



NATIONAL READERSHIP STUDIES COUNCIL

Constituted by:

Advertising Agencies
Association of
India

Audit Bureau of
Circulations

Indian Newspaper
Society

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PRESS RELEASE

NRS 2005-Key Findings

Mumbai, June 8 2005: The National Readership Studies Council (NRSC) released the findings of National Readership Study 2005 (NRS 2005), 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 2005 (NRS 2005) in India is the largest survey of its kind in the world, with a sample size of over 2,61,212 house-to-house interviews to track the media exposure and changing consumer trends in both urban and rural India – and of course the estimated readership of publications. The study covers 522 publications (221 dailies and 301 magazines).

Highlights rom The NRS 2005

- The reach of the press medium (dailies and magazines combined) has increased from 179 million to 200 million in the last three years – as a proportion reached of population aged 15 years and above it has increased from 26.4% to 27.4%.

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- Literacy as measured in the NRS (the ability to read and understand any language) has risen from 62.5% to 70.6%. The rise has been more in rural areas (nearly ten points from 55.6% to 64.6%) than in urban India (79.3% to 84.5%). One would expect this to boost the market for the press medium.
- However the reach has fallen in urban India – from 48% to 46%. Rural India has filled the gap – the reach there rising from 17% to 19% -- needless to say, on a much larger population base. The number of readers in rural India is now roughly equal to that in urban India.
- Dailies have driven this growth in the press medium, their reach rising from 23% to 24%. Magazines have declined in reach from 13% to 10% over the last three years.
- Satellite TV has grown explosively in reach – from 134 million individuals watching in an average week in 2002 to as many as 190 million individuals in 2005 – almost catching up with the number of readers.
- The time spent reading has gone up quite significantly though – from 30 minutes daily on an average to 39 minutes per day over the last three years. The increase has been sharp both in urban India (from 32 to 42 minutes daily) and in rural India (from 27 to 35 minutes daily).
- Radio's reach has stagnated at 23% of the population listening to any station in the average week. It has improved its performance in urban India (23% listen to the medium, up from 20% three years ago) primarily due to FM. In rural areas, the reach has dropped – 23% of village folk listen nowadays compared to 25% three years ago.

Some of the key findings are given below:

NRS 2005 – KEY FINDINGS

➤ **Press adds 34 million readers in the last 2 years.**

- Press continues to grow, adding 21 million readers between 2002 and 2005.
- Over the last 3 years the number of readers of dailies and magazines put together among those aged 15 years and above has grown from 179 mn to 200 mn – a growth of 4% every year.
(Note: Recently the scope of NRS has been expanded to include those aged 12 years and above but the 15 years age cut-off has been applied for the sake of comparison with NRS 2002.)

- There is still significant scope for growth, as 314 million people who can read and understand any language do not read any publication. It is not just affordability that is a constraint, since 21 million of these literate non-readers belong to the upscale SEC A and B segments.
- **There are nearly as many as rural readers as urban readers**
- Of the 200 mn readers, as many as 98 mn are from rural India and 101 mn from urban India.
- **Newspapers add substantially to the reader base**
- The reader base for dailies/ newspapers increased from 155 mn in 2002 to 176 mn this year – an increase of nearly 14% over three years.
 - However the growth in reach of dailies is less than the literacy growth of 21% in the same period.
- **The highest read Hindi Daily in India now surpasses a readership of 21 mn.**
- A list of top 10 dailies and magazines is enclosed. As many as 7 of the top 10 dailies have consistently improved their rankings in the last three years.
 - Dainik Jagran has taken the top slot even though the previous year's No.1 Dainik Bhaskar has also grown handsomely. This is because the number of literates in UP, Bihar and Jharkhand (strong Dainik Jagran markets) has grown explosively – while Dainik Bhaskar has not been as fortunate in its strong markets.
- **Decline of audience for magazines**
- Magazines overall show a decline in the reader base, both in urban and rural India. The reach of magazines has declines from 86 mn in 2002 to 69 mn in 2005. Magazines have lost 19% of their reach since 2002.
- **The time spent on press medium has increased over the years**

- An urban adult now spends on press and TV an average of 17 hours a week; on press 4.9 hours and TV 11.8 hours. The time spent on radio is 10 hours a week.
- The time spent by the average rural adult on press and TV together is 14 hours a week and that on radio is 9 hours a week

➤ **Press increases its share of urban media day**

- Today the average urban adult spends 42 minutes per day reading dailies and magazines and 1 hour 42 minutes watching TV. The average reading time used to be 32 minutes and the average viewing time 1 hour 40 minutes 3 years ago.
- Contrary to expectations, press has increased its share of the day at the expense of TV – it accounts for 30% of the time spent, up from 24% three years ago.

➤ **The growth in C&S penetration is more than twice the growth in TV owning homes**

- Television now reaches 108 mn Indian homes which means it crosses the 50% mark of all homes for the first time and reflects a growth of 32% since 2002.
- Homes with access to C&S jumped from 40 mn in 2002 to 61 in 2005. The growth of 53% is far higher than the growth of the TV market.
- C&S subscription has now penetrated 56% of all TV homes

➤ **Colour TV outstrips even the rapid pace of of cable and satellite growth**

- Homes with colour TV have doubled 29 mn to 58 mn in 2005. The increment of 43% is in line with the growth in C&S. While in 2002 a little over half the C&S homes had colour TV, today more than two-thirds (70%) do. This obviously makes the viewing pleasure of satellite channels more attractive than ever before.

➤ **TV and C&S dominate in the Southern States**

- Tamilnadu, Karnataka and Andhra Pradesh dominate the markets with TV reach of 77%, 68% and 74% respectively. These States also have high penetration of Cable & Satellite i.e. 55%, 44% and 55% respectively.

➤ **Internet reach now exceeds 10 mn**

- The number of individuals aged 12 years and above who accessed the Internet in the last 3 months increased to 11 mn in 2005. While 8 mn of these are in urban India, nearly 3 mn internet users reside in rural India.

➤ **The home 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 home and 32% go to a cybercafe. Only 16% of internet users access it from the work-place.

➤ **Radio is still stagnant**

- Radio reaches 23.1% of the adult population – marginally more in rural (23.5%)

➤ **Share of FM increases in a stagnant Urban market**

- Among the 183 mn adults who listened to radio in last 3 months, 43% or 96.8 mn, now tune on to any FM station – an increase of more than 100% over 2002.
- FM has larger audience base than Vividh Bharati (15.7% compared to 11.3%) in Urban India.

➤ **Mobile phones: a new medium emerges**

- Among the fast growing tribe of mobile phone owners, 13.9% access value added features like downloads, accessing news and Cricket scores, SMS etc. The figure is higher at 24.7% in 35 metros.

Salient Features of NRS-2005

NRS 2005, is the world's largest Readership Study covering 2,61,212 respondents in India. It is the only Readership Survey to provide a triple assurance for reliable readership estimates through:

1. Stronger Management Control at NRSC:

- a) appointment of a full time dedicated Research Professional at NRSC, Mr. Kedarnath Sharma
- b) appointment of an expert Technical Adviser, Dr.Sridhar
- c) appointment of a leading Audit firm, Ernst & Young to conduct independent quality checks on execution of NRS 2005 .

2. Appointment of a single Research Agency namely, AC Nielsen after exhaustive evaluation to ensure accountability

3. Significant improvements in design and methodology has been made to yield more robust Readership estimates.

The significant features of NRS 2005 are:

- Increase in Sample size by 32%:
- Increase of over 120% in the number of locations
- For the first time in any survey of this kind, all 536 districts in 24 states have been covered
- 5412 villages covered
- Each household has been selected randomly from electoral Roll, not just Cluster-heads
- 100% dedicated Team of the Research Agency has been deployed to supervise the entire project.
- Quality checks by reputed External Audit firm.

For more information, please contact Mr. Kedarnath Sharma, at NRSC on Tel:022-22611812

Encl: Table of TopTen Dailies and Magazines.

NRS 2005

TOP 10 DAILIES URBAN + RURAL

(excluding Malayalam)

(Readership figures in '000s)

Publication	NRS 2002 (15+)		NRS 2003 (12+)		NRS 2005 (12+)	
	Rank	Readership	Rank	Readership	Rank	Readership
Dainik Jagran	2	12670	2	14982	1	21123
Dainik Bhaskar	1	13163	1	15709	2	17373
Eenadu	5	9277	4	9458	3	11349
Hindustan	9	6385	7	7899	4	10538
Amar Ujala	8	6431	6	8640	5	10378
Daily Thanti	4	9354	3	10094	6	9370
Lokmat	6	7840	8	7867	7	8821
Rajasthan Patrika	15	5432	11	7353	8	8628
Times Of India	12	5665	10	7419	9	8064
Anand Bazar Patrika	10	6357	13	6092	10	7210

TOP 10 DAILIES URBAN

(excluding Malayalam)

(Readership figures
in '000s)

Publication	NRS 2002 (15+)		NRS 2003 (12+)		NRS 2005 (12+)	
	Rank	Readership	Rank	Readership	Rank	Readership
Dainik Jagran	2	6764	2	8494	1	10462
Dainik Bhaskar	1	7962	1	9523	2	9706
Times Of India	3	5427	3	6925	3	7294
Amar Ujala	9	3829	5	4900	4	5444
Daily Thanti	5	4571	4	6177	5	5261
Lokmat	7	4185	8	4228	6	4844
Gujarat Samachar	8	3968	10	4002	7	4591
Ananda Bazar Patrika	6	4203	6	4483	8	4359
Hindustan	13	3283	9	4009	9	4257
Eenadu	4	4902	7	4239	10	4215

**NRS 2005
TOP 10 MAGAZINES
URBAN + RURAL**

(excluding Malayalam)

(Readership figures in '000s)

Publication	NRS 2002 (15+)		NRS 2003 (12+)		NRS 2005 (12+)	
	Rank	Readership	Rank	Readership	Rank	Readership
India Today (H)	4	5127	2	5900	1	10698
Saras Salil (H)	1	10608	1	9385	2	10554
India Today (E)	3	5658	7	4194	3	6254
Kungumum	40	1527	81	765	4	5571
Kumudam	7	4464	15	2887	5	4661
Sarita	18	3078	11	3423	6	4182
Grihashobha (H)	2	6050	4	5414	7	4107
Swati SVP	11	3581	19	2467	8	3953
Meri Saheli	14	3385	6	4266	9	2797
Ananda Vikatan	16	3126	31	1689	10	2741

**TOP 10 MAGAZINES
URBAN**

(excluding Malayalam)

(Readership figures in '000s)

Publication	NRS 2002 (15+)		NRS 2003 (12+)		NRS 2005 (12+)	
	Rank	Readership	Rank	Readership	Rank	Readership
India Today (H)	4	3404	2	4135	1	5171
India Today (E)	1	4830	3	3441	2	4779
Kungumum	42	819	63	591	3	3330
Grihashobha (H)	2	4405	1	4319	4	2699
Kumudam	9	2418	11	1974	5	2670
Saras Salil (H)	6	2703	5	3040	6	2142
Sarita	14	2028	9	2177	7	1957
MeriSaheli	7	2481	4	3347	8	1886
Outlook	21	1486	20	1300	9	1732
Ananda Vikatan	15	1953	23	1266	10	1681

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