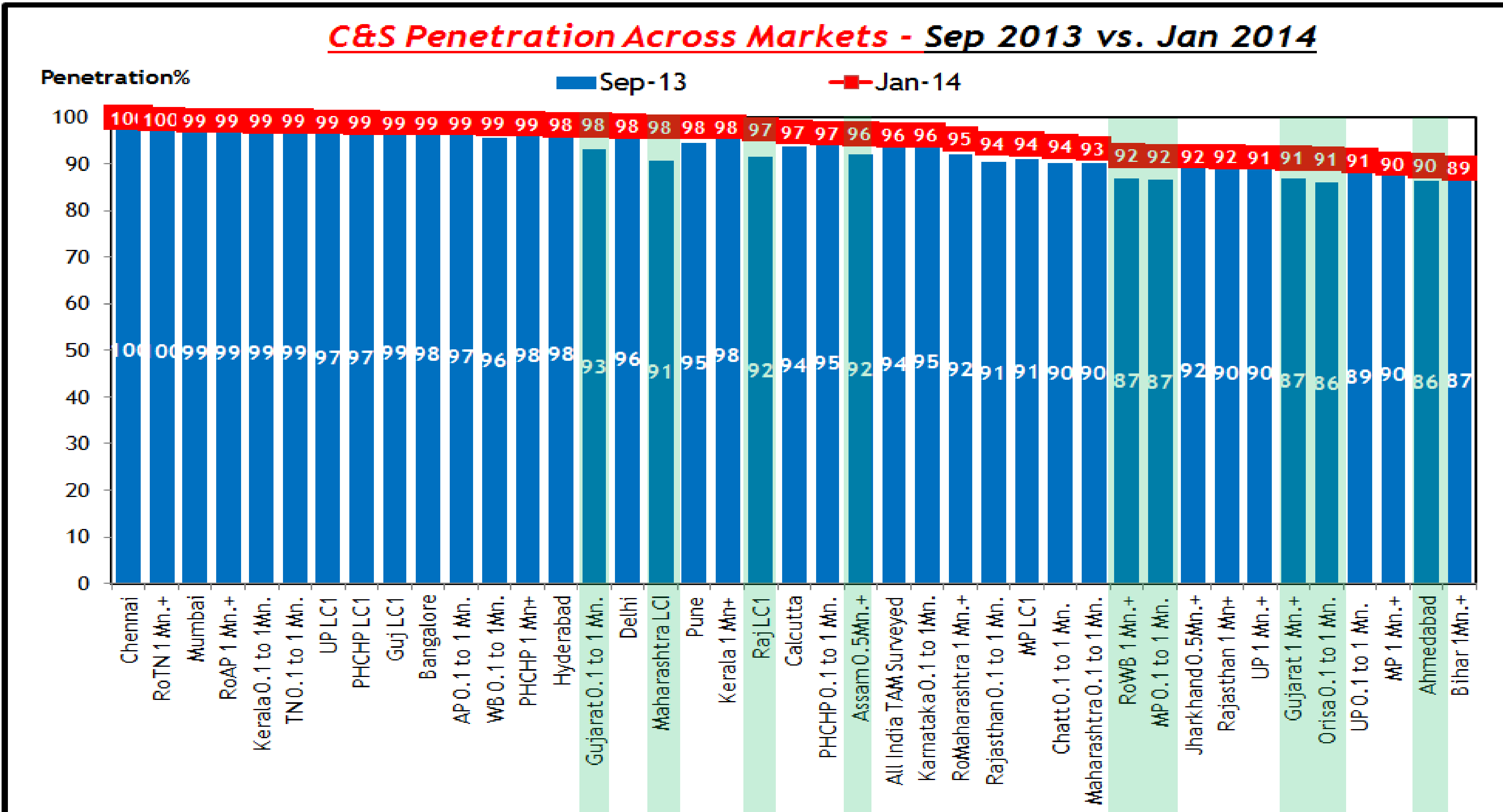
TV/CS/Digital penetration

TV penetration at All India Level

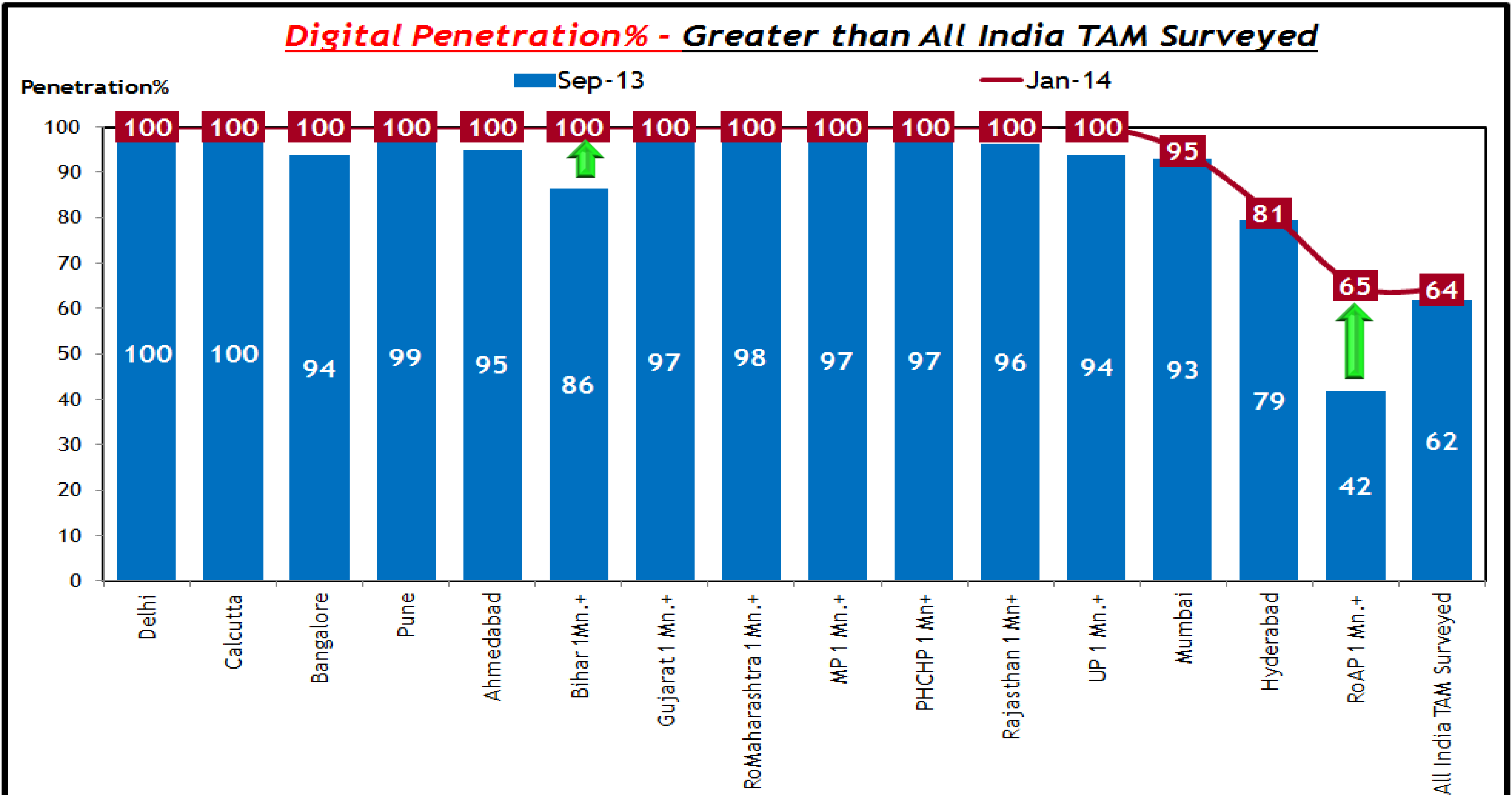


Source: TAM Baseline Study | Market: Urban 1 Lac+ & Mah, UP, MP, PHCHP, Guj & Raj LC1 | Period: Oct-Dec 2013

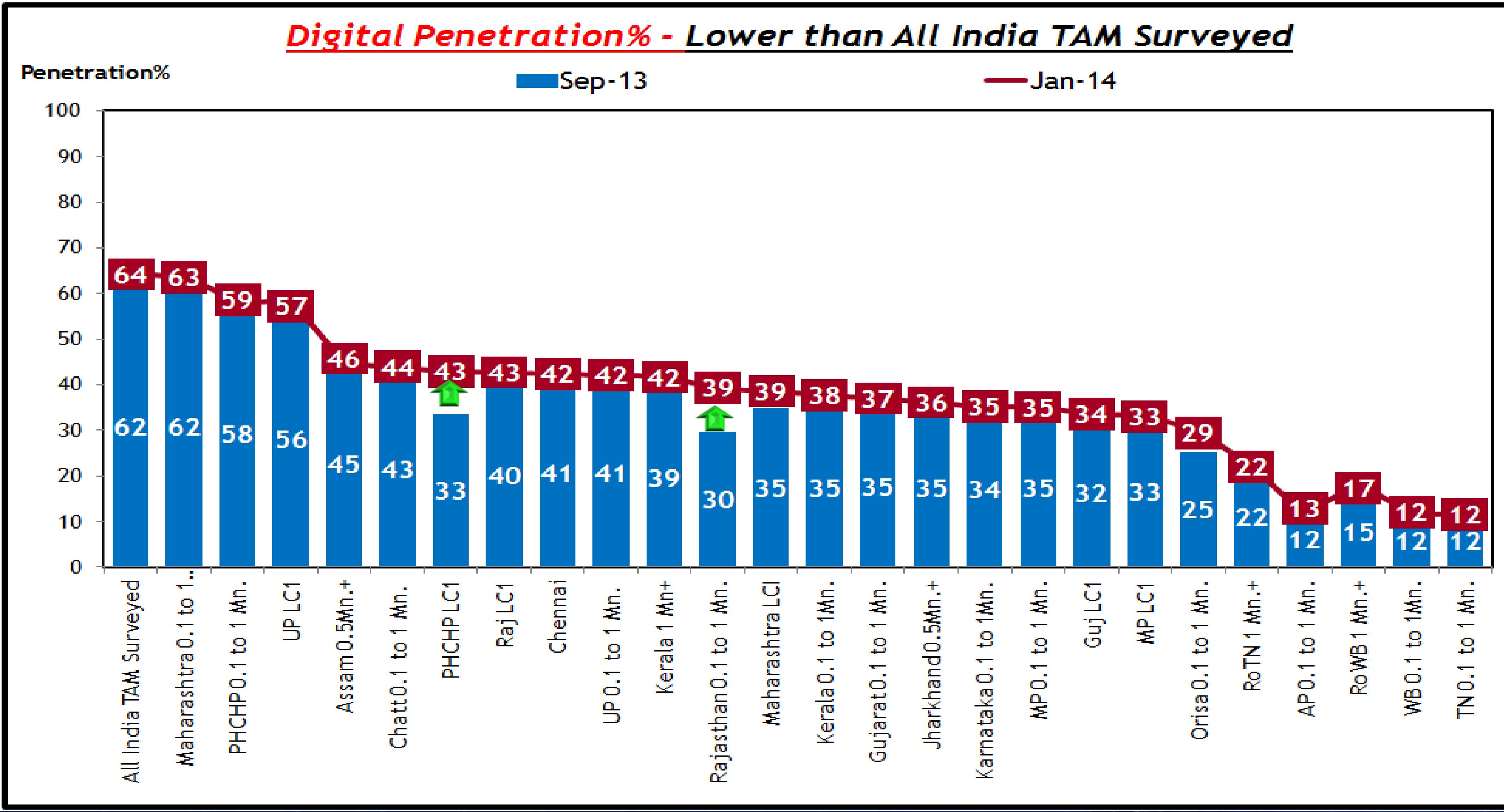
C&S Penetration growth has been highest for Guj 0.1-1 Mn., Mah LC1, Raj LC1, WB 1 Mn.+, MP 0.1-1 Mn. & Guj 1 Mn.+



Bihar & Andhra Pradesh1 Mn.+ market saw a significant growth in Digital Penetration in 2014



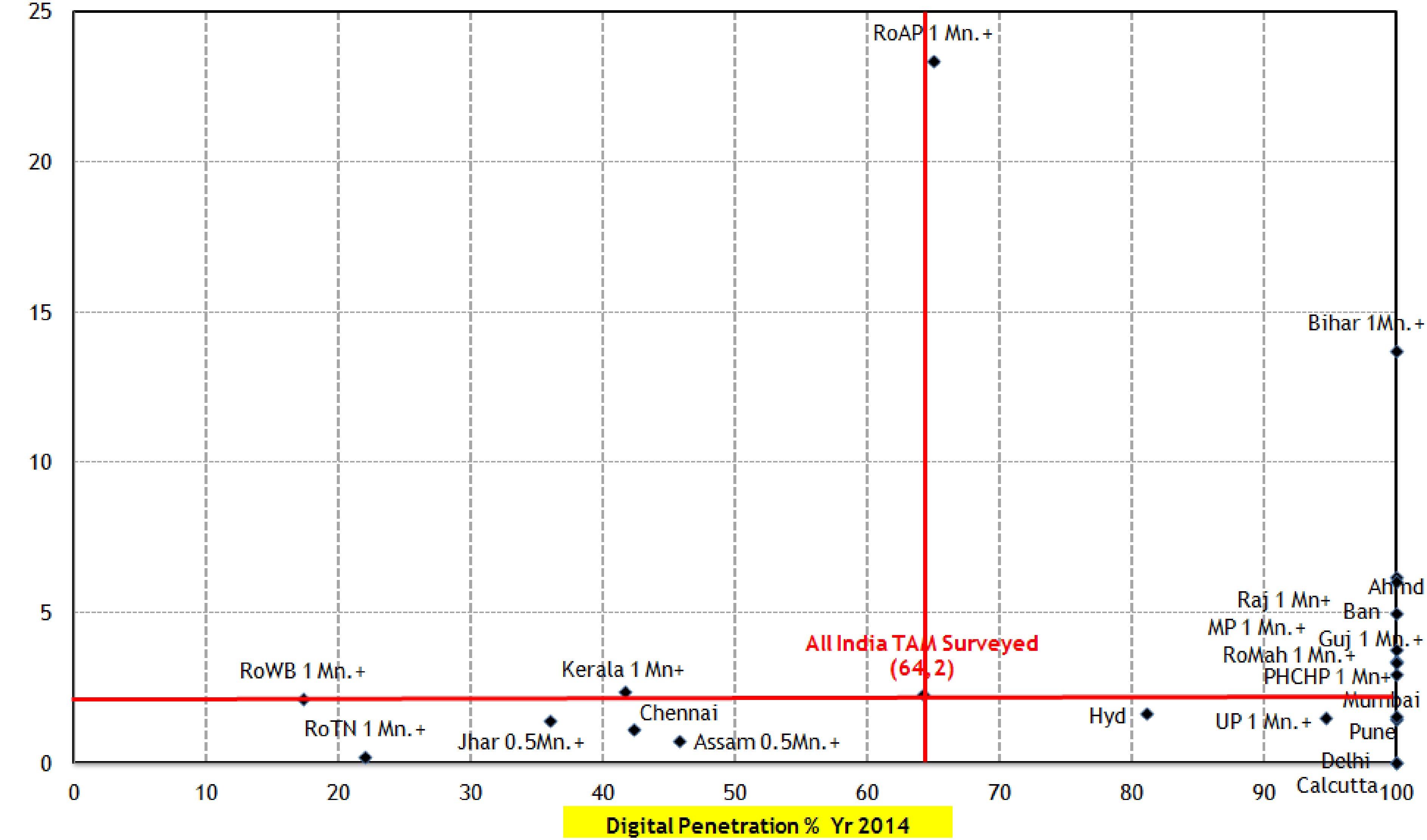
PHCHP LC1 & Raj 0.1-1 Mn. markets have seen significant growth in Digital penetration



Digital Penetration Grid

Metros, 1 Mn.+ & 0.5 Mn.+ Markets

Digital Penetration Vs Growth Grid - Metros & 0.5 Mn.+ Markets

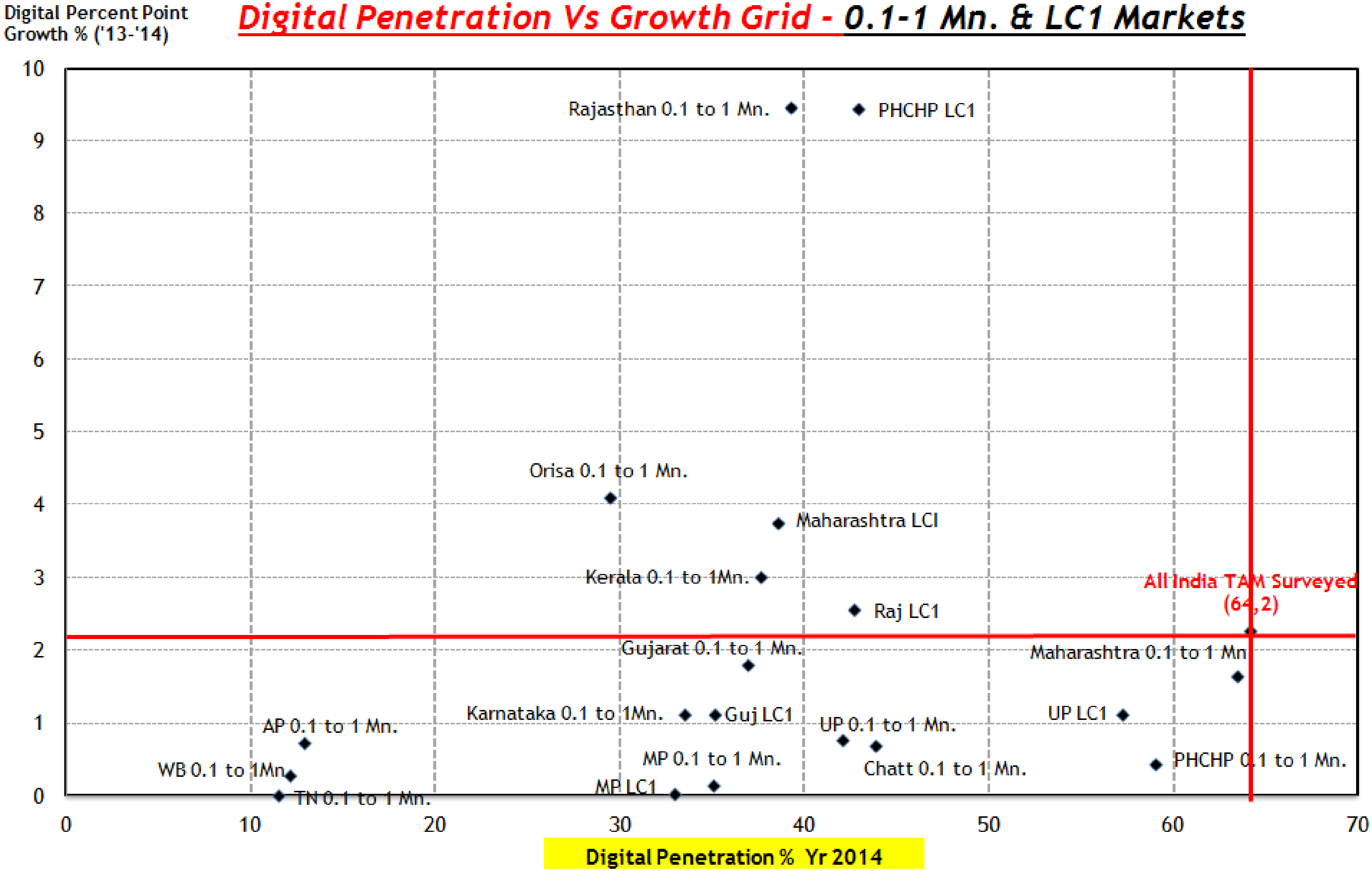


Percent Point Growth = (Penetration in 2014)- (Penetration in Sep 2013)

Digital Penetration Grid

0.1-1 Mn. & LC1 Markets

Digital Penetration Vs Growth Grid - 0.1-1 Mn. & LC1 Markets

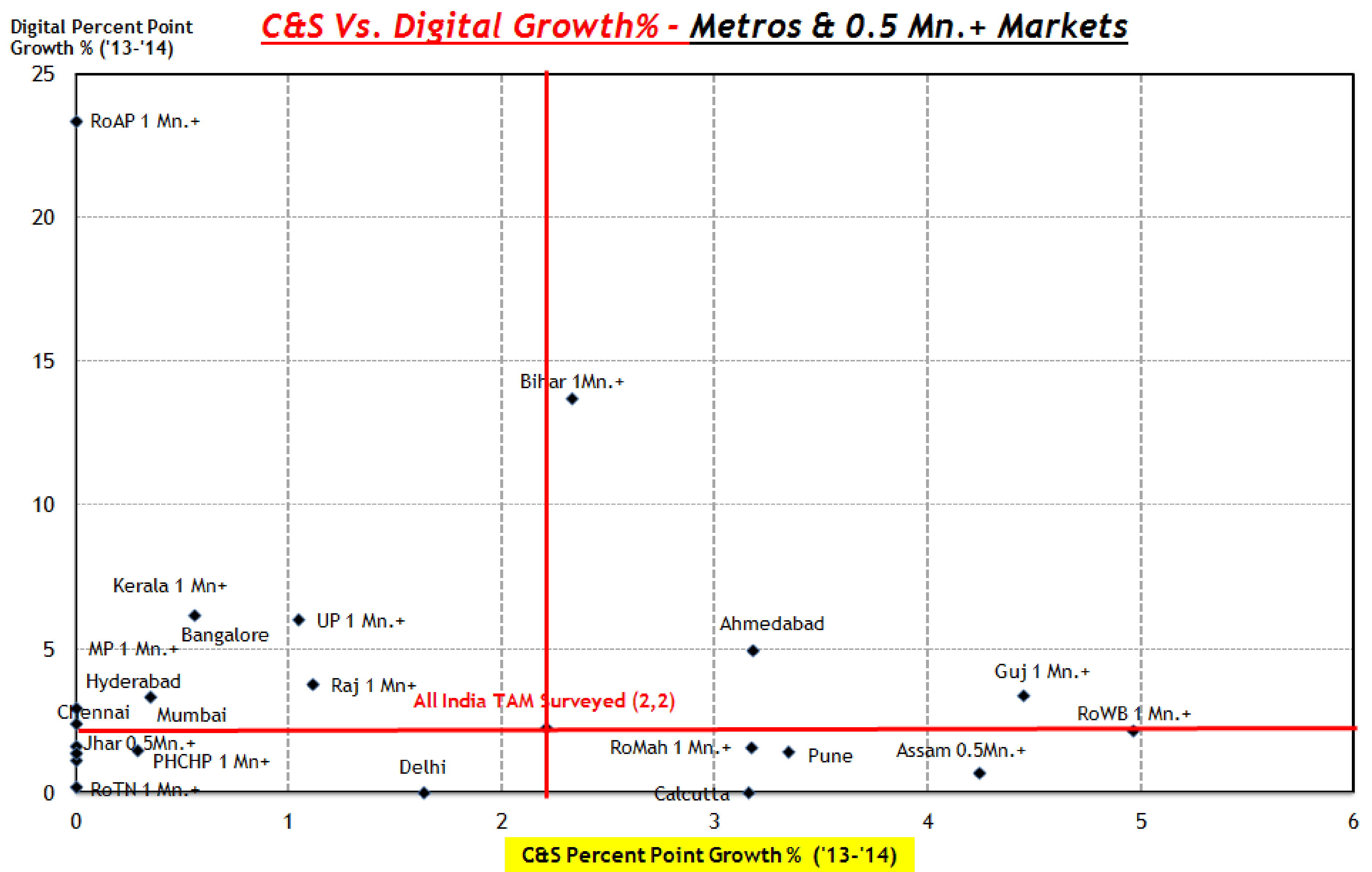


Percent Point Growth = (Penetration in 2014)- (Penetration in Sep 2013)

C&S Vs Digital Growth

Metros & 1 Mn.+ Markets

C&S Vs. Digital Growth% - Metros & 0.5 Mn.+ Markets

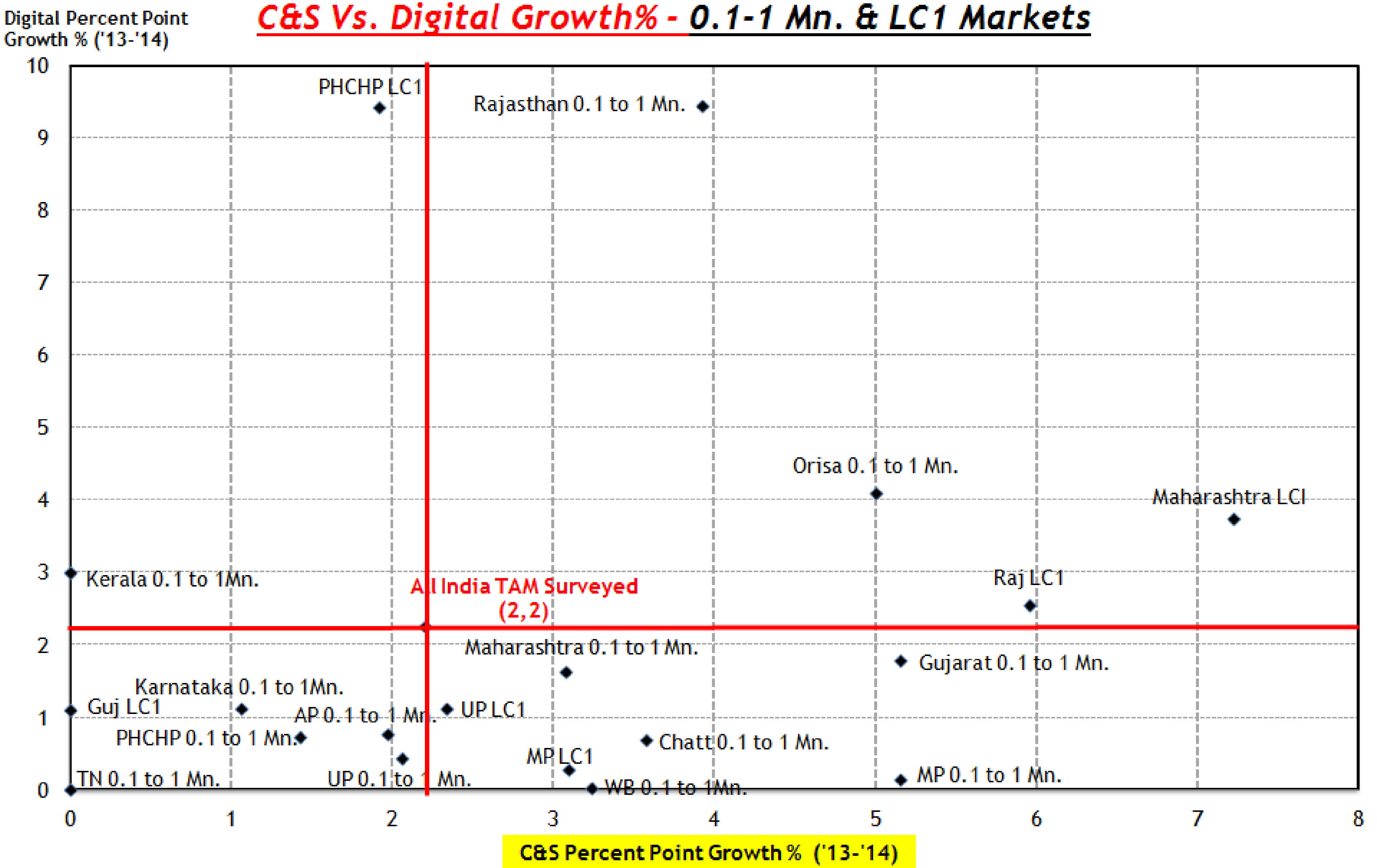


Percent Point Growth = (Penetration in 2014)- (Penetration in Sep 2013)

C&S Vs Digital Growth

0.1-1 Mn. & LC1 Markets

C&S Vs. Digital Growth% - 0.1-1 Mn. & LC1 Markets



Percent Point Growth = (Penetration in 2014)- (Penetration in Sep 2013)

Change in Demographic proportions - SECs

Digital

1 Mn.+ Markets have witnessed a significant growth in Digital Universe for SEC DE

Demographic Composition on Digital Platform

Market	Year	SEC A	SEC B	SEC C	SEC DE	Total
6 Metros	Sep-13	14.7	16.4	13.7	19.8	64.6
	Jan-14	14.8	16.5	14.4	20.7	66.4
	Growth%	0.9	0.6	4.7	4.5	2.7
Rest of States 1 Mn.+	Sep-13	10.0	11.3	10.0	13.6	44.9
	Jan-14	10.5	11.9	10.6	15.4	48.5
	Growth%	5.7	5.5	6.4	13.1	8.1
0.1-1 Mn. & 0.5 Mn.+	Sep-13	5.2	7.8	7.1	10.4	30.5
	Jan-14	5.5	8.3	7.6	11.3	32.7
	Growth%	6.6	6.2	7.3	8.6	7.3
LC1	Sep-13	2.3	4.4	5.1	9.2	21.0
	Jan-14	2.4	5.1	5.5	10.2	23.2
	Growth%	7.5	14.5	7.8	10.7	10.4
All India TAM Surveyed	Sep-13	32.1	40.0	35.9	53.1	161.0
	Jan-14	33.3	41.8	38.1	57.6	170.8
	Growth%	3.8	4.6	6.1	8.6	6.1

All Figure are Individuals in millions

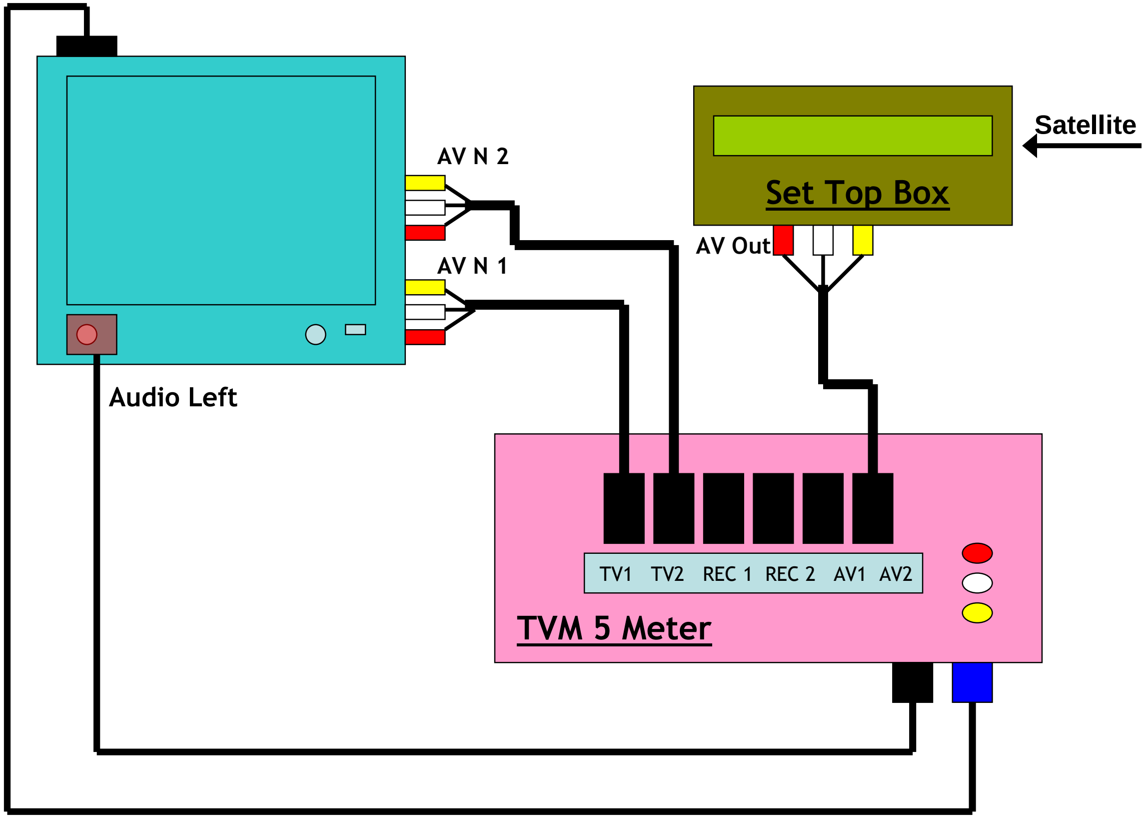
In Sum…

- C&S at All India level is currently 145 million Hhlds ,Digital Hhlds (78 Mn) have grown @ 32% which is a function of Terrestrial & Analog Hhlds migrating to Digital platform.
- Digital Population grew by 6% in Jan 2014 over Sept 2013 in TAM reported markets.
- All India Digital penetration is 64% in TAM reported markets.
- Growth in Digital has come primarily from DAS Markets (1 Mn.+ Markets) & Rajasthan 0.1-1 Mn. & PHCHP LC1 Markets.
- 1 Mn.+ Markets have witnessed a significant Digital growth for SEC DE

How is Digital TV consumption measured by TAM?

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 2013 & 2014, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2014.

(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 2013 to 15th Jan 2014, you will need to gather R&F for the period 15th - 28th Dec 2013 (up to week 52, the last week of 2013) & 29th Dec -2013(from week 1, the first week of 2014) - 15th Jan 2014 individually)

Implications for TAM Software Users

If you are a..

-Broadcaster –

(i) The TRPs & GRPs will not be exactly comparable over 2013 & 2014, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2014.

(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 2013 to 15th Jan 2014, you will need to gather R&F for the period 15th - 28th Dec 2013 (up to week 52, the last week of 2013) & 29th Dec -2013 (from week 1, the first week of 2013) – 15th Jan 2013 individually)

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Thank You.