



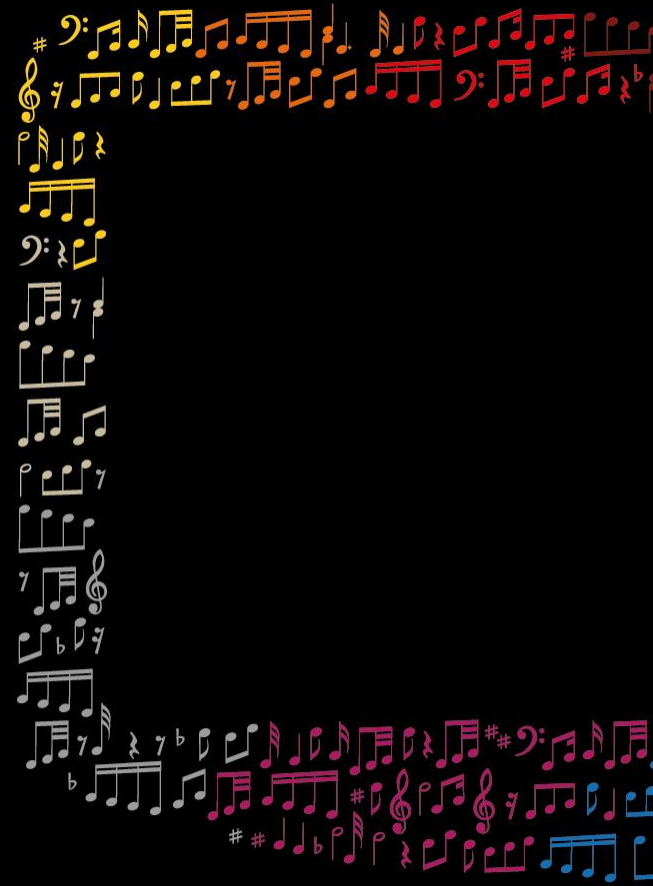
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AUDIENCES
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HARVESTING THE BENEFITS OF RURAL TV AUDIENCE MEASUREMENT



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MASS MARKET PRODUCTS DOMINATE ADVERTISING

Unlike developed countries where services are important advertising categories, the Philippine market is dominated by **basic consumer products**.

Top Advertising Categories

DETERGENTS, LAUNDRY AIDS, CLEANSERS
HAIR CARES
MILK, COFFEE & TEA, CHOCO & SOYA
ORAL CARE
FACIAL CARE
BODY CARE
WIRELESS TELEPHONY
FLAVORINGS & FOOD MIXES

FOOD PRODUCTS
OTC MEDICINES
SOUPS & NOODLES
CORPORATE ADVERTISING
CANDIES & OTHER CONFECTIONERIES
SOFTDRINKS/FRUIT JUICES
LIQUOR PRODUCTS
FOOD OUTLET





















Source: Kantar Media Radio Print & TV ADEX 2014



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MASS MARKET PRODUCTS DOMINATE ADVERTISING

Top 20 Advertisers

1	 UNILEVER Hair Care, Detergents, Laundry Aids, Cleansers, Facial Care, Body Care	6	 JOLLIBEE Food Products, Food Outlet	11	 ACS MANUFACTURING Detergents, Laundry Aids, Cleansers, Oral Care	16	 MCKENZIE DISTRIBUTION Body Care, Facial Care
2	 PROCTER & GAMBLE Detergents, Laundry Aids, Cleansers, Body Care, Hair Care	7	 MONDE NISSIN Food Products, Flavorings & Food Mixes	12	 WYETH PHILIPPINES Milk, OTC Medicines	17	 KRAFT Fruit Juices, Food Products, Candies/Other Confectioneries
3	 NESTLÉ Milk, Coffee/Tea, Choco/Soya, Flavorings/Food Mixes	8	 UNIVERSAL ROBINA NESTLÉ PHILIPPINES	13	 GOLDEN ARCHES Food Products, Food Outlet	18	 GLOBE Wireless Telephony
4	 COLGATE-PALMOLIVE Oral Care, Hair Care, Body Care	9	 UNILEVER RFM Food Products	14	 MEAD JOHNSON Milk, Choco/Soya	19	 PLDT Business Communications
5	 UNITED LABORATORIES OTC Medicines	10	 SMART COMMUNICATIONS Wireless Telephony	15	 COCA-COLA Softdrinks/Fruit Juices	20	 SAN MIGUEL Liquor Products



RURAL IMPORTANT IN BASIC PRODUCT CONSUMPTION

Out of 101 products monitored by the Kantar Worldpanel in 2014 , Rural Households contribute almost **half of consumption**.



TOTAL VALUE
101 Categories

PhP
605+ Billion

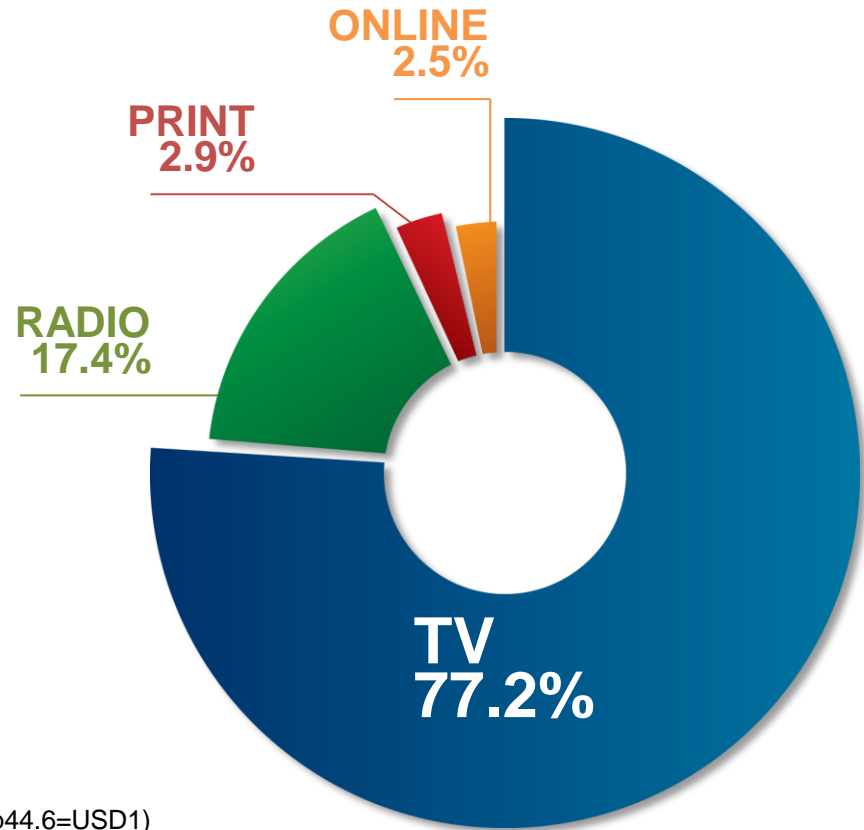
USD (@Php44.6=USD1)
13.6 Billion



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TV DOMINATES ADVERTISING

While online advertising is growing rapidly, **TV advertising** continues to dwarf other platforms.



ESTIMATED
2014 TOTAL ADSPEND

PhP
42-43 Billion

USD
(@Php44.6=USD1)
0.95 Billion



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INVESTING IN A RURAL TV AUDIENCE MEASUREMENT

- ♪ Measuring Rural TV Viewing behavior **more costly**
 - ♪ Distance between homes further apart
 - ♪ Transportation to rural areas not as easy nor as regular, lowering coverage productivity
- ♪ Managing the service also **more challenging**
 - ♪ When calamities strike, harder to stay in communication with panel homes
 - ♪ Online communication with homes also less stable (increased panel buffer, 2 Telecoms providers per home, 2nd polling window)



RURAL TV AUDIENCE MEASUREMENT A NECESSITY

Even with the cost & challenges, rural tv audience measurement is an **imperative** for ABS-CBN

- ♪ Advertising dominated by **mass-based products**
- ♪ **TV** still dominates advertising
- ♪ The Company benefits from **Rural TAM**



BENEFITS OF RURAL TAM

ABS-CBN rules in **Rural Areas**

	TV AUDIENCE SHARE		
	TOTAL	URBAN	RURAL
ABS-CBN	43	39	50
GMA	35	36	34
TV5	9	9	7

* Based on Total National Homes June 2014 – May 2015 6am -12 mn



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BENEFITS OF RURAL TAM

Rural TAM has **ensured** the **continued leadership** and importance of ABS-CBN to advertisers, which first became evident with National Urban ratings in 2009 and sustained by the introduction of Rural TAM in 2012

AUDIENCE SHARE (%)

Total Homes 6am-12mn	CHANNELS	AGB		KANTAR MEDIA						
		FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014
Total Philippines (Urban + Rural)	ABS - CBN	-	-	-	-	-	-	42	42	44
	GMA	-	-	-	-	-	-	31	33	34
Urban Phils.	ABS - CBN	-	-	-	45	43	36	36	38	39
	GMA	-	-	-	34	33	35	33	33	35
Rural Phils.	ABS - CBN	-	-	-	-	-	-	49	49	52
	GMA	-	-	-	-	-	-	31	32	33
Mega Manila	ABS - CBN	32	32	35	35	33	27	29	30	31
	GMA	42	44	46	42	38	40	38	38	40

*Urban Phils started Feb 2009; Total Phils and Rural Phils started Jun 2012

ADVERTISING REVENUE SHARE (%)

	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014
ABS - CBN	50	54	54	53	47	59	60	62	64
GMA	50	46	46	47	43	41	40	38	36

Sources:

- Kantar Media TV Audience Measurement
- Securities and Exchange Commission filings for ABS-CBN and GMA airtime revenues



ONLINE NEXT FRONTIER

We recognize the encroachment of the **online platform**

Already ABS-CBN **dominates** among local online players



Premium video-on-demand and live streaming platform of local and foreign TV programs launched December 2009

Over 5.6M registered users to date

RANK	WEBSITE	TOTAL UNIQUE VISITORS ('000)	TOTAL PAGEVIEWS (IN MILLIONS)
1	IWANTV.COM.PH	208.275	16.961
2	PINOYNETWORK.TO	102.977	0.585
3	PINOY-TV-REPLAY.COM	95.274	0.464
4	WEB.TV	62.518	0.230
5	TV GUIDE	60.951	0.283

Source: Comscore Media Metrix Entertainment TV April 2015 (Not inclusive of traffic from Apps)



ONLINE NEXT FRONTIER

Already ABS-CBN **dominates** among local online players

- The **ONLY** Philippine-based site in the Top 250 Global websites

	Global Ranking	Local Ranking
ABS-CBN News	239	6
Inquirer	1293	11
OLX	2286	13
Lazada	2315	12

Source: Alexa rankings as of May 31, 2015

- ABS-CBN NEWS** is the **WORLD'S 5th BIGGEST PUBLISHER ON FACEBOOK**

Source: NEWSWHIP.COM January 2015

- The **TOP** News and Information among local sites

	Total Unique Visitors ('000)
ABS-CBN NEWS.COM	962.53
GMA News Online	841.74
INQUIRER.NET	736.98
RAPPLER.COMx	495.68
YAHOO Philippines News	468.66
PHILSTAR.COM	429.11
KICKERDAILY.COM	304.84

Source: Comscore Media Metrix Entertainment TV April 2015

- ABS-CBN NEWS & ENTERTAINMENT** generate the most **TWEETS**, the most **LIKES** and the largest **VIEWING** in Youtube.

Source: SOCIALBAKERS.COM April 2015



ONLINE AUDIENCE MEASUREMENT

We recognize the encroachment of the **online platform**

The move to **Fusion** ratings has started.

Multi-platform measurement that will allow us to track audience and advertising **across platforms**, preparing for the expanded play with online advertising.





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