TAM Annual Universe Update – 2011

TAM Annual Universe Update-2011

- 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 2011

- Census growth rates applied for estimation of Population

- TAM + IMRB Base line study conducted in Nov-Dec 2010 to establish latest demographic proportions and Universe changes

- The 5th 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

- Sample size of ***over 1,00,000*** face-to-face interviews
- Conducted across Urban and Rural India

Methodology: An example

Week 1, 2010

TV Owning universe in Market ABC: 197,323,000 individuals

Step 1: Apply estimated annual growth rate for Market ABC →8.9%

Week 1, 2011

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

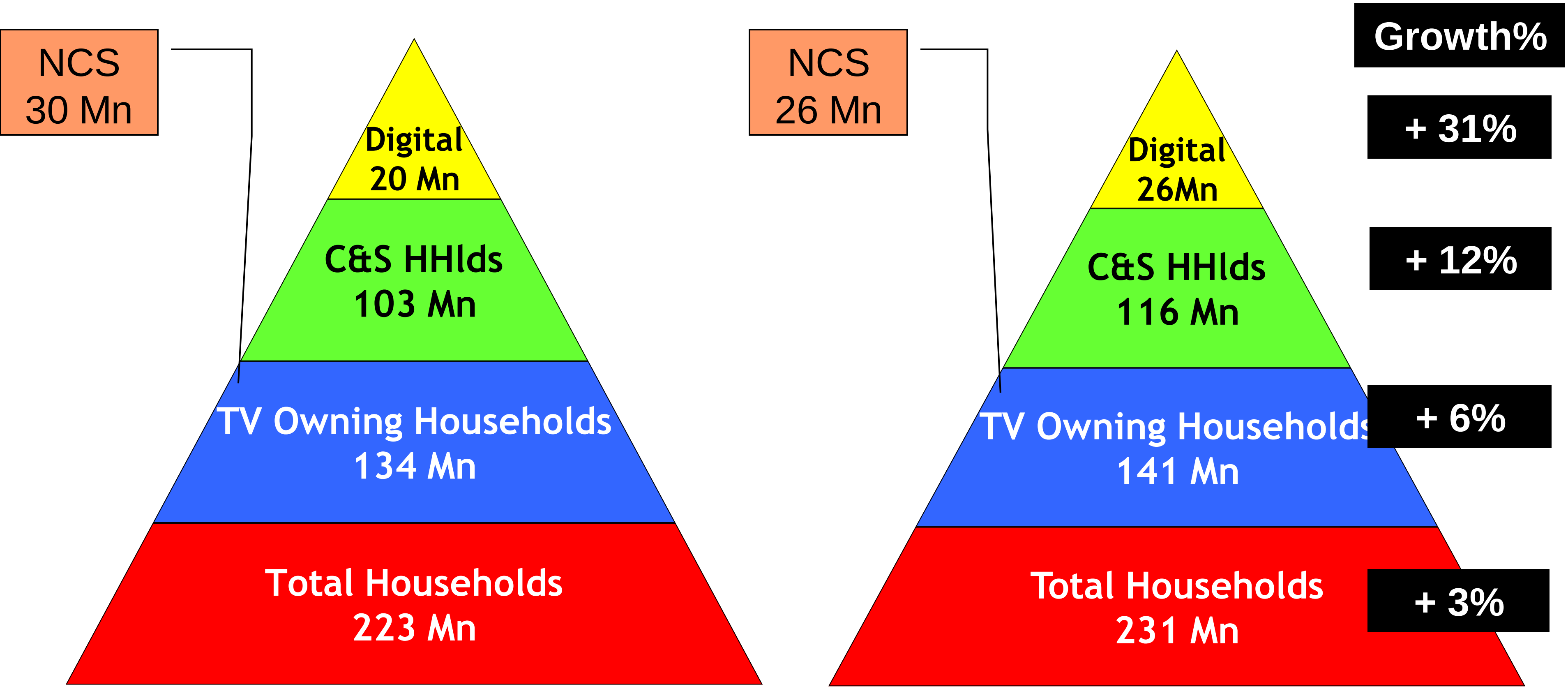
Step 2: Estimate demographic proportions from Establishment Survey

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



2010

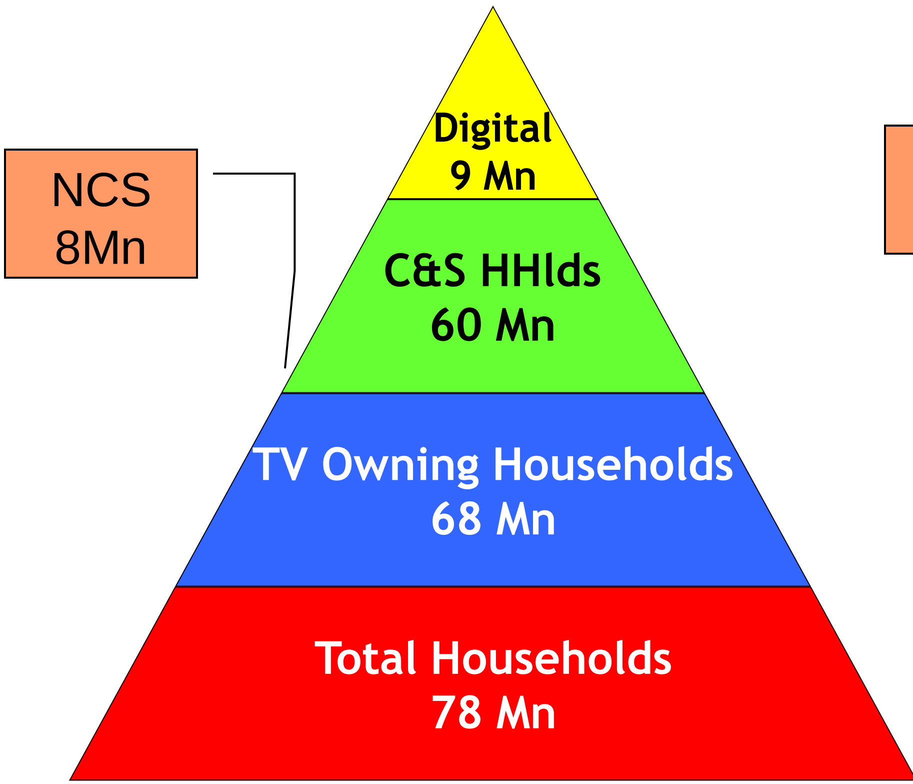
All India Household figures in Millions

2011

All India Household figures in Millions

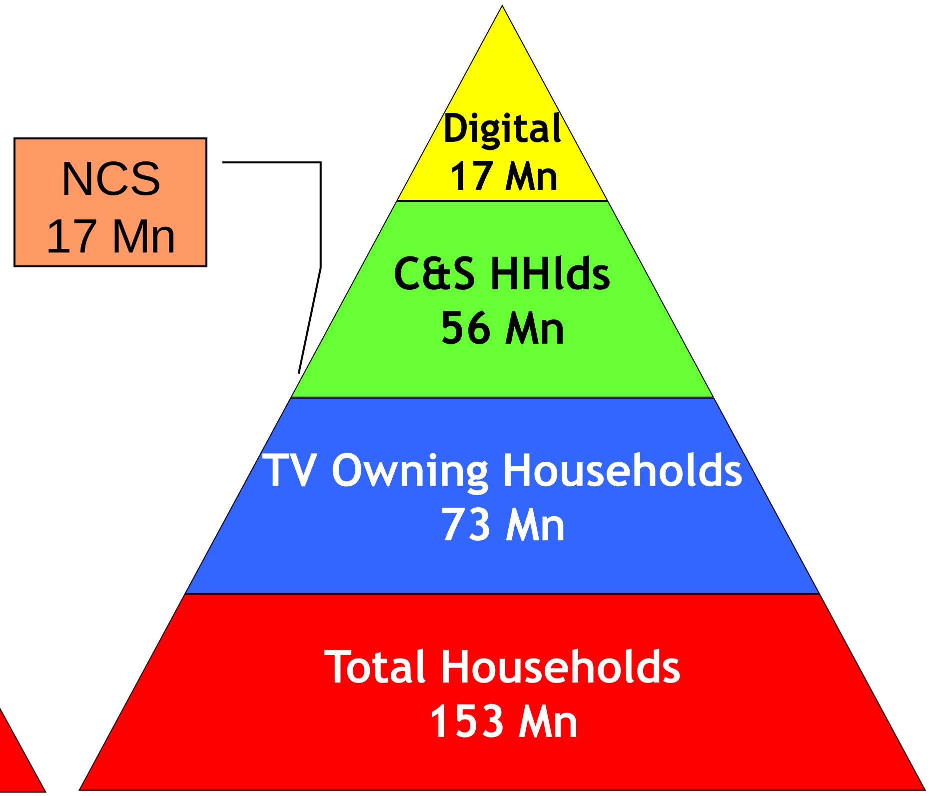
The Urban & Rural Divide…

Urban Vs Rural 2011



Urban- 2011

Household figures in Millions

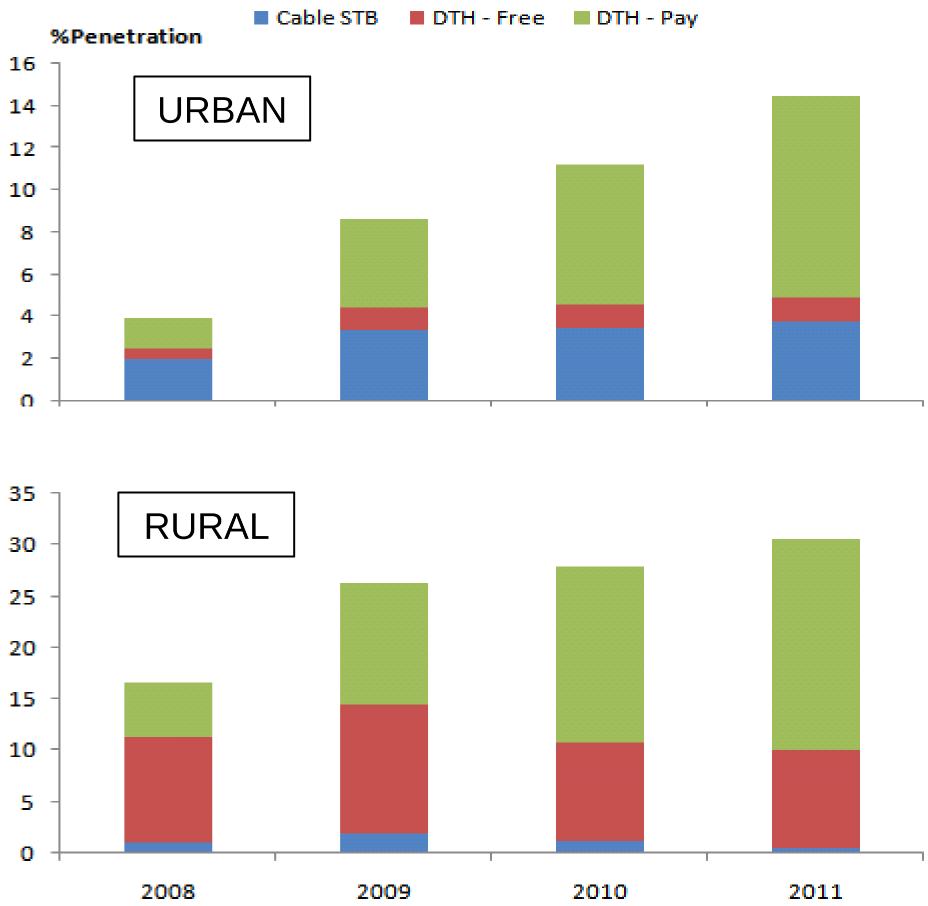


Rural -2011

Household figures in Millions

What's driving digital growth?

Pay DTH has been driving the growth of Digital across Urban and Rural areas



Share of pay - DTH among all DTH Households

	2008	2009	2010	2011
Urban	73%	79%	86%	89%
Rural	34%	49%	64%	68%

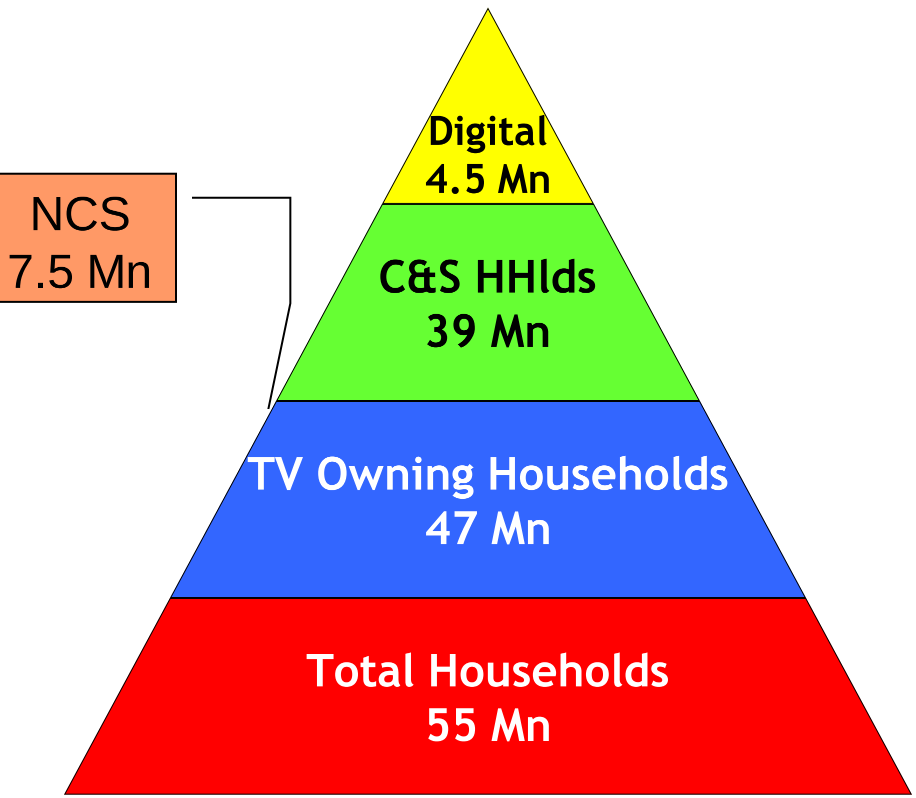
Source: Digital establishment surveys

Changes in "TAM Markets"

(Urban Class I + Maharashtra Less than Class I)

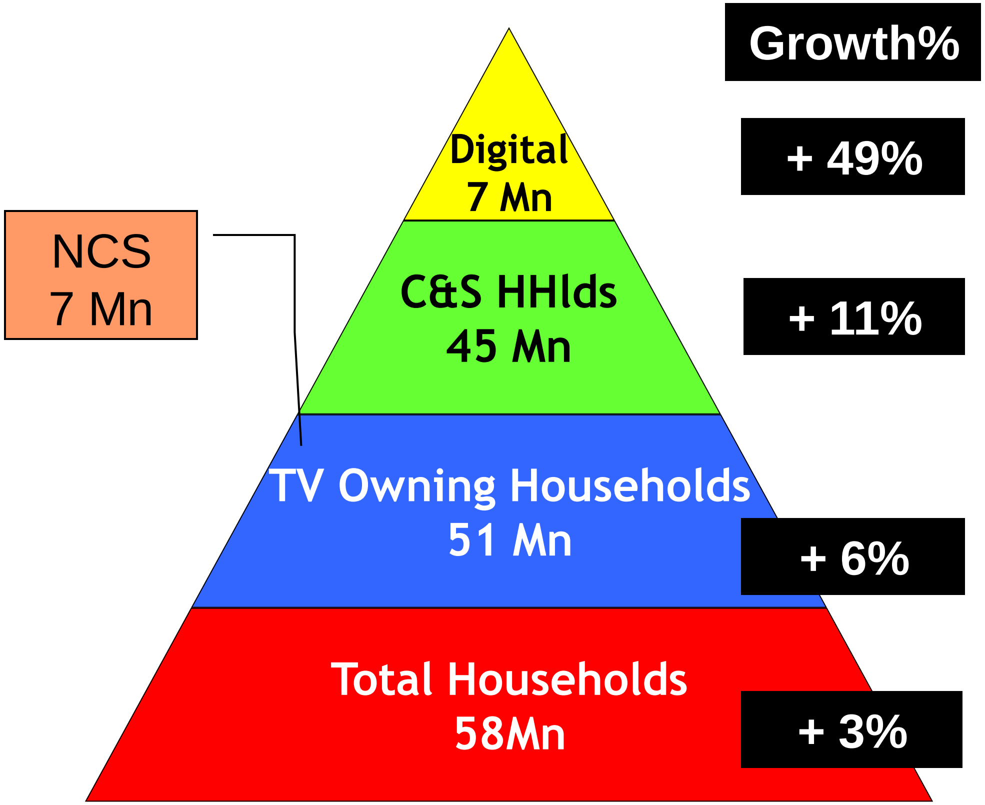
2010 Vs 2011

TAM Coverage at a Glance



2010

All India Household figures in Millions



2011

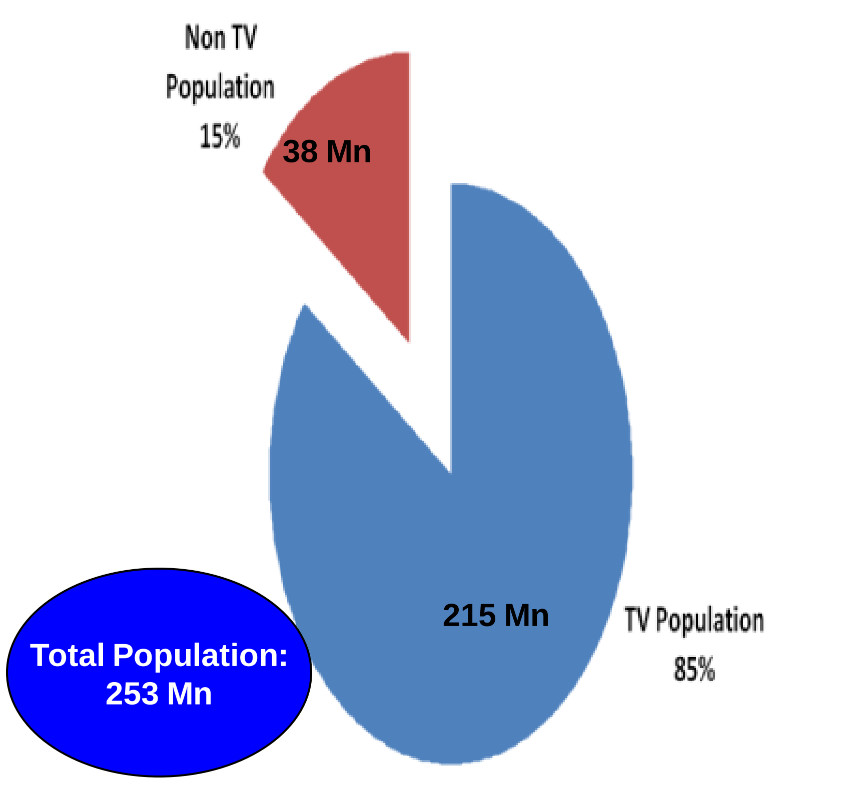
All India Household figures in Millions

Change in TV Universe 2010

TAM Markets – Individuals (mn)

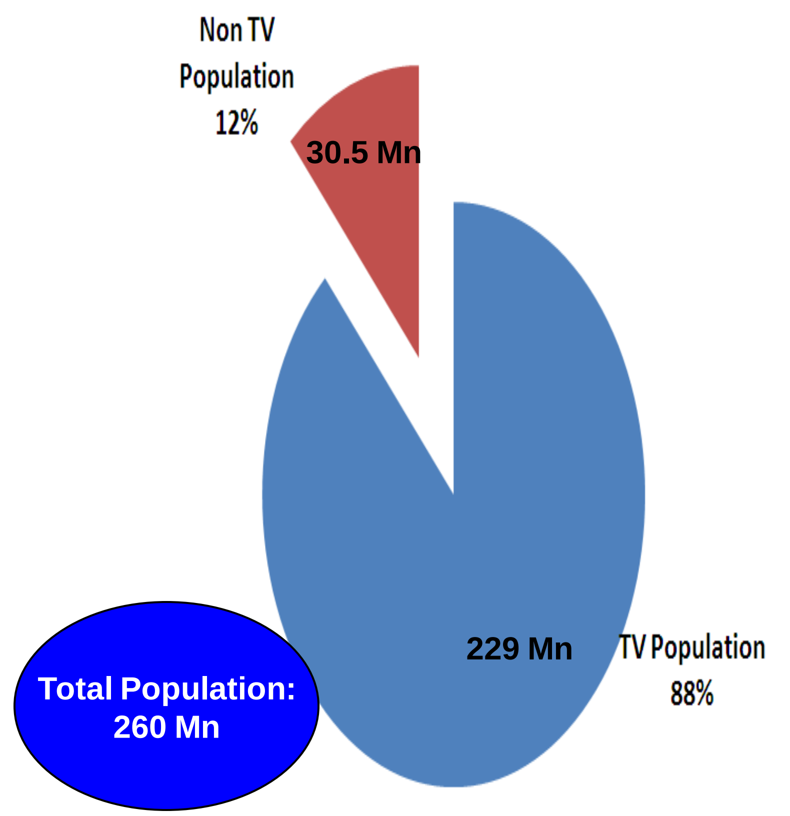
Growth in TV population is marginally ***higher*** than that of Total Population…

TV Universe 2010



Source: TAM + IMRB + Nielsen Baseline Study Market: Urban 1lac+ & Mah LC1 Period: Nov-Dec 2009

TV Universe 2011

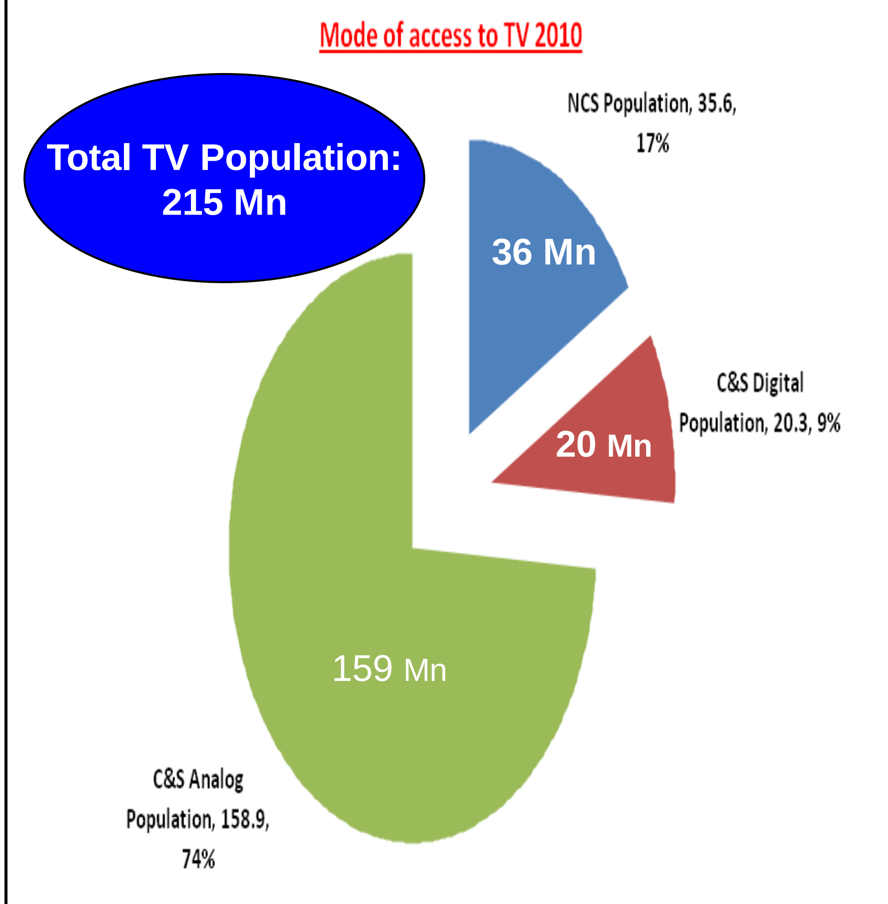


Source: TAM + IMRB Baseline Study Market: Urban 1lac+ & Mah LC1 Period: Nov-Dec 2010

All Figure are Individuals in millions

Mode of TV Access – Proportions across platforms

The growth in TV population has mainly come from Digital and followed by C&S analog…



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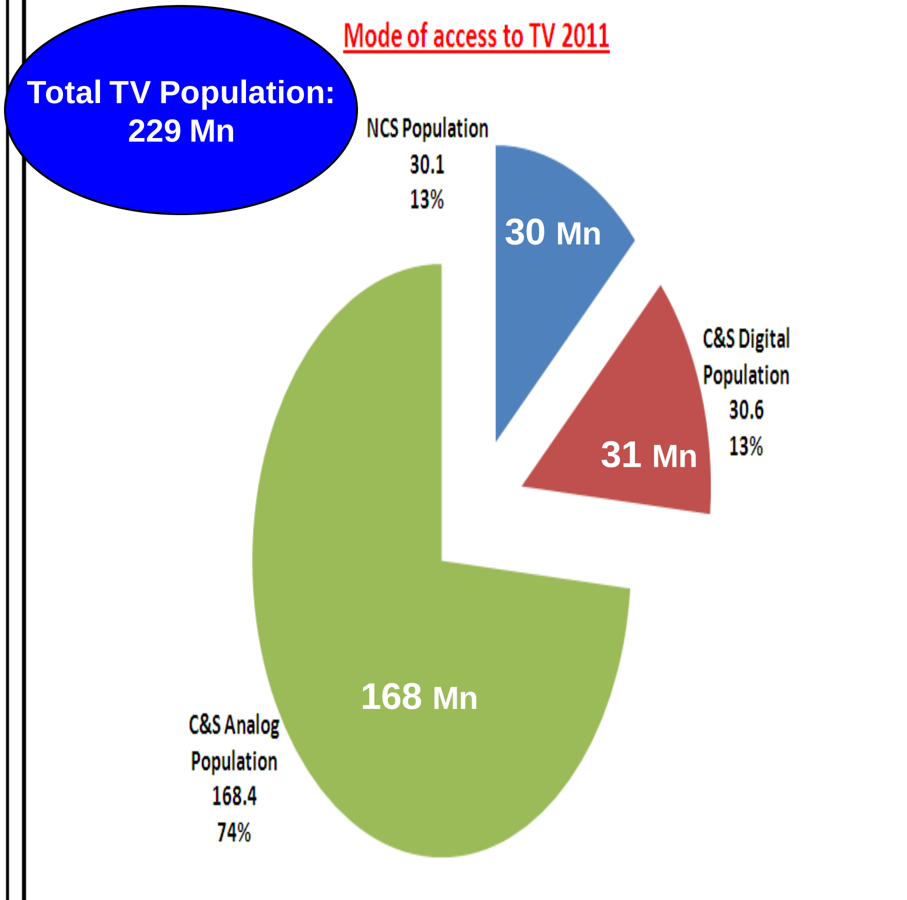
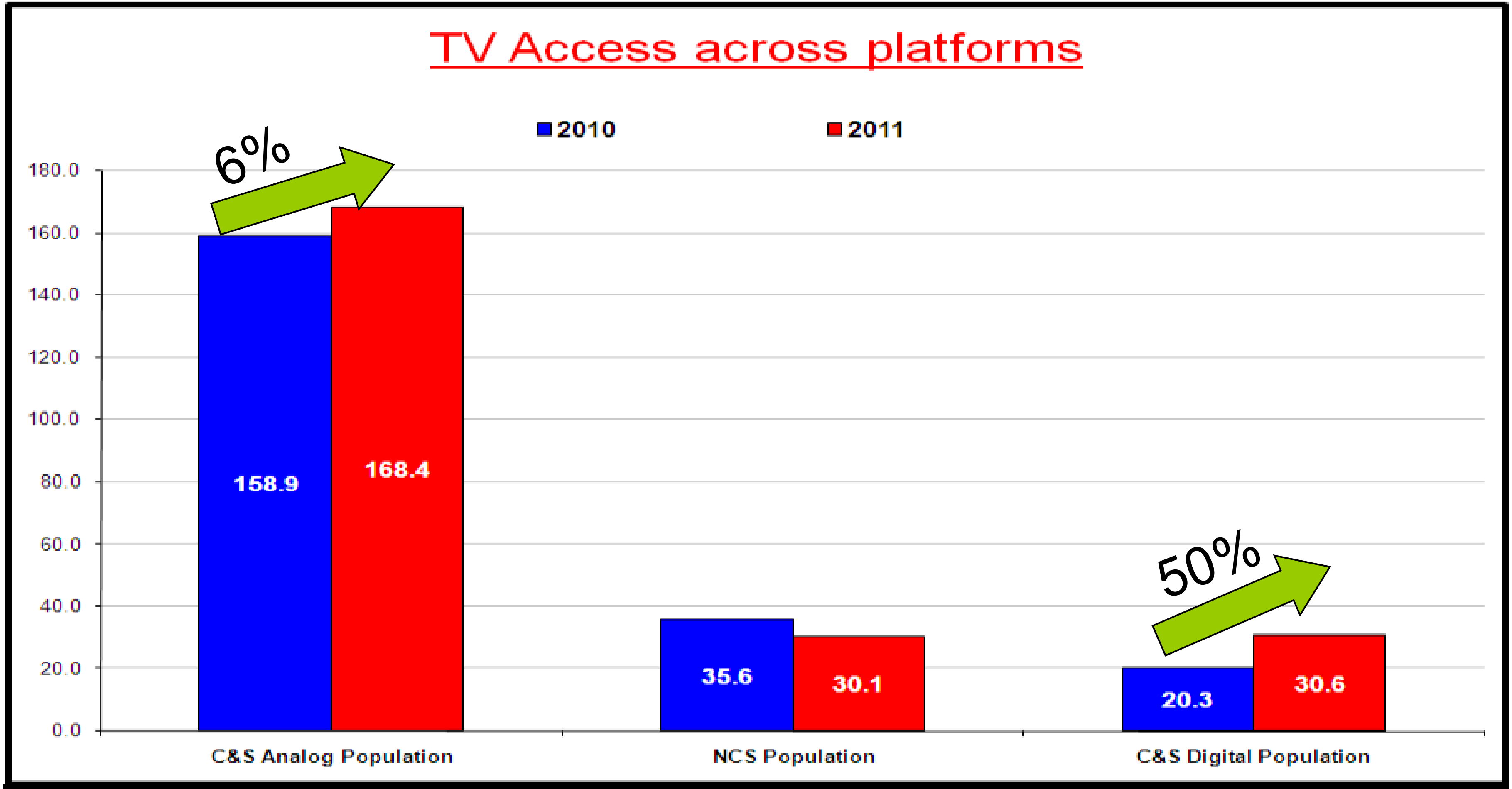


Source: TAM + IMRB Baseline Study Market: Urban 1lac+ & Mah LC1 Period: Nov-Dec 2010

148 Mn

Digital witnessed the maximum growth rate, Terrestrial has reduced by 15%



Source: TAM + IMRB + Nielsen Baseline Study Market: Urban 1lac+ & Mah LC1 Period: Nov-Dec 2009 + Nov –DEC 2010

All Figure are Individuals in millions

Changes across pop-strata…

TV, C&S and Digital

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

Pop-strata wise growth rates across TV, C&S and Digital platforms									
Pop-Strata	TV Owning			C&S			Digital		
	YR 2010 (in Millions)	YR 2011 (in Millions)	Growth%	YR 2010 (in Millions)	YR 2011 (in Millions)	Growth%	YR 2010 (in Millions)	YR 2011 (in Millions)	Growth%
6 Metros	70	74	5.9%	66	71	7.4%	9	12	38.5%
Rest of States 1 Mn+	53	57	7.2%	41	47	13.8%	4	8	73.1%
0.1-1 Mn + Mah LC1	91	97	6.9%	71	81	12.9%	7	11	51.3%
All India	215	229	6.6%	179	199	11.0%	20	31	50.4%

Source: TAM + IMRB + Nielsen Baseline Study Market: Urban 1lac+ & Mah LC1 Period: Nov-Dec 2009 + Nov –DEC 2010

All Figure are Individuals in millions

Growth at State level…

Eastern states like Assam, Orissa, West Bengal, Bihar and Chhattisgarh have witnessed a significant growth in the C&S population…

Markets	All 4+ Population Individuals in Millions			C&S 4+ Population Individuals in Millions			Digital 4+ Population Individuals in Millions		
	Year 2010	Year 2011	Growth%	Year 2010	Year 2011	Growth%	Year 2010	Year 2011	Growth%
Mumbai	17.9	19.3	7.8	17.5	19.0	8.4	3.2	4.3	35.1
Kolkatta	12.8	13.5	5.3	11.3	12.3	8.7	0.9	1.3	39.3
Delhi	18.1	19.2	6.1	16.6	18.1	9.0	2.2	3.0	35.8
Chennai	7.4	7.7	4.2	7.4	7.7	4.2	1.0	1.2	22.3
Bangalore	7.1	7.3	3.6	6.8	7.1	3.7	1.2	1.8	48.8
Hyderabad	6.9	7.3	5.5	6.7	7.1	5.6	0.5	0.7	43.2
Ro Andhra Pradesh	9.9	10.4	4.5	9.5	10.0	5.0	0.5	0.7	36.4
Gujarat	16.8	18.1	7.8	12.3	14.3	16.5	1.5	2.9	93.5
Krn .1-1Mn	7.0	7.3	4.9	6.3	6.7	4.9	0.7	0.8	18.6
Kerala	5.3	5.6	5.6	4.7	5.2	10.1	0.2	0.5	126.1
Madhya Pradesh	9.5	10.4	9.3	6.9	8.3	20.3	0.8	1.5	109.5
Chatt .1-1Mn	3.3	3.4	5.1	2.1	2.6	25.0		0.1	
ORI .1-1Mn	3.2	3.4	6.6	2.3	2.6	17.3	0.4	0.5	25.6
PHCHP	13.2	14.1	7.0	11.5	12.6	9.3	0.8	1.2	47.4
Rajasthan	8.3	8.9	7.4	5.6	6.8	21.8	0.7	1.2	68.7
Ro Tamil Nadu	9.3	9.8	6.0	9.1	9.7	6.5	1.0	1.2	17.0
Uttar Paradesh	23.6	25.3	7.1	17.1	19.4	13.4	1.1	2.2	99.7
Ro West Bengal	5.1	5.6	8.7	4.2	4.8	13.7	0.1	0.3	142.5
Ro Maharashtra	27.3	29.3	7.3	19.1	22.2	16.3	3.5	5.1	46.3
Bihar 1Mn+	2.0	2.2	9.8	1.5	1.8	18.7	0.1	0.1	46.0
Assam .5Mn+	0.9	1.0	11.6	0.7	0.8	21.9	0.1	0.2	42.6
All India TAM	214.8	229.1	6.6	179.3	199.0	11.0	20.4	30.6	49.7

Source: TAM + IMRB + Nielsen Baseline Study   Market: Urban 1lac+ & Mah LC1   Period: Nov-Dec 2009 + Nov –DEC 2010

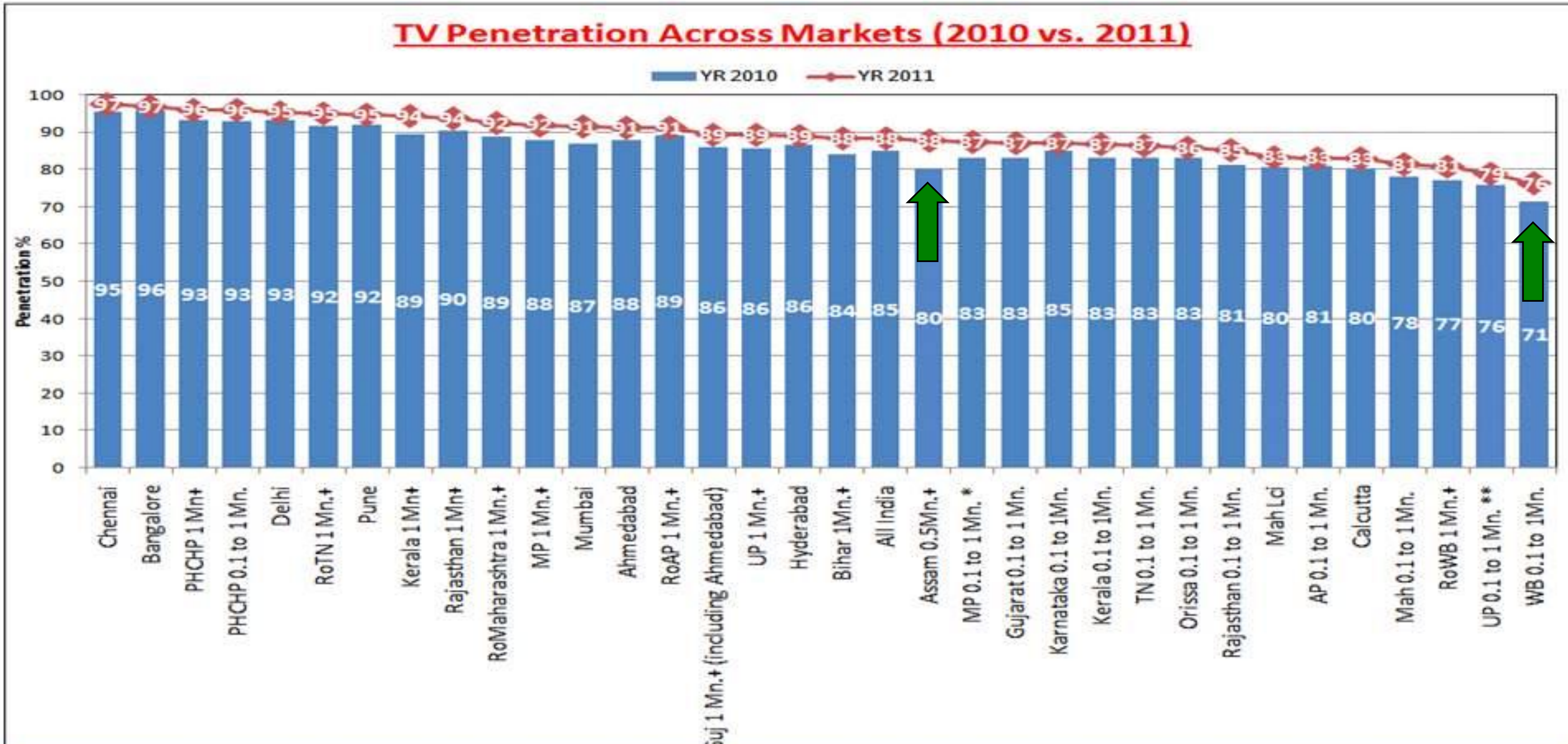
All Figure are Individuals in millions

States highlighted have higher growth rate than All India average

How is the growth across individual markets?

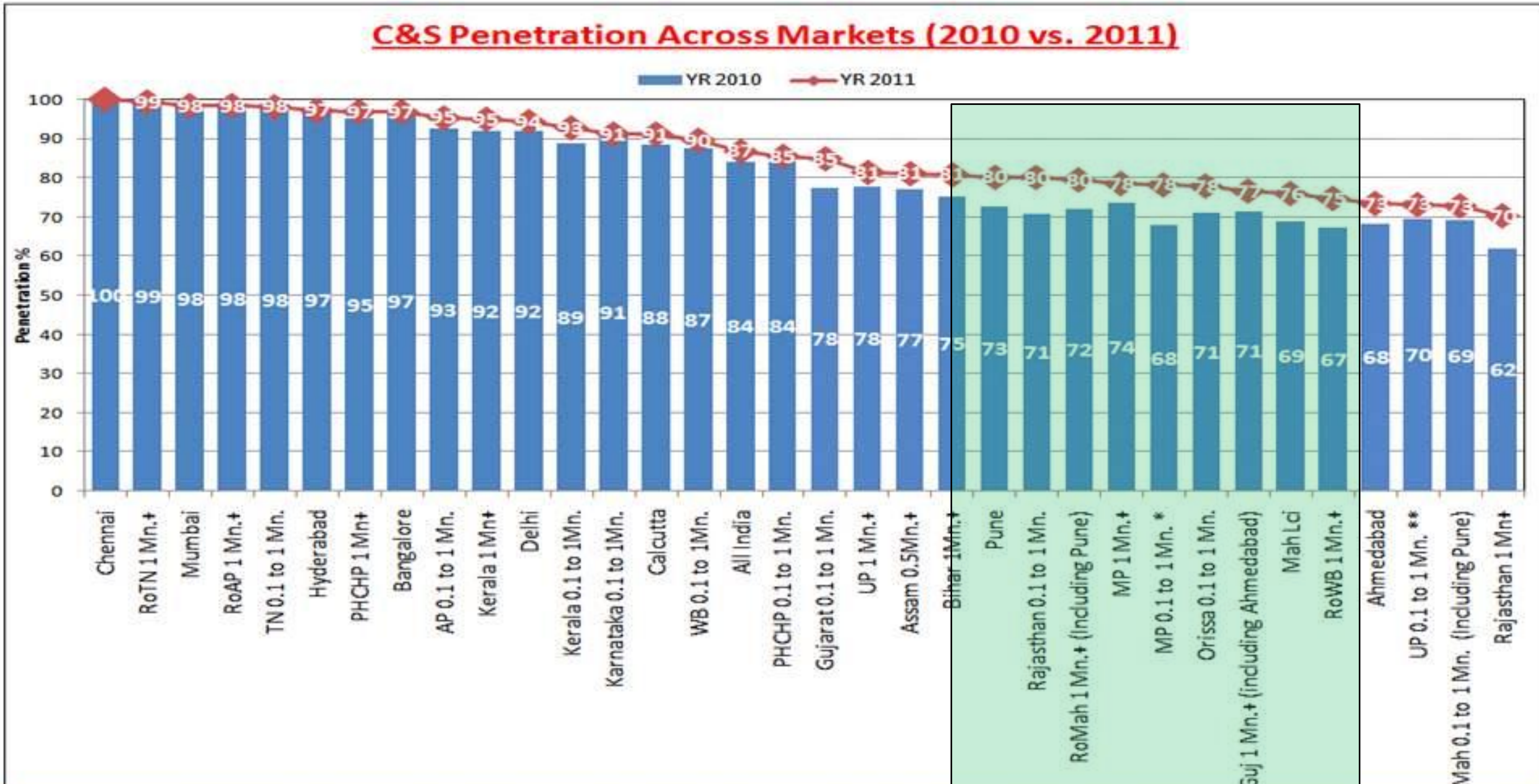
TV/CS/Digital penetration

With increases across markets, TV penetration at All India increased by 3%, significant increase witnessed in Assam .5Mn+(8%) …



Source: TAM + IMRB + Nielsen Baseline Study Market: Urban 1lac+ & Mah LC1 Period: Nov-Dec 2009 + Nov –DEC 2010

Though at All India Level C&S growth is 3%,but Markets like Gujrat, MP, Rajasthan & WB have observed a growth rate of over 6%



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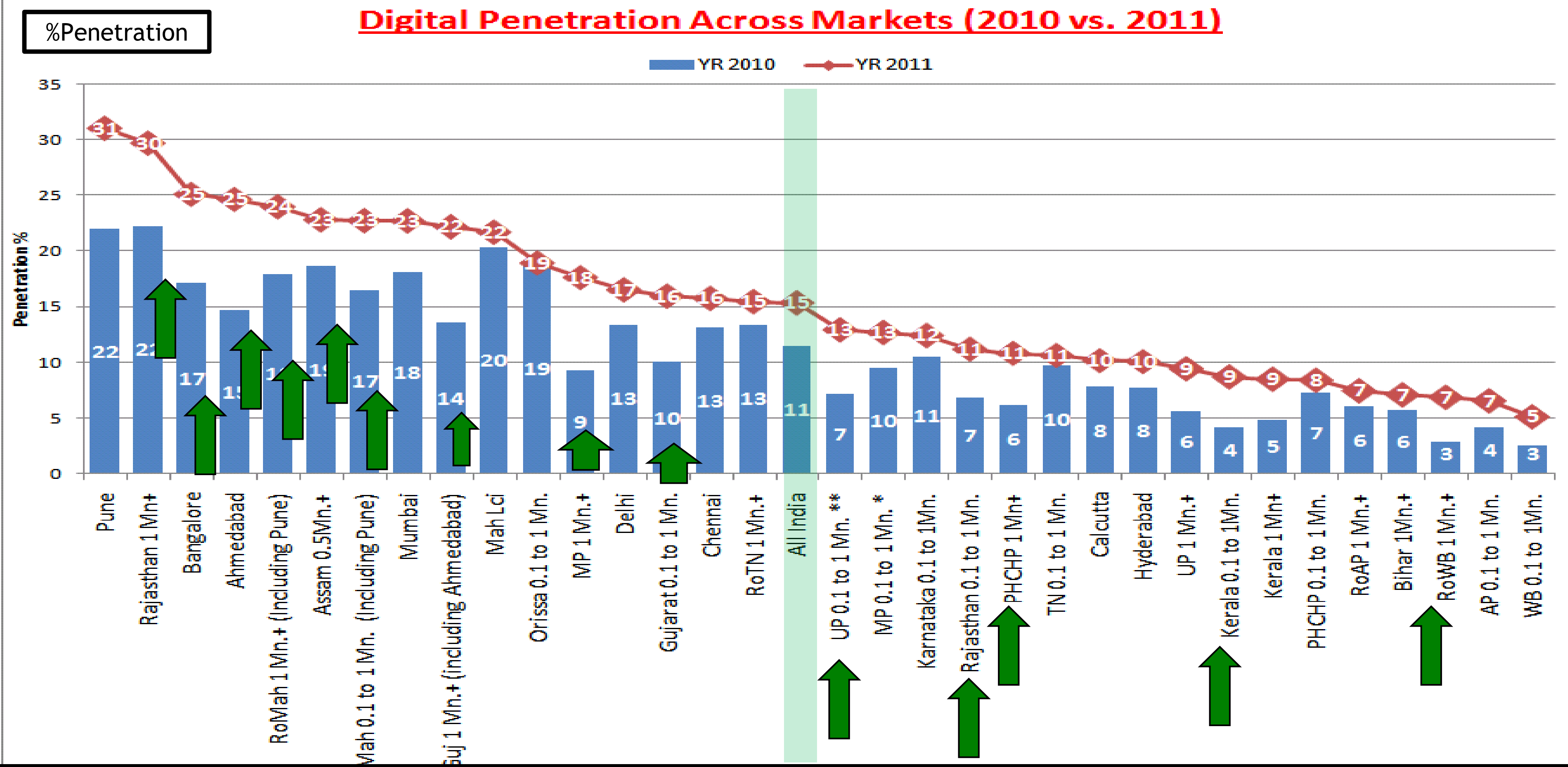
Growth in digital is driven by 1Mn+ markets and Metros



Source: TAM + IMRB + Nielsen Baseline Study Market: Urban 1lac+ & Mah LC1 Period: Nov-Dec 2009 + Nov –DEC 2010

Change in Demographic proportions - SECs

Digital

1 Mn+ Strata has witnessed a significant Digital growth at SEC CDE level, Growth rate for Metros is more across SECs …

Demographic composition on Digital platform						
Markets	Year	SEC A	SEC B	SEC C	SEC DE	Total
6 Metros	2009	2.5	2.2	1.3	1.2	7.3
	2010	3.0	2.7	1.7	1.5	8.9
	2011	4.0	3.5	2.4	2.4	12.3
	Growth% 2009 Vs 2010	20.5%	19.0%	32.8%	26.9%	22.3%
	Growth% 2010 Vs 2011	35.3%	31.2%	40.1%	55.8%	38.5%
Rest of States 1 Mn+	2009	0.8	0.7	0.5	0.5	2.6
	2010	1.5	1.2	0.8	1.0	4.4
	2011	2.1	1.9	1.5	2.1	7.7
	Growth% 2009 Vs 2010	78.5%	62.2%	52.3%	105.6%	73.6%
	Growth% 2010 Vs 2011	42.3%	60.8%	99.0%	114.0%	73.1%
0.1-1Mn + Mah LC1	2009	0.7	0.9	0.8	1.1	3.5
	2010	1.5	1.8	1.6	2.1	7.1
	2011	2.0	2.9	2.6	3.3	10.7
	Growth% 2009 Vs 2010	103.0%	114.5%	98.6%	98.0%	103.3%
	Growth% 2010 Vs 2011	34.5%	56.0%	57.5%	52.1%	50.7%
All India	2009	4.0	3.8	2.6	2.8	13.2
	2010	5.9	5.7	4.1	4.7	20.4
	2011	7.8	7.9	6.1	7.2	29.1
	Growth% 2009 Vs 2010	47.3%	48.6%	57.3%	68.1%	54.0%
	Growth% 2010 Vs 2011	32.2%	37.8%	49.7%	55.4%	42.6%

Source: TAM + IMRB Baseline Study   Market: All India Urban Class 1 + Mah LC1   Period: Nov- Dec 2010

All Figure are Individuals in millions

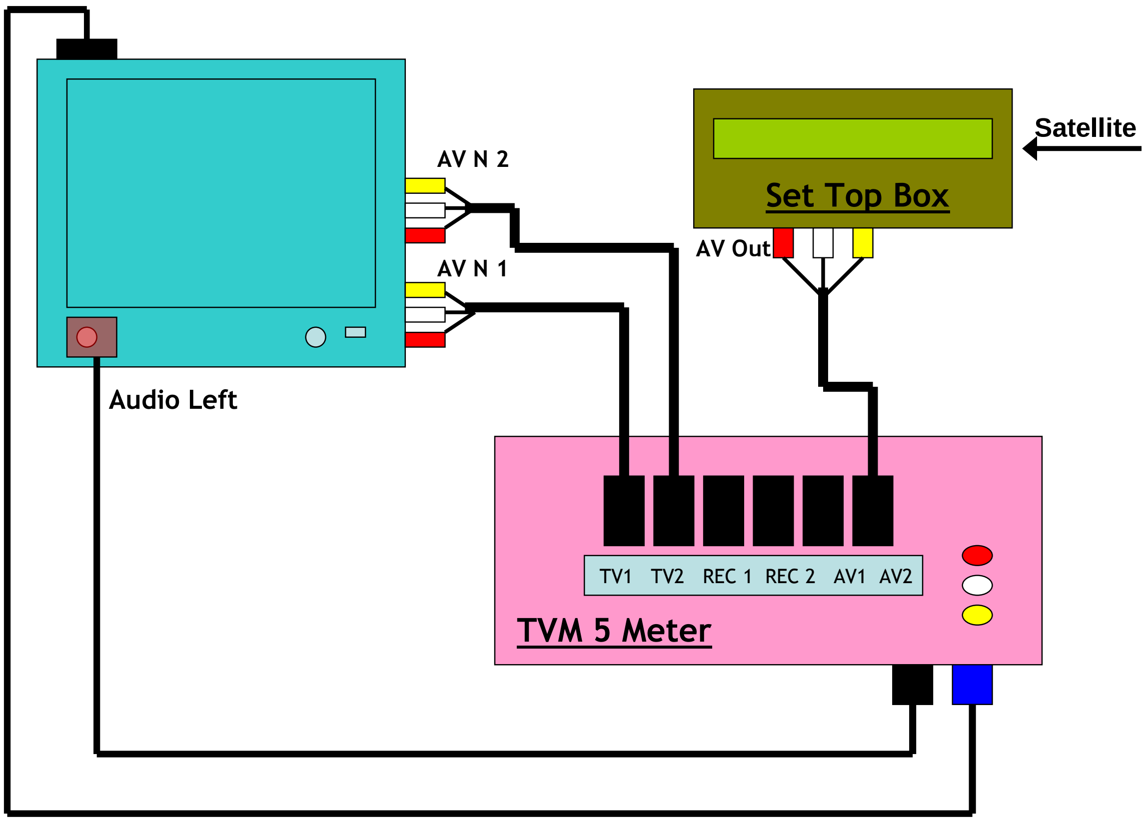
In Sum…

- C&S at All India level is currently 116 million Hhlds ,Digital Hhlds (26 Mn) have grown @ 31%.
- TV, C&S and Digital grew by 7%,11% and 50% respectively in TAM reported markets
- All India Digital penetration is 15% in TAM reported markets
- Growth in TV, C&S and Digital has come primarily from 1 Mn+ markets

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 2010 & 2011, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2011.

(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 2010 to 15th Jan 2011, you will need to gather R&F for the period 15th - 25th Dec 2010 (up to week 52, the last week of 2010) & 26th Dec 2010 (from week 1, the first week of 2011) - 15th Jan 2011 individually)

Implications for TAM Software Users

If you are a..

-<u>Broadcaster –</u>

(i) The TRPs & GRPs will not be exactly comparable over 2010 & 2011, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2011.

(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 2010 to 15th Jan 2011, you will need to gather R&F for the period 15th - 25th Dec 2010 (up to week 52, the last week of 2010) & 26th Dec 2010 (from week 1, the first week of 2011) - 15th Jan 2011 individually)

For Digital estimates of 2007, 2008, 2009 and 2010 please check Blink I & II presentations and India Peoplemeter Updates on www.tamindia.com

Thank You.