TAM Annual Universe Update – 2013

TAM Annual Universe Update-2013

- 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 2013

- **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 2013**

- TAM Base line study conducted in Oct- Dec (first week) 2012 to establish latest demographic proportions and Universe changes

- The 7th 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
- Sample size of over 65,000 face-to-face interviews.
- Conducted across Urban and Rural India

Methodology: An example

Week 1, 2012

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

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

Week 1, 2013

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

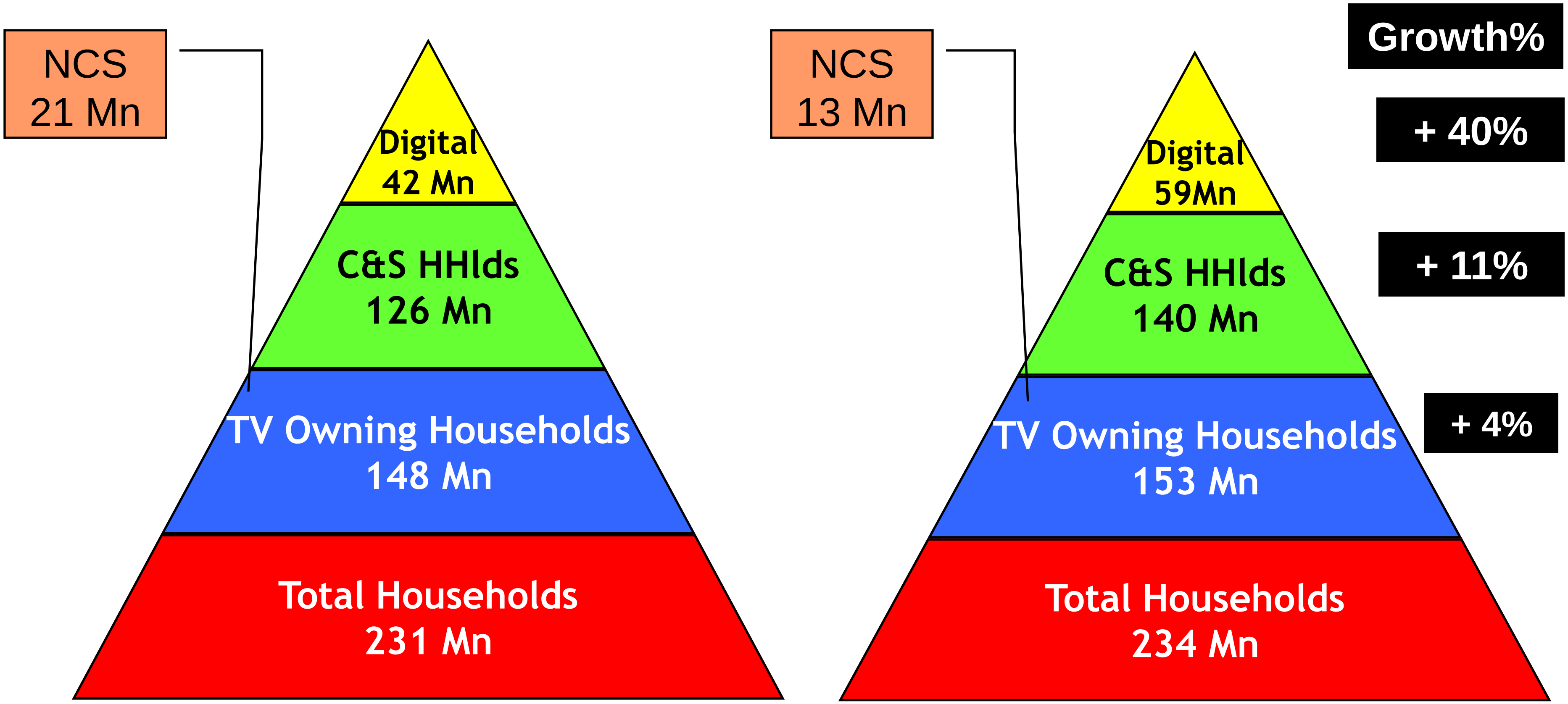
Step 2: Estimate demographic proportions from Establishment Survey

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



2012

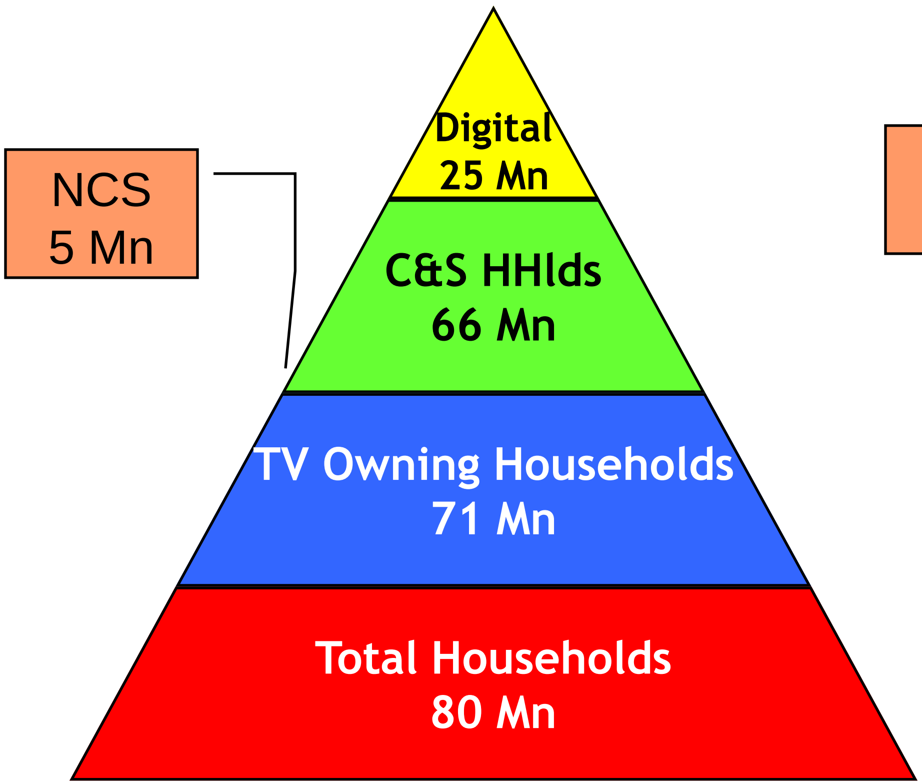
All India Household figures in Millions

2013

All India Household figures in Millions

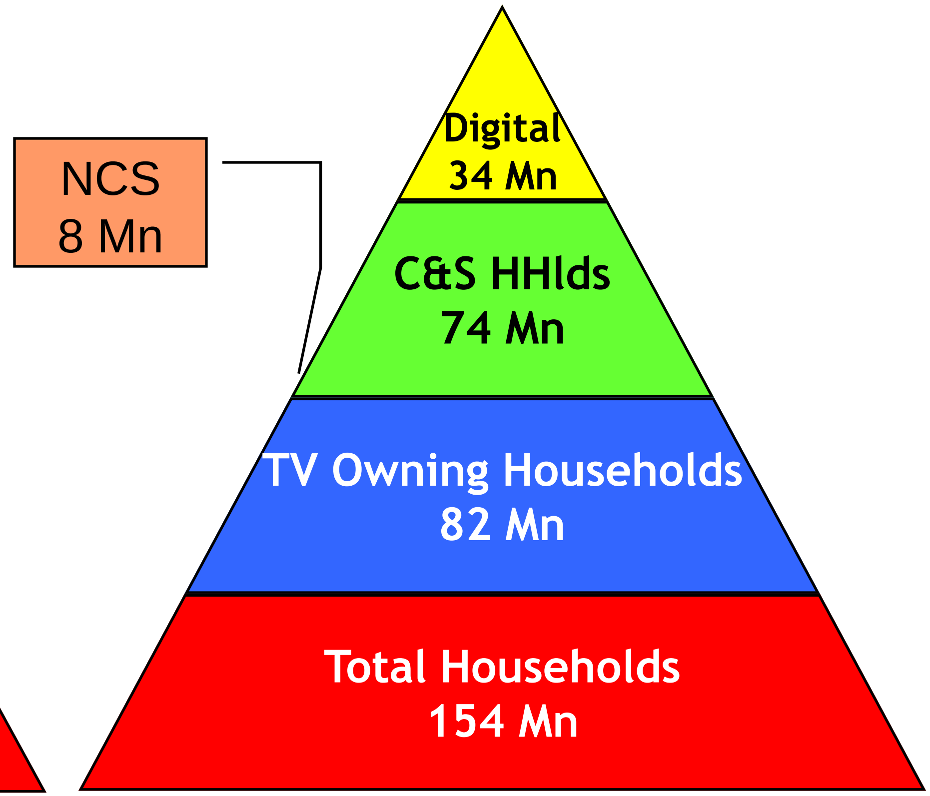
The Urban & Rural Divide…

Urban Vs Rural 2013



Urban- 2013

Household figures in Millions



Rural -2013

Household figures in Millions

Changes in “TAM Markets”

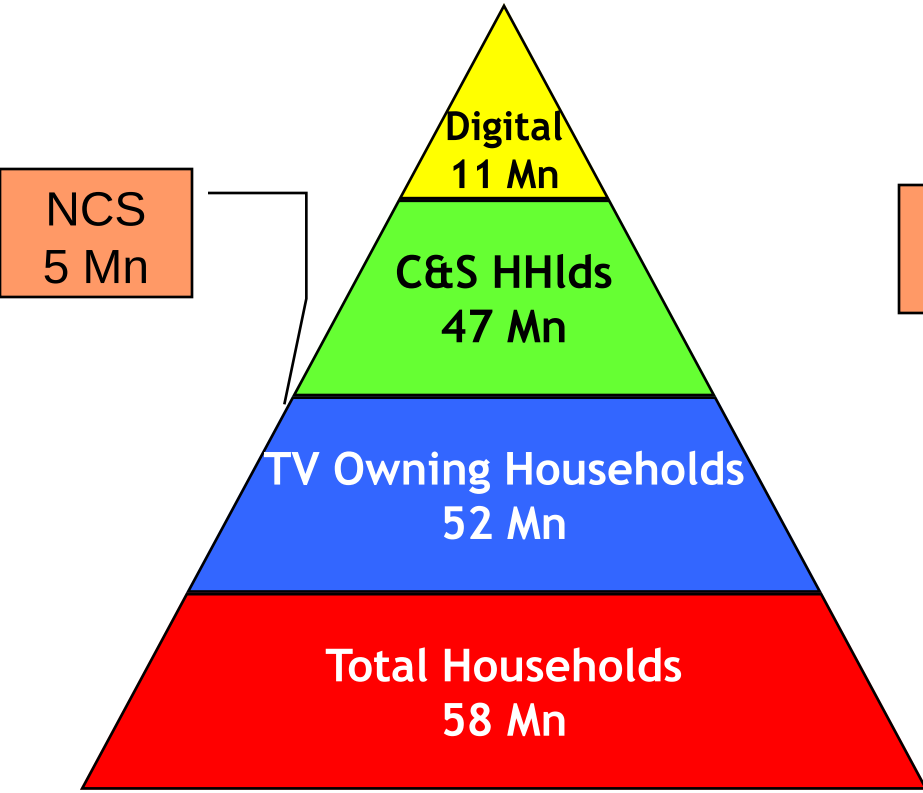
(Urban Class I + Maharashtra Less than Class I + Jharkhand 0.5Mn+)

<u>*2012 Vs 2013*</u>

TAM Coverage at a Glance

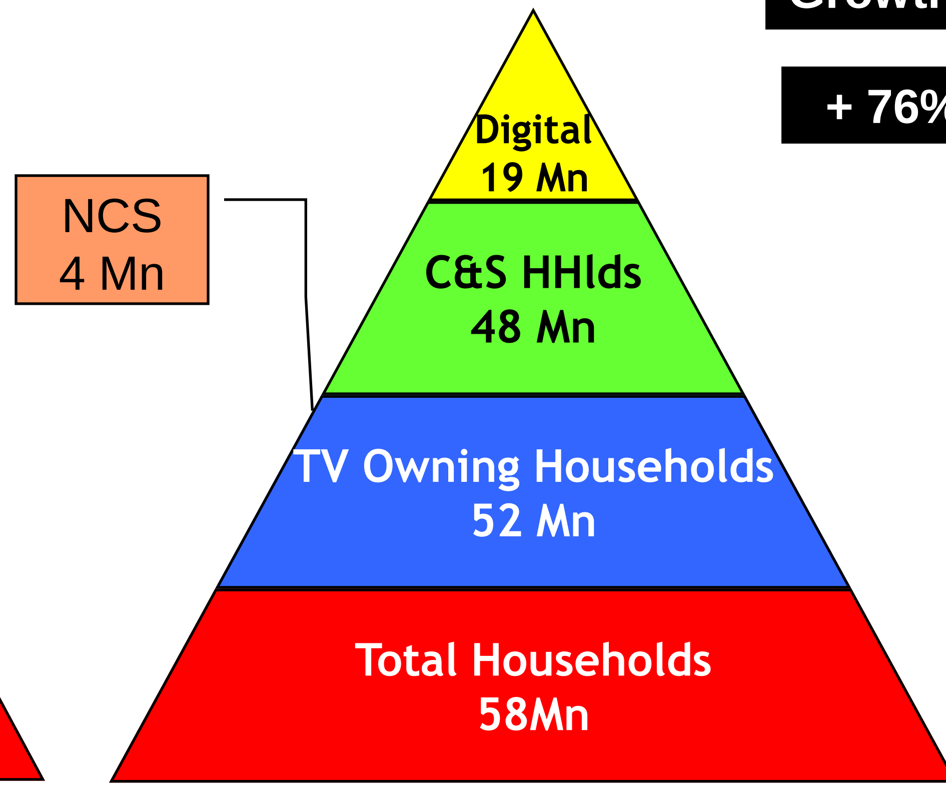
Growth%

+ 76%



2012

All India Household figures in Millions



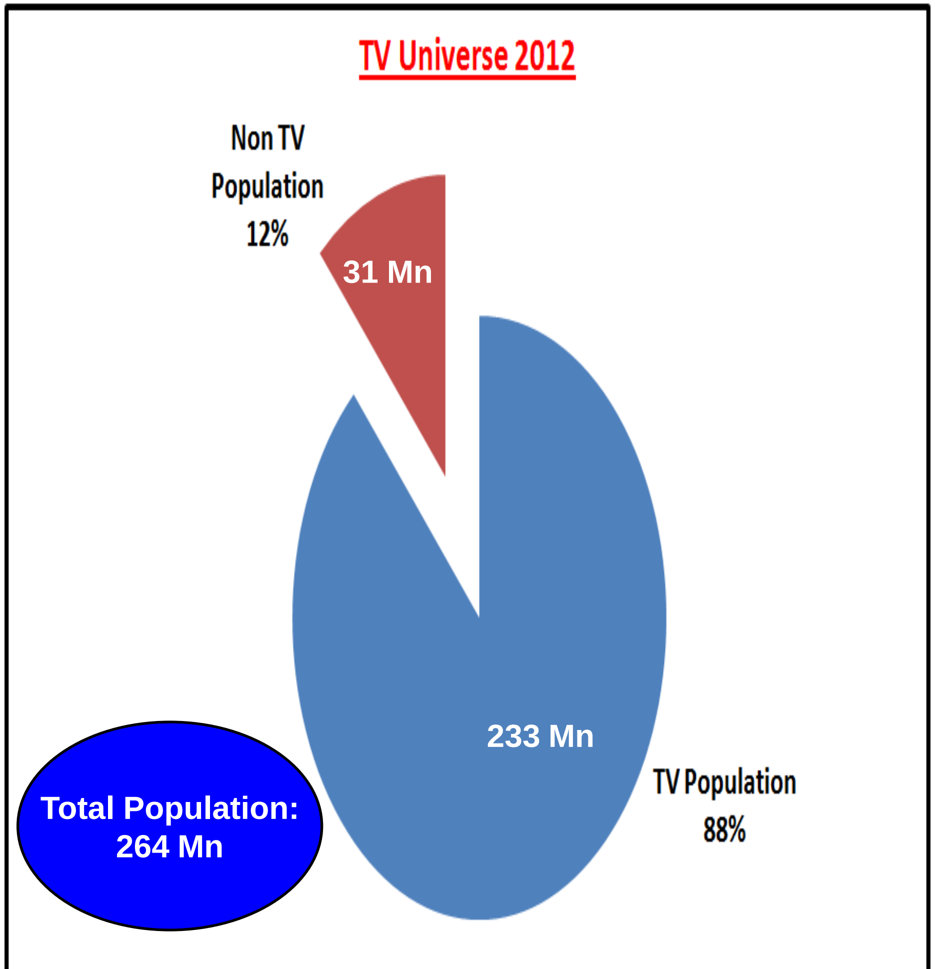
2013

All India Household figures in Millions

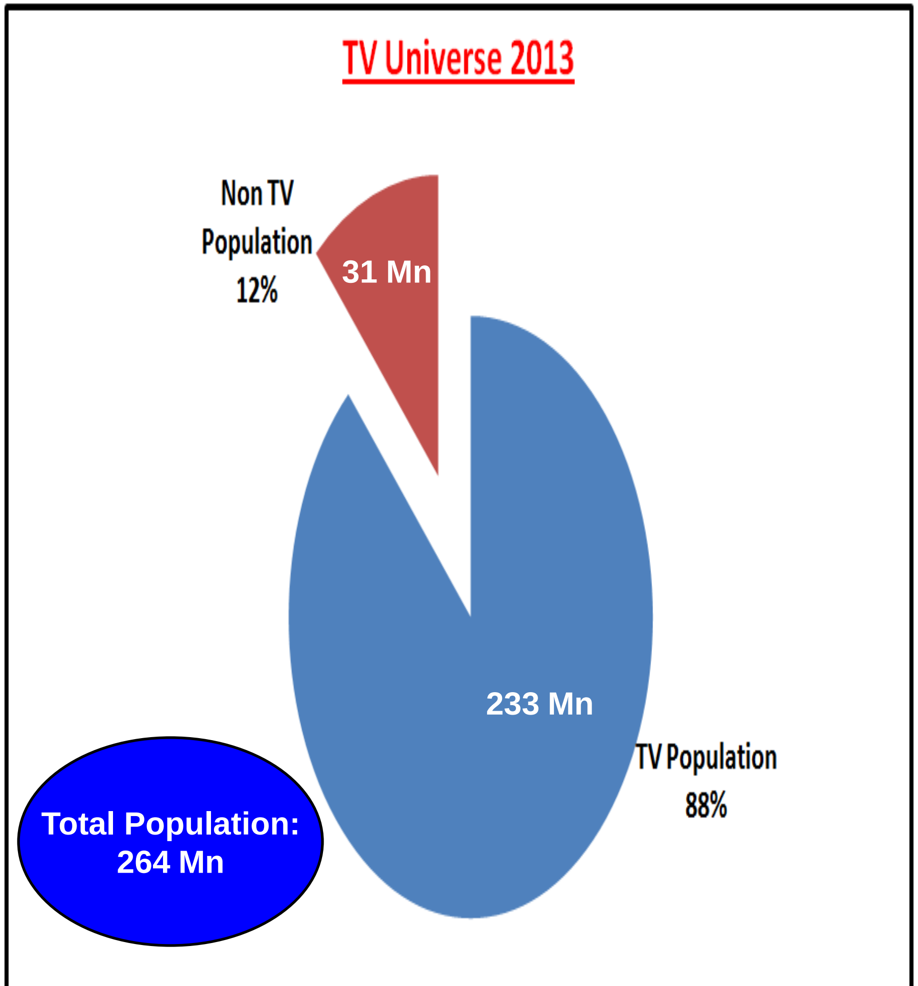
Change in TV Universe 2013

TAM Markets – Individuals (Mn)

Total Population and TV population has not witnessed any change



Source: TAM Baseline Study   Market: Urban 1lac+ & Mah LC1 + Jhrkhnd 0.5Mn+   Period: July to Nov 2011



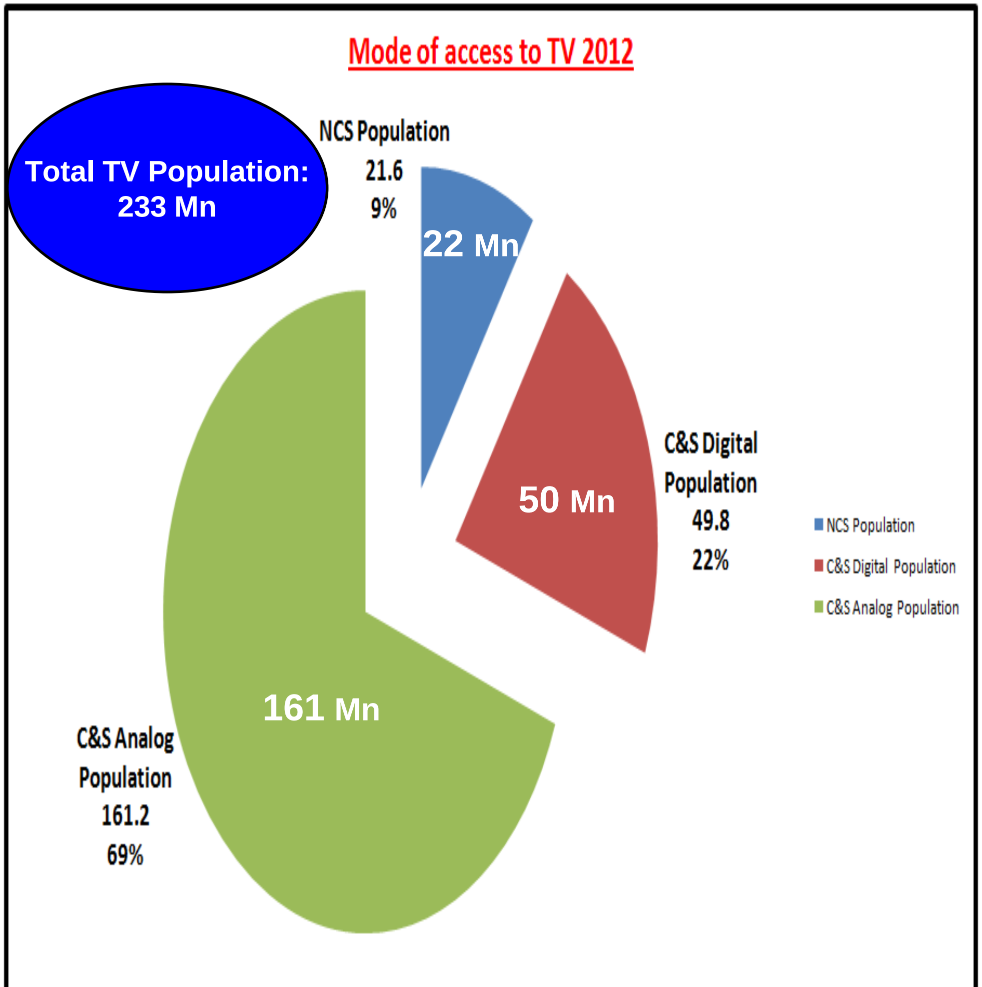
Source: TAM Baseline Study   Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+   Period: Oct to Dec -2012

All Figure are Individuals in millions

The Total Population & TV population Numbers from census 2011 may be released in 2013, which will be used in 2014 Universe update

Mode of TV Access – Proportions across platforms

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



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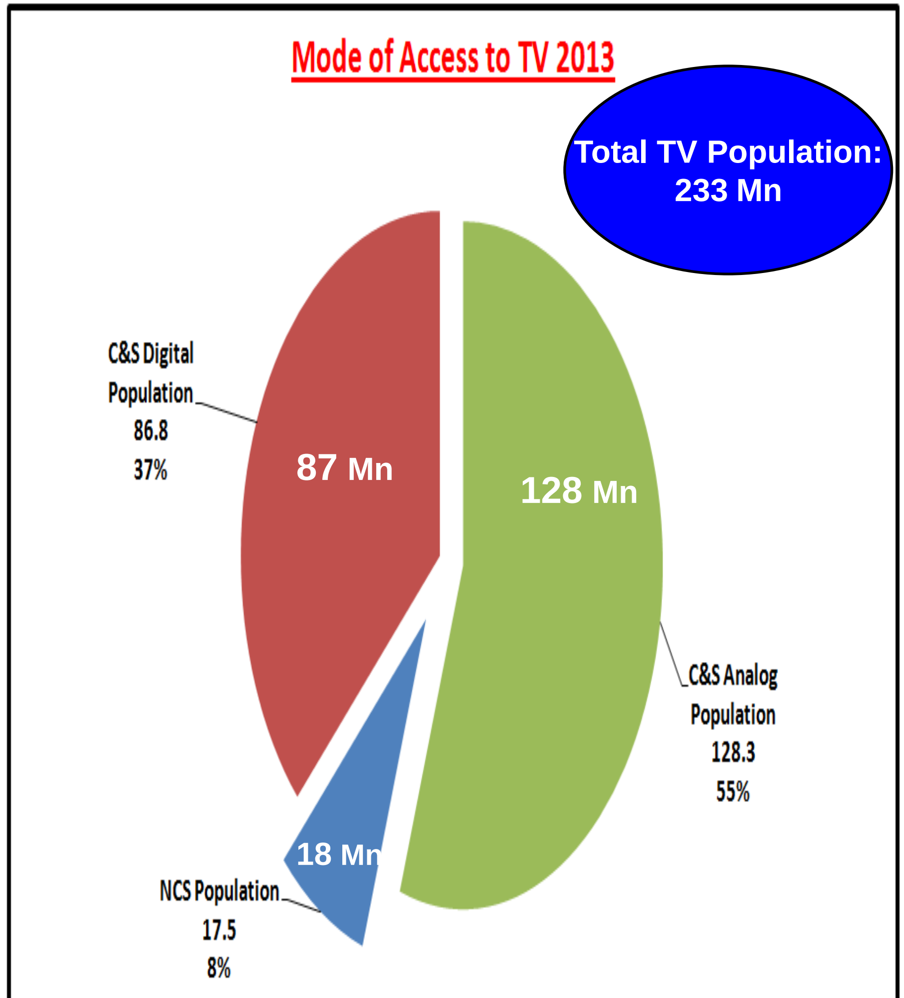
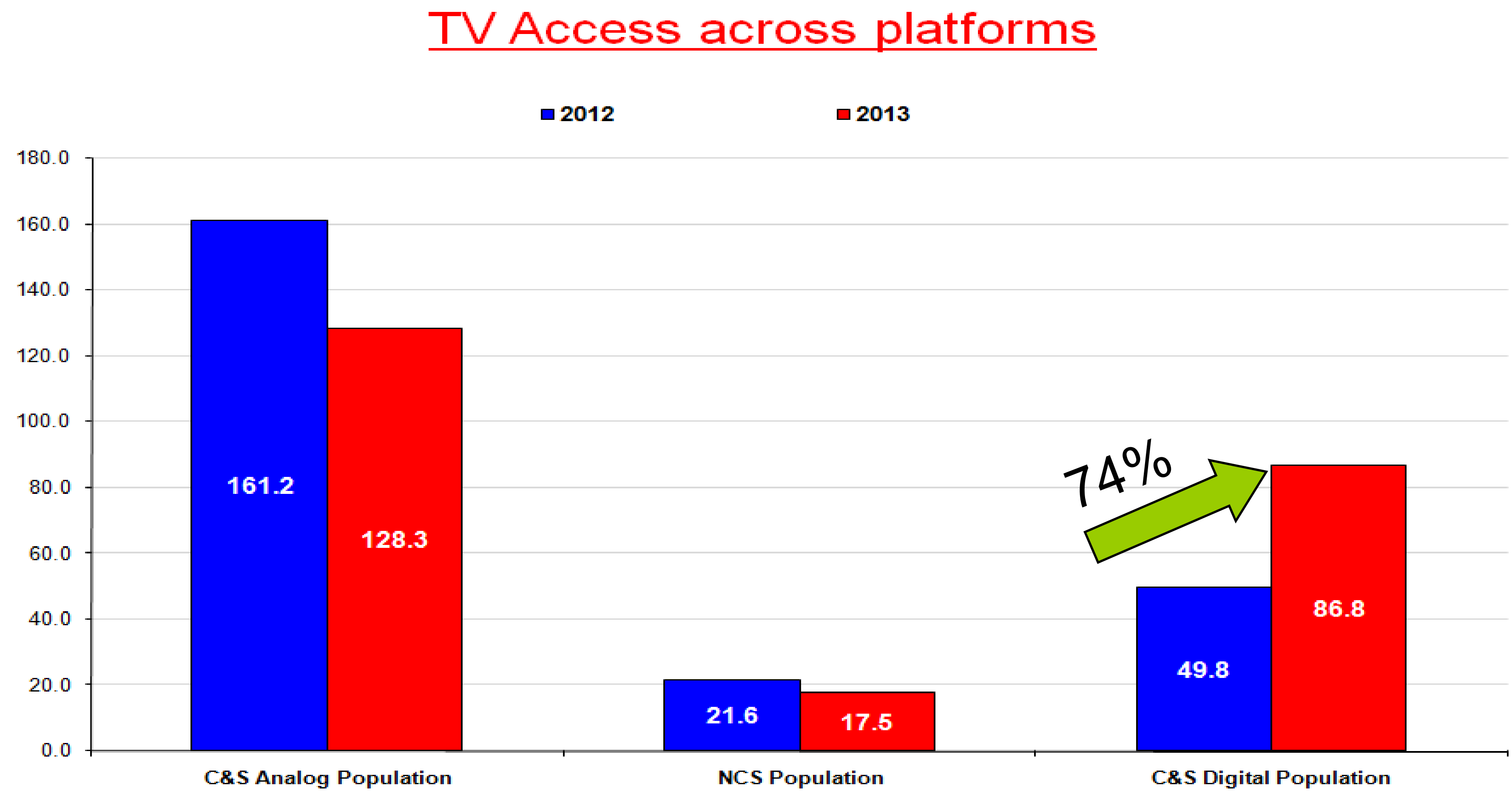


Source: TAM Baseline Study Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+ Period: Oct to Dec - 2012

148 Mn

Digital Population witnessed phenomenal growth



Source: TAM Baseline Study

Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+

Period: Oct to Dec -2012

All Figure are Individuals in millions

Changes Across Pop-Strata…

TV, C&S and Digital

DAS mandate led to the growth in Digital footprint in 6 Metros with a marginal drop in C&S population…

Pop Strata wise Growth across C&S and Digital Platform						
Pop Strata	Cable & Satellite		Growth %	Digital		Growth %
	Year 2012 (In Millions)	Year 2013 (In Millions)		Year 2012 (In Millions)	Year 2013 (In Millions)	
6 Metros	72	71		16	46	179
Rest Of State 1 Mn+	50	52	4	13	17	25
0.1-1Mn+ & 0.5Mn+ & Mah Lc1	89	93	4	20	24	20
All India Surveyed	211	215	2	50	87	74

Source: TAM Baseline Study Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+ Period: Oct to Dec -2012

All Figure are Individuals in millions

Growth at State level…

Excluding DAS Metros *(Mumbai, Calcutta & Delhi)* , *PHCHP* 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 2012-13	Year 2012	Year 2013		Year 2012	Year 2013	
Mumbai	19.3	19.0	18.8	-1.3	5.1	14.7	186.9
Delhi	19.2	18.3	18.1	-1.1	4.2	18.1	330.3
Calcutta	13.5	12.8	11.8	-8.3	2.2	7.6	251.2
Chennai	7.7	7.7	7.7	0.0	1.4	1.6	15.7
Bangalore	7.3	7.1	7.2	1.6	2.3	2.6	10.2
Hyderabad	7.3	7.1	7.2	1.1	1.2	1.4	14.6
Bihar 1Mn.+	2.2	1.8	1.9	7.3	0.4	0.4	6.3
Jharkhand 0.5Mn.+	3.5	3.1	3.2	1.7	0.7	0.7	1.8
Gujarat	18.1	15.0	15.8	5.4	5.2	5.8	12.3
Ro Maharashtra	29.3	24.6	26.3	6.7	8.0	9.2	14.9
Madhya Pradesh	13.8	11.6	12.2	4.7	4.1	4.5	8.7
PHCHP	14.1	13.2	13.5	2.3	2.1	6.0	187.4
Rajasthan	8.9	7.5	7.9	5.7	2.0	2.2	12.9
Uttar Pradesh	25.3	21.5	22.1	3.0	4.2	4.7	10.6
Assam 0.5Mn.+	1.0	0.9	0.9	4.6	0.4	0.4	5.5
Orissa 0.1 to 1 Mn.	3.4	2.8	2.9	4.7	0.7	0.7	4.3
Ro West Bengal	5.6	5.0	5.2	3.8	0.4	0.5	42.7
Ro Andhra Pradesh	10.4	10.0	10.2	1.8	1.0	1.1	6.3
Karnataka 0.1 to 1Mn.	7.3	6.8	7.0	1.8	1.3	1.5	13.1
Kerala	5.6	5.4	5.5	2.4	1.5	1.6	8.1
Ro Tamil Nadu	9.8	9.7	9.8	0.3	1.3	1.3	1.3
All India TAM Surveyed	232.6	211.0	215.1	1.9	49.8	86.8	74.4

Source: TAM Baseline Study   Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+   Period: Oct to Dec -2012

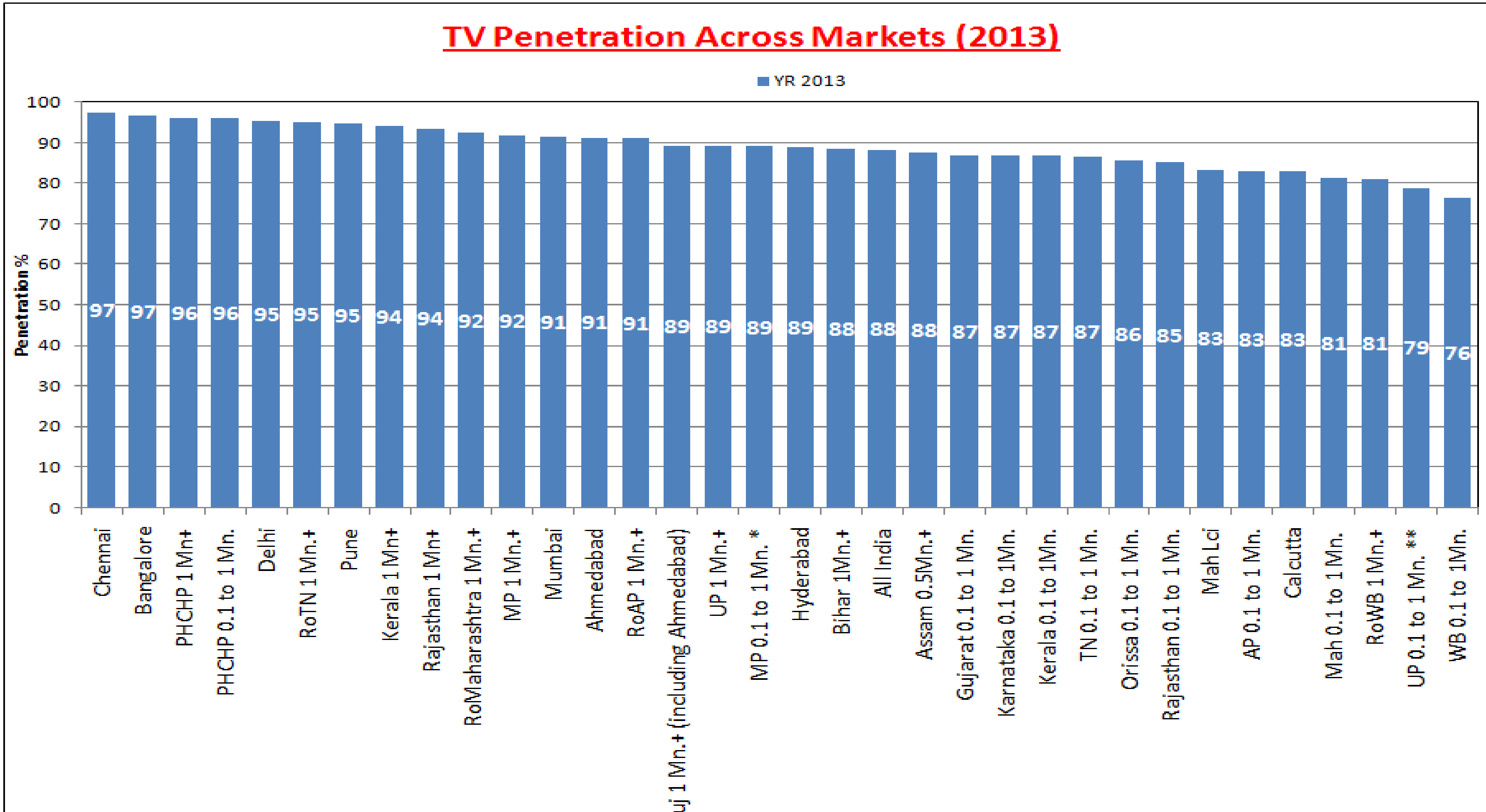
All Figure are Individuals in millions

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 is consistent

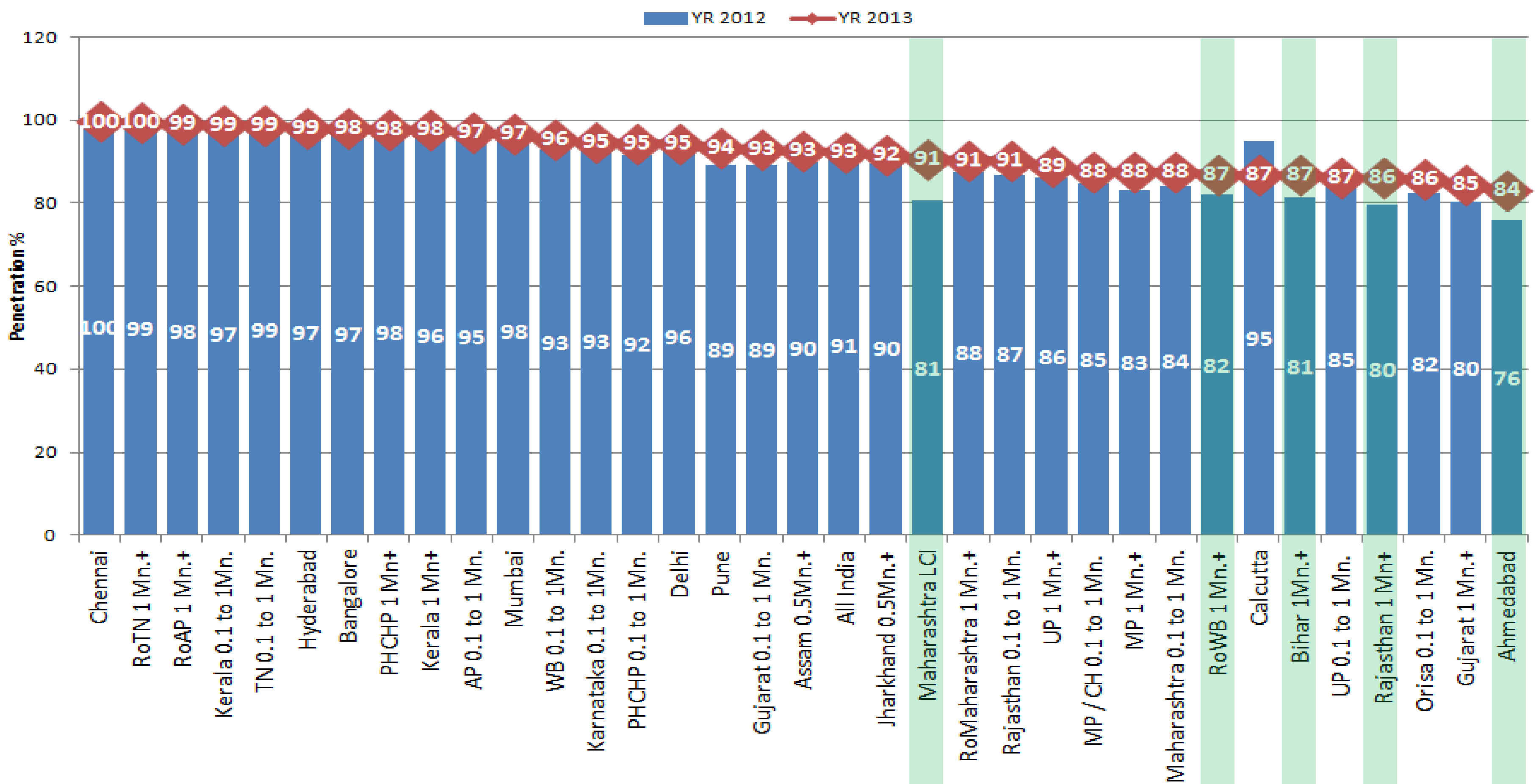


Source: TAM Baseline Study Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+ Period: Oct to Dec -2012

The Total Population & TV population Numbers from census 2011 may be released in 2013, which will be used in 2014 Universe update

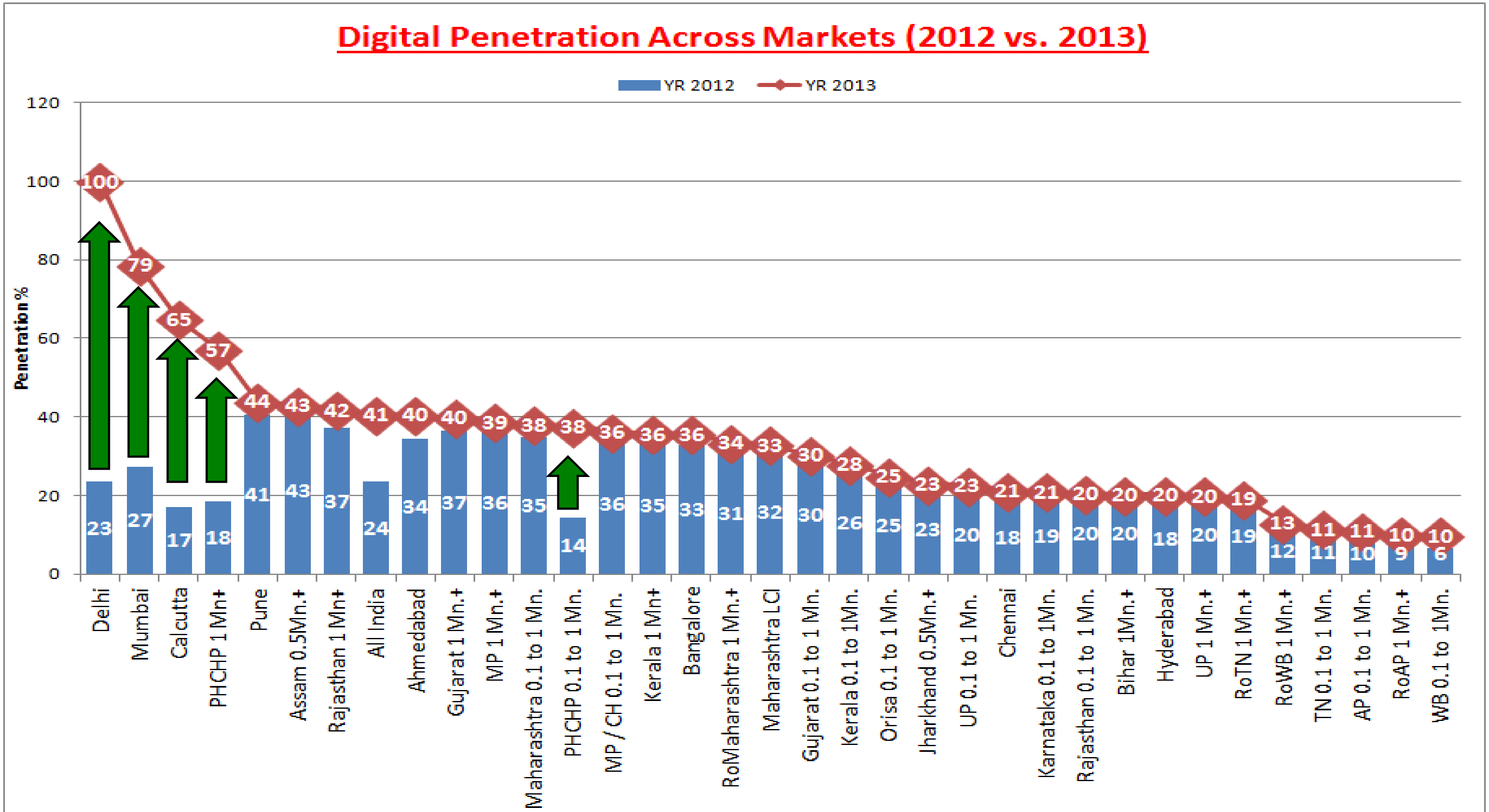
C&S Penetration growth rates have been highest for Mah LC1 , RoWB 1MN+ , Bihar 1mn+ , Raj 1mn+ & Ahmedabad

C&S Penetration Across Markets (2012 vs. 2013)



Source: TAM Baseline Study | Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+ | Period: Oct to Dec -2012

Growth in digital is driven by DAS Metros *(Mumbai, Calcutta & Delhi)* & *PHCHP*



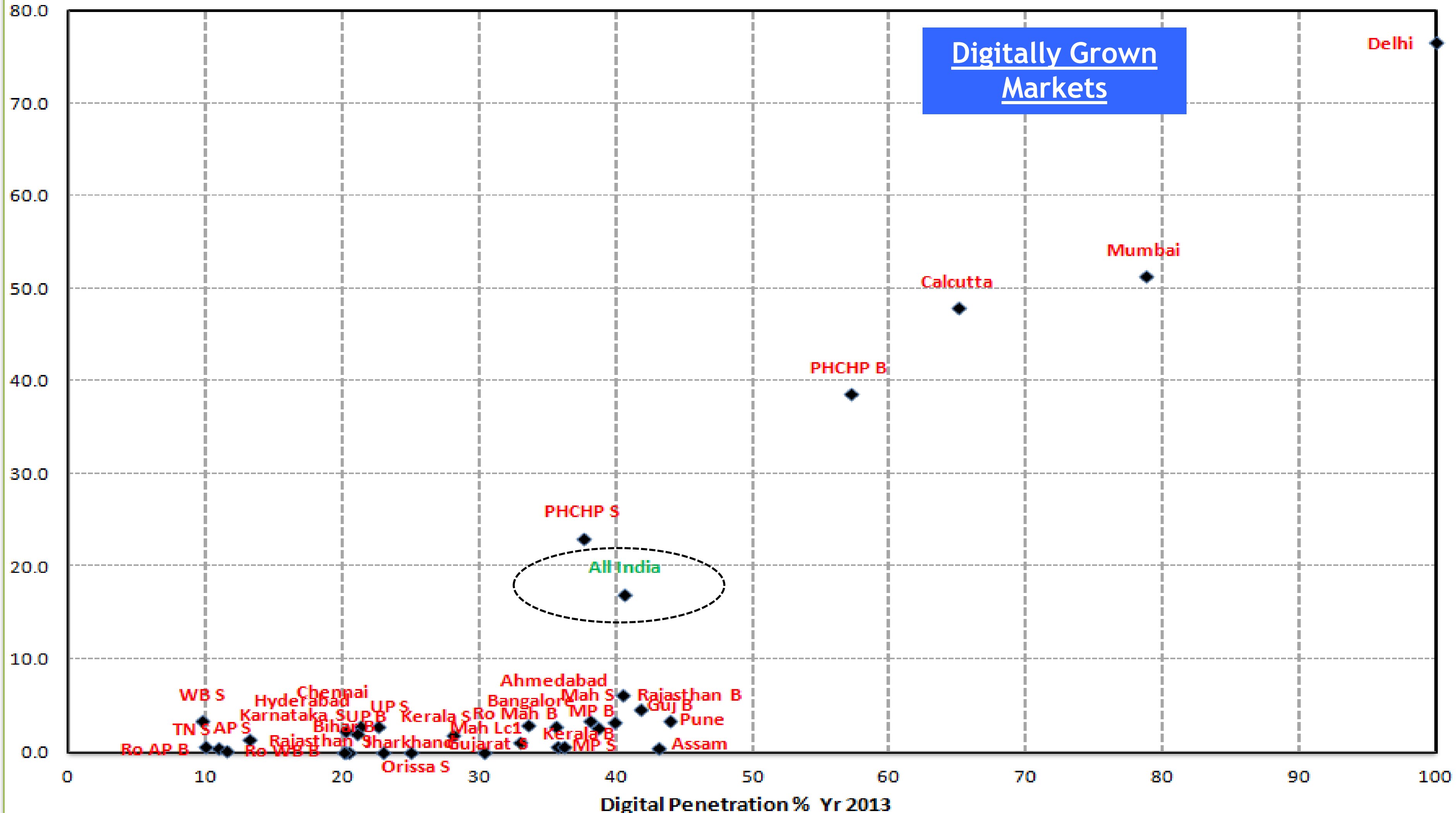
Source: TAM Baseline Study

Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+

Period: Oct to Dec -2012

Digital Penetration Grid

Digital Penetration Vs Growth Grid



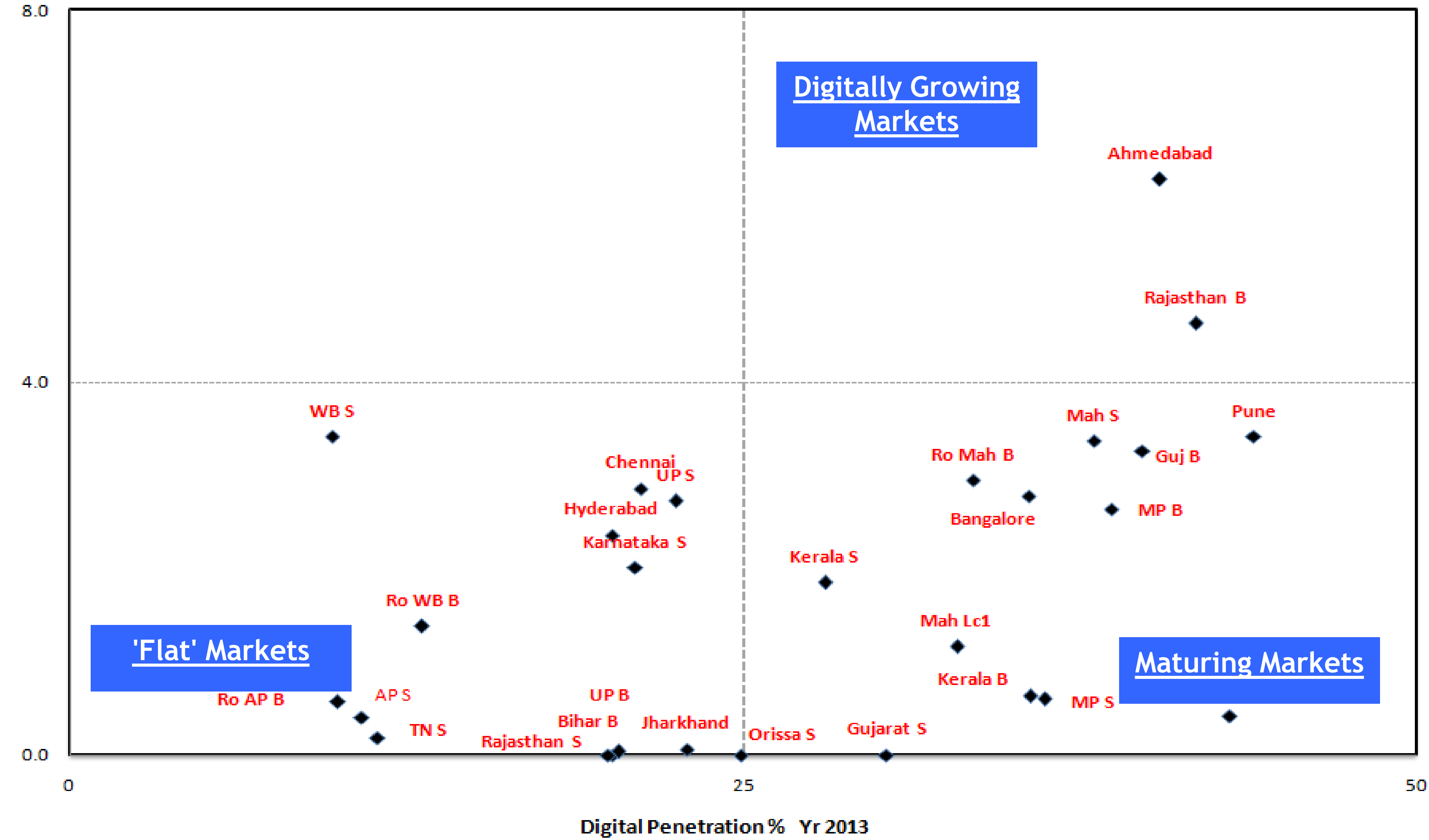
Source: TAM Baseline Study | Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+ | Period: Oct to Dec -2012

B - 1Mn+ strata
S - 0.1-1Mn strata
Percent Point Growth = (Penetration in 2013)- (Penetration in 2012)

Digital Penetration Grid excluding the High Growth Markets

Excluding Mumbai, Delhi, Kolkata & PHCHP

Digital Penetration Vs Growth Grid



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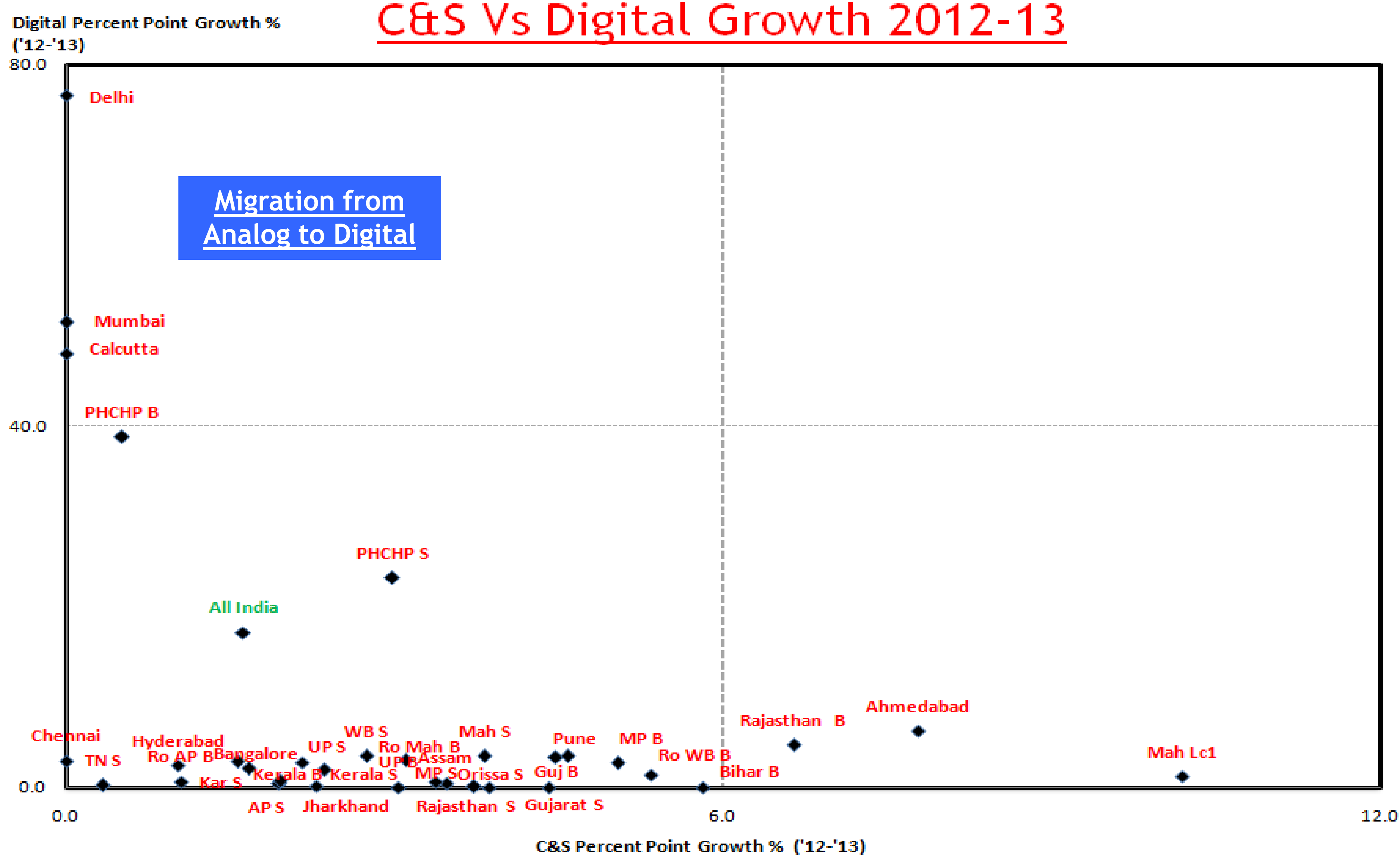
B - 1Mn+ strata

S - 0.1-1Mn strata

Percent Point Growth = (Penetration in 2013)- (Penetration in 2012)

C&S Vs Digital Growth

C&S Vs Digital Growth 2012-13



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B - 1Mn+ strata

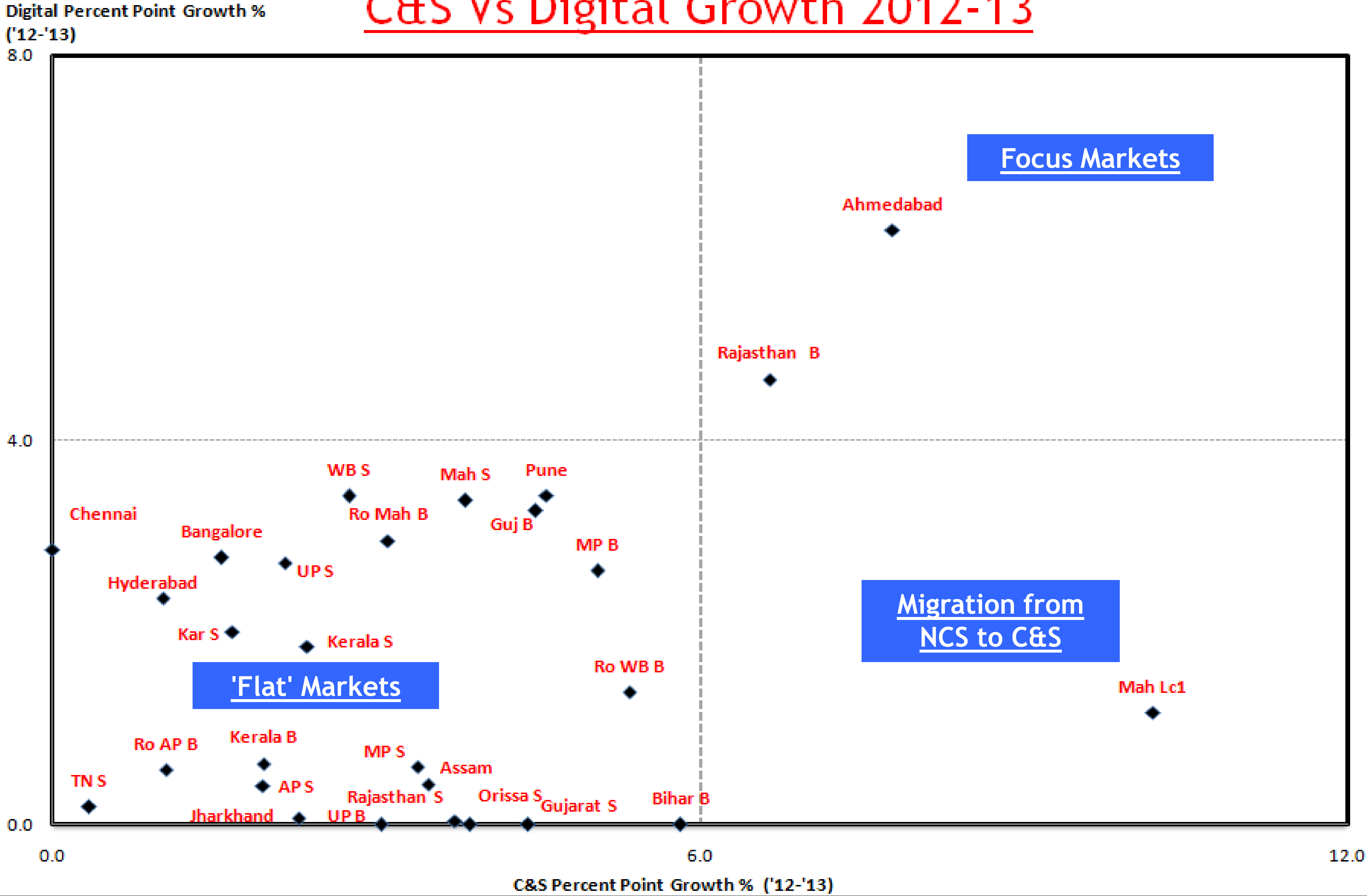
S - 0.1-1Mn strata

Percent Point Growth = (Penetration in 2013)- (Penetration in 2012)

C&S Vs Digital Growth excluding the High Growth Markets

Excluding Mumbai, Delhi, Kolkata & PHCHP

C&S Vs Digital Growth 2012-13



Source: TAM Baseline Study | Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+ | Period: Oct to Dec -2012

B - 1Mn+ strata
S - 0.1-1Mn strata
Percent Point Growth = (Penetration in 2013)- (Penetration in 2012)

Change in Demographic proportions - SECs

Digital

Metros have 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	2012	5.1	4.9	3.1	3.4	16.5
	2013	11.7	11.6	9.6	13.2	46.1
	Growth%	126.3%	139.7%	212.3%	285.7%	179.3%
Rest of States 1 Mn+	2012	3.5	3.3	2.8	3.7	13.3
	2013	4.3	4.4	3.4	4.5	16.7
	Growth%	23.7%	33.5%	21.4%	22.2%	25.2%
0.1-1Mn + Mah LC1 + Jharkhand 0.5 Mn+	2012	3.2	4.8	5.0	7.0	20.0
	2013	3.8	5.9	5.7	8.7	24.0
	Growth%	18.6%	22.8%	14.3%	23.9%	20.4%
India Surveyed	2012	11.8	13.0	10.8	14.1	49.8
	2013	19.8	22.0	18.7	26.4	86.8
	Growth%	67.0%	69.2%	72.6%	86.7%	74.4%

Source: TAM Baseline Study Market: Urban 1lac+ & Mah LC1 + Jhrkhnd0.5Mn+ Period: Oct to Dec -2012

All Figure are Individuals in millions

In Sum…

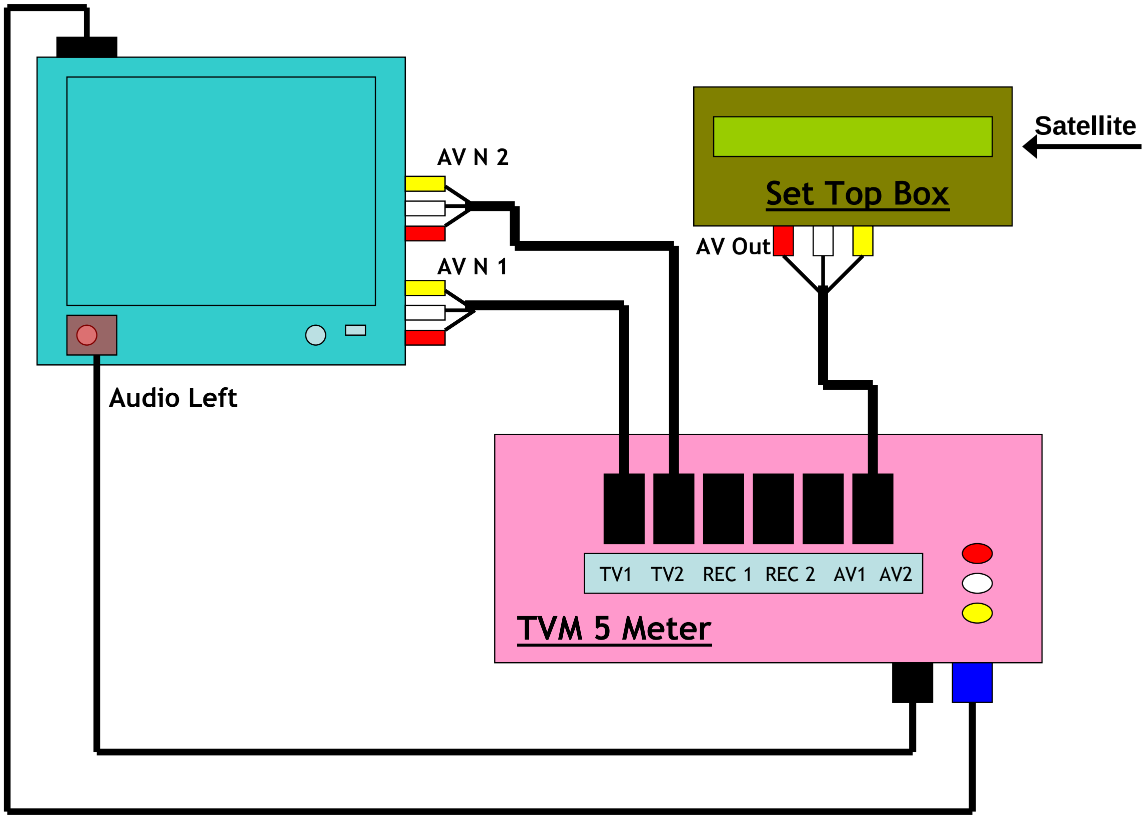
- C&S at All India level is currently 140 million Hhlds ,Digital Hhlds (59 Mn) have grown @ 40% which is a function of Terrestrial & Analog Hhlds migrating to Digital platform.
- Digital Population grew by 74% in TAM reported markets.
- All India Digital penetration is 41% in TAM reported markets.
- Growth in Digital has come primarily from DAS Markets (Mumbai, Calcutta & Delhi) & PHCHP.
- Metros have witnessed a significant Digital growth for the Lower SECs

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 2012 & 2013, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2013.

(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 2012 to 15th Jan 2013,

you will need to gather R&F for the period 15th - 29th Dec 2012 (up to week 52, the last week of 2012) & 30th Dec -2012(from week 1, the first week of 2013) - 15th Jan 2013 individually)

Implications for TAM Software Users

If you are a..

-Broadcaster –

(i) The TRPs & GRPs will not be exactly comparable over 2012 & 2013, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2013.

(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 2012 to 15th Jan 2013, you will need to gather R&F for the period 15th - 29th Dec 2012 (up to week 52, the last week of 2012) & 30th Dec -2012(from week 1, the first week of 2013) - 15th Jan 2013 individually)

For Digital estimates of 2007, 2008, 2009, 2011 2012 and 2013 please check Blink I & II presentations and India Peoplemeter Updates on www.tamindia.com

Thank You.