TAM Annual Universe Update – 2015

TAM Annual Universe Update - 2015

- 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
  - Growth in Digital penetration
  - 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 2015

- 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 2015
- TAM Base line study conducted in Oct - Nov 2014 to establish latest demographic proportions and Universe changes
- The 9th 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
  - DES IX: Field work: Oct-Nov 2014; utilized for 2015 universe update
- Sample size of over 75,000 face-to-face interviews.
- Conducted across Urban and Rural India

Methodology: An example

Week 1, 2014

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

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

Week 1, 2015

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

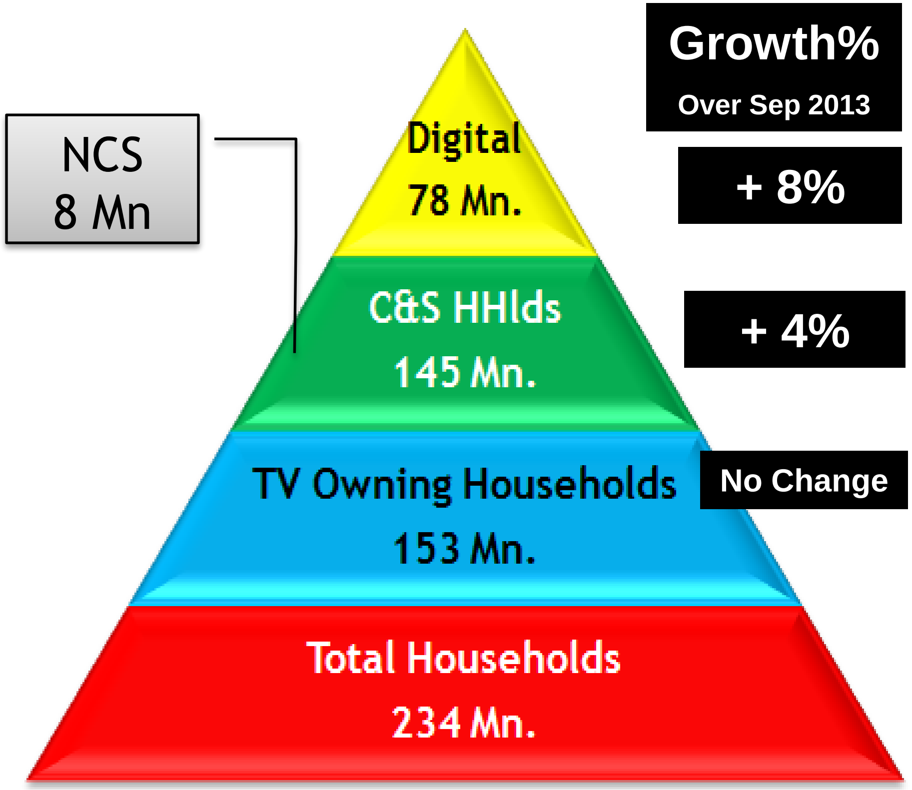
Step 2: Estimate demographic proportions from Establishment Survey

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

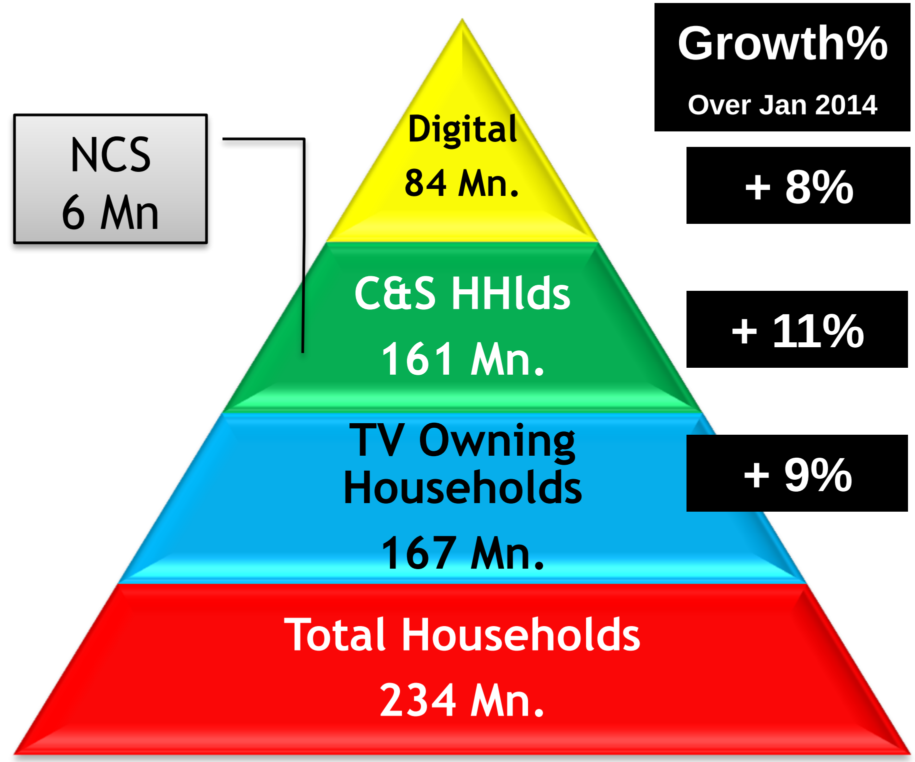
India at a Glance

(Urban & Rural)



Jan 2014

All India Household figures in Millions

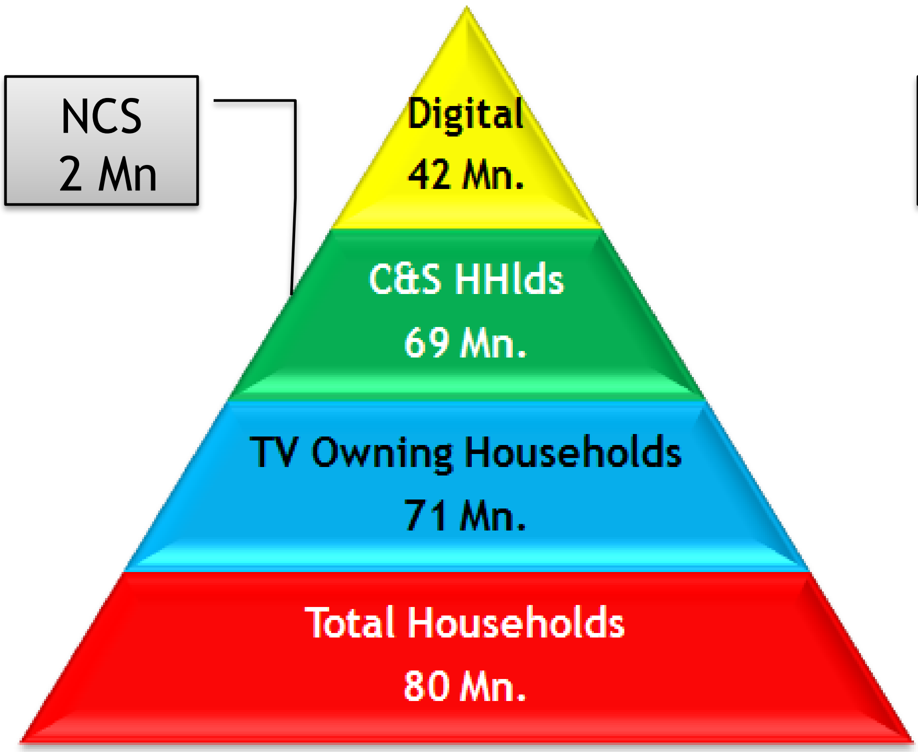


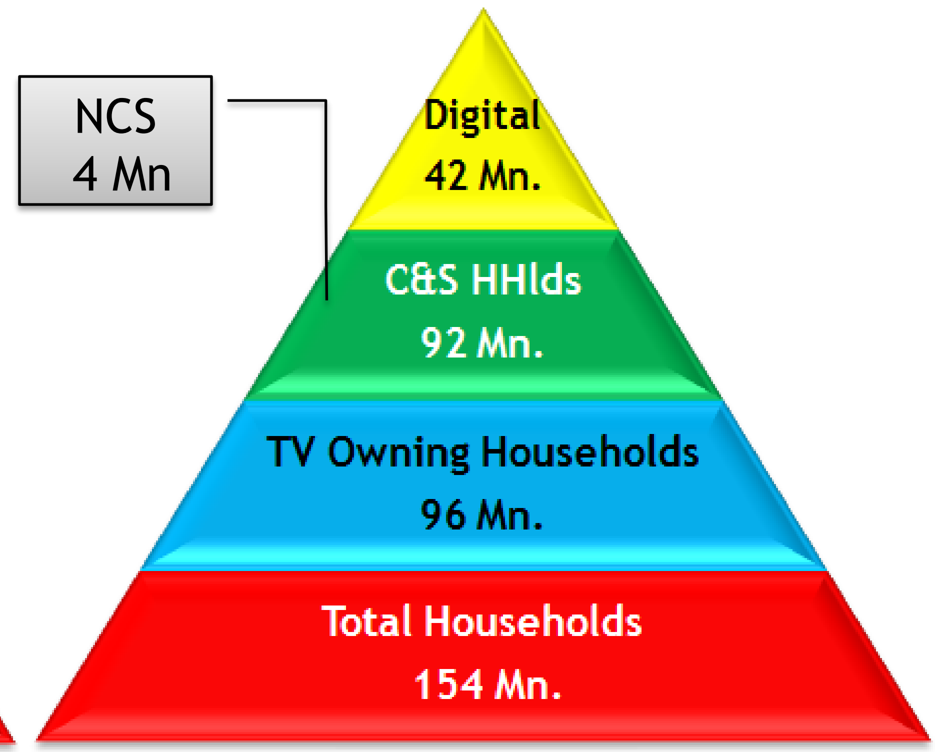
Jan 2015

All India Household figures in Millions

The Urban & Rural Divide…

Urban Vs Rural 2015





Urban- 2015

Household figures in Millions

Rural -2015

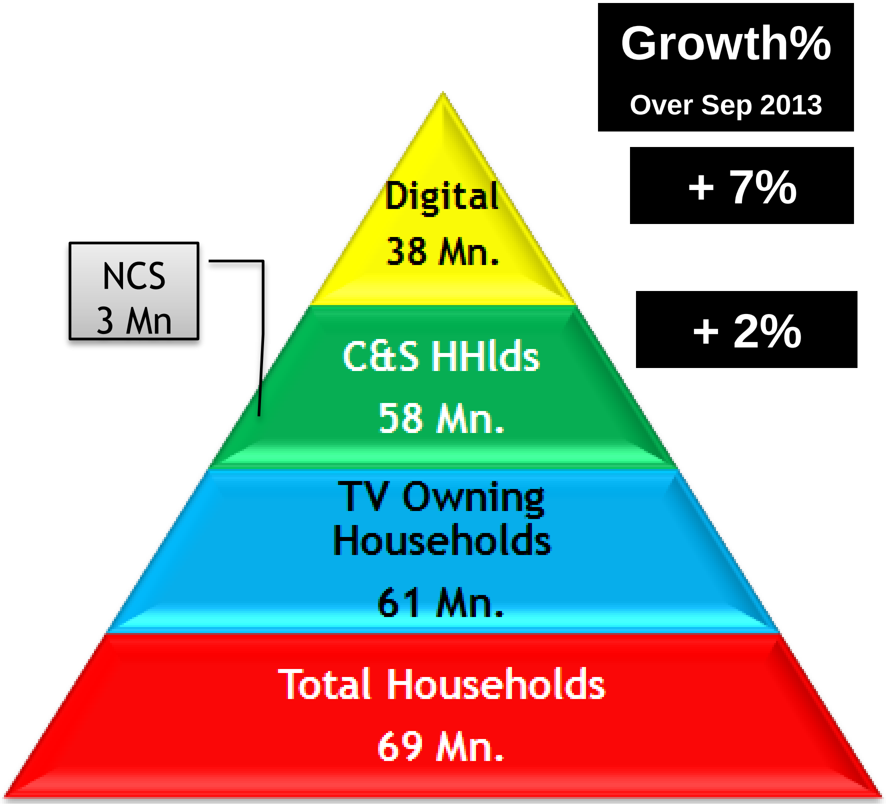
Household figures in Millions

Universes in "TAM Surveyed Markets*"

2014 Vs 2015

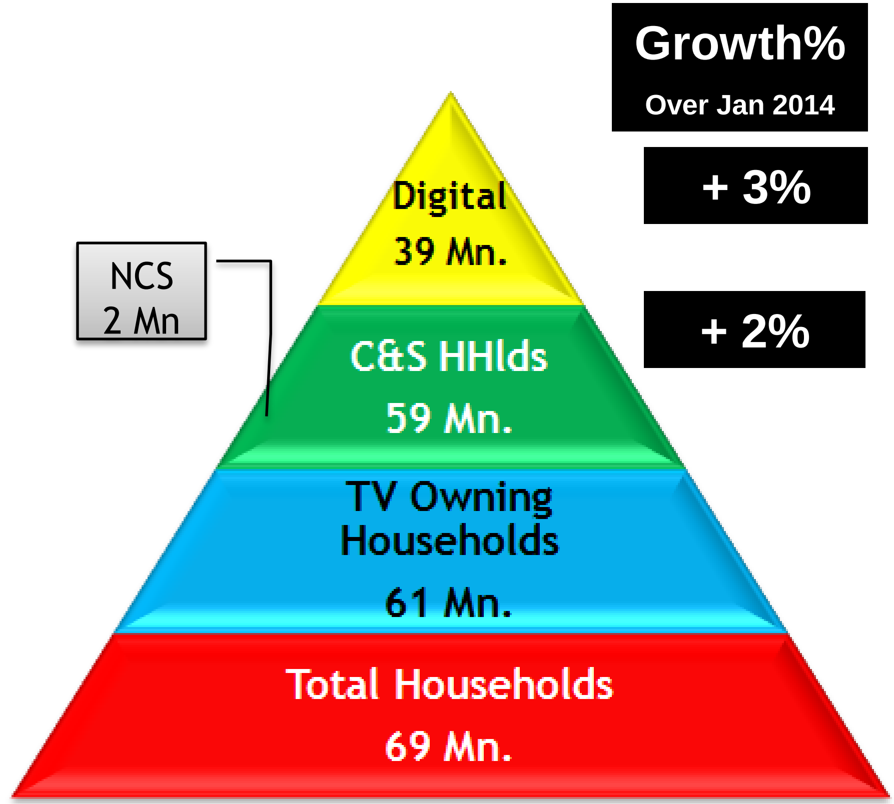
(*Urban Class I + Mah, UP, MP, Guj, Raj, PHCHP LC1 excluding J&K and North Eastern States)

TAM Coverage at a Glance



Jan 2014

All India Hhld figures in Mn.



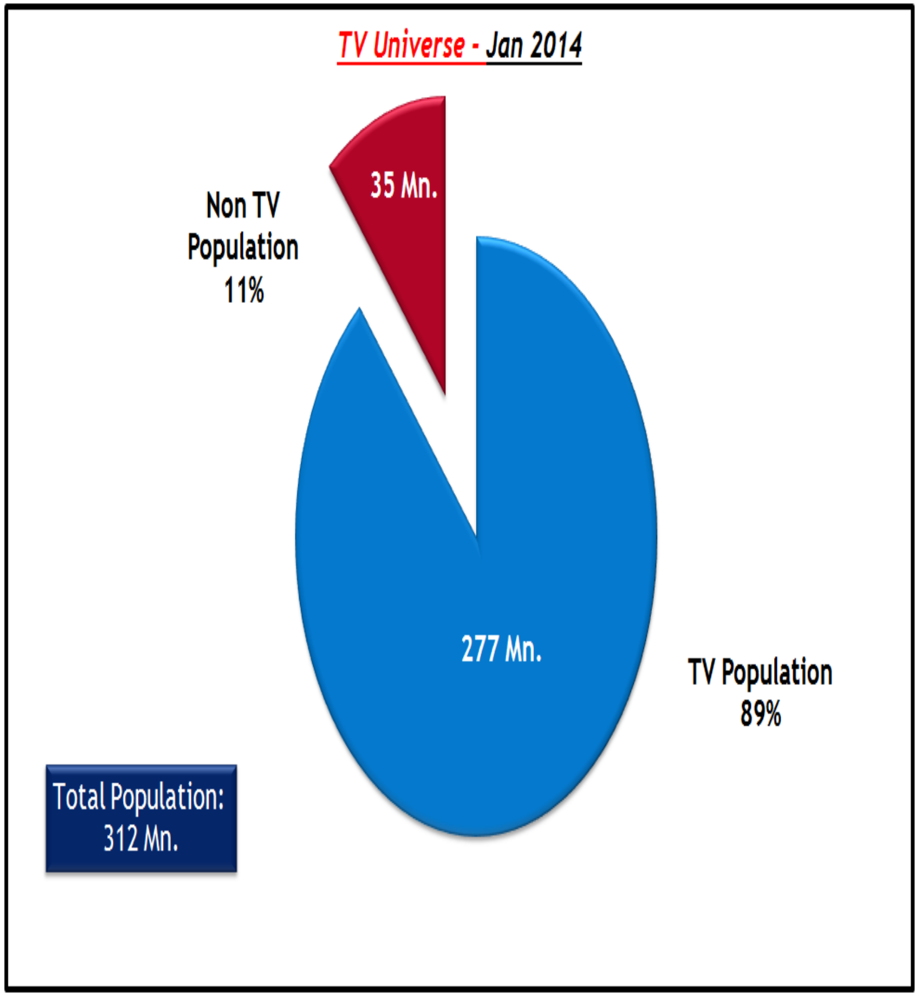
Jan 2015

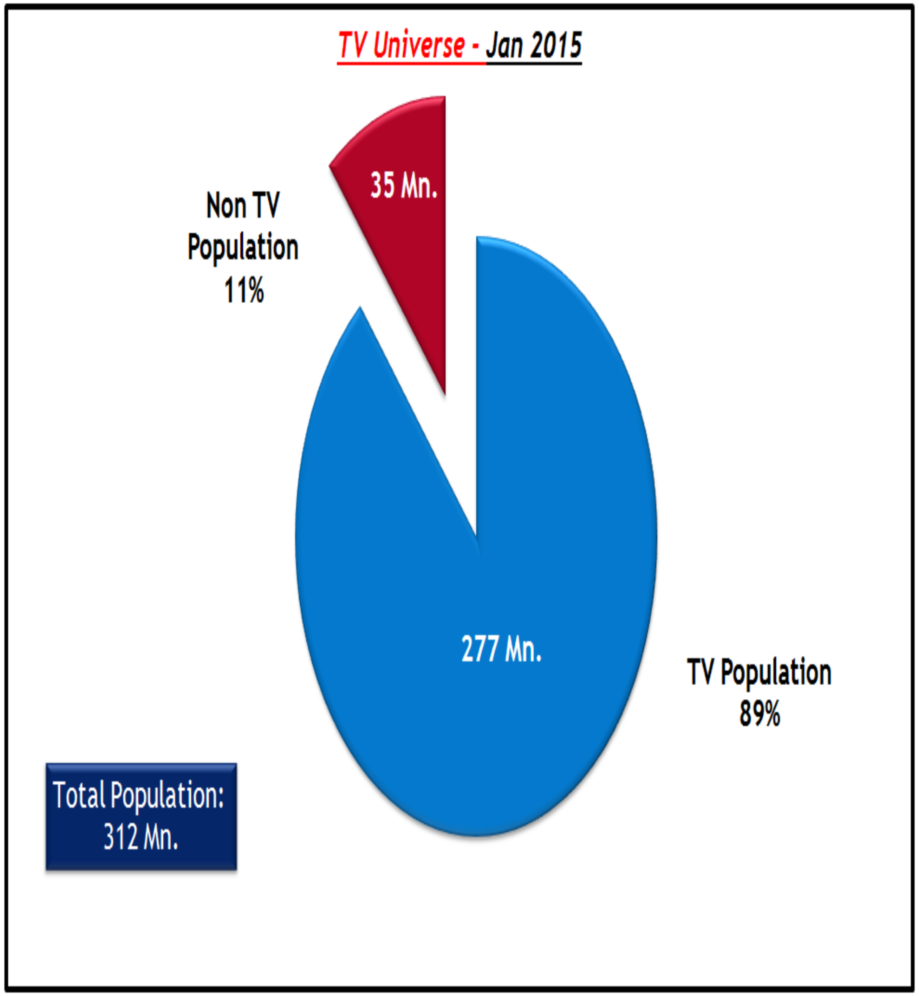
All India Hhld figures in Mn.

TV Universe 2015

TAM Markets – Individuals (in Millions)

Total Population and TV population has not witnessed any change.

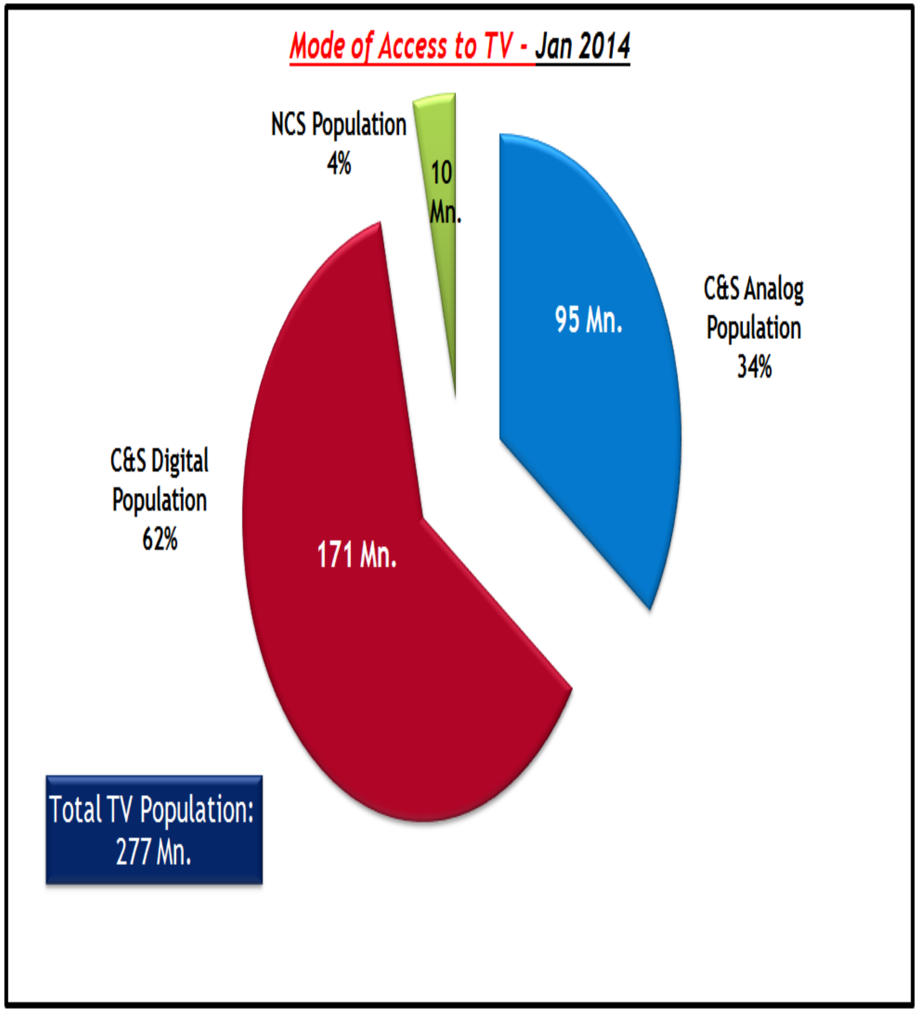


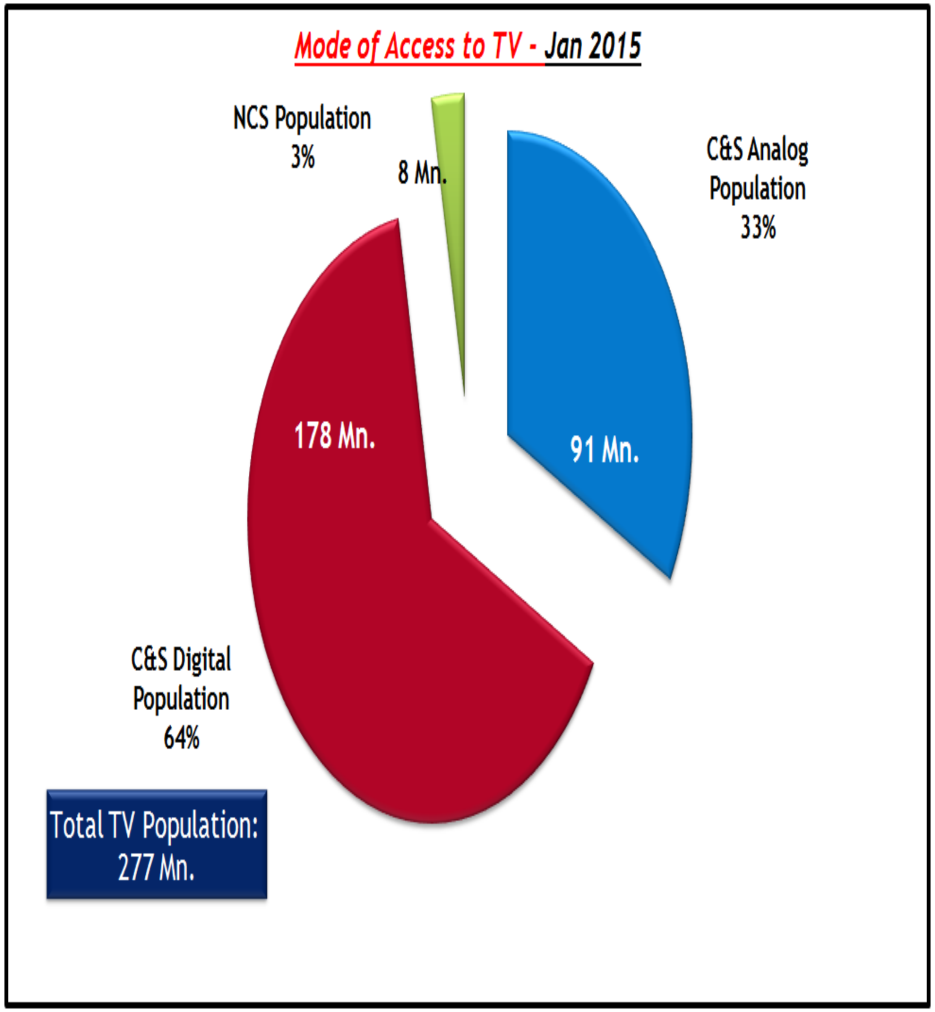


All Figure are Individuals in millions

Mode of TV Access – Proportions across Platforms

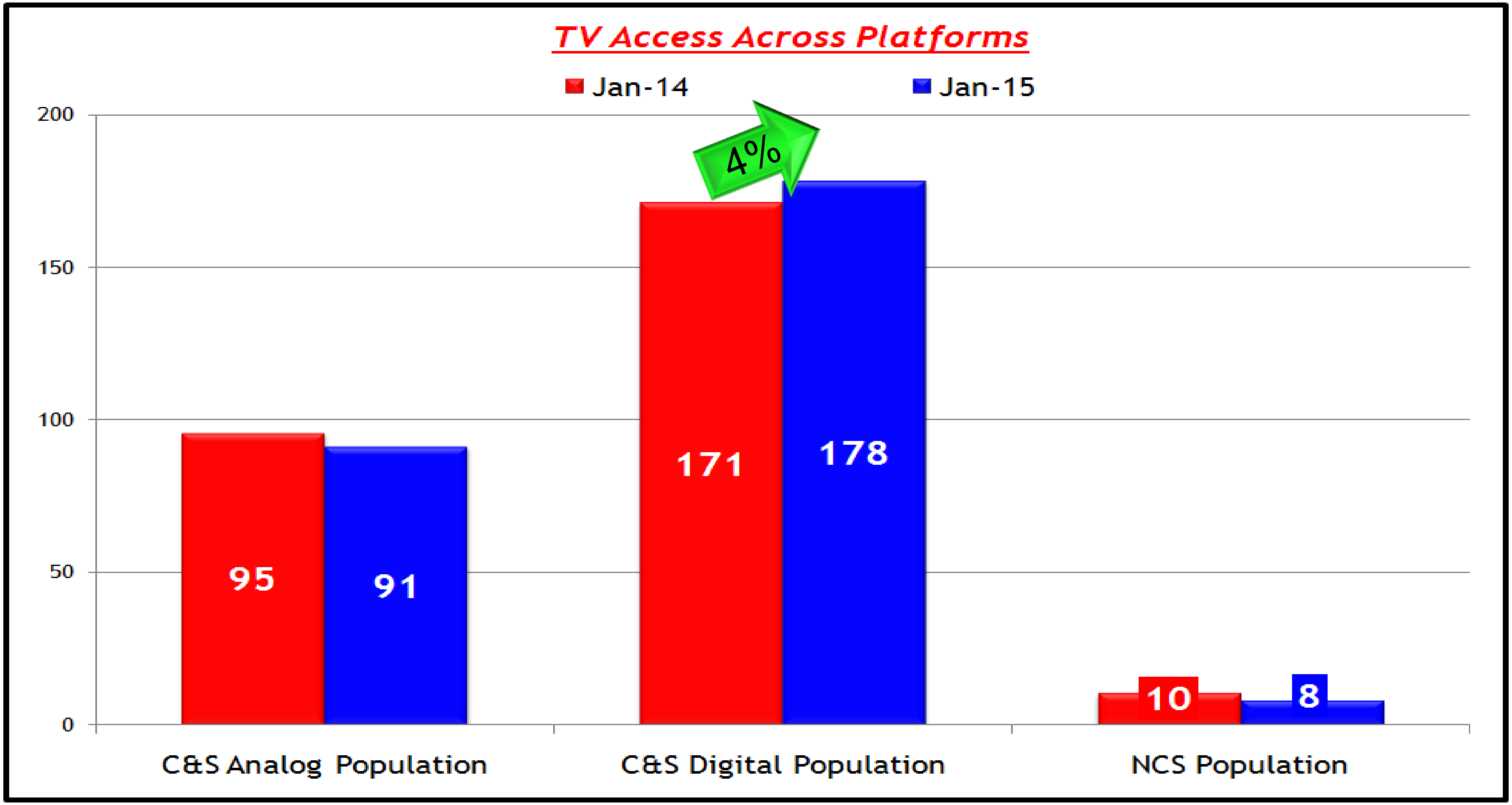
The migration from NCS & Analog has led to the growth in Digital population.





148 Mn

Digital Population witnessed a 4% growth with the other platforms witnessing a drop.



All Figure are Individuals in millions

Universes Across Pop-Strata…

C&S and Digital

0.1 to 1Mn. markets witnessed a 12% growth on the Digital platform.

Pop Strata	Cable & Satellite		Growth%	Digital		Growth%
	Jan 2014 (in Millions)	Jan 2015 (in Millions)		Jan 2014 (in Millions)	Jan 2015 (in Millions)	
6 Metros	73	74	0.5	66	67	1.3
Rest of State 1 Mn.+	54	54	1.7	49	50	2.4
0.1-1 Mn. & 0.5 Mn.+	87	88	1.5	33	37	11.9
LC1	52	53	0.5	23	25	6.1
All India TAM Surveyed	**266**	**269**	**1.0**	**171**	**178**	**4.3**

All Figure are Individuals in millions

Growth at State level…

Kerala 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-15	Jan-14	Jan-15		Jan-14	Jan-15	
Uttar Pradesh	42.0	39.6	40.1	1.2	25.2	26.6	5.2
Delhi	19.2	18.8	19.0	1.0	18.8	19.0	1.0
Ro Maharashtra	29.3	28.0	28.3	1.2	18.7	19.4	3.6
Mumbai	19.3	19.2	19.2	0.0	18.2	18.4	1.3
Gujarat	22.8	21.5	21.9	1.8	15.2	15.9	4.1
PHCHP	21.3	20.9	21.1	1.0	13.1	14.3	8.3
Calcutta	13.5	13.1	13.2	0.8	13.1	13.2	0.8
Madhya Pradesh	19.0	17.5	17.9	1.9	8.9	9.1	2.5
Rajasthan	15.8	15.0	15.2	1.7	7.9	8.3	5.1
Bangalore	7.3	7.3	7.3	0.0	7.3	7.3	0.0
Hyderabad	7.3	7.2	7.2	0.7	5.8	5.9	2.0
Chennai	7.7	7.7	7.7	0.0	3.3	3.5	6.3
Ro Andhra Pradesh	10.4	10.3	10.3	0.3	2.7	2.9	7.5
Karnataka 0.1-1 Mn.	7.3	7.0	7.1	1.0	2.5	2.6	5.4
Kerala	5.6	5.5	5.5	0.1	2.1	3.2	33.4
Bihar 1 Mn.+	2.2	2.0	2.0	2.2	2.0	2.0	2.2
Ro Tamil Nadu	9.8	9.8	9.8	0.0	1.4	1.4	0.3
Jharkhand 0.5 Mn.+	3.5	3.2	3.2	1.3	1.2	1.4	18.5
Orissa 0.1-1 Mn.	3.4	3.1	3.2	2.4	0.9	1.0	4.3
Ro West Bengal	5.6	5.4	5.4	0.6	0.7	0.8	10.3
Assam 0.5 Mn.+	1.0	1.0	1.0	1.7	0.4	0.4	1.6
Chattisgarh 0.1 to 1 Mn.	3.4	3.2	3.3	2.5	1.4	1.5	3.6
All India TAM Surveyed	**277**	**266**	**269**	**1.0**	**171**	**178**	**4.3**

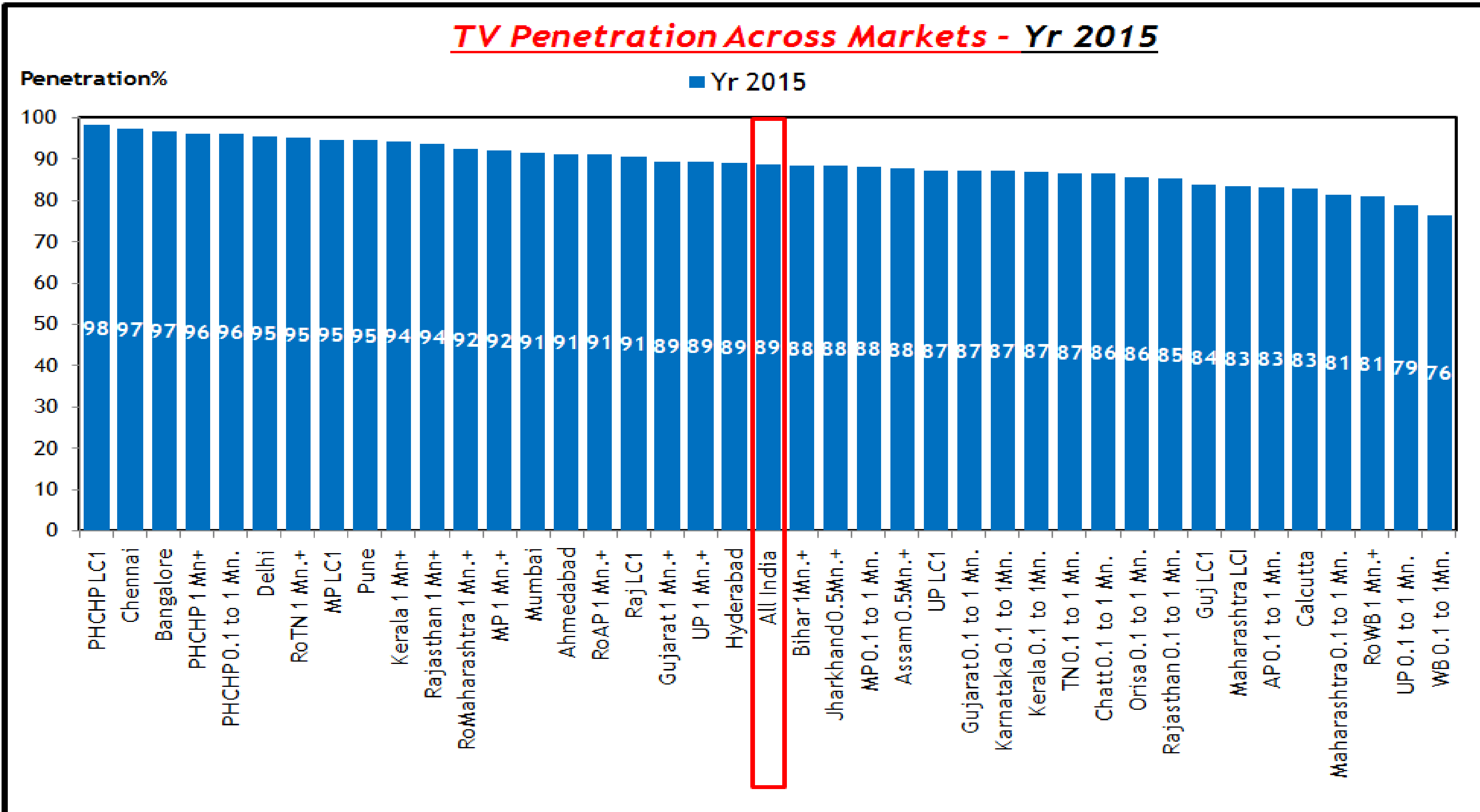
All Figures are Individuals in millions

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

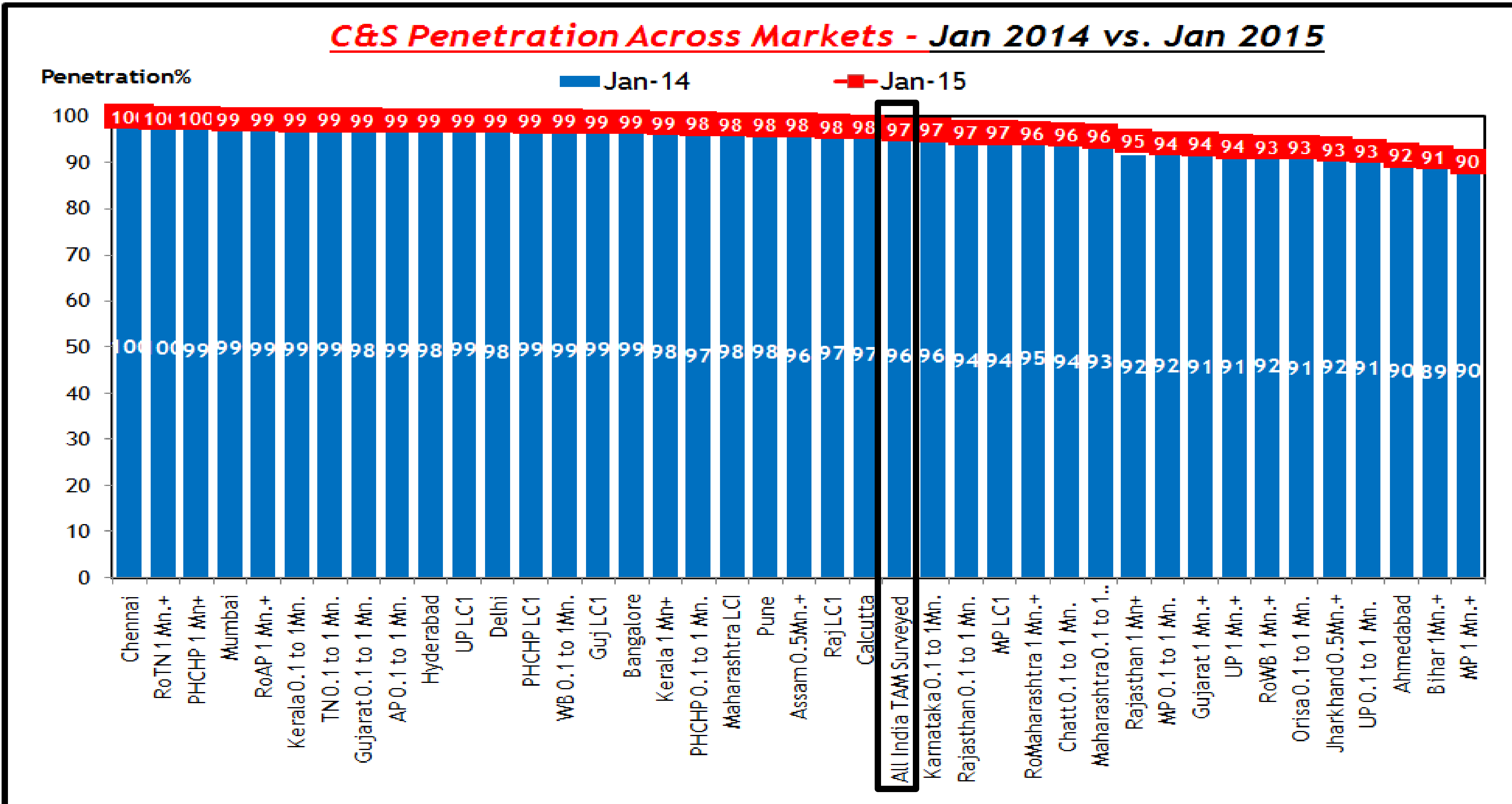
How is the growth across individual markets?

TV/CS/Digital penetration

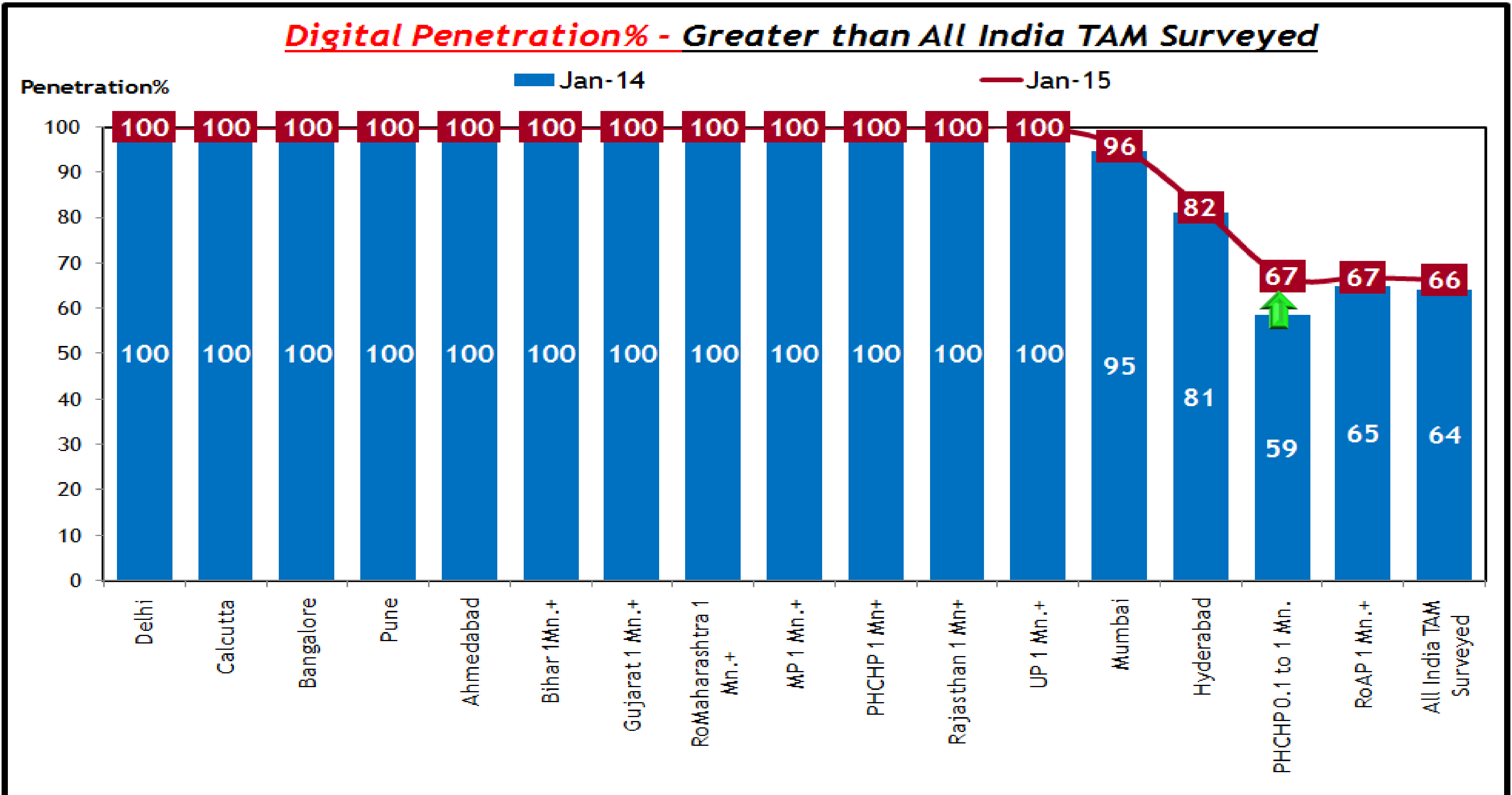
TV penetration at All India Level



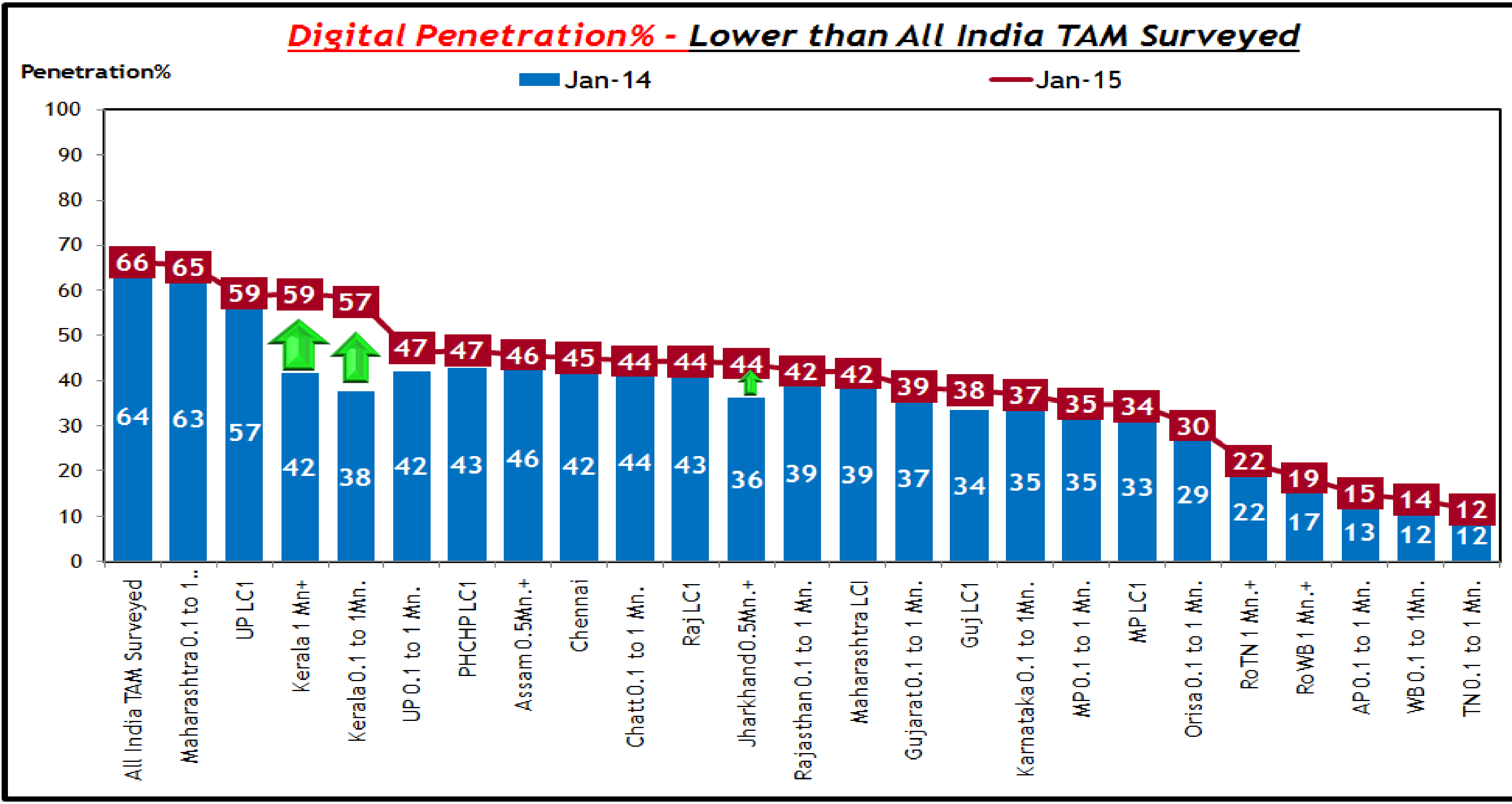
All the Markets have witnessed a growth with even the least penetrated market having a 90% C&S penetration.



PHCHP 0.1 to 1Mn. market saw a significant growth in Digital Penetration in 2015.



Kerala & Jharkhand 0.5Mn+ markets have witnessed a significant growth in Digital penetration.



Change in Demographic proportions - SECs

Digital

0.1 to 1Mn markets have witnessed a significant growth in the Digital universe for SEC CDE.

Demographic Composition on Digital Platform						
Market	Year	SEC A	SEC B	SEC C	SEC DE	Total
6 Metros	Jan-14	14.8	16.5	14.4	20.7	66.4
	Jan-15	14.9	16.6	14.8	21.0	67.3
	Growth%	0.2	0.5	2.8	1.6	1.3
Rest of States 1 Mn.+	Jan-14	10.5	11.9	10.6	15.4	48.5
	Jan-15	10.6	12.2	10.9	16.0	49.7
	Growth%	1.1	2.1	2.6	3.5	2.4
0.1-1 Mn. & 0.5 Mn.+	Jan-14	5.5	8.3	7.6	11.3	32.7
	Jan-15	6.0	9.2	8.7	12.7	36.6
	Growth%	9.1	11.0	14.0	12.4	11.9
LC1	Jan-14	2.4	5.1	5.5	10.2	23.2
	Jan-15	2.5	5.4	5.7	11.0	24.6
	Growth%	4.3	6.8	3.7	7.6	6.1
All India TAM Surveyed	Jan-14	33.3	41.8	38.1	57.6	170.8
	Jan-15	34.0	43.4	40.0	60.7	178.1
	Growth%	2.3	3.8	5.1	5.3	4.3

All Figures are Individuals in millions

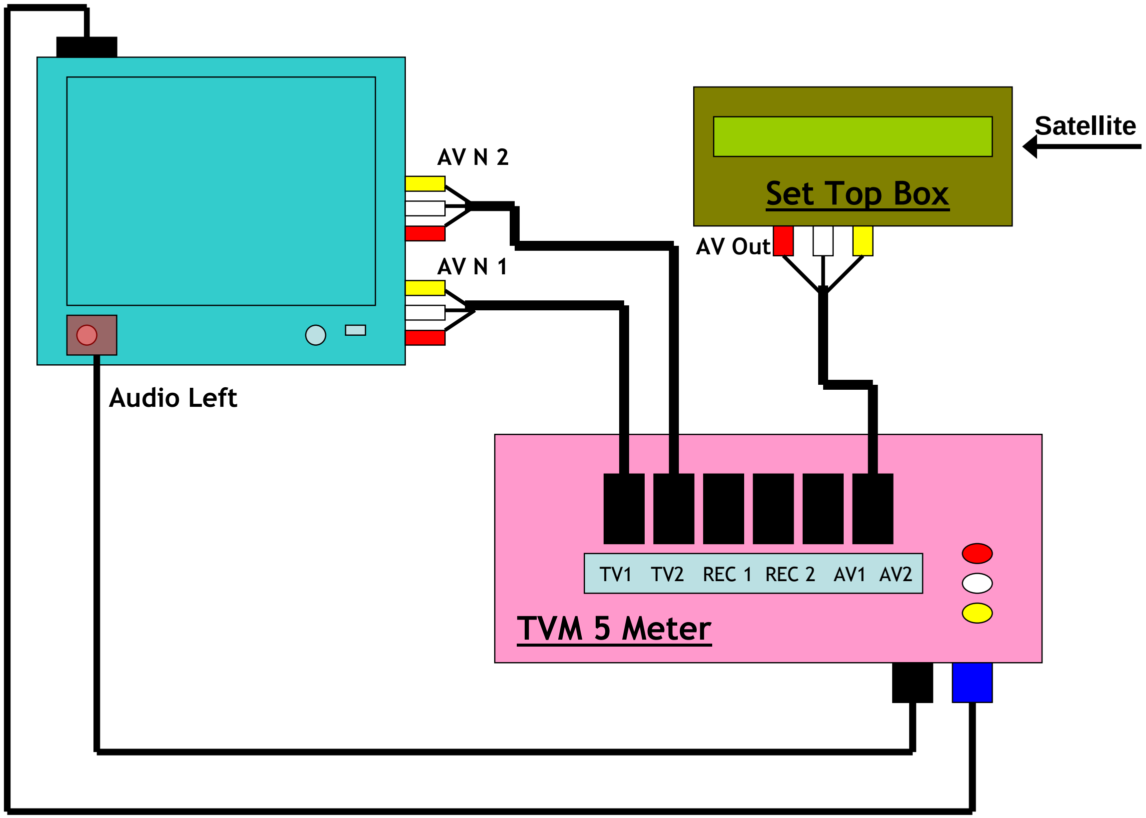
In Sum…

- *C&S at All India level is currently 161 million Households having grown @ 11% over Jan, 2014. Digital Households (84 Mn.) have grown @ 8% while Terrestrial Households have witnessed a drop.*
- *C&S penetration has witnessed a growth across all TAM reported markets with growth being highest in Rajasthan, UP (1Mn+ & .1 to 1Mn) & MP LCI.*
- *Digital population grew by **4% in Jan 2015 over Jan 2014** in TAM reported markets with maximum growth observed in 0.1 to 1Mn & LCI markets.*
- *All India Digital penetration is **66%** in TAM reported markets in Jan, 2015.*
- *Kerala market witnessed the highest growth in Digital penetration.*
- *0.1 to 1Mn. Markets have witnessed a significant growth in the Digital universe for SEC CDE.*

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 2014 & 2015, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2015.

(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 2014 to 15th Jan 2015,

you will need to gather R&F for the period 15th - 27th Dec 2014 (up to week 52, the last week of 2014) & 28th Dec -2014(from week 1, the first week of 2015) - 15th Jan 2015 individually)

Implications for TAM Software Users

If you are a..

-Broadcaster –

(i) The TRPs & GRPs will not be exactly comparable over 2014 & 2015, since TRPs/GRPs are %age values & the base (universe) is being updated in January 2015.

(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 a 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 2014 to 15th Jan 2015, you will need to gather R&F for the period 15th - 27th Dec 2014 (up to week 52, the last week of 2014) & 28th Dec -2014(from week 1, the first week of 2015) - 15th Jan 2015 individually)

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For Digital Estimates and India Peoplemeter Updates go to www.tamindia.com

Thank You.