



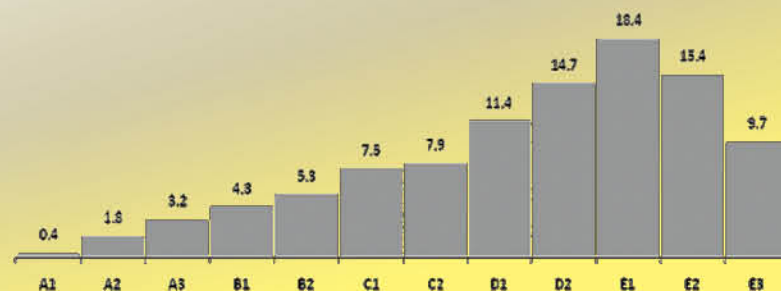
The New SEC system

By Ashutosh Sinha
with inputs from Vikrant Dogra
and Prashant Raikuni

For several years, the marketing and research industry in India has been working to move away from the current system of **socio-economic classification**.

The current system of classification goes back to 1988, when the Market Research Society of India (MRSI) proposed a system for classifying urban households. based on the education and occupation of the chief earner. In this system, households are classified into 8 grades, ranging from A1 to E2. A parallel system was developed a few years later for rural India, based on education of chief earner and material used in construction of dwelling.

The main reason for wanting to move away from the current system was a desire for more discrimination. But it's also evident that the dual approach to rural-urban was unwieldy. As someone said: "rural and urban are not two countries with a border running in the middle..."



We have 12 grades in the New SEC system, ranging from A1 to E3; the modal grade is E1. The figure above shows the distribution of households for India as a whole (urban + rural). Data Source: MRUC/Hansa-IRS2008 (round20)

What is the new system?

The new system is based on two variables:

- Education of chief wage earner
- Number of "consumer durables" (from a predefined list) owned by the family. The list has 11 items, ranging from 'electricity connection' and 'agricultural land' to 'car' and 'air conditioners'

We evaluated many alternatives, based on various demographic variables, assets and amenities at home. While dealing with two sets of variables, the analysis relies heavily on the LIFE scoring method. This is a standard of living measure that awards points based on ownership/usership of a product - with points inversely related to the penetration level. To compare two alternative systems, we used the Lorenz curve and the associated Gini-coefficient as a measure of discrimination.

What are the advantages of the new system?

The advantages of the New SEC system are:

- The new system will provide more discrimination as compared with the current systems: more than the current urban system, and much more than the current rural system
- We now have a single system for urban and rural India
- The new system is less subjective- as we no longer use occupation. There is some room for subjectivity in deciding whether a person is "senior/middle" or "junior" executive, or in distinguishing between a businessman, shopkeeper and a petty trader
- It's simple-easy to answer short and easy to classify.

Are there any drawbacks associated with the new system?

We believe there are no serious problems: however, the new system will require updating from time to time, because penetration of consumer durables will change faster than education or occupation.

To sum up:

The user of market research benefits from having a powerful, discriminating variable that is used across all surveys and databases. All major databases are working on incorporating the new SEC system: including MarketPulse (IMRB's household panel), TAM, IRS and NCAER surveys.

Conclusion:

We now have a system that is simple and easy to administer. It gives us good discrimination and the social grades created are more homogenous. It's also very easy to use the new SEC: just the question on durables/assets needs to be added. It's time to begin using this in all surveys.

For more information on SEC
write to ashutosh.sinha@imrbint.com

Editors Note:

Dear Readers,

We are glad to share with you our next issue of IMRB IMPRINT, an endeavour designed specifically to keep all our valued clients updated on happenings at IMRB & in the MR fraternity and to solicit your views.

With this issue of IMPRINT we are glad to share with you some interesting insights & information on the New SEC system and some more interesting articles written by our senior researchers. Do leave your comments and queries on imprint@imrbint.com and we will be glad to interact via this platform.

IMRB IMPRINT has once again being awarded Gold by PRCI (Public Relations council of India) in the tabloid category. Our success is based on your constant encouragement and support. We also take this opportunity to reaffirm our commitment and add value to your business through innovation and the latest in research methodology.

Do read this information-packed issue. As ever, I look forward to receiving your feedback.

Best Regards,
Seema Saini

THE BUSINESS OF "STORY" AND "STORYTELLING"

- IS MR MISSING THE BUS TO THE BOARD ROOM?

Why movies like Rang De Basanti, which is essentially 'old wine in new bottle formula' work and others, fail to make any impact on the audiences? There are few important aspects that could decide the fate of a movie – Story, Screenplay, Actors, Director, Editors, & 'The audience'.

Imagine linking Bollywood to Research – Can there be a crosspollination of learning's from these two distinct yet similar industries? The authors found that this process could offer enriched learning's as to why some research findings are well received by clients and some just fail to make any impact?

In the research fraternity, Insight Managers play the key role of directors and respective MR companies become lead actors out in the market. Like any movie, considerable amount of resources get invested, however only two – three hours are made available to communicate the message.

The authors have experienced that the current state of presentations in business and academia causes its own degree of suffering for audiences and for presenters alike. The challenge is further magnified in MR industry where the client usually gets exposed to the tip and not the complete ice-berg.

Hence effective delivery of results and presentation should become the creative magnifier for the Insight Managers and the intelligence should be communicated in a manner that affects client's perception of its validity.

Exhibit 1: - Research Communication Process

Unlike Bollywood, The MR industry in India has evolved and developed standardised processes in terms of data collection, quality controls and data analysis yet more often than not ; the results fail to create an impact on the business outcomes for clients. Essentially the industry has all enablers which help in building "the story" however, lays lesser emphasis on "the story telling". If creating the story is a science, being a good storyteller is an art. From the research perspective the story constitutes of research methods, analysis tools, action points or insights directly impacting the clients offering whereas story telling refers to the method in which the story is communicated. An effective story teller takes into account three key factors (i) The receiver – for e.g. an Expert/ General, Many/Few etc (ii) Type of Content: Data intensive, Conceptual etc (iii) Mode of communication – for e.g. traditional forms, dashboards, interactive workshops etc

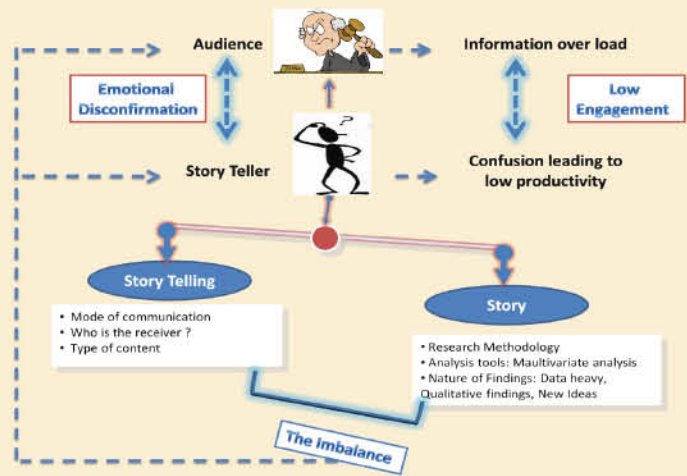


Exhibit 1 above explicates the bottlenecks in the research communication process. The Insights Managers (Story Tellers) will have to play bigger role of balancing the weights between "Story Telling" and "The story".

The key question that requires immediate attention is that "Are we overselling one and underselling the other?" The imbalance between the two is the root cause of dissatisfaction, low impact presentations and low productivity among the managers.

People will forget what you said, people will forget what you did but people will never forget how you made them feel. Hence, softer aspects for e.g. emotions, trust, and empathy cannot be ignored as they play an equally important role in determining the effectiveness of the communication process.

Although it is important to focus on the story, there is still room for innovation in the art of storytelling, which will be the key differentiator in the future. The authors are practitioners of art forms and new wave technology, and have been experimenting by adopting several creative forms of communication in delivering research findings to clients.

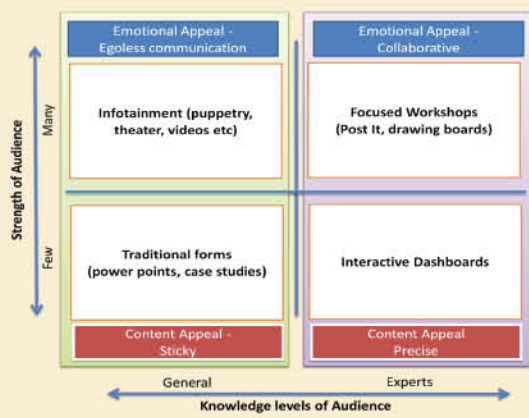


How can Insight managers align their teams to effective delivery? Is there a winning formula or a framework?

Exhibit 2: Delivery Framework for Data Intensive Study:

To understand the effectiveness of communication in various environments a systematic approach is essentially required. A case in point is illustrated below.

The 2X2 framework elucidates solutions to Insights Managers for presenting data intensive research findings to varied forms of audiences. The framework also captures the emotional & content appeal required for impactful delivery. For e.g. new form of communication having an element of infotainment (information plus entertainment) will be useful tool for disseminating information to a large group comprising of non research stakeholders. Further it becomes imperative that the message should be communicated with an egoless tool and content should have a sticky appeal in order to enable desired process improvement for the businesses. Dealer deployment workshops (Typical in Customer Satisfaction Survey), NGOs Training & Implementation Workshops (Rural surveys) etc are live illustrations where these forms can be applied effectively.



Further, fusion of technology in the delivery can be deployed as a powerful tool for enhancing the receiver's experience. From popular open sources (videos, you tube, audio, Google Maps) to freewares available on web can be harnessed and used to not only to convey the message but also to create visual delight for the audience. For e.g. Google Maps can be useful in depicting catchment area for typical studies conducted in the real estate sector and a stick animation freeware can help in conveying banal messages in more lively and impact form.

Likewise there can be different frameworks and dimensions which can guide Insight Managers on how to use different communication methods in different environments (conceptual studies, brainstorming exercises, strategy papers etc).

The Research Offer

The detailed paper will not be restricted to framework and dimensions explained above, rather it will draw frameworks based on several other dimensions explained along side.

Moreover the relevance, efficacy and viability of several communication tools on live research projects would be covered detailing the impact of innovations through direct interactions with client and various stakeholders. The authors plan for live demonstrations during the seminar across various types of studies to showcase the untapped potential of several creative forms of communication and its applicability in effective presentation delivery.

Through this paper, the authors wish to address the key area of concern for MR industry and strike the perfect balance between "The story" and "The story telling" thus enabling agencies to create an everlasting trust and relationship with their customers.

"Creating good stories is important for MR companies... Spreading it through story telling is another"

Authored by:
Saurabh Sardana,
Gurpratap Ratra. with inputs from
Mohan Krishnan

An e-Tale of India's World Cup Final Match

Online Property	Reach / Unique Visitors	Online Property	Average Time Spent (in Mins)
Espnstar.com/cwclive	1.73 Mn	Espnstar.com/cwclive	41 Mins
Espncricinfo.com	1.7 Mn	Cricbuzz.com	30 Mins
Cricket.yahoo.com	1.6 Mn	Cricket.yahoo.com	25 Mins
Cricbuzz.com	0.27 Mn	Espncricinfo.com	21 Mins

For more details contact tarun.abhichandani@imrbint.com
Source: WAM (Web Audience Measurements)



Effective implementation of ISO 9001 Quality Management System: A Case Study from Abacus Market Analytics, a specialist unit of IMRB International.

The paper from Abacus Market Analytics, a division of IMRB International, won the best paper award in the 13th International conference on Quality organized by National Institute of Quality and Reliability (NIQR).

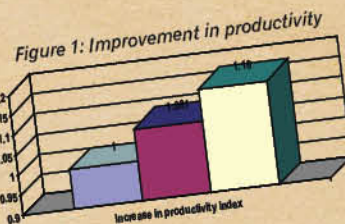
Background: The International Quality Management system, ISO 9000 has been developed to provide necessary conceptual and structural inputs for fulfilling customer needs by ensuring desired and consistent product quality. This case study details the effective implementation of ISO 9000 quality management system in IMRB's analytics department. Although there was no external pressure, IMRB decided to pursue the ISO certification keeping customer satisfaction as the key focus area. With team efforts, the entire process of certification i.e. designing, documentation and effective implementation of the ISO quality management system was completed within a span of 12 months, involving the following eight steps:

- Defining scope and the roadmap for the Bangalore office of the company
- Appointment of Management Representative (MR), formation of review committees and defining quality policy and objectives
- Identification of core, enabling and ISO specified mandatory processes, and then drafting the organizational structure and responsibilities of the process owners
- Designing and documentation of the system with a special emphasis for a system for monitoring continuous improvement
- Implementation of the system, monitoring the implementation process and maintaining the system
- ISO 9001:2000 QMS certification for the Bangalore office
- Implementation of the ISO 9001:2000 QMS in all national offices of the company and the certification
- Up gradation from ISO 9001:2000 QMS to ISO 9001:2008 QMS

The lessons learnt: Here are some key lessons learnt in executing ISO in IMRB:

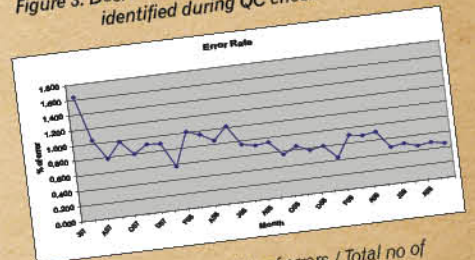
- Involve everyone i.e. staff and clients from design to deployment to improvements
- Demonstrate success – share audited results of improvements
- Flexibility to agreed rules – reducing inconvenience to staff and clients while aligning processes
- Ensure strong commitments from senior managers through trimester meetings and yearly management reviews

The results: A systematic approach enabled us to implement ISO 9001: QMS in our organisation in a time bound, effective and successful manner. The entire process of system design documentation, implementation and certification could be completed within the planned timeframe, resulting in associated cost of the ISO 9001 QMS certification process being maintained at a low level. The organization achieved substantial improvement in business processes in the form of increase in productivity and decrease in internal error after implementation of the ISO 9001 QMS. We achieved 16% improvement in productivity in 2 years, improved client satisfaction level from 95% to a consistent 99% and internal errors from over 1.5% to less than 0.5% (see figures below).



Note: % Client Satisfaction Score = (Sum of all parameters satisfaction score / No of parameters used for client feedback)*100

Figure 3: Decreasing trend in internal error rate identified during QC check



% of Error = (Total No of errors / Total no of tables checked)*100



Sudipta Gouri - Abacus Analysis, IMRB International receiving award by NIQR

Congrats to Sunil and Sudipta for making us proud by winning the prestigious award for their case study at the international conference organized by NIQR (National Institute of Quality and Reliability)

IMRB IMPRINT wins GOLD at PRCI



Seema Saini, Corporate Communication, IMRB International receiving gold from PRCI

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SYNDICATED STUDY



The women of today are more educated, confident, determined, demanding with high aspirations. About 30-35 per cent of the estimated 480 million jobs are performed by women and 54% of television advertising is targeted towards housewives making them the most targeted and sought after Target Group.

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A decision support system for a comprehensive understanding of HomeMakers.

Did you know

- Women of today has very high self confidence - 60% of women in Urban India strongly agrees they are responsible for everything that happens in their life
- Every third urban women is open to send their girl child to another town for higher education
- Every third urban women believes their children would be better off being educated than being rich
- 34% of urban women believes in insurance policies for their children
- 31% of urban women strongly believes in vegan food for their family

To know more write to homemakers@imrbint.com

Those who do things well, will be honored from generation to (third) generation

The recent auction of 3G or 'Third Generation' spectrum is seeing the rollout of services by operators to enable delivery of a wide range of next generation services, such as video streaming, movie downloads, video calls, etc. which were not present till now. With as much as Rs.67,719 crores invested by the operators in 3G spectrum, they are bound to follow Tao Te Ching's wisdom, in introducing 3G services in the market.

Bharti Airtel, is using experiential marketing wherein it has several bright red colored 3G buses on the move in top cities in India. Here mobile users can experience firsthand - 3G mobile services such as telephony such as Mobile TV, Video Call and High Speed Download among others. Many of us would be familiar with the print and outdoor ads that scream "Airtel 3G is here". Tata DoCoMo - known to have one of the largest footprint in retail stores amongst telecom operators, is turning thousands of its shops into "experience stores". Consumers can walk in and experience services like video SMS, video streaming, mobile television, ultra-high-speed data transfers, route-finder, and live aarti. This assisted experiential marketing would help in making the millions who have not used GPRS yet more familiar with what 3G is all about.

Many of us would be familiar by now with the Superhero ZooZoo flying all over our TV screens. That was Vodafone's 3G launch strategy i.e. use its TV ads which have been much appreciated to announce introduction of 3G services in India. The superhero ZooZoo stands for the brand personality of 3G - Faster, smarter and better and helps in educating subscribers on this new technology in a simple manner. The different things the ZooZoo does in the TVC are indirectly pointing to the quality of the 3G network that Vodafone aspires to offer. Vodafone is also offering free time bound 3G trial to its current GPRS subscribers. This not only serves purpose of pre-purchase service trail but also provides Vodafone with valuable usage data from which they can infer which services are more sought after, how the data consumption is likely to change after mass introduction of 3G services etc.

On the other hand, Reliance is focusing more on partnerships to offer popular VAS. It has tied up with Universal Music Group so as to offer music streaming and is promoting its new App Store on Reliance 3G that enables you to get directions while on the road, cooking to yoga tips etc.

There are some lessons to be learned from BSNL/MTNL in terms of 3G Services strategies that did not work very well. Users found their 2G to 3G SIM Card exchange system complicated since one was required to send a SMS as "M3G120 to 53733



and confirm the SMS you get back as "M3G120 Y" to 53733. BSNL's strategy of offering 3G services at the same price as 2G perhaps helped in weaning away subscribers from competition. However this did not lead to higher data ARPU vis-à-vis 2G network. In Japan, innovative data plans and highlighting the relevance for 3G services has enabled high penetration and data ARPU. Moreover these PSUs were not able to provide

enough marketing thrust to 3G services - thus leading to lack of awareness of their 3G services. It must not be forgotten that the target customers for a service like 3G prefers young and energetic brands like Airtel, Vodafone etc.

To 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

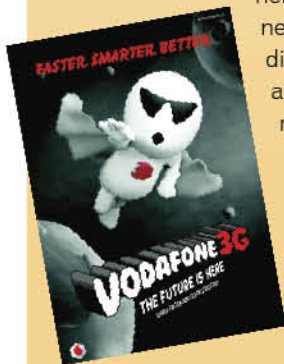
several years now, recently carried out a Syndicated Study on 3G Mobile Services in India christened "The World Of 3nity".

The first round of the study has been conducted amongst as many as 10,000 mobile subscribers and 1,520 establishments across top cities in India which are Delhi, Mumbai, Chennai, Kolkata, Pune, Ahmadabad, Bangalore and Hyderabad. The study also covers views of several industry experts on the India 3G market. The mobile operators seem to be on the right track since as many as 72% of mobile users assume understanding how to use 3G services usage would be complicated and someone would need to demonstrate to them first.

The study reveals that only 9% own a 3G enabled handset, but 82% are willing to switch to a new (3G enabled) handset to avail 3G services, provided it lies in the Rs. 4200- 6400 price band. This is in line with the fact that Indian handset manufacturers have already started offering 3G enabled handsets at 'middle class affordable' prices. With a plethora of handsets in the market, the bigger issue is the pricing of the 3G services. As we know India is a price sensitive market and for 3G to percolate to the masses the price would need to be quite low and attractive - to start with. However that is unlikely to happen given the huge cost of spectrum which itself is scarce and the fact that some of the winners are currently already operating in the low ARPU voice market. The Consumer segment study was carried out using random sampling with a minimum quota for some aspects such as SEC A, B, C & D and subscribers of the 3G spectrum winners while the fieldwork was completed in Dec 2010.

*Absolute perfection comes from the absolute.
That which is well built
will never be torn down.
That which is well latched
cannot slip away.
Those who do things well
will be honored from generation to generation.*

(Tao Te Ching).



...contd. from page 4.

Those who do things well, will be honored from generation to (third) generation

(3G)

As per the IMRB study, 32% are aware of 3G mobile services. Amongst those who are aware, as many as 93% associate video calling with 3G. Here is what an industry expert had to say about other 3G services "Purely utilitarian stuff like traffic signal, map, directions, facilities, restaurants and purely entertainment stuff like gaming, infotainment will be very big. Casual gaming will dominate." The report also reveals even more interesting information - that while video calling may be the most awaited 3G application, the main reason why people would even consider subscribing to 3G services is that 73% of the mobile subscribers believe it will mean better voice quality. Experts believe that in the first instance, 3G will be used by many operators to improve their overall network quality and retain voice customers.

Video Calling could well emerge as the next big mobile application, however there are certain constraints - e.g. both sides need a double camera phone. Moreover it is a way that even the illiterate can use to communicate. It is ironical that rural citizens who require high speed applications (telemedicine, e-education) the most can afford it the least. In Korea, the Government accelerated the adoption of 3G with subsidies for operators as well as mobile phone manufacturers. In India too, the Government and the industry would need to work together to take 3G to the villages.

The Business segment study was done purposively amongst those involved with mobile/telecom decision making. In case of SMEs, the mobile usage today, is more restricted to voice. Other than that messaging is also being used especially by small enterprises. However the awareness of specialized enterprise applications such as ERP and CRM on mobile was found to be abysmally low. In order to increase penetration of 3G amongst enterprises, it is important to create higher awareness about how they can utilize 3G for business purposes.

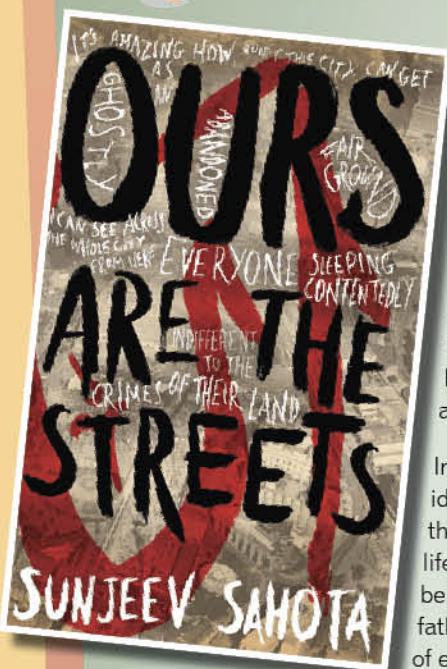
We have seen in global markets that it takes time for 3G to transcend from a technology to becoming a household need. The recent rollout of 3G in China has seen only 4% adoption after two years of aggressive marketing by the players and evident government backing. Since none of the operators have a national footprint we are likely to see partnerships being forged amongst operators to weave together a national offering. And with consolidation in the telecom industry on the cards in next few years, only time will tell who religiously followed Tao Te Ching's wisdom.

Deepak Halan is Group Business Director, IMRB can be reached at deepak.halan@imrbint.com



BOOK Review

BY SANJEEV KOTNALA
VICE PRESIDENT,
DAINIK BHASKAR GROUP



OURS ARE THE STREETS by SUNJEEV SAHOTA

Untouched by the potential havoc his actions of being a suicide bomber will create, young IMITIAZ RAINA, is busy writing his confession, so that his young daughter from his British wife Becka may know the true him and not something that will be thrust on her face from the news clippings and social speak.

Imtiaz, is a young father full of romantic ideas. He is happily married or something like that. His father is a taxi driver easily adapts to life in England and overlooks repeated racial behaviour. Imtiaz's visit to Pakistan to bury his father, brings in certain changes more of a result of external forces and his own changing outlook. The confession are his own way of making. He

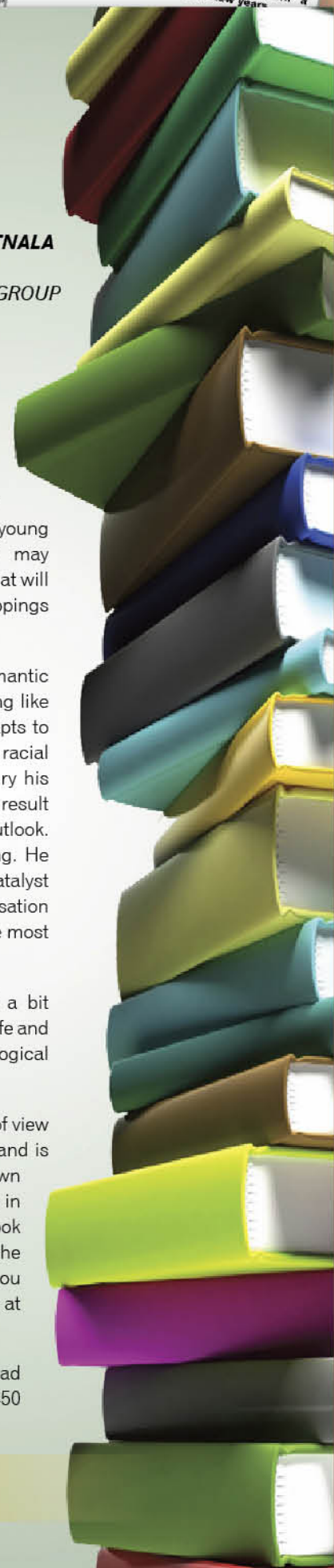
now believes in the cause. More he believes that his action will be catalyst for the change. You expect a series of hardliner thoughts and rationalisation for his transformation- but surprisingly it is a smooth walk. This is the most interesting and relevant part of the book.

Nearing his D-Day as a suicide bomber, Imtiaz is confused and a bit depressed. This is beautifully captured in narration. He suspects his wife and his cousin to be having an affair and that leads to the routine psychological doubt: why me. .

Thankfully the book remains true to confession from a father's point of view and does not attempt providing any solution. The story is very fluid and is well written. It grips you from page one. Even in pages which slow down to explain his philosophy behind his actions, it just takes you along in a flow of monologue. In my judgement when one starts seeing a book like a movie, it speaks volume of writer's ability to transfer you to the site of action. In OURS ARE THE STREETS, I could (and believe you would) see the house in Pakistan, the pump at the fields and the room at Afghanistan - the story comes to life.

I am impressed with Sunjeev way of writing and will definitely read whatever next he produces. Read it. 'Ours are the streets' Rs 450 Published by Picador, this 312 pages are worth reading

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

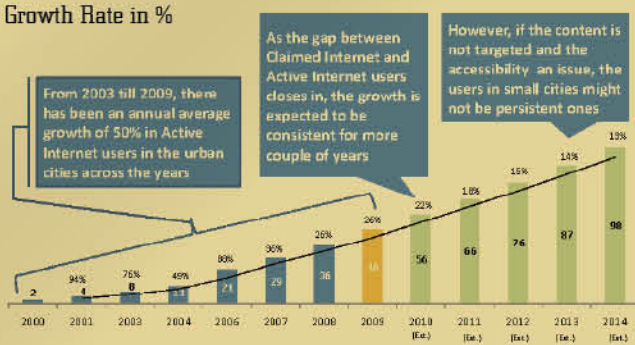


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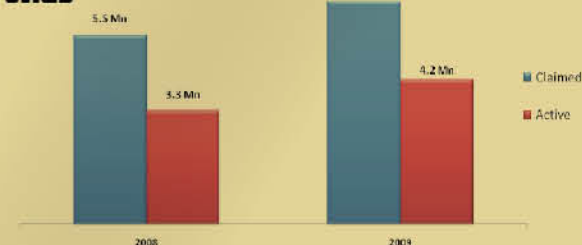
Active Internet user (Urban) – Trends and Forecast

Base: All India Active Internet users - Who have used Internet in the past one month

Figures in Mn
Growth Rate in %



Claimed/Active Internet users (Rural) – Trends

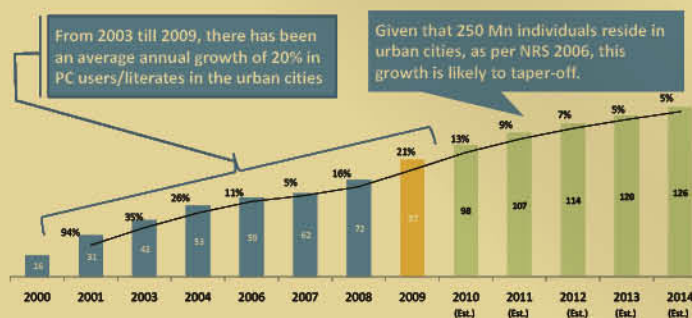


If you are keen to understand more on this topic write to balendu.shrivastava@imrbint.com

PC Literates (Urban) – Trends and Forecast

Base: All India PC Literates

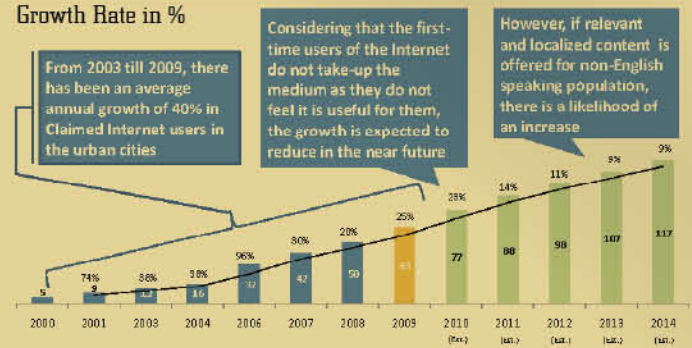
Figures in Mn
Growth Rate in %



Claimed Internet users (Urban) – Trends and Forecast

Base: All India Claimed Internet users- Who have used Internet atleast once in their past

Figures in Mn
Growth Rate in %



ASK the expert



IMRB International has been offering specialised research services for more than four decades to clients in India and overseas. IMRB International operates out of its five full service offices in Mumbai, Delhi, Kolkata, Chennai and Bangalore and is supported by 15 other regional centers for collection of survey information.

We have nine specialist units to cater to various sectors. So if you have a query on your sector or would like to take a view on an area of concern or would like to give us your view point, we will be glad to have our sector specialist write to you.

ABACUS MARKET ANALYTICS unit offers a wide range of services to all the research units in IMRB.

BIRD, the Business & Industrial Research Division of IMRB, is the market research and consultancy division servicing B2B and industrial markets.

The Brand Science Group (BSG) is a new unit at IMRB that primarily focuses on Brand and Communication Research.

Customer Satisfaction Management & Measurement (CSMM) provides a range of consulting products and services to manage external customer and employee loyalty and integrate

stakeholder measurement and management efforts into the companies decision making process at all levels.

Media and Panel is an independent, specialist unit of IMRB, incorporated in 1992 and handles different kinds of research both syndicated and customized.

Probe Qualitative Research (PQR) is one of India's leading qualitative research groups and has executives specially trained in India and overseas in qualitative research methods.

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MindTech Systems is the Software development house and has been in software development to enhance Market Research services.

Social and Rural Research Institute (SRI) has been set up by IMRB International in 1990 with the objective servicing the clients in the development sector with focused efforts.

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