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Innovation at work
The World Of 3nity



Thomas Puliyeel
President IMRB International

Does anybody worry about Quality of data?

With pressures on time, both clients and agencies are focusing on delivery of results. Quality data is at times sacrificed at the altar of the clock. This cavalier attitude results in chasing impossible deadlines, initiating work without adequate pretesting or piloting of a questionnaire, perfunctory field briefing sessions and superficial quality checks.

It's time we focused on basics. Whether as the research agency's management or clients, we need to ask some hard questions: are we compensating our field freelance professionals enough for their work, are they fully trained on sampling methods and the random walk method, do they have the skill to establish rapport with the respondent?

Let's just take two recent initiatives that our field unit, Abacus, has taken. As a company we have decided that except in the most exceptional circumstances we will not have interviews in excess of 45 minutes. A smaller questionnaire helps in retaining respondents' attention to the end of the interview, getting better data, and ensuring a greater likelihood of respondents participating in research surveys in the future. So Clients, if you see our researchers pushing back strongly on questionnaire coverage, this is primarily to help in getting much better quality of data. And the insights and our recommendations would be the better for it.

Another bold step that we have taken is to do a step change in our payments to freelance professionals who do fieldwork. We need to attract the right talent for this difficult task, and it is clear that in today's growing economy there are several job opportunities which attract the same kind of talent. This year we are also taking up with renewed vigour the task of certifying many of our experienced interviewing pool through the Interviewer Quality Assessment programme of the MRSI.

If you would like to know about these and other initiatives that we are taking to ensure good robust data – how we try to eliminate 'professional' respondents, how we reach difficult target groups – write or call Nikhil Rawal (nikhil.rawal@imrbint.com). We would love to hear from you.

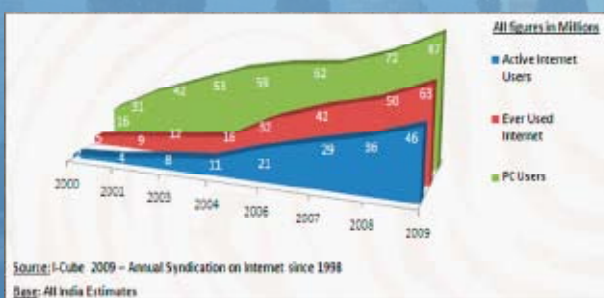
Internet Works!

IMRB



Internet Usage Rising in India

Internet is beginning to reach the masses in India. It is no more a niche medium that is exclusive to a certain category of individuals. It has reached different parts of the country and has effectively brought people from various demographics together. In fact, as per latest findings of ICube 2009, IMRB's annual syndication on Internet usage in India, 41% of Internet users belonged to non-metros and small towns. In addition, 28% of all Internet users belonged to SEC C/D/E i.e. typically people belonging to lower income groups. Overall, as per ICube 2009, there were about 63 million people that have experienced (ever used) the Internet in India. Among these claimed Internet users, there were about 46 million active Internet users. An active Internet user denotes a person who has used the Internet in the last one month.



Need for Web Audience Measurement

The digital advertising medium comprises of advertisers, publishers and media agencies. These entities collaborate with one another and help placement of advertisements for the advertiser. However each entity has its own preferred currency for measuring internet traffic. This builds in a whole lot of confusion amongst the advertisers for they have to learn a new set of definitions altogether, and also rely on what the media owners tell them in terms of what is good for their brands. Therefore, there clearly is a need for a common currency for advertisers, publishers and media agencies which would be independent of one another and serve the collective need of audience measurement.

IMRB's web audience measurement service, WAM will help solve just that. The panel based system is capable of capturing audience data across multiple browsers (IE, Chrome and Firefox) and messengers (Yahoo! Messenger, Windows Live and Google Talk). The system also captures data across Internet

access points including Cyber Cafes, Homes and Offices. The data captured from the system is projected to the audience universe determined by the industry acceptable I-Cube research.

Key Features / Metrics

WAM introduces a revolutionary concept in audience measurement entitled Web Rating Points (Web RPs), coined in much the way as TRPs are for television. With WRPs, advertisers and media agencies will accurately know the time spent on a given website, as well as the number of people visiting a website in a given time frame. Apart from a common currency for each of the types of media, it is also pertinent to have comparable measures that can be fused together. This fusion will enable advertisers and planners to accurately arrive at the returns that they can expect by investing their monies in different media. Also, as part of the 'Trends' module, WAM will provide other insightful information like 'Exposures', 'Pageviews', 'Dayparts Analysis', 'Reach', 'Time Spent' etc. In fact, daypart analysis will allow various stakeholders to know the type of visitors visiting a website for a customizable time period on any given day.

In addition to 'Trends', WAM consists of two other modules, 'Planning' and 'Advanced'. The Planning module includes functionalities like Pre-Plan and Post-Plan campaign analysis, allowing advertisers and their respective media agencies to plan a campaign effectively.

The 'Advanced' module consists of features like 'Duplicate Viewing' using which one can find the overlap of Internet users between the selected channels. For example, if one needs to know for a given time period and a given target group, how many Facebook users were also on Orkut, one can use Duplicate viewing analysis to find the same.





IMRB WAM

Also, as part of the 'Advanced' module, WAM offers a 'Gain/Loss' feature that helps one know the number of people gained (for a given channel/website) in the current month, as compared to the previous month. For example, if one needed to find the increase/decrease in number of people that timesofindia.com had in November 2010 as compared to October 2010, it will be possible using the Gain/Loss feature.

Methodology

The working of this system is comprised of various subsystems:

Panel Management and Software Meter - The methodology adopted for measuring online behavior is largely traditional in its characteristics. A panel of Internet users, who have agreed to provide their Internet usage data, has been formed. Every user in the panel has been provided with software to be installed on their machine. This software acts as a meter through which online behavior of every user is collected. The meter is capable of capturing internet usage data from multiple

Categorization Level	Details	Rational
Channel	news.yahoo.com	
Property	Yahoo! News	Yahoo! News is a property of Yahoo!
Group	Yahoo!	Yahoo! News is owned by Yahoo!
Property		
Category	News/Portal	Yahoo! News belongs to the News / Portal category

machines and still attribute to the same panelists. Further, the meter allows the flexibility of capturing only the panel member's data in case the machine is used by multiple users. As mentioned earlier, the meter can capture data from multiple browsers (all versions of IE, all versions of Chrome, Firefox, Yahoo! Messenger, Google Talk and MSN Messenger).

Data Categorization - The data collected through the software meter is organized under certain categories through an auto-categorization system. The categorization occurs at various levels. Due to detailed categorization, analysis and reports can be obtained at a granular level. The table, above, gives an example of how a particular URL (<http://news.yahoo.com>) is categorized.

Analysis and Reporting - The system which follows the traditional tenets of audience measurement has been piloted for over six months. The panel based approach adopted by the WAM system has been made possible due to a unique metering technology custom built for the Indian market. The data reporting is done through well established Media Xpress tool customized for the Internet market. The reporting tool called Web Xpress allows pre and post media planning, duplication analysis and profiling apart from the usual trending tools. The tool is also capable of reporting day level data and for that matter day part level data.

Some Interesting Findings by WAM

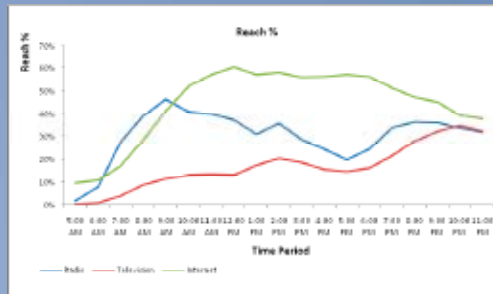
Reach % of Internet vs Television vs Radio

WAM reports how the Reach of Internet varies in comparison to the Reach of Television and of Radio. It is interesting to note that although the Reach of Radio builds very quickly, and in the earlier part of the day, the peak periods are short-lived. Similar is the case with television, where peak periods are relatively short-lived as compared to the Internet.

Internet Reach, on the other hand, steadily rises and maintains a certain level. In fact, as soon as Radio Reach arrives at a certain level, Internet Reach takes over and maintains a sustained level throughout the day. As per WAM's findings, the Internet reach exhibits a significant increase in the earlier part of the day, especially between

12 pm and 3 pm, after which the reach is observed at a stable level.

In other words, it will be increasingly advantageous for clients to advertise on the Internet, as they not only can target a desired audience but also maintain a sustained level of interest for various categories of Internet users. WAM with its various functionalities can play a pivotal role in understanding this complex Internet behavior.



Measuring Reach across Categories

Well, what could be the reason for this sustained level of Internet reach? WAM could answer this quandary. With WAM, we can note that 'Email' and 'Social Networking' were the two most used purposes of Internet usage. For October 2010, Reach % for Email was the most at 83% followed by 61% for Social Networking. People using the Internet for Email and Social Networking typically log in multiple times in a given day, partly explaining this sustained Reach. In addition, people often visit links posted by friends / colleagues that take them to other websites. In other words, there could be a multitude of reasons for Internet Reach to remain at a sustained level, something that could be figured using WAM.

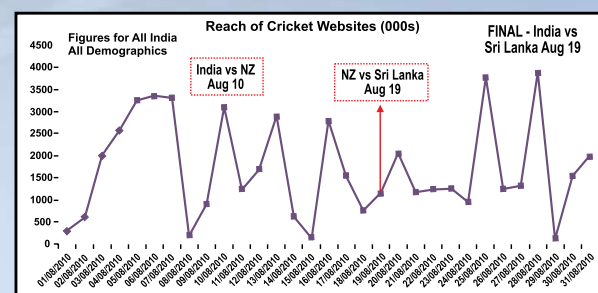
As per WAM, Cricket Reach for October 2010 was 14%. Although Cricket Reach is relatively small when compared with Email and Social Networking, it is interesting to understand how Reach of Cricket varies on a day to day basis.

With WAM, it is possible to accurately understand how Reach varies at different times during the day, especially when a cricket match is happening anywhere in the world.

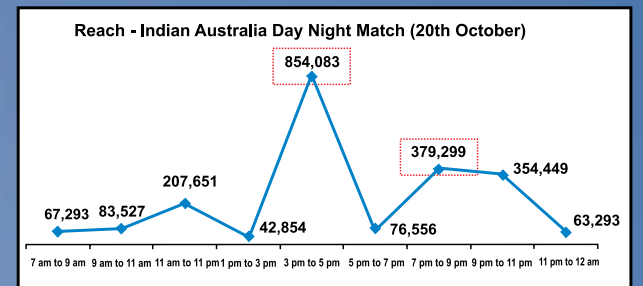
The examples elaborated further describe the unique functionalities that WAM offers through some interesting examples, based on Cricket matches that have happened in the recent past.

Measuring Cricket Reach

For the recently concluded India, Sri Lanka and New Zealand Cricket Tri Series in August 2010, WAM clearly depicts a change in Cricket website Reach on the match days. As seen below, the Reach for cricket websites on match days was much more than that on any other average day. In fact, it is interesting to note that Reach dropped from 3 million on August 10th when India played New Zealand, to 1.1 million people on 19th August when Sri Lanka played New Zealand. Clearly, people visit cricket websites to view scores or read articles, more



Source: WAM (August 2010 All Demographics All India)



Source: WAM (October 2010 All Demographics All India)

often when India plays. Reach of cricket websites was maximum at 3.8 million on August 28th 2010, when India played Sri Lanka in the Final match of the Tri Series.

WAM also describes how on a given match day, Reach varies during different times of the day. Using WAM's daypart analysis, the examples below explain how Reach varies depending on different times of the day. The example below is for a day night cricket game between India and Australia held on October 20th 2010 (Wednesday). As seen below, Reach is maximum for the time period 3 pm to 5 pm, followed by 7 pm to 9 pm.

Comparatively, if we consider 11th October 2010 (Monday), the 3rd day of the India Australia test match, Reach was quickly built in the earlier part of the day. As seen above, Reach was maximum at 1.5 million visitors between 3 to 5 pm again and was closely followed by the 1 pm to 3 pm time slot where it was 1.4 million. Reach build up

in the time period 1 pm to 3 pm is sudden as these are the lunch hours where people typically use the Internet for non-work related surfing.

WAM's ability to provide precise numbers for different parts of the day would be especially useful while planning an online media campaign that needs to effectively know at what time an advertisement should be placed, to fetch maximum clicks and visitors.

A Step towards Integrated Media Planning

With increasing importance of the Internet, WAM will bring various media together i.e. Internet, Television and Radio and help integrated media planning, which is the need of the hour. With the interactive nature of the Internet medium, advertisers could potentially build awareness using Television, Internet, Radio or other media forms, and track it with an Internet campaign to understand views of end users. Measurement of the campaign's effectiveness would be possible through various features that WAM offers.

WAM, with its high-end metering technology built with traditional tenets of market research, will therefore go a long way in improving online web measurement. Additionally, with its panel based approach, WAM promises a robust and a stable sample, which will accurately represent Internet users across India.

WAM will also solve the biggest issue seen with the web audience measurement i.e. the lack of a common currency. Web RPs (WRPs) will effectively provide a standard of measurement that will be acceptable to advertisers, media agencies and publishers alike.

To know more write to
balendu.shrivastava@imrbint.com

Happenings

IMRB International Launches Web Audience Measurement

Now the Internet can be measured. Not just on how many people access the net but also their profile by age, sex and demographics, which regions, and whether they do this on weekdays or weekends, at office, home or elsewhere. All this has been made possible by a new service launched by IMRB International, the pioneers in market research in India. Like its predecessors – TAM for TV and RAM for Radio – WAM for the Internet is based on a panel of people who have a unique metering device that is custom built for India.

Over the last decade, the Internet has seen exponential growth, from 25,000 users in 1998 when IMRB International released the first-ever data on Internet access, to 50 million active Internet users in 2009-10, as per the recent IMRB Survey, I-Cube 2009-10.

“We can now say that we are truly in the Age of the Internet” said Thomas Puliye, President, IMRB International. “With WAM we can fully realise the potential of the Internet as an advertising and marketing medium. We will be able to measure the effectiveness of the medium in terms of reach and frequency, just like any other medium.”



Panel Discussion Session (from left) L.V. Krishnan, Thomas Puliye, R Gowthaman, Sam Balsara and Nitin Mathur



Thomas Puliye during the Panel Discussion



R Gowthaman during the Panel Discussion



Nikhil Rawal addressing the delegates



Thomas Puliye, L.V. Krishnan, Sam Balsara and Nikhil Rawal, at the cocktail session after the launch



Delegates attending the WAM Launch



L.V. Krishnan moderating the Panel Discussion



Delegates during the WAM Launch



Dezma D'melo and Balendu Shrivastava, during the Dinner.

**IMRB
IMPRINT
Wins Gold**



Seema Saini Head Corporate Communications receiving the Gold for IMRB Imprint

We are glad to share with you that IMRB has won awards in the following categories in the 50th Annual Awards Nite of the Association of Business Communicators of India (ABCI).

IMRB IMPRINT - Category (Tabloids) GOLD

Mind & Unmind - Category (E-Zine) BRONZE

Would like to thank all our readers for all the cooperation and look forward to your continued support.

For information regarding this newsletter, email to imprint@imrbint.com or call on +91 22 24233213





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Twitter and beyond

Follow us on Twitter @imrbspeaks for the latest news, insights, research and much more from IMRB International.



Pre owned Car Market in India

– A syndicated initiative by TeamMoto, IMRB, Mumbai

- Pre-owned (used) car market in India was once completely dominated by the unorganized sector (unorganized sector means sources like car agents, brokers, friends, relatives, etc.) without any role played by the organized sector.
- Later, car manufacturers entered the pre-owned car market with the main objective of providing a one stop solution for car exchange and thereby supplement new car sales.
- Exchange programmes provided a platform for willing consumers to sell their old cars and buy a new car from the manufacturer
- This also helped further customer loyalty towards the brand/manufacturer.
- Today, manufacturer pre-owned showrooms offer buyers the choice of buying pre-owned cars with the assurance of quality, verified ownership and accident documentation and also add-ons such as warranty and free services. The assurance is that of reducing "risk" involved in buying a pre-owned car.

Car manufacturers have increasingly started recognizing the potential of their pre-owned car divisions as profit centres and it's contribution to the bottom line. Demand for certified pre-owned cars is witnessing high growth rate (25% to 30%). Increased consumer demand has resulted in better profit margins too.

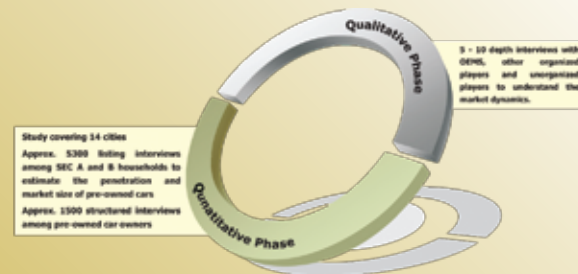
Apart from car manufacturers, independent multi brand outlets like Mahindra First Choice, Carnation Auto etc. are also expanding their network of pre owned car sales in India to capitalize on this opportunity.

The need for reliable market information:

Information on pre-owned car market in India is incomplete primarily due to the unorganized nature of the industry and lesser research focus till date.

The share of the organized sector in the pre owned car market has grown considerably in the last 5 years but is still on lower side (roughly in the range of 10% to 15%) compared to the size of the unorganized sector.

Taking into consideration the industry perspective, TeamMoto at IMRB, realised the importance of understanding the industry and consumer buying behaviour. This syndicated study is an initiative to support the information needs of the decision makers.



Key deliverables from the study:

The industry:

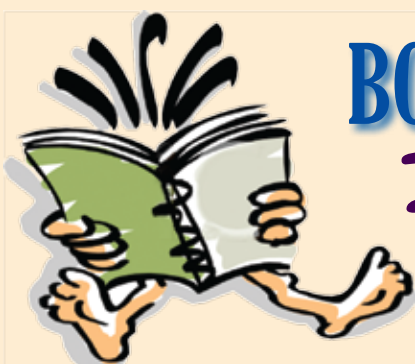
- Pre-owned car market size in India, size and brand share
- Forecast of future trends and developments in the pre-owned car market
- Industry analysis: Porter's five force analysis

The consumer:

- Pre-owned car owner profiling and segmentation
- Consumer behaviour: Need initiation to post purchase behaviour
- Consumer analysis: Channel preferences and perceptions about organized players



If you are interested to know more on the pre-owned car market write to our expert sanjiv.sen@imrbint.com



BOOK Review

by Ameya Samant
Insights Director

DID YOU KNOW

Increasing Mass

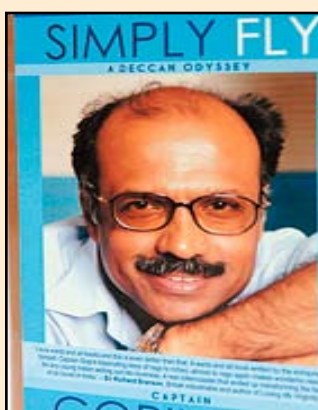
BMI	2005	2010	
Underweight (<18.5)	32%	24%	↓
Normal (18.5 - 24.9)	53%	54%	↑
Overweight (25-29.9)	13%	19%	↑
Obese (30+)	2%	4%	↑

Source: TGI India
Base: SEC ABC, 15 - 55, Top 8 Metros



Simply Fly – The autobiography of Deccan Aviation founder Captain G R Gopinath

Simply Unputdownable!!!



Captain Gopinath's life is a rollercoaster ride.

It's the amazing story of a poor schoolteacher's son in rural Karnataka. He starts life as an officer in the Indian Army, fights in the Bangladesh war and is posted at

the sub zero degree Siachen Glacier. He gives it all up and takes up farming on a barren ancestral plot

in his native village. He soon becomes a role model for organic cultivation, revives the dying art of sustainable silk worm farming, starts an irrigation consultancy and bags a few environment awards on the way. A paucity of bike mechanics in his region pushes him to start his own two wheeler dealership; the success of this dealership eggs him to start his own Udipi hotel.

Next up, he stands for elections, manages to take on the might of the incumbent chief minister during an election rally but eventually loses at the ballot.

A discussion with an old army friend leads him to the dream of starting a helicopter rental company (without having the faintest idea about the political influence and monetary backing required for such a venture).

These are the initial years of liberalization and he has to wade through a maze of red tape to get the necessary approvals.

He manages to pull it off without paying a single bribe and launches India's first private helicopter rental service. Again, a casual discussion with one of his clients propels the idea of making air travel as casual as road travel. So he launches India's first discount airline for the Common Man, recruits R.K Laxman's lovable character as its mascot and changes the face of Indian aviation.

A gripping narrative and an Indian Entrepreneurs 101 guide rolled into one book- don't give this one a miss.

If you like to have a book reviewed or volunteer to review an interesting book write to imprint@imrbint.com

The World Of 3nity



IMRB International's Syndicated Study on 3G Mobile Services in India:

The recent auction of 3G spectrum and the likely rollout of services by operators in next two quarters will see delivery of a wide range of next generation services, such as video streaming, movie downloads, video calls, etc. which were not present till now. This research will provide critical insights to close in the strategy for deployment of 3G services.

The eTech Group@IMRB, active in the area of Telecom related market research for several years now, is proud to present its

Syndicated Study on 3G Mobile Services in India:

"The World Of 3nity"

Our report covers 10,000 mobile subscribers and 1,520 enterprises across the top 8 circles/ cities in India. It also covers views of industry experts based on in-depth interviews amongst senior management and industry veterans across operators, handset manufacturers and VAS companies. As of now the Mumbai, Pune, Ahmedabad and Bangalore reports are ready. All 8 circles/cities reports and the All India Report would be ready by Jan 2011 end.

Some of the insights that this study provides are:

- Are mobile users in India aware of 3G services?
- Proportion of subscribers aware that their handset is 3G enabled
- Who will be the early adopters?
- 3G Applications that would be used the most?
- What would be the main hurdles and barriers to 3G adoption?
- How much premium are subscribers willing to pay to gain access to 3G services?
- Apart from the consumer segment, is there potential in the business segment too – to what extent are 3G services relevant and which ones are likely to have high penetration?
- How much are enterprises spending on developing mobile applications?

Our 3G study answers these and many other questions.

Subscribe to our reports to get a better understanding of this Telecom Revolution that is taking place in India right now.

To know more about this study please write to:
deepak.halan@imrbint.com

ASK the expert



Query : How IMRB's syndicated consumer profiling tools like TGI can help in understanding the changes in consumer behavior, attitudes and beliefs thereby increasing the scalability of a business model?

Expert View:

The changing consumer: TGI Perspective

Successful marketing requires adapting a holistic marketing approach which would mean gaining a 360-degree view of consumers of both their daily lives and the changes that occur during their lifetime so that the right products are marketed to the right customers in the right way. Since consumers usually have a number of alternative solutions to choose from, depending on the complexity of the purchase, the decision making process of the consumer often times is determined by strongly entrenched social, personal & psychological factors.

IMRB's syndicated consumer profiling tools like TGI provide information and insights across a wide spectrum of product and service categories that touch upon the consumers and provide incisive understanding of these influencing factors

Social Factors: The dis-integration of family structure

The great Indian family which had started shrinking in the 90's is still on the declining trend. Though a large number of factors contribute to the nuclearization of Indian families, it is more interesting to know how it had impacted the day to day life of a consumer. The shrinking size of the family had lead to the increase of women in the household taking to work. The regular household chores like dusting, cleaning, washing, cooking etc. which were earlier done by the women at home are getting outsourced, and the traditional breakfast, lunch and dinner are slowly getting replaced by convenience foods like breakfast cereals and ready to eat / cook products. Usage of packaged frozen vegetables which grew by 38%

Top 8 Metros	2005	2010
Doing household work like cleaning, dusting, etc	63%	55%
Breakfast cereals	21%	31%
Ready to eat food	13%	20%
Large tetra pack of fruit juices	19%	35%
Ready to drink fruit and veg juices	23%	53%
Tea made from Tea Bags	13%	21%

shown in the table along side)

during the last 5 year period, stands as a testimony to the preparedness of the consumer in handling the day to day vagaries of life. The fast paced work life while ensuring a higher household income, also has increased the spending on various lifestyle activities, utilities and products which were considered as non-essential a few years back. (As

Personal Factors: Growing Materialism

Indian consumers are often type-casted as an intensely religious set of people who disregard materialistic values. The desire to get updated and be on top of things is higher now than ever before. One-fourth of the consumers in Top 8 metros turn to the internet for information as their first destination. Although long term plans remain priority, life's pleasures right here & right now, are gaining importance. The desire to own consumer electronics and durables has grown dramatically. 85% now own a mobile phone, car ownership has grown by 37%, and 2 wheeler by 23%, in the last 5 years. With things changing at a frenetic pace, the consumers have shifted substantially towards consumerism in the last 5 years.

Top 8 Metros	2005	2010
Washing Machine	37%	55%
PC / Laptops	11%	23%
Food Processors	7%	15%
Microwave Oven	4%	12%
Air Conditioner	7%	14%
DVD Players	8%	38%
Home Theatre	2%	5%
LCD / Plasma TV	4%	8%

Psychological factors:

Increase in greater self confidence, economic freedom and disintegration of familial structures have made the consumer more self centric. Family approval which used to be the ultimate measure of accomplishment is slowly losing its importance. The search seems to be in being more independent, individualistic and creating one's own identity. With shop shelves groaning under ever expanding brands and sku's, consumer loyalty towards brands is fast diminishing. The urge to try new brands is extremely strong and the consumers wants to experiment and evaluate the options available to them before forming their core brand set.

Top 8 Metros	2005	2010
I enjoy spending time with my family	45%	36%
My friends are more important to me than my family	10%	22%
It's important my family thinks I'm doing well in my life	39%	32%
When I see a new brand, I often buy to see what it is like	39%	45%

For more details on TGI write to
magesh.poondi@imrbint.com

Client talk



Sumit Goswami
Head – Marketing (India & ASEAN)
Mobile Marketing Group
Mobile & Enterprise Division
Nuance Communication, Inc

1. Market Research & its contribution to your company.

Nuance is in the business of providing compelling and intuitive user experience to consumers around the globe using various forms of input and output mechanisms. By providing world class speech, web and mobile interfaces, we make the complex business of communication look and feel simpler for the consumers. Our products touch millions of consumers daily in various types of interactions and we work with some of the largest telecom entities that provide networks, devices or solutions. To serve the consumers with an enriching experience and to help our customers and partners provide world class solutions and services, we are constantly in touch with the end users through various research methods, user experience studies, feedback mechanisms and forums. Nuance drives its approach to solutions from a consumer perspective and hence it is extremely important for us to be in regular touch with the users and understand their perspective.

2. Can you tell us about your experiences with IMRB, and the areas that it has worked with your company (you could also mention how long your current company has worked with IMRB)

We have been associated with IMRB for many years now. Our association with IMRB has primarily been with their telecom practice. The telecom team is extremely innovative with their thoughts and ideas and it has been a great experience working with them on different projects. The team is forward looking and is always on the look out for information and emerging trends. Since our business revolves around the end user, it is important for us to be associated with a research partner who can understand our business domain and the consumers. IMRB's various research initiatives like the study on MVAS market, their latest initiative around 3G are laudable.

3. What are the areas that you think MR is growing and areas where MR is lacking in India?

Over the last couple of years we have witnessed many new entrants in India from the MR perspective. It has helped the industry mature and with the growing competition, we see a certain level of aggression amongst some of the larger players and this is helping the industry. Most of the research carried out in India is either led by the industry incumbents or sponsored by one of the leading OEMs or service providers. Seldom have we seen a research agency coming out on their

own with interesting insights or reports on topics relevant to the industry. The research agencies are hardly seen active in social media or networking space. Very few agencies organize a round table or forums for industry leaders to debate on topics like "Innovation" or "India 2020".

4. Any thing else that you would like to add for our readers.

With fierce competition present in all the major industry domains like Telecom, Finance, Travel and Hospitality and automotive, it is very important for the industry players to be closely associated with their consumers and understand their wants and needs better. The role of MR is going to increase over the years and it is important for the MR industry to scale up to meet the requirement and embrace new technologies and ideas to meet the demands of the next generation economy.

