A decorative border composed of numerous small squares in various colors (red, yellow, green, orange) arranged in a roughly rectangular shape around the central text.

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A TALE OF TWO MARKETS



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A THOUSAND AND ONE TALES

THE UAE TAM STORY

Christopher O'Hearn

General Manager



KANTAR MEDIA

POPULATION

BEYOND DIVERSITY

- Local UAE National population = 15%
- Arab Expats = 21%
 - 14 Nationalities, mainly Egyptian, Syrian
- Indians = 40%
 - Half from Kerala, different language (Hindi v Malayalam)
- Other sub-continent (Pakistan, Bangladesh) = 12%
- Other Asians (Filipino) = 8%
- Others 4%



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POPULATION

BEYOND DIVERSITY

- Very little overlap – socially, culturally and in TV viewing
- Non-permanent population – the only people with a right to live in the UAE are the 15% of locals.
 - Work-based – unstable, shared housing, no data
 - Labour camps – excluded, 20-25% population
- Panel size 850 HHs covering 6.5m population



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CHANNELS

A SCRAMBLED PICTURE

- Pan-Arab viewing
 - Satellite viewers watch 'home' or pan-Arab channels
 - 400+ Channels Available – 54 monitored currently
 - Traditional incumbents weak - unmatched viewing 60%
- Extreme socio-economics - 90% advertising on 35% viewers
 - KSA is dominant market – 80% ad spend
- Piracy – illegal Indian footprint can be seen at 1/10th cost
 - Between 10-15% of panel is useless data



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FUTURE

SORT OUT THE PRESENT FIRST !

- Highly resistant market – major players have been non-cooperative, preferring the status quo
 - UAE is a proxy battleground for the rest of the Gulf
- Although TV is a popular medium advertising rates are low, and quality follows
- Very young population
 - High internet usage but there is not yet an online culture among businesses and services
 - Extremely high mobile penetration +150%



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A FAST FLIGHT OVER CANADA

A TALE OF TWO MARKETS

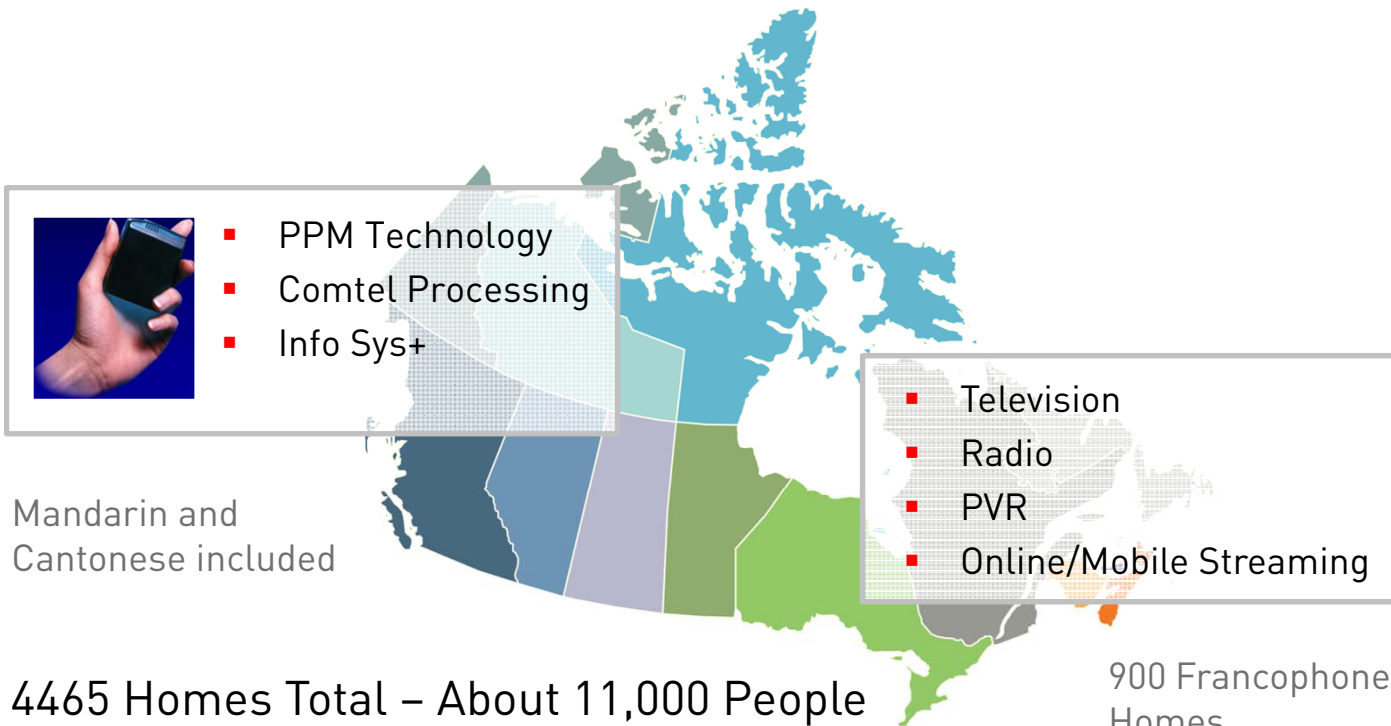
Jim MacLeod
President



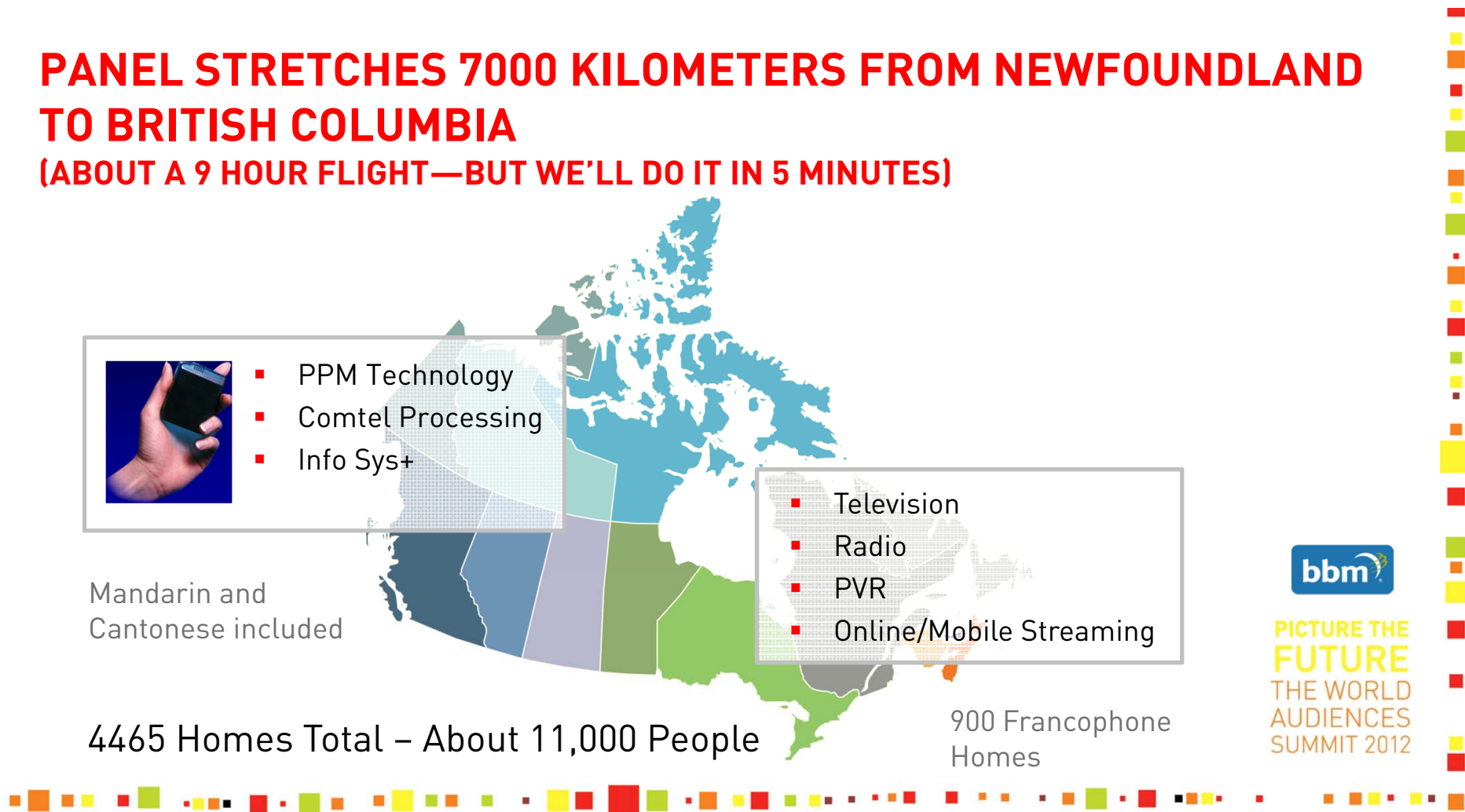
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PANEL STRETCHES 7000 KILOMETERS FROM NEWFOUNDLAND TO BRITISH COLUMBIA

(ABOUT A 9 HOUR FLIGHT—BUT WE'LL DO IT IN 5 MINUTES)



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FLYING LOW OVER THE PANELS



MONTREAL	TORONTO	VANCOUVER	CALGARY	EDMONTON
900 Homes Total	800 Homes Total	672 Homes Total	528 Homes Total	565 Homes Total
800 Radio	600 Radio	450 Radio	400 Radio	400 Radio

An Additional 1000 Homes Round out the Television Panels



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PPM TAKEOFF



- BBM was one of the first to roll out PPM... television in Montreal and Quebec became PPM markets in 2004
- Radio decided to roll out PPM in the 6 largest markets in late 2008
- Television, in a tender process, chose PPM to replace our Mark II meters in 2008
- BBM thus installed just under 4,000 homes, balanced the panels, and moved to commercial operations in less than a year
- Edmonton joined the service in 2011
- BBM operates the JV between BBM and Nielsen



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SHINY NEW EQUIPMENT: PPM 360

- Wireless – no dock, no hub
- Presence in home will be confirmed with multiple Bluetooth beacons
- Ability to send messages
- No change to PPM portion of the device – same sensitivity, same motion sensor
- PPM 360 joins the fleet this fall



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MORE THAN PPM

- BBM operates diary based measurement for radio and television in non-PPM markets
- A large qualitative return to sample study is designed to support radio
- BBM's subsidiary, BBM Analytics, markets analysis software, provides CMR commercial tracking, Rad Tracker commercial tracking for radio, and a host of other services and products
- BBM is owned by its members, is tripartite broadcaster/agency/advertisers, not for profit



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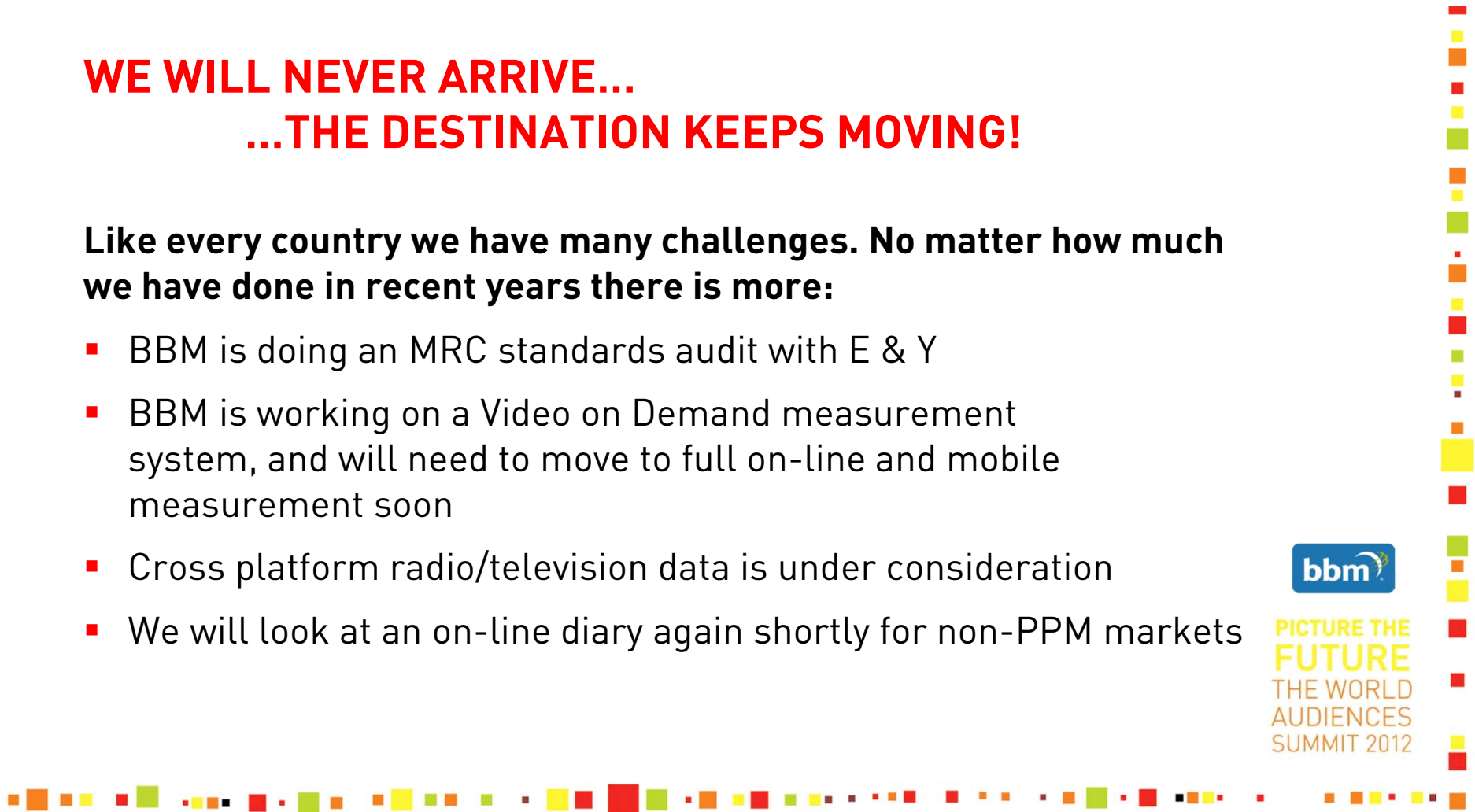
WE WILL NEVER ARRIVE... ...THE DESTINATION KEEPS MOVING!

Like every country we have many challenges. No matter how much we have done in recent years there is more:

- BBM is doing an MRC standards audit with E & Y
- BBM is working on a Video on Demand measurement system, and will need to move to full on-line and mobile measurement soon
- Cross platform radio/television data is under consideration
- We will look at an on-line diary again shortly for non-PPM markets



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