

# All WE hear is Radio Ga-Ga...!

Welcome to the TAM MEDIA  
RESEARCH press conference

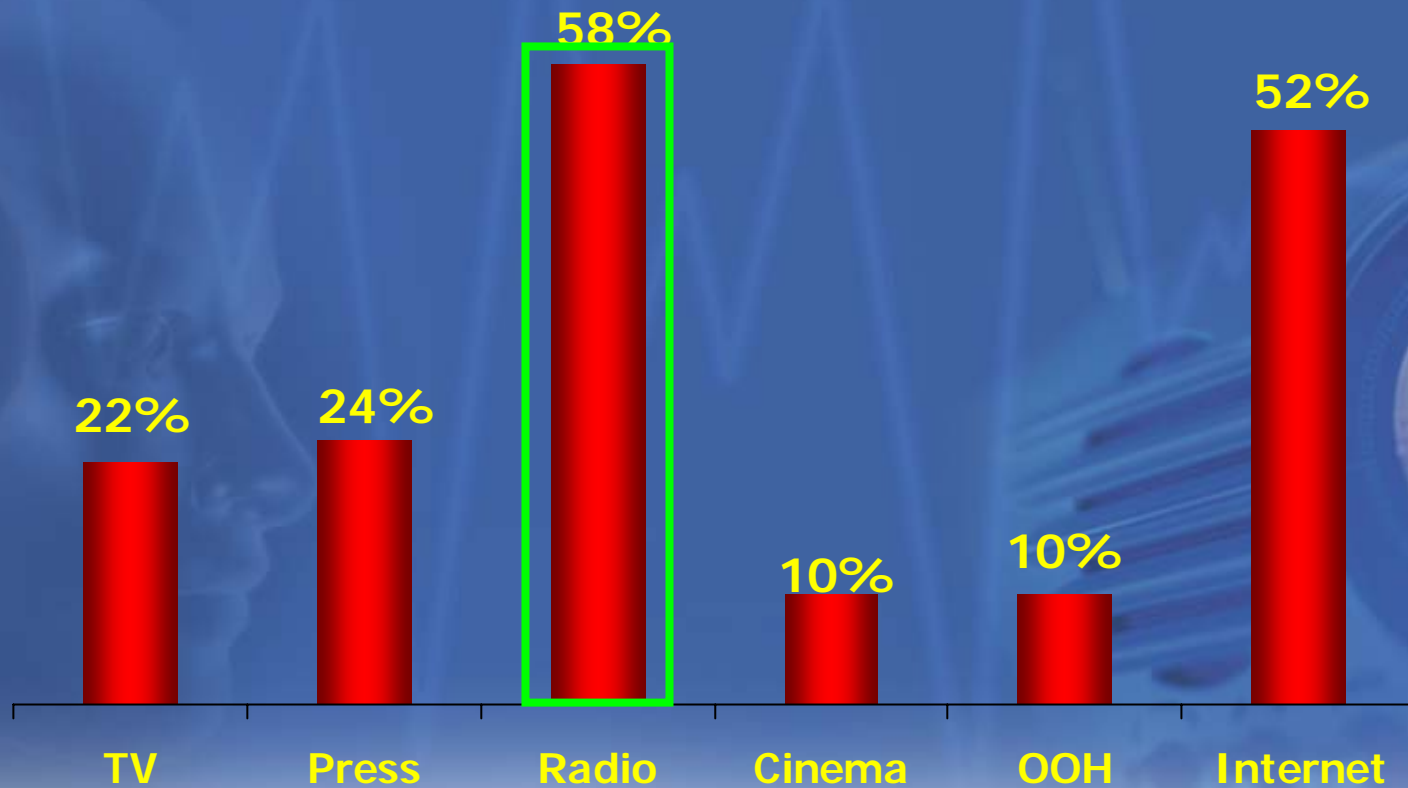
*May 29, 2007  
Mumbai*

# FIRST Leap: Kudos to the Government...

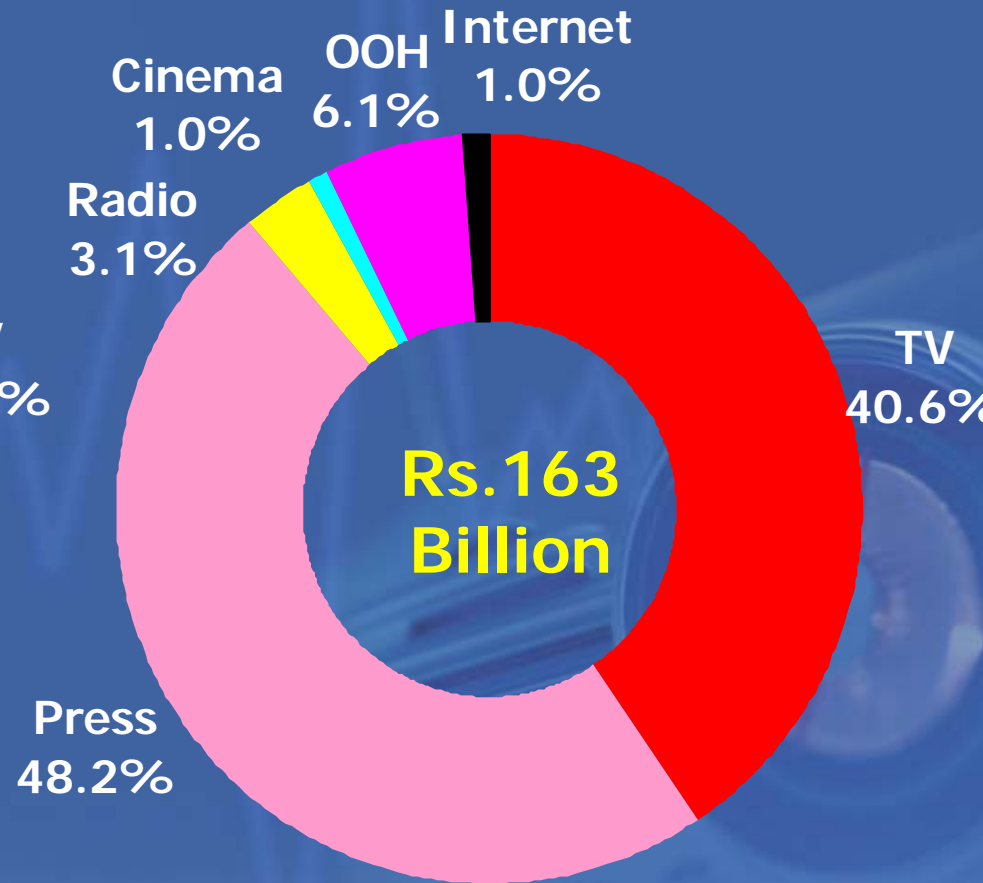
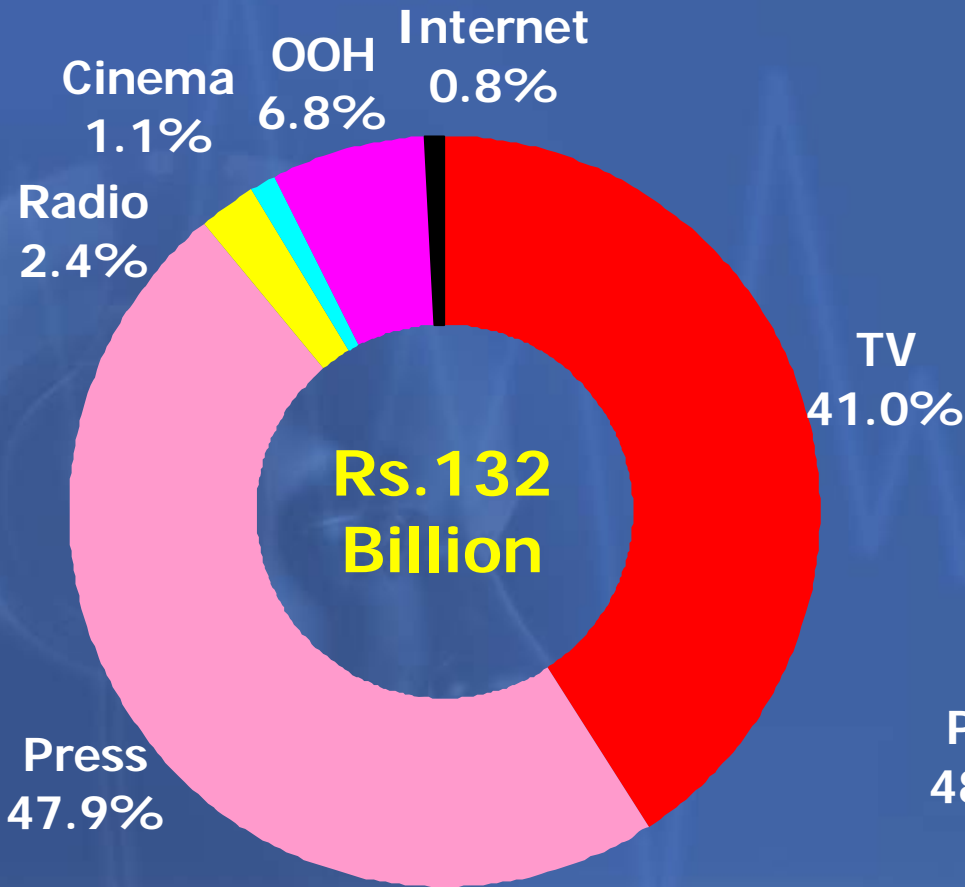
Granting licenses go Private FM players in phases

Ad fare!

# Add revenue growth across media... (2006 vs 2005)



# Advertising Revenues '05 vs '06



Year 2005

Year 2006

# Product Categories: Gaining Weight...

Top 10 sectors contributed 83% of ad volumes in the first quarter of 2007

Top 10 Sectors	% share
Services	16%
Hair Care	13%
Banking/Finance/Investment	12%
Media	11%
Food & Beverages	8%
Telecom/Internet Service Providers	7%
Retail	5%
Personal Accessories	3%
Auto	3%
Textiles/Clothing	3%

Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on Secondages

**AdEx**  
**India**  
A Division of TAM Media Research

# Advertisers: Who's Who!

3 of the Top 10 Advertisers belong to Telecom sector

Q1 2007

Top 10 Advertisers	% share
Life Insurance Corporation of India	4%
Ministry of Health & Family Welfare	2%
Bharti Airtel Ltd	2%
MTNL	1%
Tata Sky Ltd	1%
Pepsi Co	1%
Bhawani Textiles	1%
Idea Cellular Ltd	1%
Brooke Bond Lipton	1%
Hindustan Lever Ltd	1%

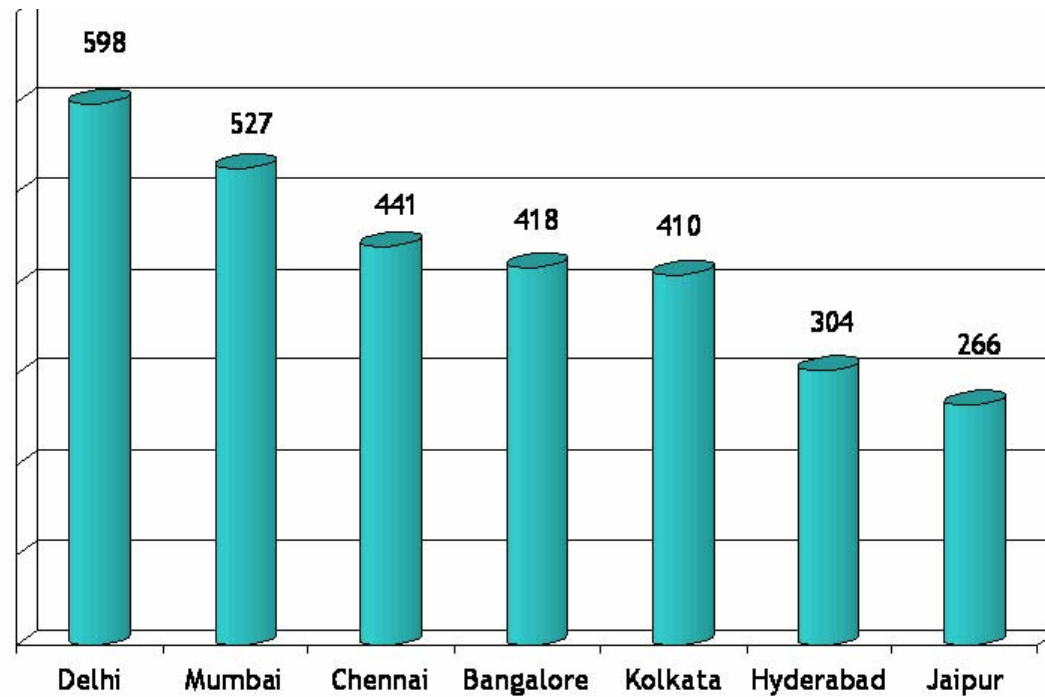
Source: AdEx India (A Division of TAM Media Research)

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**AdEx  
India**  
A Division of TAM Media Research

# Brands: The HEAT is on...!

## Opting for Radio - Q1 2007



Source: AdEx India (A Division of TAM Media Research)

Note: Figures are based on Count of brands

**AdEx**  
**India**  
A Division of TAM Media Research  
A Division of TAM Media Research

Can we see a new growth trajectory...

**Enter Measurement!**

## What should a robust RADIO measurement answer?

- How much is required when one plans marketing communications investments on Radio?
- Should Radio serve as a tactical (promotional activity) only or strategic tool for brand building too?
- On audience reach and ad spends, how do I stack up against my competition?
- What are the peak listening times for my brand target groups?

WE estimate, the current ad contribution  
of 3% by radio should double in the next  
**THREE YEARS!**

# THE MOVERS AND SHAKERS of the INDIAN RADIO INDUSTRY are HERE!

WE will hear it from THEM!

Before that...some details about the  
NEXT Giant Leap by the Indian Radio  
Industry!