



The future is digital



And the future has arrived!

- Digital penetration is rising rapidly globally
- Europe and USA at ~60% penetration levels

India is no exception to the digital growth story

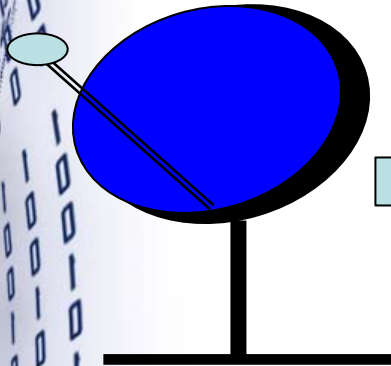
There are implications from the
consumer point of view...

...and great opportunities from the
audience measurement point of view

The next step in TV Audience Measurement...

STB Return Path Data (RPD)

What is RPD?



Receiver



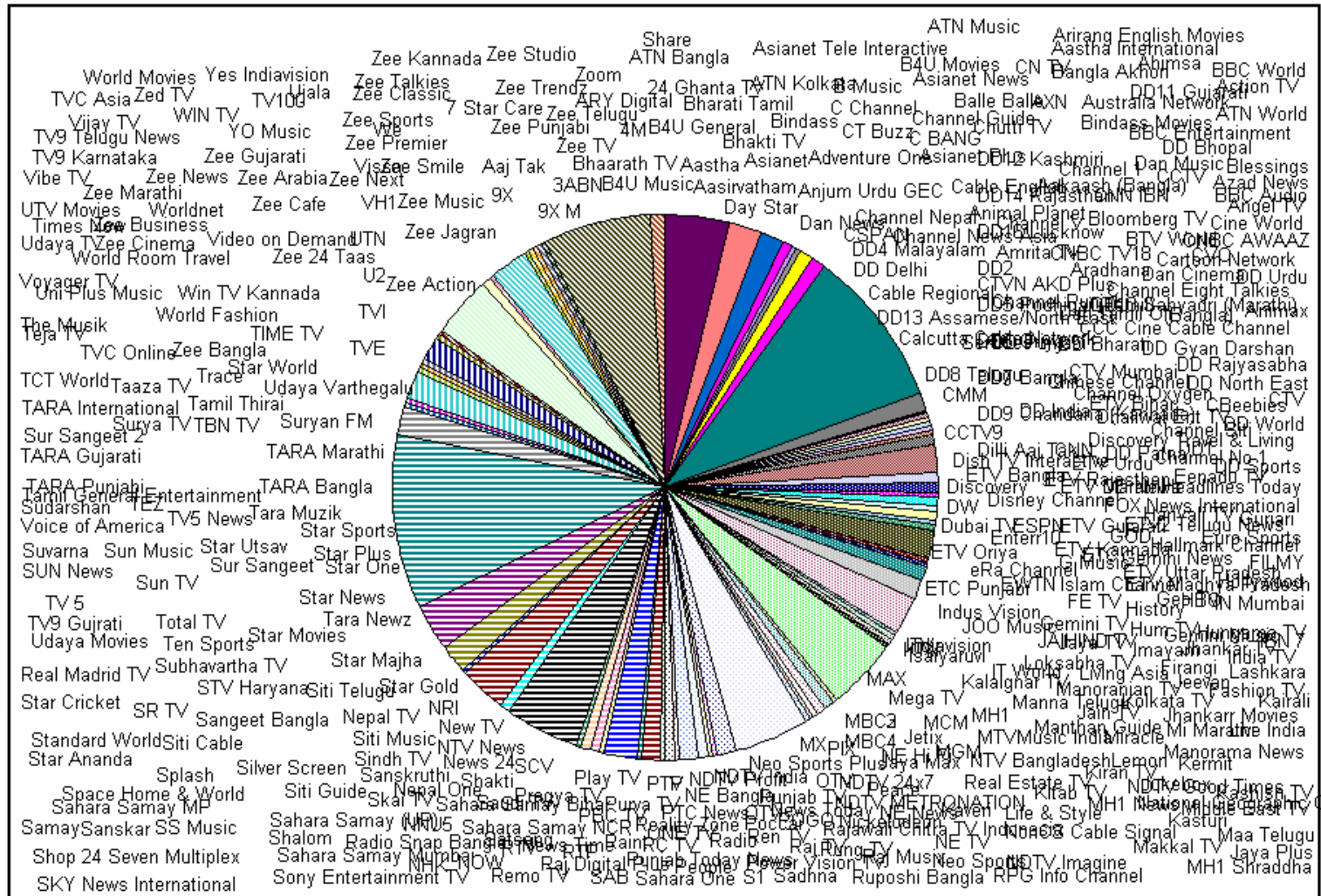
Set-top Box



Television

Why RPD?

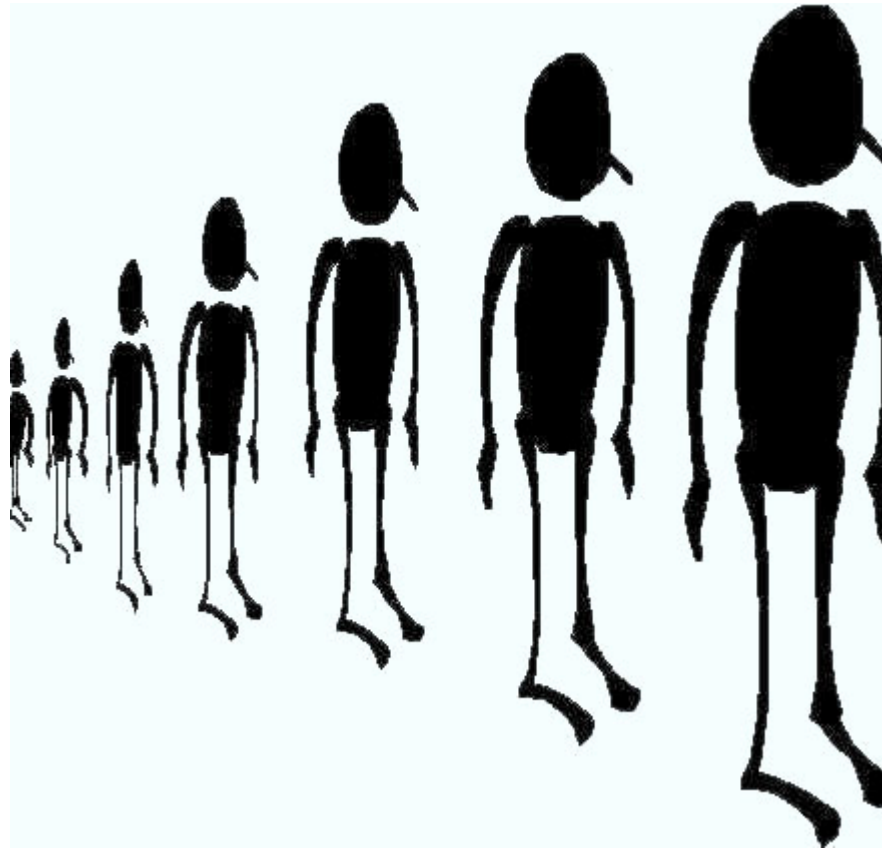
An IMMENSELY fragmented market



Why RPD...

1. Precision needs
2. Sample availability needs

How does RPD help?



What's in it for the industry

I. Platform Owners

Enhancing viewer experience



nielsen
.....

Nielsen to Provide Ratings for Programming on HBO's Subscription Video On Demand Services: HBO On Demand and Cinemax On Demand

I. Platform Owners...

- **Addressable messages**



The screenshot shows the INVIDI Technologies Corporation website. The navigation bar includes tabs for 'The Company', 'Advatar™', 'INVIDI ADS™', and 'Techno...'. The main content area features a large heading 'INVIDI TECHNOLOGIES CORPORATION' and a sub-heading 'For the first time, INVIDI ADS™ makes it possible to send targeted television media exactly where it needs to go – to the right household, every time'. Below this is a navigation menu with options: 'Introduction', 'At-a-Glance', 'Data Integration', 'Ad Delivery', 'INVIDI ADS Marketing', and 'INVIDI ADS & Advatar'. A red arrow points to the 'Introduction' option, which is highlighted in red. The main text area contains the following content:

Decisions. Decisions. Decisions.

INVIDI ADS homes in on American households
As if the decision-making process wasn't complicated enough. Today's advertisers, agencies and media buyers face the daunting task of reaching relevant households in an increasingly fractionalized digital homescape.

With a mountain of marketing data

II. Broadcasters/Production Houses

- **New launches**
 - Programme testing
- **Specialized genres**
 - Weather
- **Marketing**
 - Promotion evaluation

III. Advertisers/ Agencies

- **Targeting special segments**
 - **Part-time working housewife who uses detergent XYZ and has a washing machine at home**
- **Other research!**

Broadcasters/
Production houses

Platform Owners



Advertisers/Agencies

With all the promise...

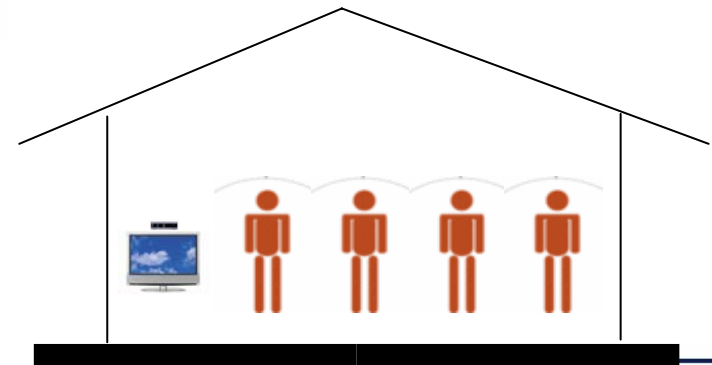
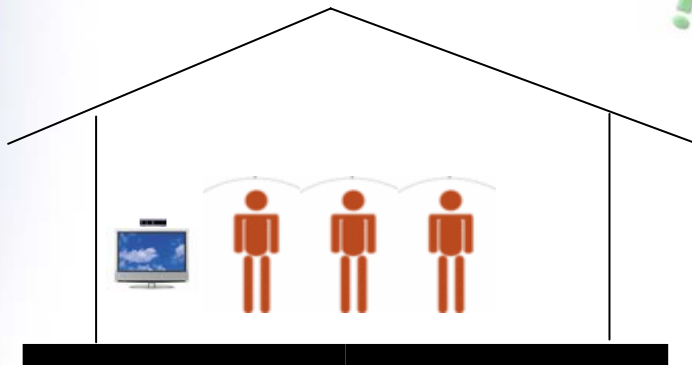
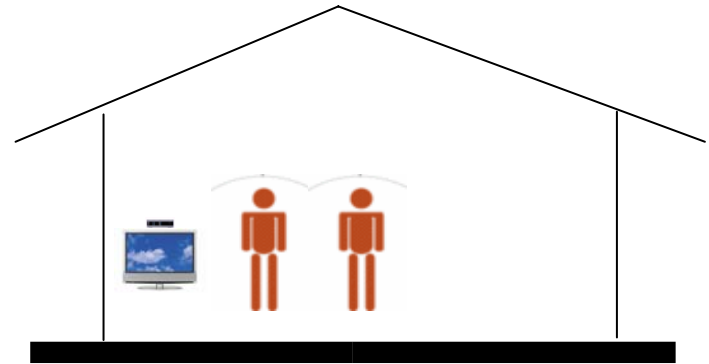
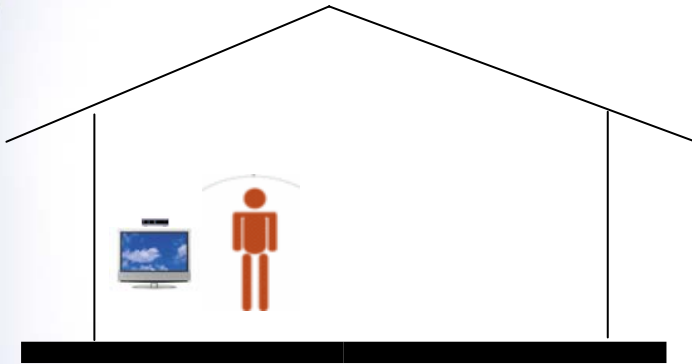


Four basic issues

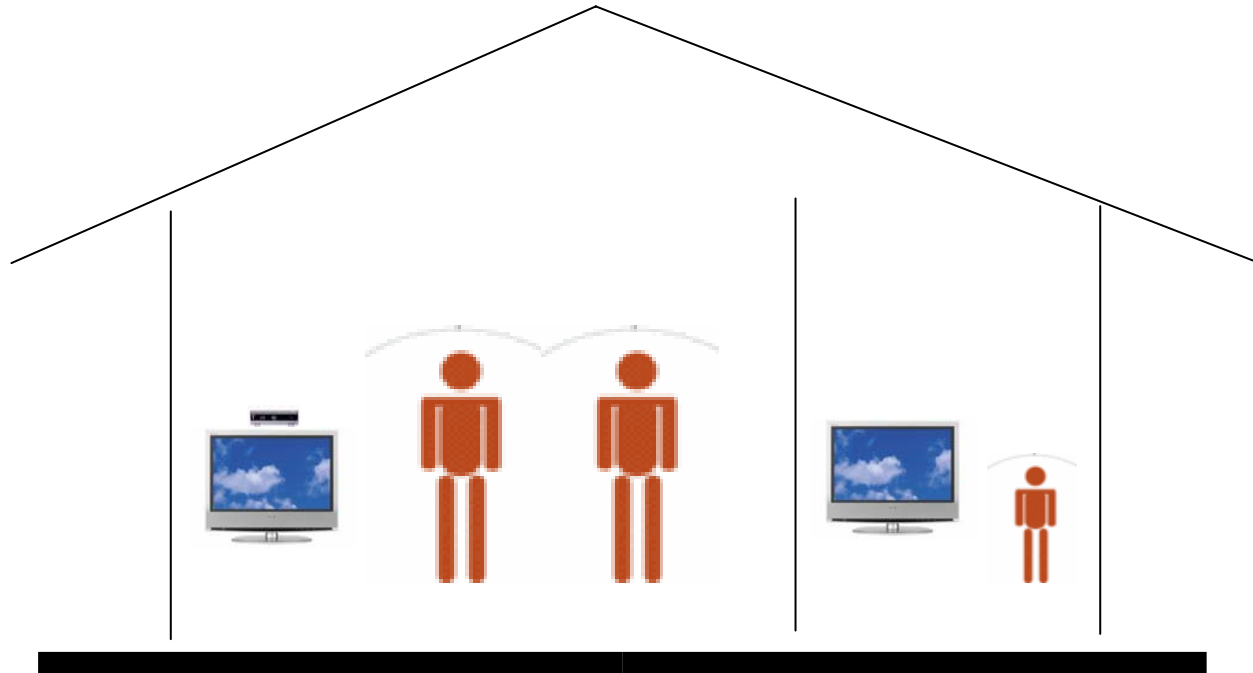
I. Tuning Information



II. Individual Information



III. Analog tuning in digital homes



IV. Not all STBs in digital homes are RP-ready

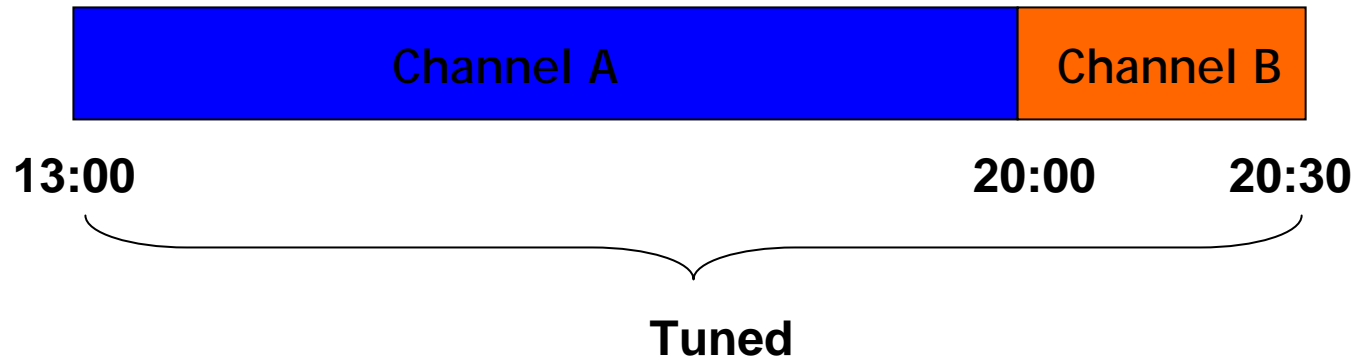


Issues with set-top measurement must be addressed satisfactorily

Requires expertise in audience measurement
and sophisticated statistical methods

I. Inappropriate Tuning Information

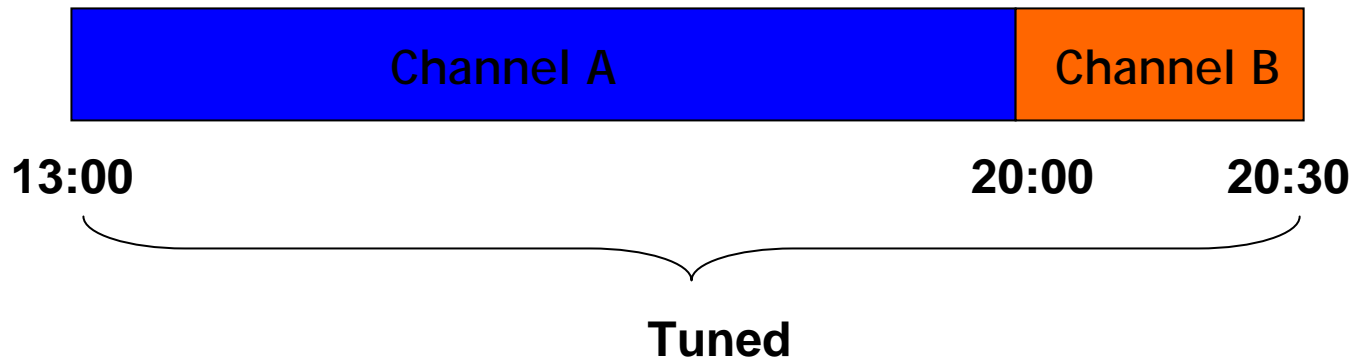
“As is”



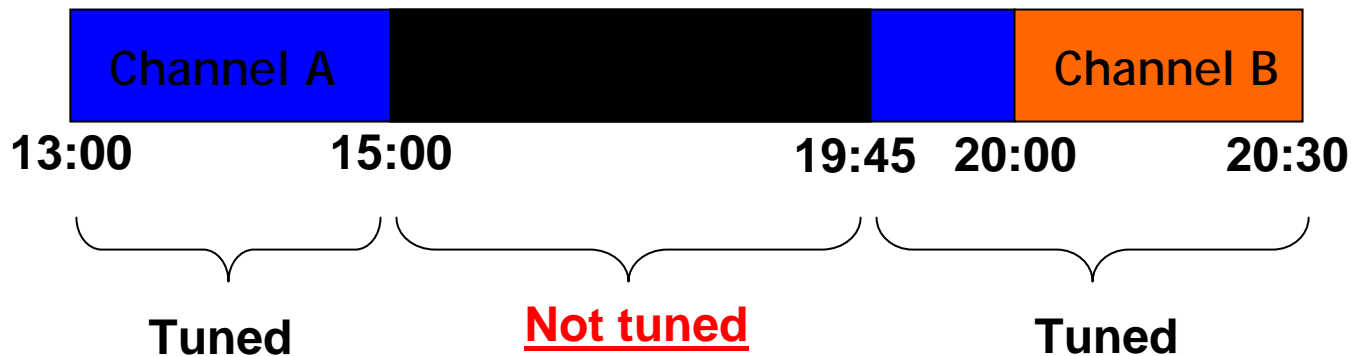
- Use a capping algorithm
 - Based on TAM Peoplemeter data
 - Depends on market, demographics, genre, channel, daypart

International experience suggests ~20% of tuning time requires capping

“As is”



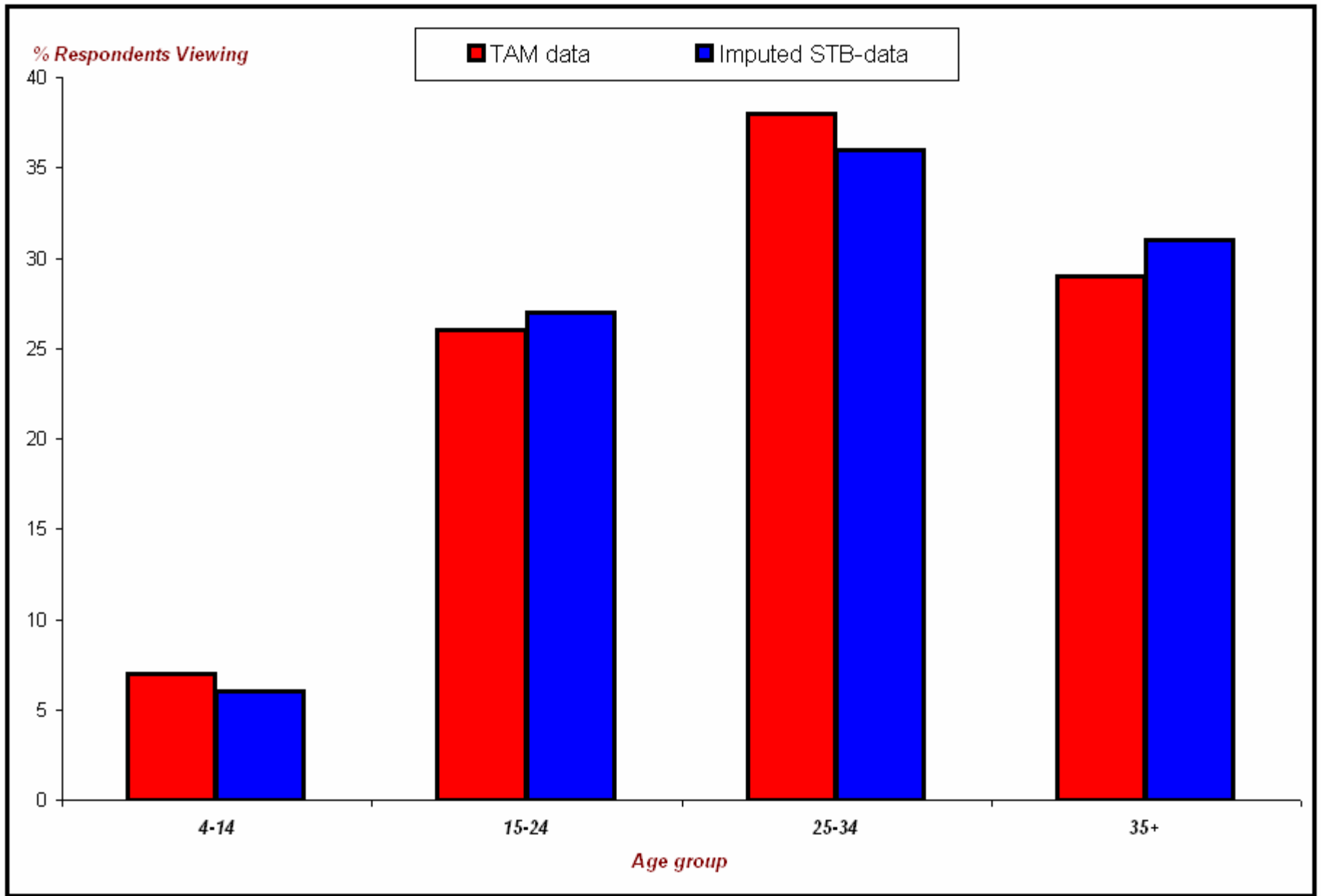
“Capped”



II. Lack of Individual viewing Information

- Use TAM Peoplemeter data to assign probabilities of individual viewing
 - SEC A home
 - TV on at 20:30
 - Channel being viewed is a sports channel.
 - Who is likely to be present?

Very close correspondence in distributions



Implementing RPD

Already in talks with platform owners

Starting with Mumbai

Looking at a panel of 10,000 homes

I. Platform Establishment Survey (PES)

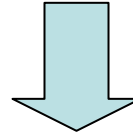
- Talking with platform owners to include PES data in their subscription forms
- Each platform profiled on demographics that TAM will use to sample and report data on
- Will also serve as the database from which to recruit

II. Sampling and Recruitment

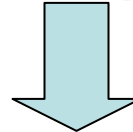
- Need to select representative sample from this list
- If home has to be made RP-enabled, then to ensure that the viewing is not affected
- Recruitment likely to be much easier than recruiting for a Peoplemeter panel!

III. Data processing and management

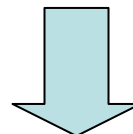
Data cleaning (huge volume!)



Handle RPD-specific quirks



Project RPD to the platform universe



Enable industry to analyze data

Access to international experience



- Deal with Charter, LA
- 330,000 household panel !
- Two years of testing before commercial roll-out

Summary

- Exciting phase in audience measurement
- Complementary Peoplemeter + STB measurement offers promise
- Large industry benefits
- But need to be careful in planning and execution

Thank You!