



Life in a Digital Era...

In a simple Analog world...

- Home-Neighbourhood Cable Op connected
 - *Limitation in Channels received in your TV set*
 - *'OK' Sound & Video Quality of Content*
 - *Your favorite channel may be missing from the line-up*



What does 'Life in a Digital Era' mean?

- Home & Platform Owner directly connected
 - *'Unlimited' Channels received in your TV set*
 - *'Digital' Sound & Video Quality of Content*
 - *Choice to view your favorite channel*

Input is via a STB provided by either a DTH or Digital Cable



When it was first mandated by the government in Jan 2007...

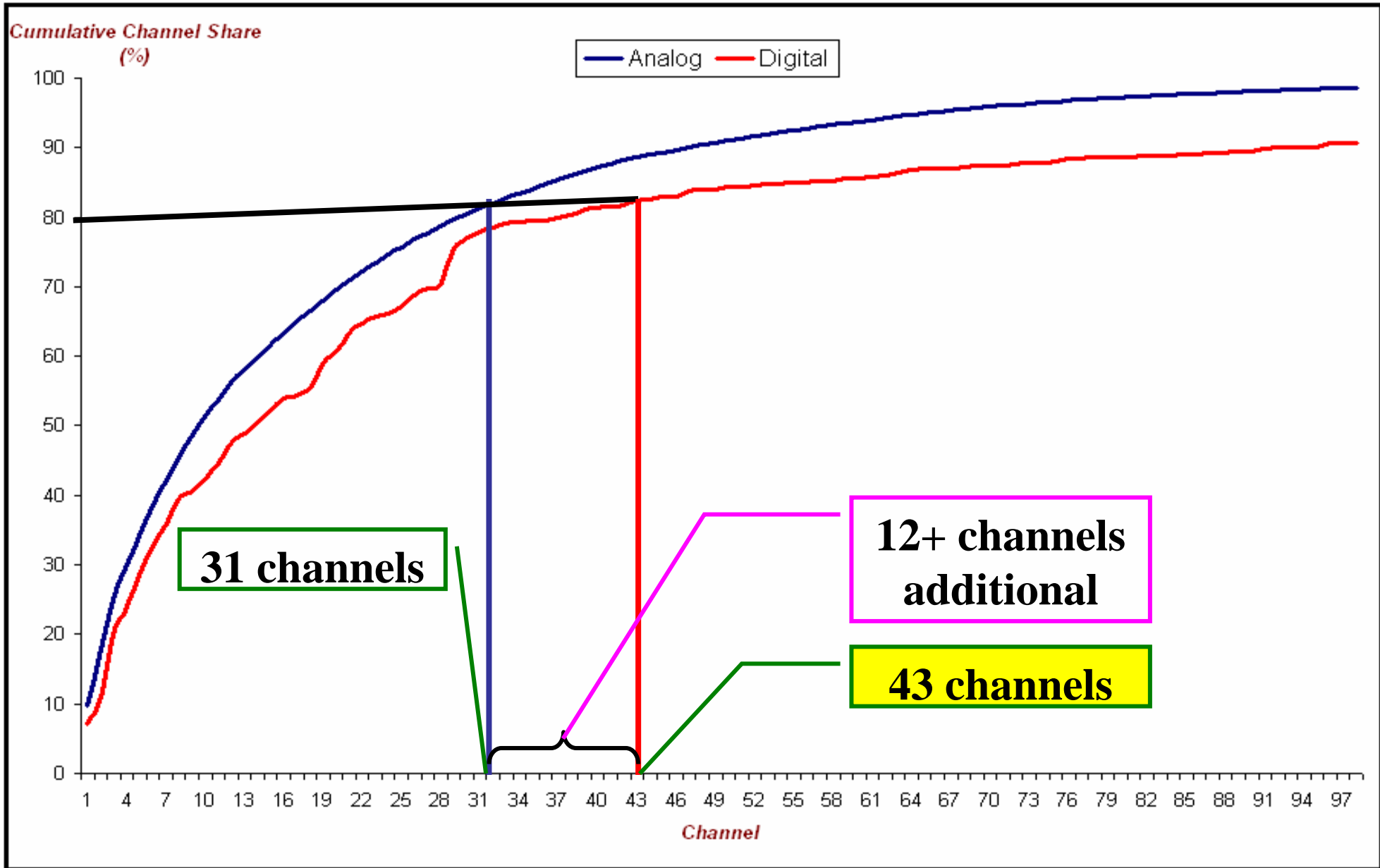
- TAM study in Feb 2007 indicated...(3 cities : Mum, Del, Cal)
 - *16.33 lakh Cable & Satellite homes in the CAS area Universe*
 - *29% (4.75 lakh) homes moved/moving to Digital (DTH/Digital Cable)*
 - *71% stayed with Free-to-Air (FTA) channels*

- TAM study in end 2007 indicated...(3 cities : Mum, Del, Cal)
 - *16.33 lakh Cable & Satellite homes in the CAS area Universe*
 - *38% (6.4 lakh) homes moved to Digital (DTH/Digital Cable)*
 - *62% have stayed with Free-to-Air (FTA) channels*
 - *Mumbai digital penetration highest (50%), followed by Delhi (39%)*

Going Digital meant 3 big benefits!

- Access to more Channels for a viewer
 - *Measured by % of channels contributing to 80% viewing time*
- Better Picture, Better Sound experience for a viewer
 - *Measured by the Increase in Time Spent viewing TV post Digital adoption*
- Preferred Content, a choice for selection to view
 - *Measured by Increase in Genre shares of Unique Content Channels*

1. A Digital viewer watches more channels



2. Digital homes spend 25% more time on TV

TG	Time Spent (minutes per day)
Analog	150
Digital	186

3. Preferred Content has increased Time Spent

Genre	Time Spent (minutes per day)	
	Digital	Minutes > Analog
Hindi GEC	67	23
Marathi GEC	30	4
Hindi Movies	30	8
Hindi News	13	2
Infotainment	3	1
Business News	3	2
Cable	8	-5
Marathi News	2	-1
Marathi Movies	1	-2

Presently focused
around Hindi GEC

But Consumer voice concerns on Digital

- Individual/Bouquet Pricing of existing Pay channels have not been received well
- The STB offer of Value added services like Interactivity, VOD, are used but infrequently due to lack of Education
- Quickness in Service is a crying need

From a TAM measurement perspective...

While Digital is taking
concrete steps on TV...

...2 other platforms will soon offer competition!



How do we keep track of all the
3 screen Digital viewer?

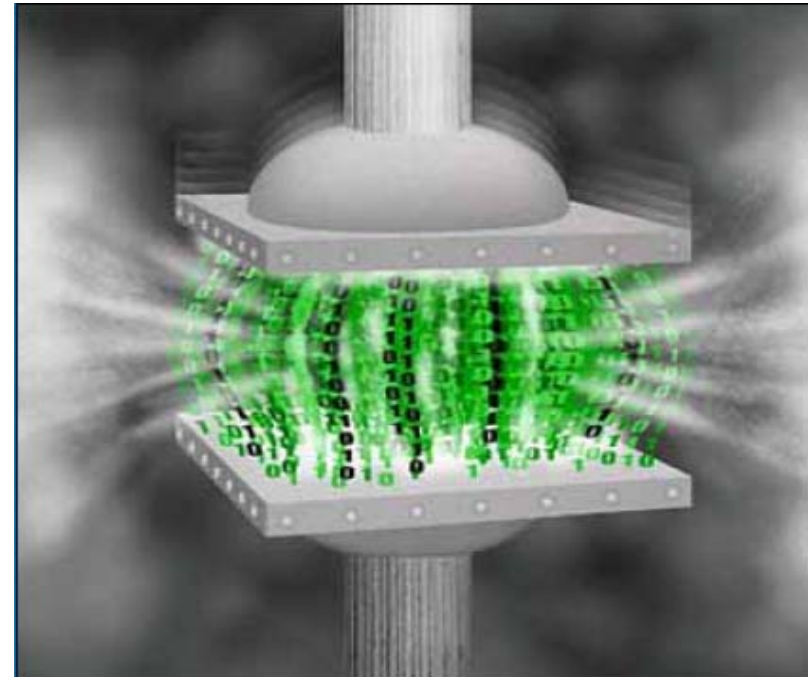
First, the all important TV screen

- Digital TV Viewing comprise :
 - Digital DTH
 - Digital Cable
- Measurement process :
 - Using Peoplemeter
 - Using Peoplemeter + Set Top Box (STB)

While Peoplemeter measurement is
the 1st stage of Digital Measurement...

STB based measurement requires...

- Alignment/Sync to incoming Data Elements :
 - *Media Access Control (MAC) Address unique to every STB*
 - *Channel code*
 - *Head end code*
 - *Area code*
 - *Date, Start time, End time stamps on viewing statement*



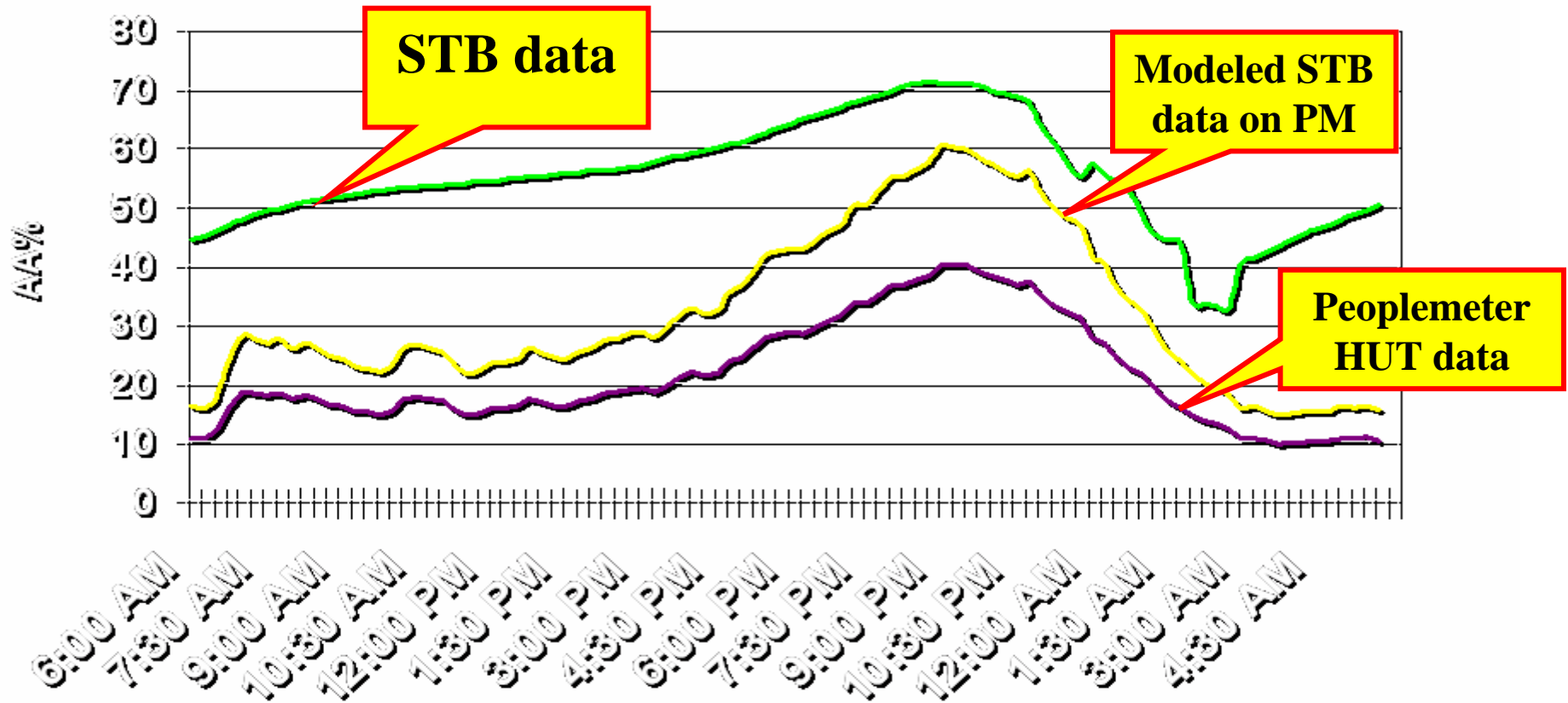
~ for 10,000 STB's, we will be processing
3 million viewing statement (volume of data) on a weekly basis!

Hindrance

- No STB ON/OFF information
- No Individual viewing information
- No natural, easy Return path for the Data

Using Peoplemeter data for modeling of STB data...

Making STB data useful to you



Setting stage for measuring the 2nd Screen...IPTV on Computer/TV

The new addition...

- **Ability of STB (with PVR/DVR) to Record & Replay Content**
 - Measuring the Live + 2nd or 3rd or 4th round of viewing of same content
- **Ability to provide a natural Return Path for Data**
 - 2 way path in a Broadband connectivity provides not only interactivity for the viewer, but also provides a Return path for viewing data

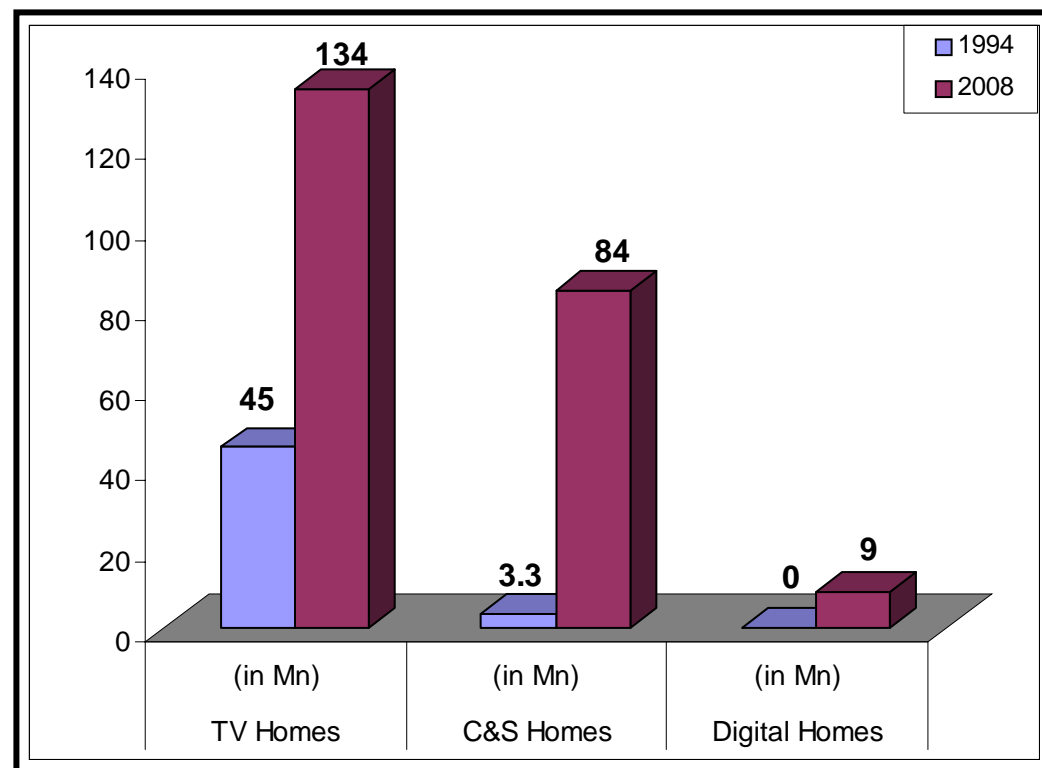
Today, both these viewing phenomenon
are measurable by our
TVM5 Peoplemeter

On the 3rd Screen, Mobile TV,
measurement trials are in progress
within Nielsen

Reflecting back to 1994...

- C&S was a small phenomenon...1994
 - *7% of TV homes*
 - *In 14 years, from 3.3 million to 84 million!*

- Digital penetration, small phenomenon?
 - *Projected estimates for 2008 ~ 9 million homes (7% of TV homes)!*



1994 - Frank Small Research study
 2008 - TAM IMRB Research study

Time to Join Hands & Ride the Digital Wave

