

Leveraging technology and expertise

New solutions for old problems

Medialogic

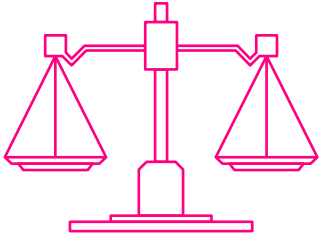
medialogic ON AIR
MAKING SENSE OF INFORMATION

THE
WORLD
AUDIENCES
SUMMIT
2016

- 100+ Million people
- Per Cap Income <USD100 per month
- Agricultural economy
- Mostly subsistence living
- Joint Family Living, Large Families
- Many areas still do not have electricity
- Less than 60% TV Penetration
- Less than 30% Cable Penetration

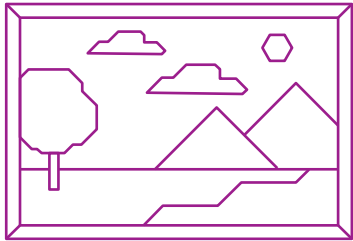
- 50 Million people
- Higher Disposable Income
- Service/Industry based economy
- Independent family structure
- Almost universal TV Penetration
- 90% Cable Penetration
- Exposure to international media & lifestyle

Key Issues for TAM in Developing Markets



Conflicting Business Dynamics

- Large Population but comparatively small TV Ad market
- 'Sample Size' obsession
- Urban vs. Rural divide
- Advertisers want measurement based on 'Purchasing Power', Broadcasters want 'population representation'
- High demographic lifestyle divide
- National vs. Regional Language representation

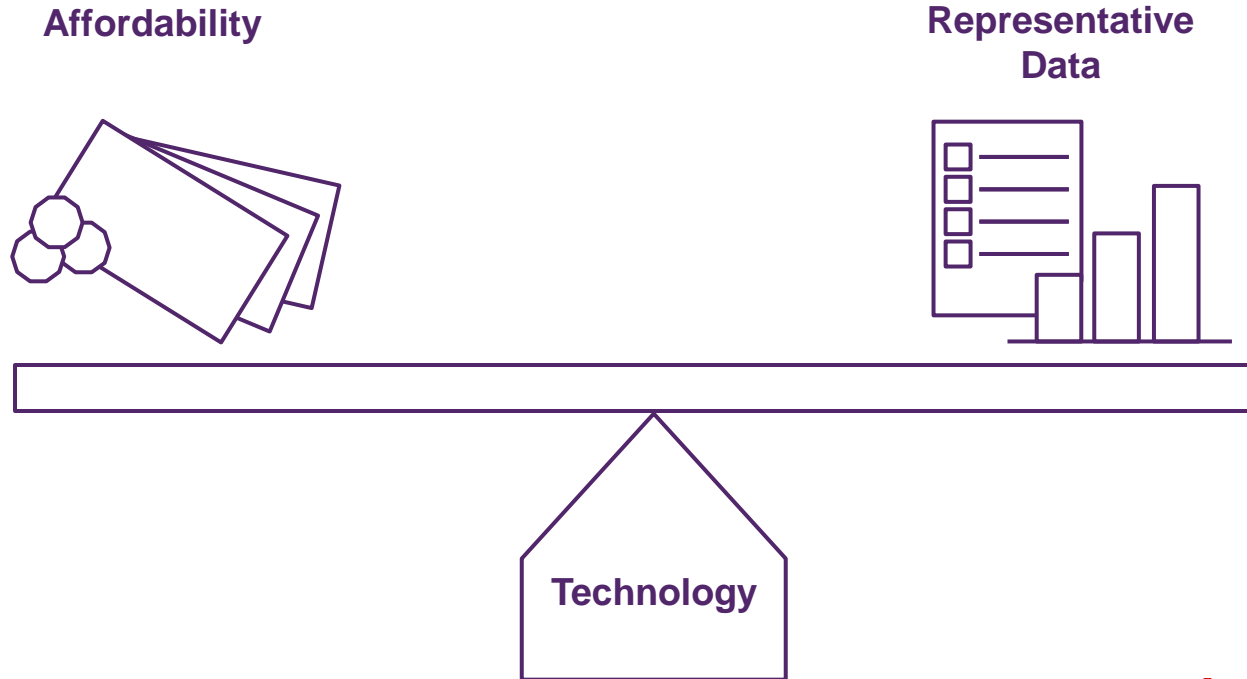


Rapidly Changing Technology Landscape

- Penetration of new technologies and distribution platforms expected to grow (Digital Cable, STBs, DTH, IPTV)
- Second Screen viewership also expected to become significant with higher broadband penetration 3G/4G connectivity

Absence of Formal Supervisory Structures

Technology can be leveraged for superior representation



Addressing needs efficiently

Use and deployment of Kantar Media RapidMeter technology

- Fit for purpose/ lower cost enabling Larger Panel – Better Representation
- Expansion from top 9 to top 20 cities – 900+ households
- Coverage of Non Metro Issues on News Channels
- Entertainment Industry moving towards Mass content
- Small town storylines becoming popular
- Evaluating further expansion

Panel expansion delivers a stronger currency

Panel Expansion from **9** to **20** cities



+3% in viewership

+7% coming from new/smaller towns

Varying trends between Metros & Small Towns

	Metros	Small Towns
Entertainment	34%	42%
News	14%	10%
Foreign Ent.	5%	2%

Addressing Core TV panel size limitations

- Even with RapidMeters, there is a limitation on TAM Panel Size
- We believe the solution lies in sourcing 'Big Data' from RPD and combining it with TAM to create 'Hybrid' currency



Integrating measurement from PeopleMeter & the Return Path

Individual data

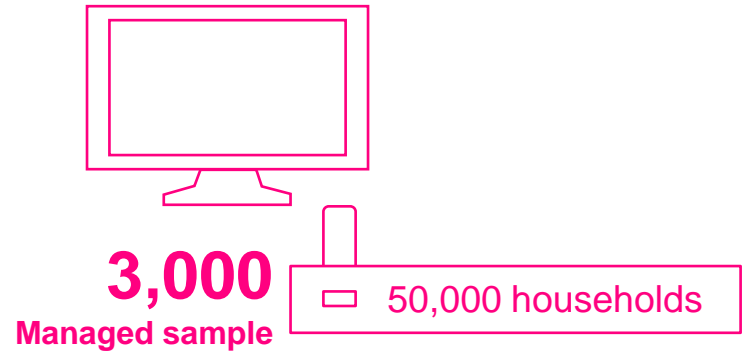


900

Representative Panel[®]

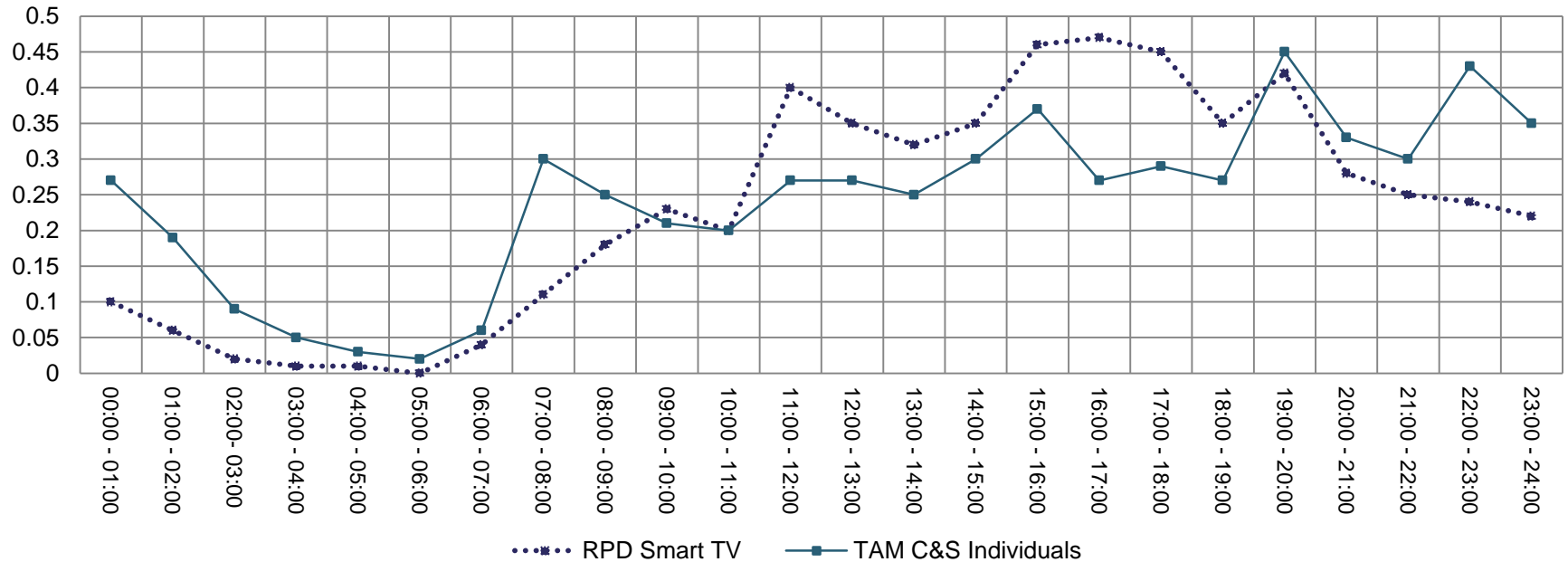


Household data



Viewership of niche channels across day parts

Niche Channels registering higher viewership and fewer 'zero' values in RPD



Why a hybrid approach to measurement is the way forward

Delivers consistency

- Data values much less volatile.
- Makes Media Planning easier

SEC A/A+ representation

- 'Purchasing Power' flavour

Data much more spread out

- Over 40 cities/towns represented



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