

# NATIONAL READERSHIP STUDIES COUNCIL

Constituted by:  
Advertising Agencies  
Association of  
India  
Audit Bureau of  
Circulations  
Indian Newspaper  
Society

***For immediate release***

## **PRESS RELEASE**

### **NRS 2006 – Key Findings**

**Mumbai, August 29 2006:** The National Readership Studies Council (NRSC) released the findings of National Readership Study 2006 (NRS 2006), to an audience comprising the who's who of the media, advertising and marketing fraternity. Press and television correspondents were also invited to share the findings of the study.

The National Readership Study 2006 (NRS 2006) in India is the largest survey of its kind in the world, with a sample size of 2,84,373 house-to-house interviews to measure the media exposure and consumer product penetration in both urban and rural India – and of course the estimated readership of publications. The study covers 535 publications of which 230 are dailies and 305 are magazines.

#### **Highlights from NRS 2006**

- The reach of the press medium (dailies and magazines combined) has increased from 216 million to 222 million over the last one year.
- As a proportion however, press reach has stabilized in urban India – at 45%. Press reach in rural India has also stayed the same at 19% -- needless to say, on a much larger population base. The number of readers in rural India (110 million) is now roughly equal to that in urban India (112 million).
- Dailies have driven this growth in the press medium, their reach rising as a proportion of all individuals aged 12 years and above – which is the universe defined for NRS – from 24% to 25%. Magazines have declined in reach from 9% to 8% over the last one year.

- The time spent reading has remained the same – at 39 minutes daily on an average per day over the last year. But there has been increase in urban India (from 41 to 44 minutes daily) and decrease in rural India (from 36 to 35 minutes daily).
- Literacy as measured in the NRS has risen from 69.9% to 71.1% over the last year. The rate of growth has been marginally lower urban areas (84.4% to 85.3%) than in rural areas (63.6% to 64.8%). One would expect this to boost the market for the press medium.
- Satellite TV has grown considerably in reach – from 207 million individuals watching in an average week in 2005 to as many as 230 million individuals in 2006 – further expanding its lead over the number of readers.
- Radio is one medium that has shown considerable resurgence. Its reach has increased from 23% to 27% of the population listening to any station in the average week. Almost equaling the number of readers.
- Radio FM has driven this explosion in reach – from 76 million individuals listening in an average week in 2005 to as many as 119 million individuals in 2006 – a 55% increase over last year.
- Cinema has, on the surface, declined sharply from 51 million individuals going regularly to the movies (at least once a month) to 39 million. This has been the story for years now. However, the cinema audience seems to have been reversed in urban India – from 23 million regular theatre-goers last year NRS now estimates there are 25 million. As a proportion this means a marginal increase from 9.6% to 10.0%.
- The Internet as a medium seems to have paused on its growth trajectory. From 7.2 million users who logged in every week last year, the number has grown, though only to 9.4 million. As proportions, these represent 0.9% and 1.2% of India's 12 years plus population. However, urban India has shown faster growth in internet reach – from 2.3% to 3.4%.
- Mobile phones must now be given their due place as media. Reach of this medium – as measured by the proportion of the population accessing value-added-features (VAS) at least once a week – has grown from 1.1% last year to 2.7% -- translating to nearly 22 million individuals.
- If there is one overall conclusion, it is that the press medium must watch emerging media closely. The NRS has the data points to indicate media consumption amongst consumers from all walks of life. It is also worth remembering that, socio-culturally speaking, India is like a

couple of dozen countries with a total of sixteen official languages and wide disparities in living standards – the complexity of the Indian media market would rival those of Europe if taken as a whole.

## **NRS 2006 – DETAILED FINDINGS**

### ➤ **Press adds 7 million readers over the last year.**

- Dailies continue to grow, adding 12.6 million readers from last year to reach 203.6 million while there has been a drop of 7.1 million magazine readers. It must be remembered that this refers only to mainstream magazines. A host of niche titles that continue to be launched regularly are not fielded and their collective readership estimate is outside the purview of the study.
- Over the last 3 years the number of readers of dailies and magazines put together among those aged 12 years and above has grown from 216 mn to 222 mn – a growth of almost 3% over last year.
- There is still significant scope for growth, as 359 million people who can read and understand any language do not read any publication. Of this 359 million, 68% read Hindi. It is not just affordability that is a constraint, since 20 million of these literate non-readers belong to the upscale SEC A and B segments.
- The Hindi belt has been witness to intense activity from large dailies and is an indicator of the general growth in the vernacular dailies segment. To elaborate, vernacular dailies have grown from 191.0 million readers to 203.6 million while English dailies have stagnated at around 21 million.
- Magazines overall show a decline in the reader base, both in urban and rural India. The reach of magazines has declined from 75 mn in 2005 to 68 mn in 2006. Magazines have lost 12% of their reach since 2005.

### ➤ **The battle heats up in English & Hindi Dailies arena**

- There are now two dailies that have captured more than 2 crore readers – Dainik Jagran (with 2.12 crores) and Dainik Bhaskar (with 2.10 crores). The gap between Dainik Jagran & Danik Bhaskar has reduced from 38 lakh readers to 2 lakh readers this year.

- The Times of India is the most read English Daily with 7.4 mn readers, but The Hindu has taken the second spot with 4.05 mn readers, pushing Hindustan Times, to the third spot with an estimated readership of 3.85 mn. Though Hindustan Times adding 3.6 lakh new readers in Mumbai, it has but lost readership in U.P. and Punjab.
- **Press increases its share of urban media day**
- Today the average urban adult spends 44 minutes per day reading dailies and magazines. The average reading time used to be 41 minutes.
- **The growth in C&S penetration is more than the growth in TV owning homes**
- Television now reaches 112 mn Indian homes reflecting a growth of 3.2% over last year.
  - Homes with access to C&S have increased by 12% from 61 mn to 68 mn.
  - C&S reach has now penetrated 61% of all TV homes up from 56% last year.
- **TV & C&S dominate in Southern States**
- Tamil Nadu, Karnataka and Andhra Pradesh dominate the markets with TV reach of 76.2%, 76.2% and 78% respectively. These States also have high penetration of Cable & Satellite i.e. 60%, 53% and 59% respectively.
- **Color TV now matches the rapid pace of cable and satellite growth**
- Homes with color TV have increased from 58 mn to 64 mn in 2006. The increment of 10.4% runs parallel to the growth in C&S.
- **Internet reach now exceeds 12 mn**
- The number of individuals who accessed the Internet in the last 3 months increased marginally from 10.8 mn to 13.0 mn in 2006. While 10.8 mn of these are in urban India, nearly 1.8 mn internet users reside in rural India. The growth seems slower than expected – it must be pointed out that the growth of the number of internet users in urban India is 35% over last year while in rural India this seems to have stagnated.

➤ **Cybercafé is the new access point for Internet**

- As reach of Internet increases, office is no longer the main place of access. As many as 34% of users now surf from cybercafé and 30% from home. About 20% of Internet users access it from the work-place.

➤ **Mobile phones: now the focus is on usage of advanced features.**

- Among the fast growing tribe of mobile phone owners, 38% access value added features like downloads, accessing news and Cricket scores, SMS etc vs. 13.9% last year. The figure is higher at 44% in 42 metros. This means that as an advertising medium, it reaches more than 22 million consumers. As can be expected, the usage levels are much higher among young urban audiences and needs to be closely watched by not only the press but also the TV industry in future. With the impending launch of 3G next year the quality of content that will be delivered to mobile subscribers will make it a force to reckon with.

➤ **Topics Of Interest**

- Reader engagement is a growing concern for many media owners. With this in mind, the NRS has – for the first time in India – attempted to capture the topics that interest readers across different strata of society. Apart from News and Politics, Sports is the topic of interest among readers. This is followed by Films & TV Serials. While the level of interest among urban audiences is predictably higher than among rural audiences, it is remarkable that urban and rural up-market readers (SEC AB and R1) exhibit very similar patterns.

➤ **Salient Features of NRS-2006**

- NRS 2006 is the world's largest Readership Study covering 2,84,373 respondents in India. It is the only Readership Survey.
- Appointment of a single Research Agency namely, AC Nielsen after exhaustive evaluation to ensure accountability
- Significant improvements in design and methodology have been made to yield more robust Readership estimates.

- All town classes and village classes in each and every district have been covered
- All Towns above 1 lakh population have been covered
- Supplement Readership extended to 35 Metros for NRS 2006 from top 8 Metros in NRS 2005.
- Topics of interest to readers which may indicate the probable page traffic and additional clues on lifestyle for profiling of readers
- Time spent on reading for each Publication
- Source of publication read
- Psychographic Profiling Parameters
- Dedicated team of the Research Agency has been deployed to supervise the entire project
- Quality checks by reputed External Audit firm.

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Encl: Table of Top Dailies and Magazines.

### The 5 Million Club

Urban + Rural	2006		Urban + Rural	2005	
	Nos ( <b>'000's</b> )	Rank		Nos ( <b>'000's</b> )	Rank
Dainik Jagran	21165	1	Dainik Jagran	21244	1
Dainik Bhaskar	20958	2	Dainik Bhaskar	17379	2
Eenadu	13805	3	Eenadu	11350	3
Lokmat	10856	4	Lokmat	8820	7
Amar Ujala	10847	5	Amar Ujala	10469	5
Hindustan	10437	6	Hindustan	10557	4
Daily Thanthi	10389	7	Daily Thanthi	9445	6
Dinakaran	9639	8	Dinakaran	1485	39
Rajasthan Patrika	9391	9	Rajasthan Patrika	8651	8
Malayala Manorama	8409	10	Malayala Manorama	7985	10
Times of India	7502	11	Times of India	8092	9
Mathrubhumi	7415	12	Mathrubhumi	6412	13
Ananda Bazar Patrika	7295	13	Ananda Bazar Patrika	7215	11
Gujarat Samachar	6416	14	Gujarat Samachar	6780	12
Punjab Kesari	6302	15	Punjab Kesari	4427	18
Dinamalar	5977	16	Dinamalar	4877	17
Divya Bhaskar	5490	17	Divya Bhaskar	5162	15
Sakal	5066	18	Sakal	4191	19

The 2-Million Club

Urban + Rural	2006		Urban + Rural	2005	
	Nos ('000's)	Rank		Nos ('000's)	Rank
Saras Salil	7139	1	Saras Salil	10561	1
India Today - Eng	5150	2	India Today - Eng.	6295	2
Vanitha - Mal.	4115	4	Vanitha - Mal.	3832	8
Grihashobha - Hin	3788	5	Grihashobha - Hin	4121	6
Kumudam	3698	6	Kumudam	4675	4
Swati Sapari Vara Pat	3408	7	Swati Sapari Vara Pat	3959	7
Kungumum	3347	8	Kungumum	5600	3
Sarita	2820	9	Sarita	4191	5
Meri Saheli	2610	10	Meri Saheli	2811	10
Balarama	2526	11	Balarama	2196	13
Ananda Vikatan	2426	12	Ananda Vikatan	2760	11
Cricket Samrat	2370	13	Cricket Samrat	2156	14
Malayala Manorama	2351	14	Malayala Manorama	2947	9
Reader's Digest	2321	15	Reader's Digest	1330	22
Grihalakshmi (Mal)	2312	16	Grihalakshmi (Hin)	2070	15
Nirogdham	2034	17	Nirogdham	902	42