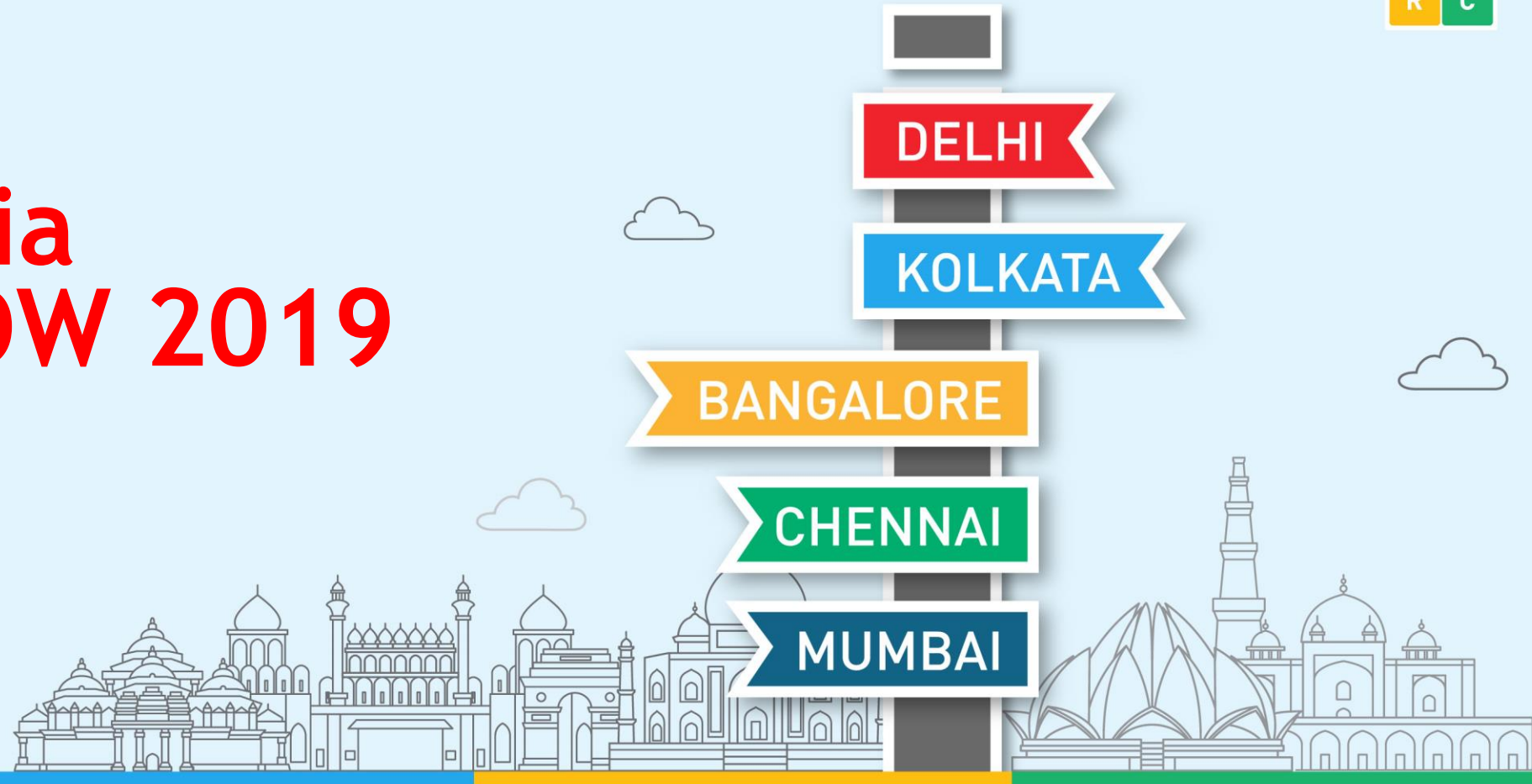




BARC India ROADSHOW 2019



Media Partners:

ADgully

AGENCY
Reporter

BEST MEDIA INFO

INDIANtelevision

medianews 4u.com

m.m
mxmindia.com

AGENDA



Advanced Analytics Platform

Introduction to an enhanced BMW software



Insight Solutions

Suite of Insight products for various in-depth analyses



Tariff Order Transition

Trends seen during the NTO period



New Reporting Cuts & Metrics

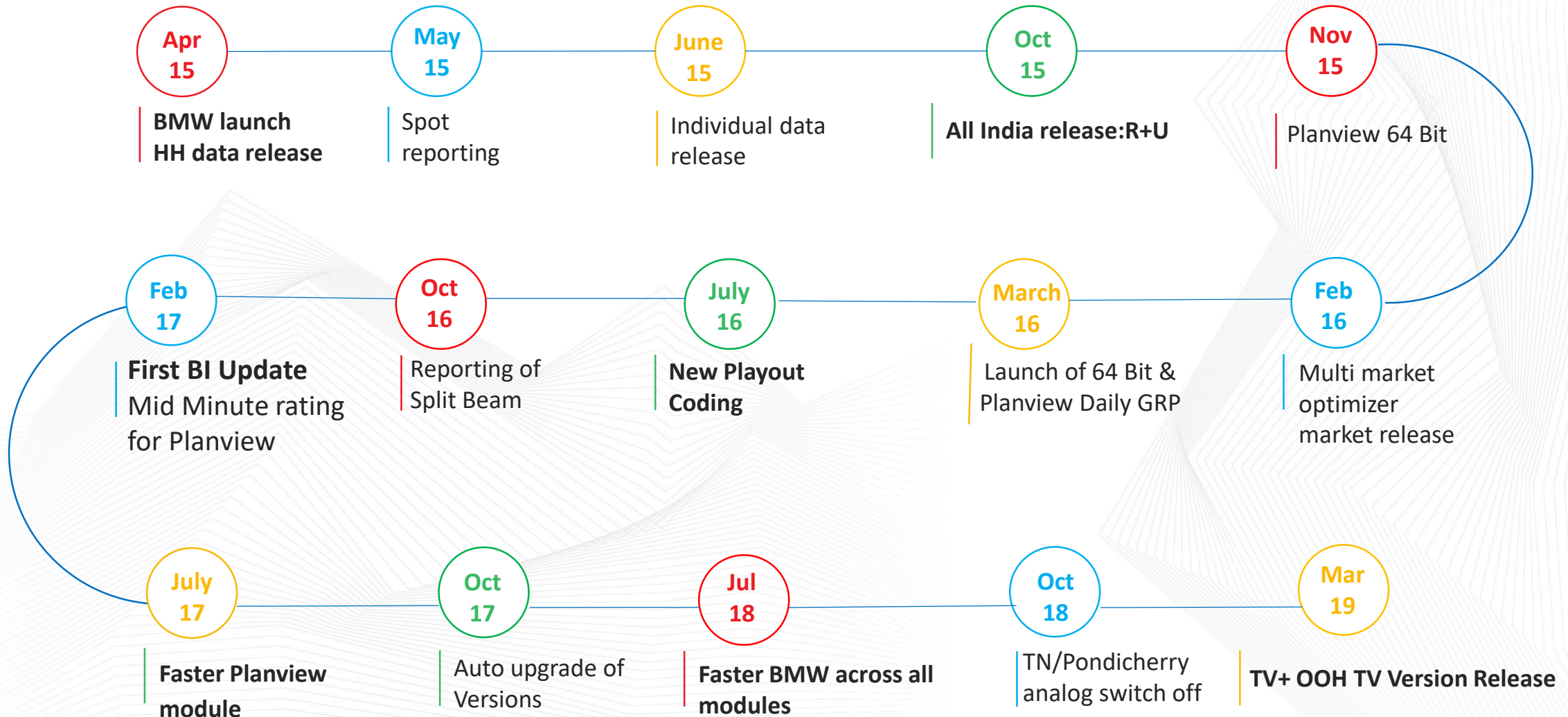


Advanced Analytics Platform



SECTION I

THE BMW JOURNEY 97 Versions Tested | 25 Version released to market in 50 Months



**What's
Next?**



Introducing..



What BMW can do, and More...

BMW vs YUMI



BARC INDIA
MEDIA
WORKSTATION



X

- Graphical Outputs



X

- Evolution Modules



X

- Multi Tasking



X

- Analysis across other database



X

- Advanced Formulas



Sneak Peek of **YUMI** MARKDATA

All steps of Query definition under one tab called Parameters

The screenshot displays the YUMI 19.06.00 software interface. The 'Parameters' tab is active, showing a tree view on the left and a data table on the right. The tree view includes categories like Batches, Control Panel, FTP, AudView, AdView, AdSplit, and Teleview. The 'AudView' section is expanded, showing 'Report Programs' and 'Report TimeBands'. The 'Report TimeBands' section is further expanded, showing 'Regions' (India), 'Channels' (Base Channel: TOTAL, &pictures, &pictures HD, &Prive HD, 10 TV, Zee 24 Ghanta, 4TV News(na), 7S Music, 9X(na), &flix, <more>), 'Targets' (Ref Target: Universe, HH Ref Target: Unive..., Universe), 'Threshold', 'Screens' (TV), 'Time bands' (02:00:00-26:00:00 (split...)), 'Advanced Filters', and 'Transformers'. The data table on the right lists channels and their universe ratings.

Channel	Universe rat%
1 STAR Sports 1 Hindi	151.22
2 Sun TV	108.24
3 Dangal	95.89
4 Zee TV	83.95
5 STAR Plus	82.36
6 STAR Maa	77.95
7 STAR Vijay	65.68
8 Big Magic	64.16
9 Sony Entertainment Television	63.30
10 SONY SAB	62.86
11 Colors	59.12
12 STAR Gold	53.97
13 Zee Telugu	53.76
14 Zee Tamil	53.62
15 Zee Cinema	53.53
16 ETV Telugu	53.11
17 Zee Kannada	49.22
18 Gemini TV	47.30
19 B4U Kadak	46.99
20 Zee Marathi	42.48
21 Colors Kannada	41.36
22 Zee Bangla	40.02
23 Asianet	39.44
24 STAR Bharat	39.08
25 Bhojpuri Cinema	34.33
26 KTV	32.37
27 STAR Jalsha	31.91

Layout on the left side
Single screen to select Regions,
Targets and Channels

Module Database: Week 8 2017 onwards | Module Location: Modules\MAP\India\Reports\Report TimeBands | Default Database: Week 8 2017 onwards | User: user

Multi Database Analysis



YUMI 19.06.00

File View Options Window

About Database Week 8 2017 onward

Modules: Roadshow, Report Programs, Competing Programs, Report Programs, Ratings Curve, Program Evolution

Tools: Batches, Control Panel, FTP

AudView: Report Programs, Report TimeBands, Individual Analysis, Grid, Classic Grid, Switching, Switching Table, PR Ratings Curve, Ratings Curve

AdView: Report Programs and Advertising, Report Advertising, CoverGuide, Calendar Campaign

AdSplit: Report Ad-Split

Modules: Modules, Favorites

Workspace\Documents\Roadshow

Name	Area	Type	Database
TB all channels	user	Module Presentation	Week 8 2017 onwards; W41 '15 to W7 '17 All India

Context Menu:

- Execute
- Execute With Database...
- Change Database...
- Reset to Base Module
- Edit
- Delete
- Rename
- Cut
- Copy
- Export
- Save as
- Add to Startup
- Permissions
- Customize This Item...
- View
- Arrange Icons By
- Icons Size
- Refresh

Documents:

- Users
- Groups
- BARC India Examples
- Roadshow
- VIVO IPL 2015-19

TaskHelper

Default Database: Week 8 2017 onwards User: user

Saved workspace files can be executed in multiple databases without logging out to change database

Selecting a particular program in Program report allows selection of 3 evolution modules

B A
R C

YUMI 19.06.00

File View Options Window

Modules: Documents, Report Programs

Tools: Ratings Curve, Competing Programs, Program Evolution

AudView: Report Programs, Report TimeBands, Individual Analysis, Grid, Classic Grid, Switching, Switching Table, PR Ratings Curve, Ratings Curve

AdView: Report Programs and Advertising, Report Advertising, CoverGuide, Calendar Campaign

AdSplit: Report Ad-Split

Televue: Modules, Favorites

Report Programs

Search...

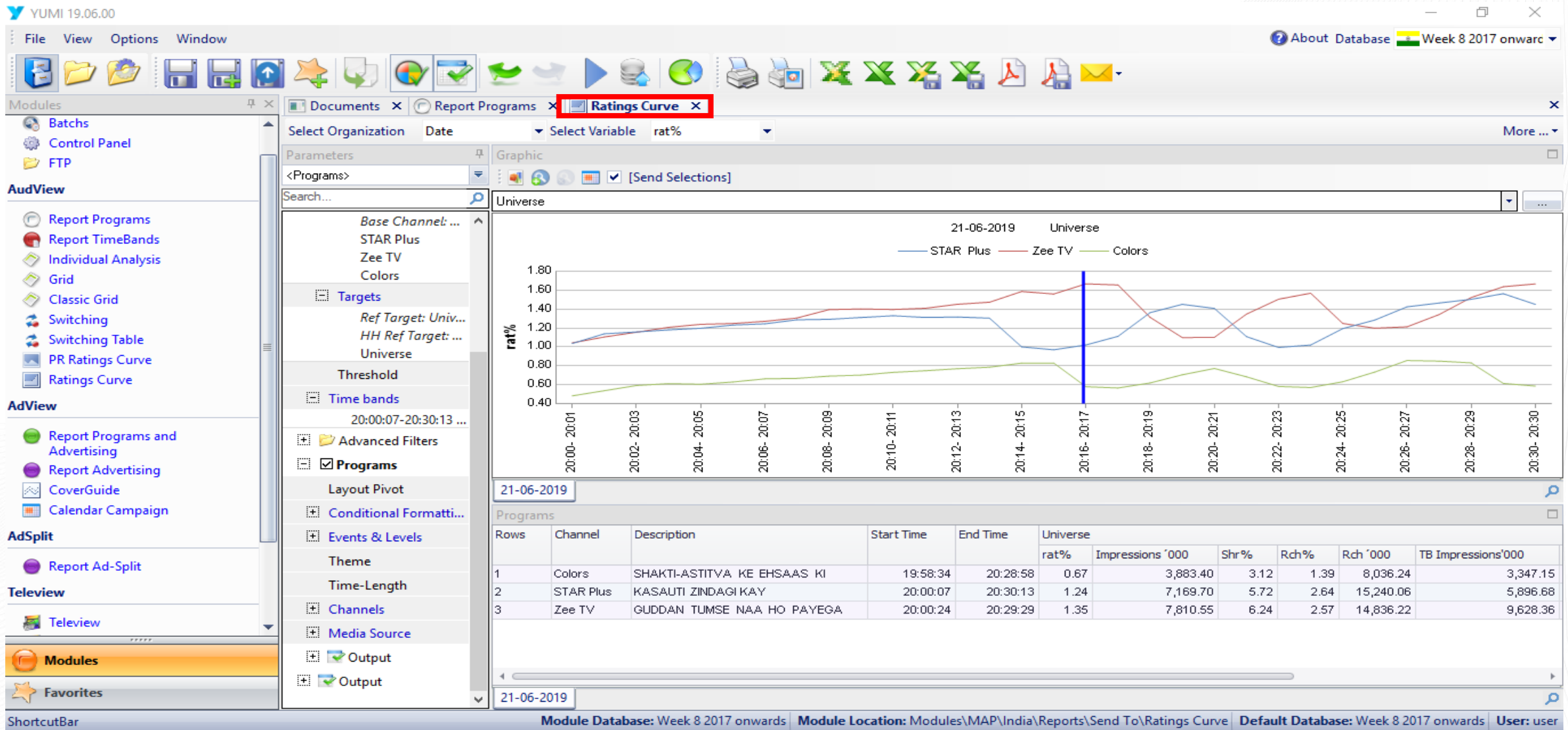
Report TV Programs

Channel	Rows	Description	Level	Ev. Type	Start Time	End Time	Length [hhmmss]	Universe	Impressions '000
								rat%	
STAR Plus	22	KASAUTI ZINDAGI KAY	Level 1	Program	10:59:50	11:30:31	00:30:41	0.54	3,139.50
STAR Plus	23	NAZAR	Level 1	Program	11:30:31	11:59:51	00:29:20	0.58	3,329.52
STAR Plus	24	YEH RISHTY HAIN PYAAR KE	Level 1	Program	11:59:51	12:30:41	00:30:50	0.51	2,959.94
STAR Plus	25	YEH RISHTA KYA KEHLATA HAI	Level 1	Program	12:30:41	13:00:08	00:29:27	0.58	3,347.77
STAR Plus	26	KULFI KUMAR BAJEWALA	Level 1	Program	13:00:08	13:29:45	00:29:37	0.40	2,289.64
STAR Plus	27	KASAUTI ZINDAGI KAY	Level 1	Program	13:29:45	13:59:56	00:30:11	0.40	2,282.29
STAR Plus	28	KAHAAN HUM KAHAAN TUM	Level 1	Program	13:59:56	14:30:26	00:30:30	0.46	2,678.34
STAR Plus	29	NAZAR	Level 1	Program	14:30:26	14:59:46	00:29:20	0.32	1,838.03
STAR Plus	30	DIVYA DRISHTI	Level 1	Program	14:59:46	15:29:56	00:30:10	0.29	1,651.93
STAR Plus	31	YEH RISHTY HAIN PYAAR KE	Level 1	Program	15:29:56	16:00:24	00:30:28	0.33	1,904.80
STAR Plus	32	PYAAR KA DARD HAI	Level 1	Program	16:00:24	17:00:14	00:59:50	0.26	1,520.98
STAR Plus	33	YE HAI MOHABBATEIN	Level 1	Program	17:00:14	17:30:04	00:29:50	0.23	1,347.65
STAR Plus	34	NAZAR	Level 1	Program	17:30:04	18:00:14	00:30:10	0.21	1,208.63
STAR Plus	35	KASAUTI ZINDAGI KAY	Level 1	Program	18:00:14	18:30:15	00:30:01	0.23	1,307.73
STAR Plus	36	YEH RISHTA KYA KEHLATA HAI	Level 1	Program	18:30:15	18:59:57	00:29:42	0.33	1,897.87
STAR Plus	37	EK BHARAM SARVAGUN SAMPANNA	Level 1	Program	18:59:57	19:30:07	00:30:10	0.51	2,942.61
STAR Plus	38	DIL TO HAPPY HAI JI	Level 1	Program	19:30:07	20:00:07	00:30:00	0.64	3,698.53
STAR Plus	39	KASAUTI ZINDAGI KAY	Level 1	Program	20:00:07	20:30:13	00:30:06	1.24	7,169.70
STAR Plus	40	KULFI KUMAR BAJEWALA	Level 1	Program	20:30:13	20:59:58	00:29:45	1.31	7,587.29
STAR Plus	41	KAHAAN HUM KAHAAN TUM	Level 1	Program	20:59:58	21:30:17	00:30:19	0.98	5,630.87
STAR Plus	42	YEH RISHTA KYA KEHLATA HAI	Level 1	Program	21:30:17	22:00:22	00:30:05	1.66	9,569.48
STAR Plus	43	YEH RISHTY HAIN PYAAR KE	Level 1	Program	22:00:22	22:30:08	00:29:46	1.21	6,993.82
STAR Plus	44	YE HAI MOHABBATEIN	Level 1	Program	22:30:08	22:59:58	00:29:50	0.80	4,634.04
STAR Plus	45	NAZAR	Level 1	Program	22:59:58	23:30:38	00:30:40	0.80	4,623.77
STAR Plus	46	KASAUTI ZINDAGI KAY	Level 1	Program	23:30:38	23:59:24	00:28:46	0.36	2,079.32
STAR Plus	47	DIVYA DRISHTI	Level 1	Program	23:59:24	24:29:43	00:30:19	0.11	628.38
STAR Plus	48	YEH RISHTA KYA KEHLATA HAI	Level 1	Program	24:29:43	24:58:53	00:29:10	0.07	381.74

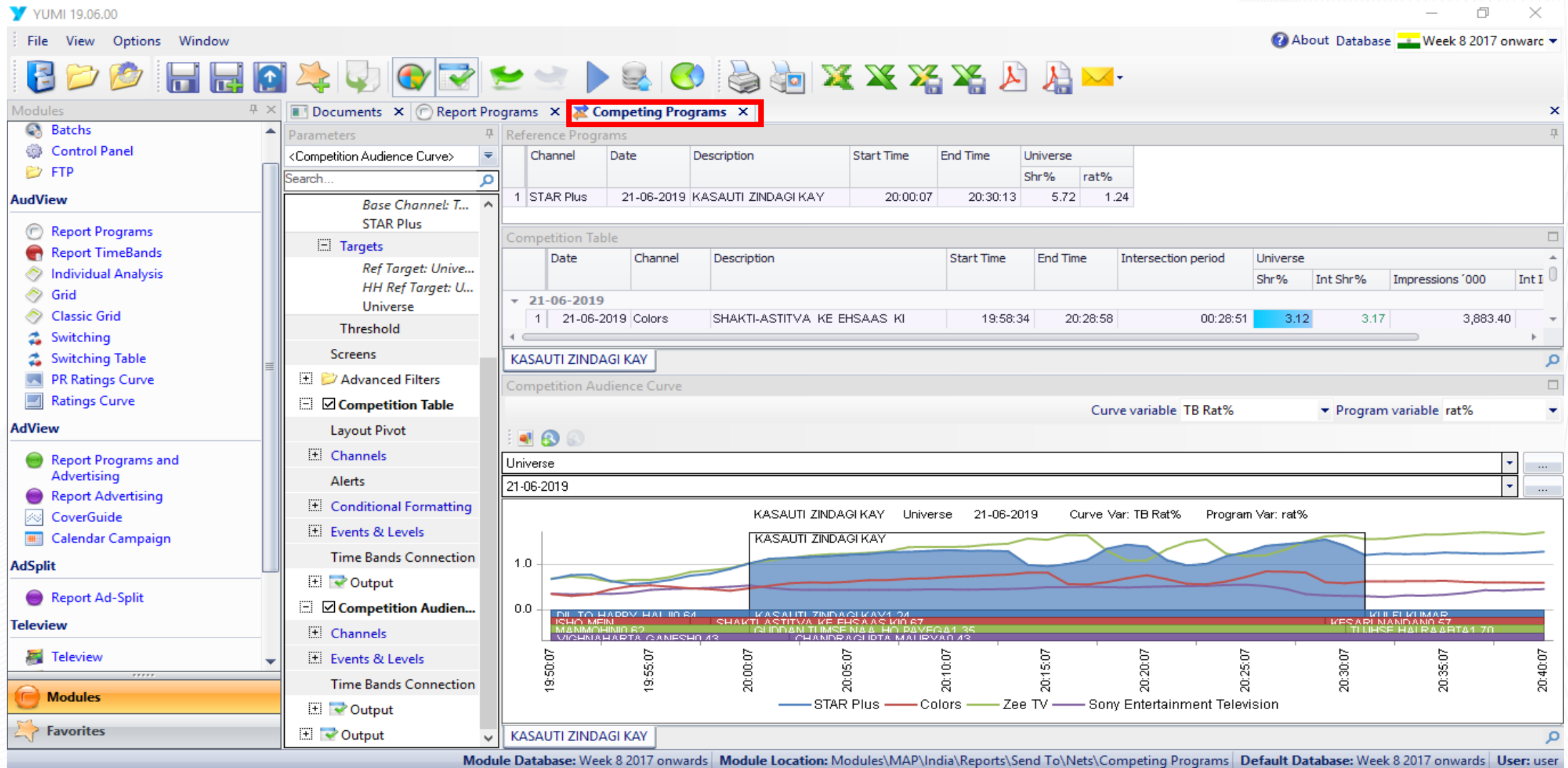
Data Table Info

Module Database: Week 8 2017 onwards | Module Location: Documents\Report Programs | Default Database: Week 8 2017 onwards | User: user

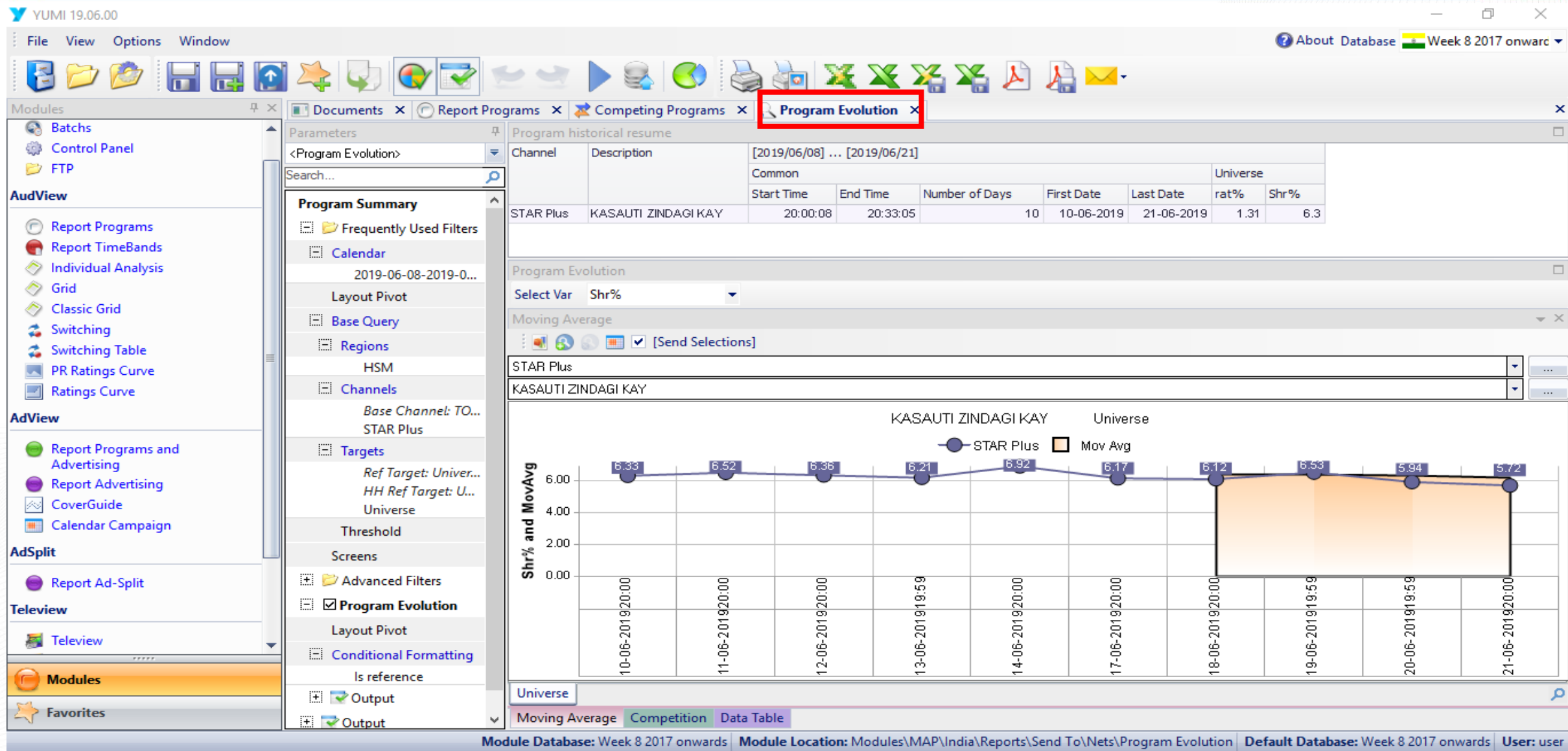
1. Ratings curve: traditional ratings graph inbuilt for the same program slot across channels



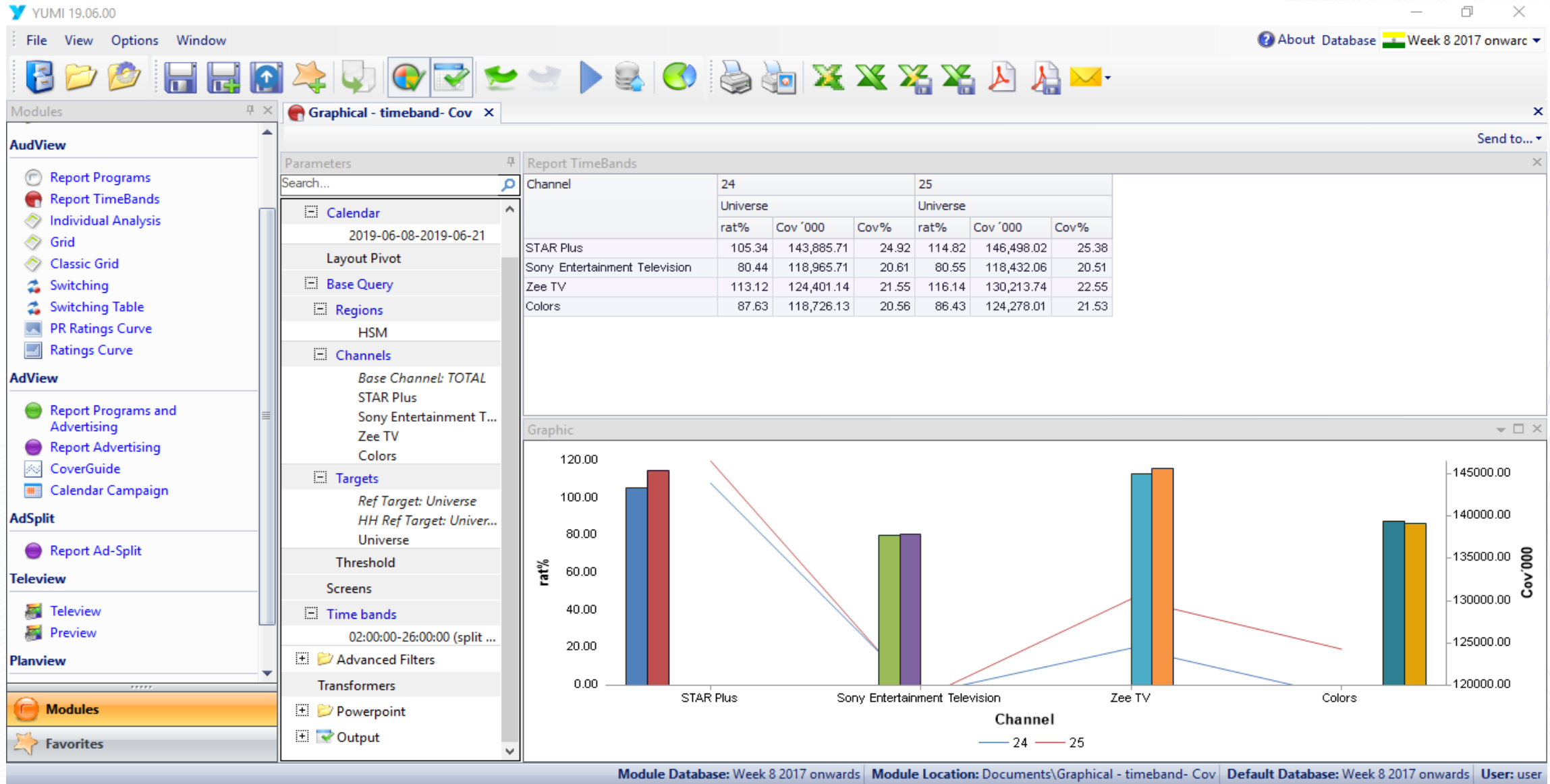
2. Competing programs :to see programs from competing channels under various parameters in both graphical and data format



3. Program Evolution : helps to understand episode wise performance historically



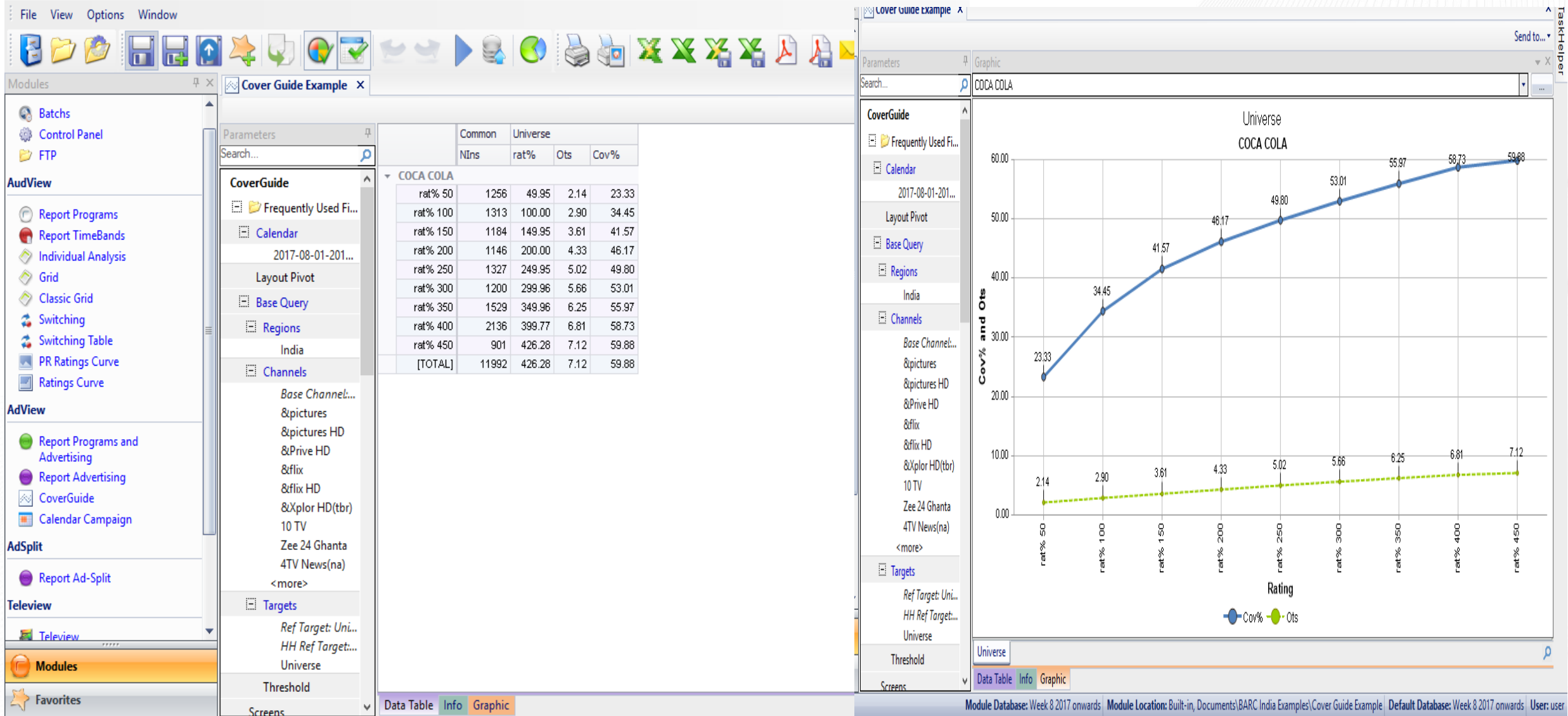
Create charts along with data in the same window which can be exported to Excel or PDF



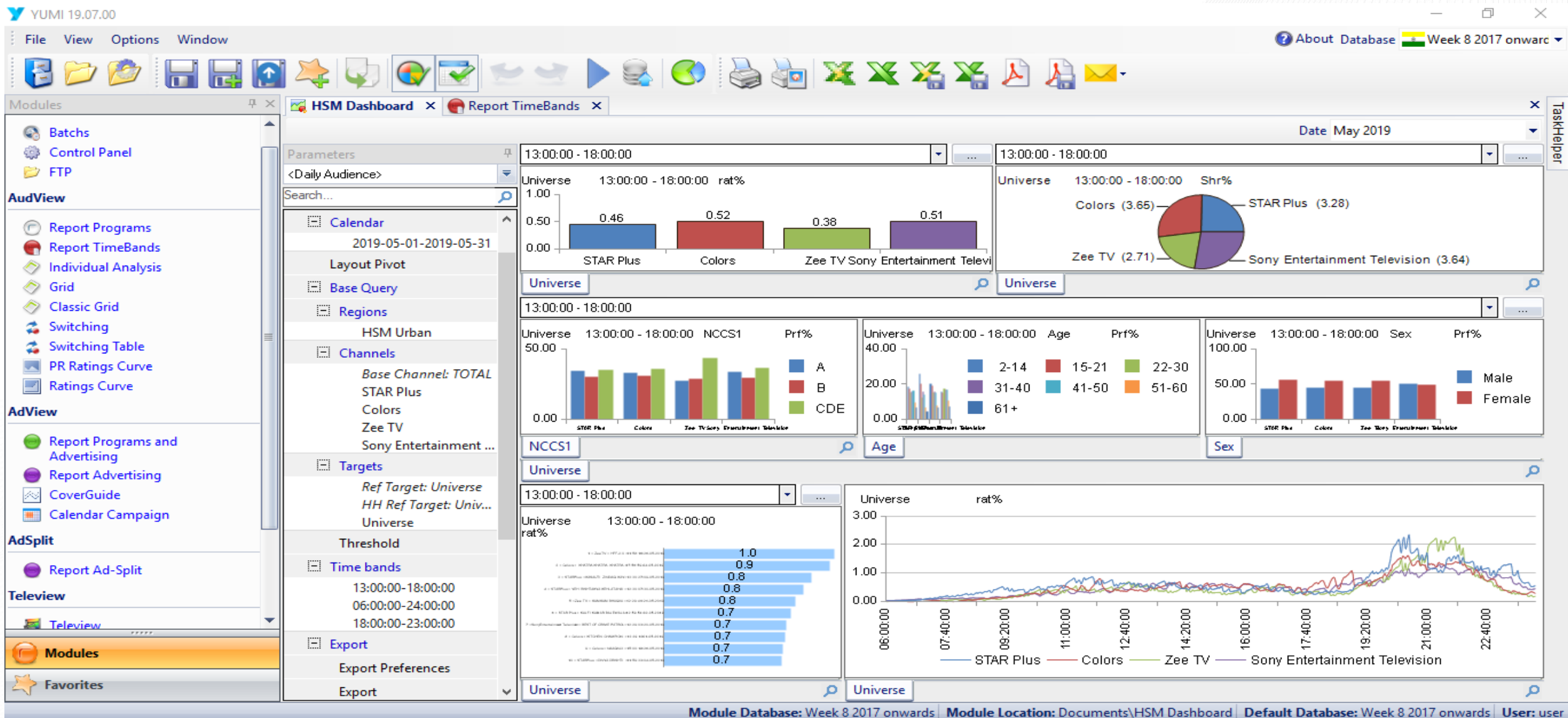
The traditional Reach Curve can be compiled for Sector/Brand/Category using Cover Guide



YUMI 19:07:00



Corporate Level Dashboards can be created using customized templates



Combining individual analysis modules like duplication, SMH in the same window



YUMI 19.07.00

File View Options Window

Report TimeBands Week 8 2017 onward

Modules

- Batches
- Control Panel
- FTP
- AudView
 - Report Programs
 - Report TimeBands
 - Individual Analysis
 - Grid
 - Classic Grid
 - Switching
 - Switching Table
 - PR Ratings Curve
 - Ratings Curve
- AdView
 - Report Programs and Advertising
 - Report Advertising
 - CoverGuide
 - Calendar Campaign
- AdSplit
 - Report Ad-Split
- Televue
 - Televue
- Modules
- Favorites

Report TimeBands

Parameters

Search...

Report TimeBands

- Frequently Used Filters
 - Calendar
 - 2019-06-01-2019-06-21
 - Layout Pivot
 - Base Query
 - Regions
 - HSM
 - Channels
 - Base Channel: TOTAL
 - STAR Plus
 - Zee TV
 - Colors
 - Targets
 - Ref Target: Universe
 - HH Ref Target: Universe...
 - Universe
 - Threshold
 - Screens
 - Time bands
 - 02:00:00-26:00:00 (split by...
 - Advanced Filters
 - Transformers
 - Output

Channel	Year&Week	Universe	Audience	Dup/Exc								
				Dup%	Dup%							
					rat%	[1]	[2]	[3]	[4]	[5]	[6]	[7]
STAR Plus	2019W23	106.15	95.04	74.14	71.24	61.89	54.27	52.47	66.70	58.81	56.04	
STAR Plus	2019W24	105.34	74.35	96.10	75.21	54.77	61.44	54.11	59.19	65.84	59.01	
STAR Plus	2019W25	114.82	71.30	75.06	95.80	52.52	54.45	60.96	57.14	59.48	65.41	
Zee TV	2019W23	102.87	52.13	46.00	44.20	95.88	71.61	68.28	56.50	49.76	46.91	
Zee TV	2019W24	113.12	46.97	53.04	47.09	73.58	96.76	72.69	51.77	58.06	51.43	
Zee TV	2019W25	116.14	46.48	47.81	53.96	71.82	74.40	96.00	50.44	52.56	58.03	
Colors	2019W23	91.00	54.86	48.55	46.96	55.17	49.19	46.83	97.05	72.29	67.88	
Colors	2019W24	87.63	48.52	54.17	49.03	48.74	55.34	48.95	72.52	97.45	71.81	
Colors	2019W25	86.43	47.41	49.79	55.30	47.12	50.27	55.43	69.83	73.64	96.76	

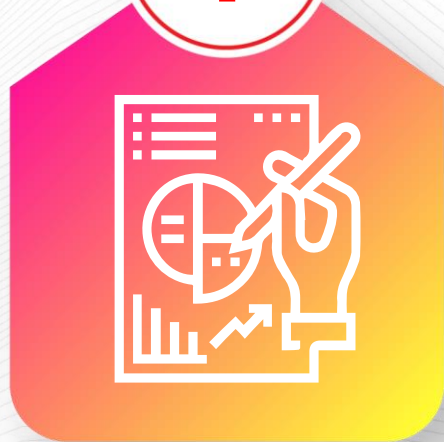
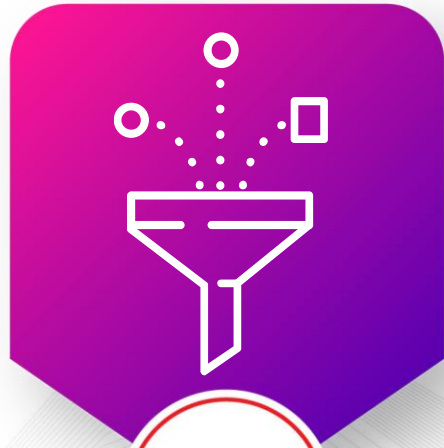
Data Table Info

Insight Solutions

SECTION II



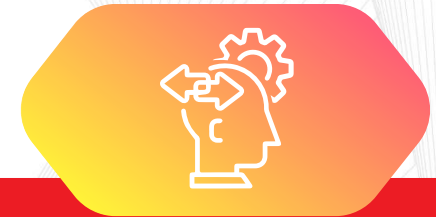
Gathering Data



Data Analysis



Insights



Actions

Moving beyond data...

**Going beyond
traditional BMW
reports**



**From Data
driven to an
Insights
delivering
organisation**



**Delivering
more value to
customers**



SOLUTIONS THAT ENABLE YOU TO TAKE BETTER BUSINESS DECISIONS



PrimaVU



TV + OOH TV



Self-Service Portal



Spot Trek

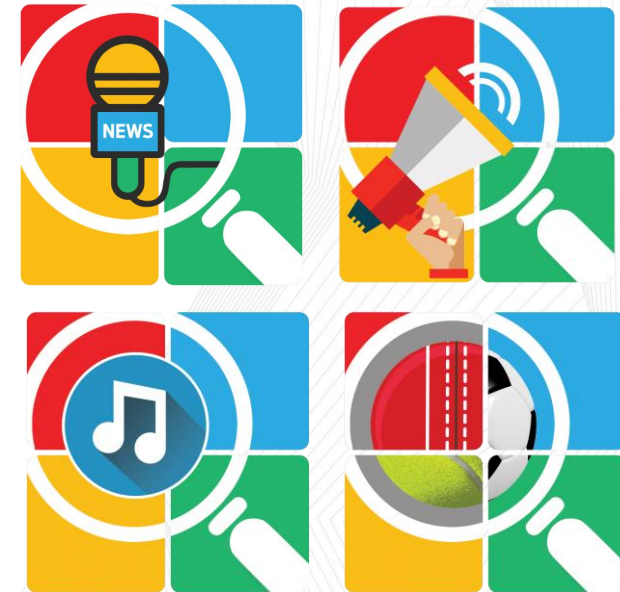


PreView



**Advanced
Targeting
Solutions**

The BIO Suite



& Many More Coming Soon

IT'S NEVER BEEN
EASIER TO TARGET

PREMIUM HOMES



Introducing

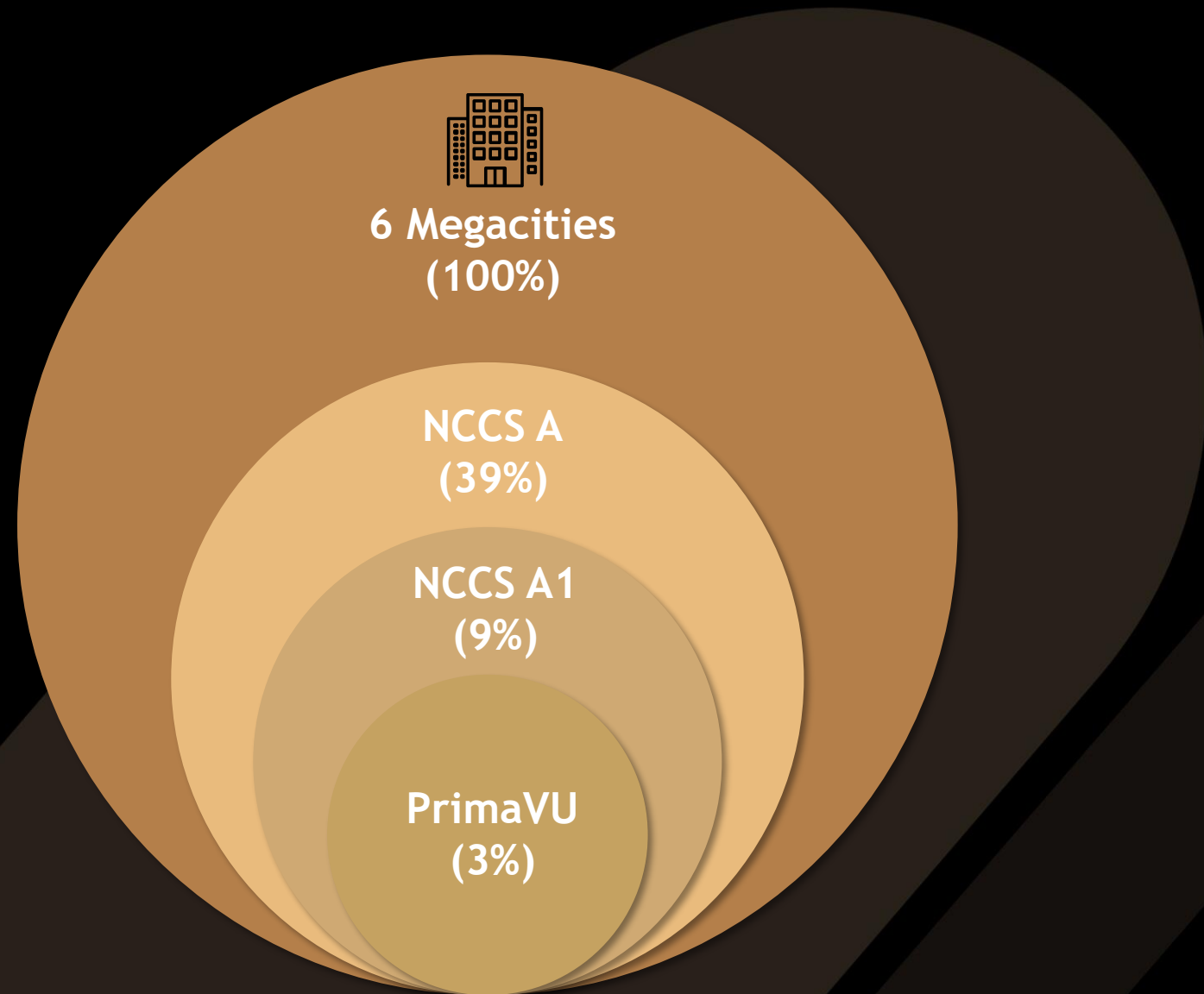


An Audience Measurement
Solution for Premium Homes

Measuring the Top 3% of Socio-Economic Strata in 6 Megacities

Premium Homes: **0.76 Mn**

Individuals in Premium Homes: **~3 Mn**



What is a Premium Home?



**NCCS
Definition**

NCCS A1



**Residence
characteristics**

**Minimum 3 Rooms
+ Kitchen**



**Device
Ownership**

**Owning Laptop/Desktop
or Smartphone/Tablet**



**Vehicle
Ownership**

**Private Car Service or
4-Wheeler, INR 10 Lakh+**



A/C at home

**Central A/C or 2+ rooms
with A/C**



**Travel &
Leisure**

**Travelled to premium
holiday destinations**



Markets Covered:
6 Megacities



Reporting Levels:
Household



Sample:
2500 meters
1500 homes



Data Cuts:
Household & Prog.
level data



Separate Dashboard
for PrimaVu
Also Available in BMW



Dashboard Interface



gargi.salgaonkar@barc

Period: 2019 - Week 26
Region: 6 PV Markets
Metric: Weekly Viewing Minutes
Submit



1682 Mn
Weekly Viewing Minutes



728
Cume Reach '000

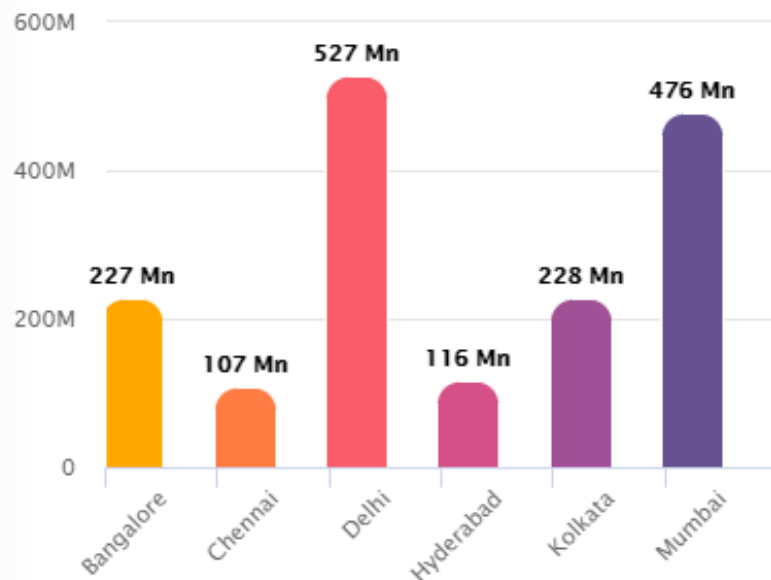


05:46:57
ATS

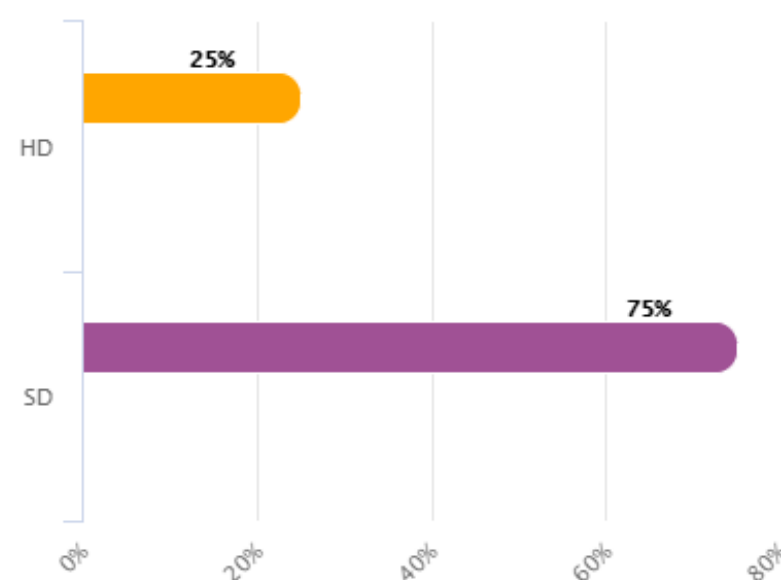


692
Daily Average

Region-wise : Weekly Viewing Minutes



HD Vs SD : Weekly Viewing Minutes



Top 5 Channel Genre : Weekly Viewing Minutes

Genres	Weekly Viewing Minutes	S
Hindi GEC	408 Mn	
Sports	340 Mn	
Hindi Movies	165 Mn	
Hindi News	121 Mn	
Bangla Channels	114 Mn	



Home



Channel
Analysis



Program
Analysis



Advertising
Analysis

THE POWER OF HD



6%
HD VIEWERSHIP
FROM NCCS A HOMES
OF CURRENCY PANEL

25%
HD VIEWERSHIP
FROM PrimaVU
HOMES

LOVE FOR ENGLISH CONTENT



5%
FROM NCCS A HOMES
OF CURRENCY PANEL

14%
FROM PrimaVU
HOMES

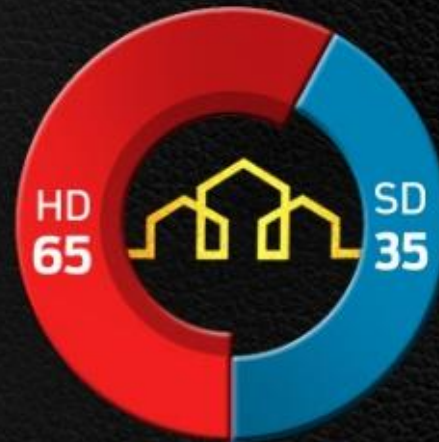
What Premium Homes Watch !

- Premium Homes are **more inclined to HD Consumption** over the NCCSA Universe
- Consumption of **English Language Content** receives a boost

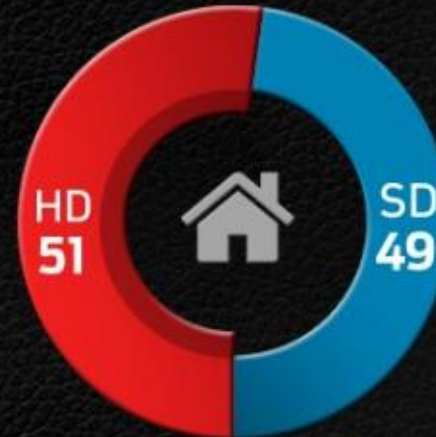
ENGLISH LANGUAGE VIEWERSHIP DISPERSION

HD : SD

PrimaVU HOMES



NCCS A HOMES



FIGURES IN %

What Premium Homes Watch !

Premium Homes show **more inclination** towards **English HD content** over the NCCSA Currency Panel



TV + OOH TV

First of its kind integration of OOH TV viewership with TV viewership



**TV Viewership at
Home**



**TV Viewership at
Eateries**

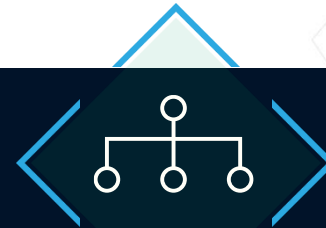


**TV Viewership of
Individuals at
Home & Eateries**

Tracking TV viewing drive of individuals from Home to Restaurants/Pubs



**1000+
Restaurants**

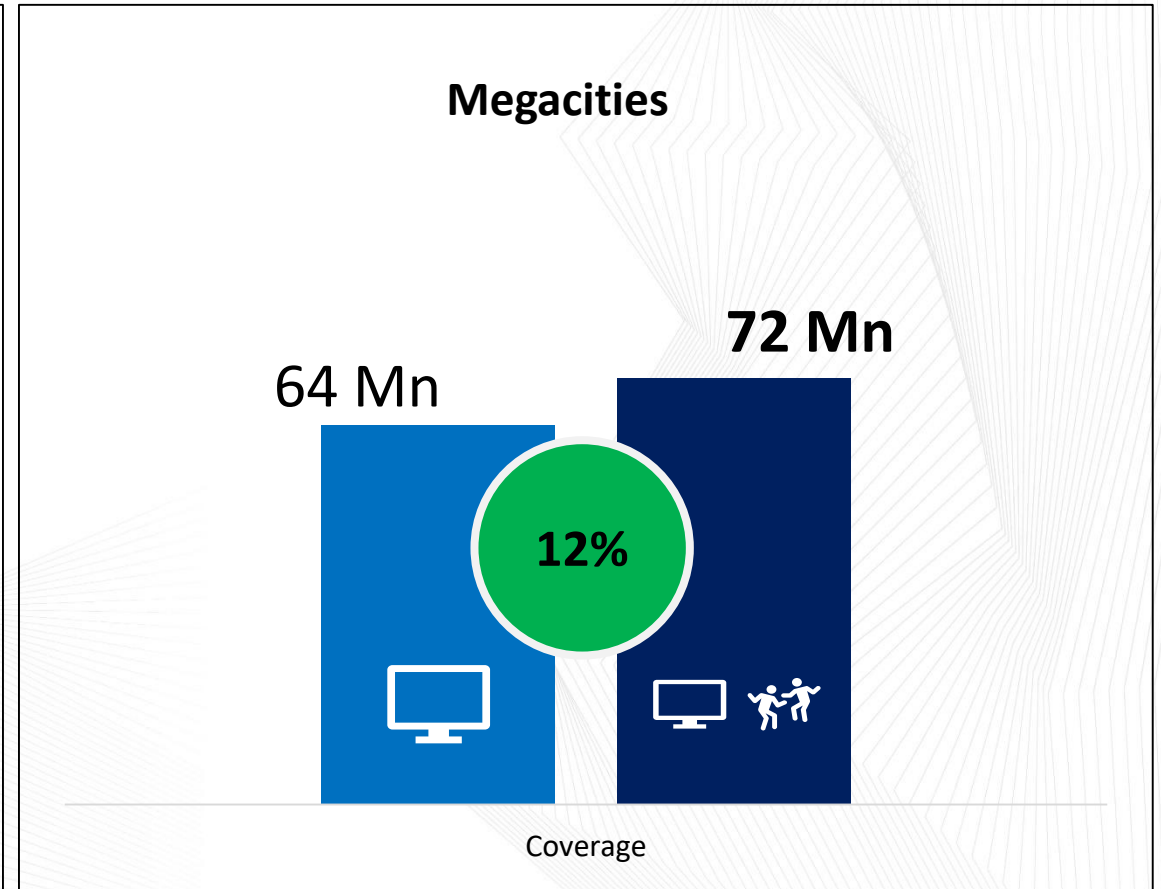
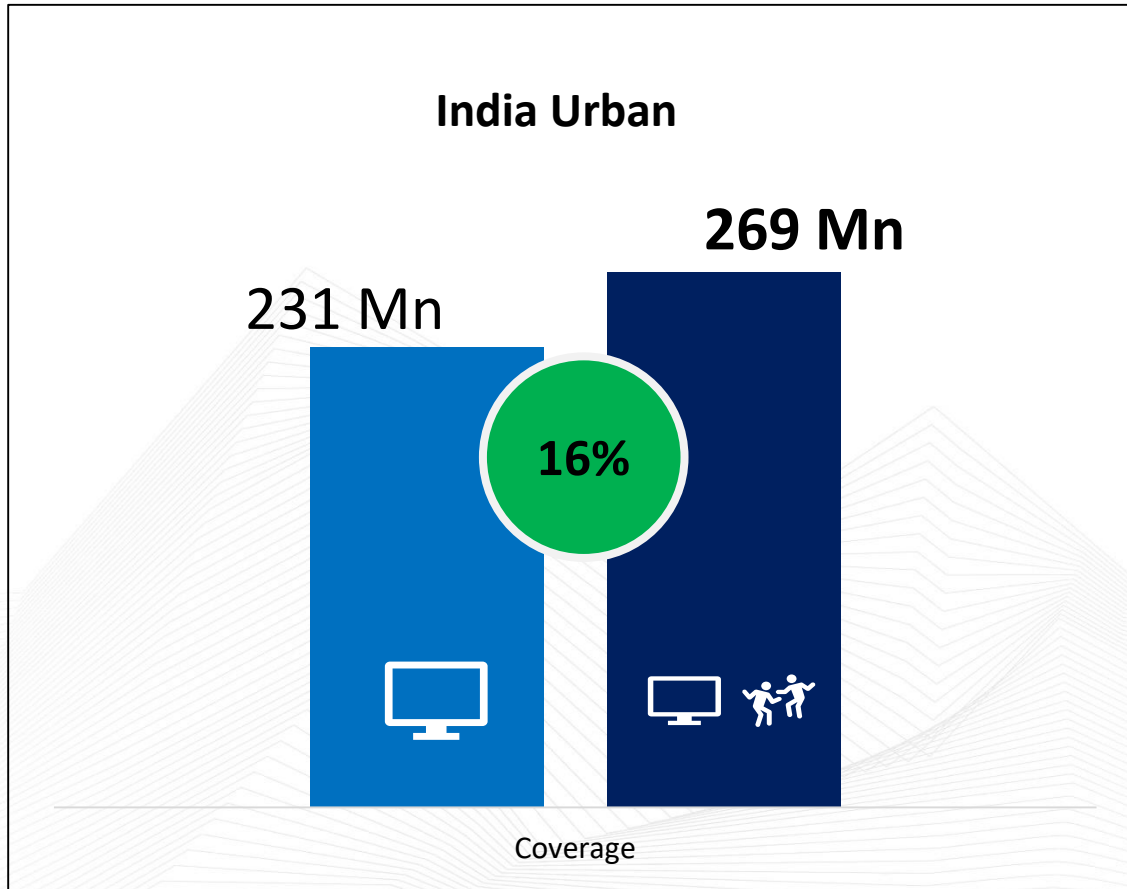


**1500 meters
Installed**



**~120+ towns
covered**

TV+OOH TV led to 16% increase in the Viewer base during IPL 2019



Channels in IPL-12: Asianet Plus, Star Suvarna, STAR Suvarna HD, Jalsha Movies, Jalsha Movies HD, Star Maa Movies, STAR Maa Movies HD, STAR Gold HD, STAR Gold, STAR Pravah, STAR Sports 1, STAR Sports 1 Tamil, STAR Sports 1 Kannada, STAR Sports 1 Telugu, STAR Sports 1 Bangla, STAR Sports 2(v), STAR Sports 1 Hindi, STAR Sports 1 HD, STAR Sports 2 HD(v), STAR Sports 1 HD Hindi, STAR Sports Select 1 HD, STAR Sports Select 1 SD, STAR Vijay Super



BIO News

The changing face of the News Room



Know 'Who' is Watching 'What', 'When' & 'Where'



BREAKING NEWS

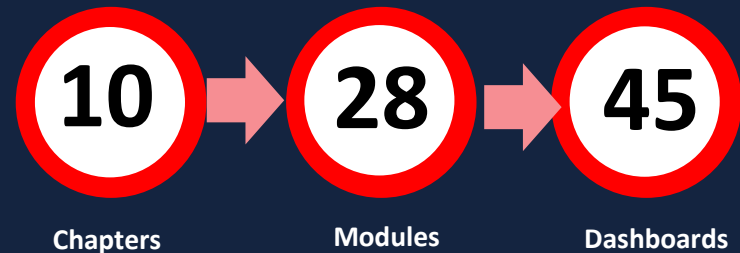
BIO News provides Inter-channel comparison at Story, Region, anchor & Guest level

BREAKING NEWS

News channels can now compare SOV, SOD and Yield from their main storyline

BREAKING NEWS

Insights available on a user-friendly & interactive visualisation tool



HOME PAGE

B A
R C

Genre
Hindi

Region
HSM:Overall

Target Group
15+

Channels
NA

Date
NA

Time Range
NA

Submit

gargi.salgaonkar@barcindia.co.in



CHANNEL RANKING ⚠️ (c) across the two universe sets Pre Week 29 and Post because of the Universe update.

Rank	WK09	WK10	WK11	WK12
01	AAJ TAK	AAJ TAK	AAJ TAK	AAJ TAK
02	ABP NEWS	INDIA TV	INDIA TV	INDIA TV
03	INDIA TV	REPUBLIC BHARAT	REPUBLIC BHARAT	REPUBLIC BHARAT
04	ZEE NEWS	ABP NEWS	ZEE NEWS	ZEE NEWS
05	REPUBLIC BHARAT	ZEE NEWS	ABP NEWS	ABP NEWS



Lok Sabha Elections 2019 emerges as Top Story Viewed on News channels



TOP 10 STORIES OF THE WEEK - SHARE OF VIEWERSHIP

(SOV %)



SOD

SOV

Yield

01

LOK SABHA
ELECTIONS(2019)

02

RESULTS OF LOK SABHA
& STATE ASSEMBLY
ELECTIONS(2019)

03

LOK SABHA ELECTIONS
(2019)

04

EXIT POLLS FOR LOK
SABHA ELECTION(2019)

05

REPORT ON ZODIAC
FORECAST

06

NDA S GOVERNMENT
FORMATION IN
INDIA(2019)

07

REPORT ON LOK SABHA
& STATE ASSEMBLY
ELECTIONS (2019)

08

INTERVIEW WITH INDIAN
PM NARENDRA MODI

09

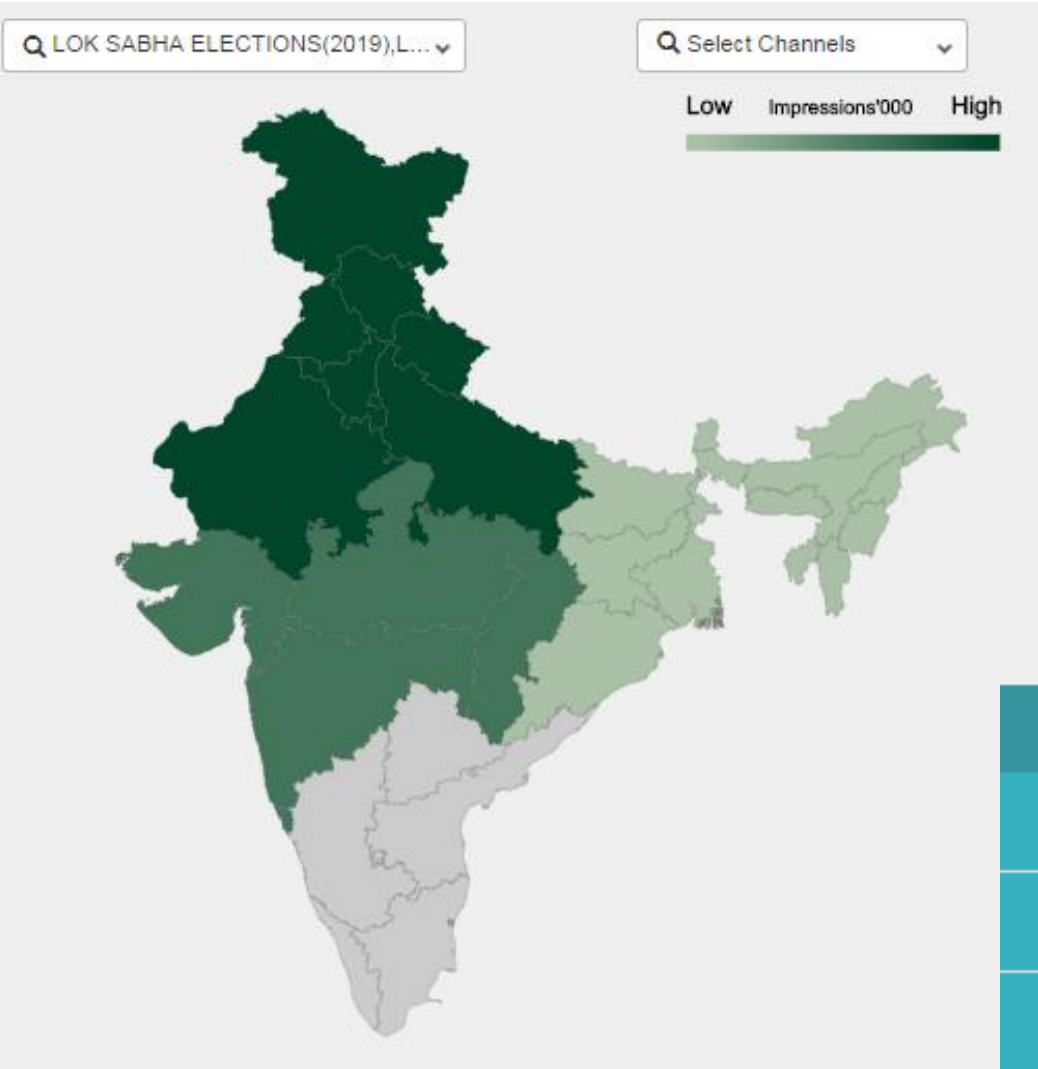
INTERVIEW WITH INDIAN
PM NARENDRA MODI BY
AKSHAY KUMAR

10

CYCLONE FANI HITS
INDIA(2019)



BIO News allows region-wise drill down of a story



Rank	Region	Impressions'000	Contribution ▼
01	North	111,237,593	48.1% <div></div>
02	West	82,433,410	35.7% <div></div>
03	East	37,483,615	16.2% <div></div>

An Award winning Visualisation tool





BIO Music

In-Depth analysis of Songs & Viewership



Music Broadcasters & Labels can now get analysis of songs aired on TV Music channels



Track Performance of own content and study competition



Study Performance of Songs, Genres, Actors & Artists by Time-band and Regions





Who is your Favorite?

Viewers in HSM Urban & Rural show clear divide in Artist preference



HSM Urban

Top Artists		IMPS
1	Neha Kakkar	483.7k
2	Badshah	258.9k
3	Udit Narayan	190.1k
4	Kumar Sanu	178.6k
5	Alka Yagnik	172.6k

HSM Rural

Top Actors		IMPS
1	Salman Khan	257.1k
2	Anil Kapoor	187.5k
3	Akshay Kumar	161.5k
4	Sonam Kapoor	137.2k
5	Madhuri Dixit	136.2k

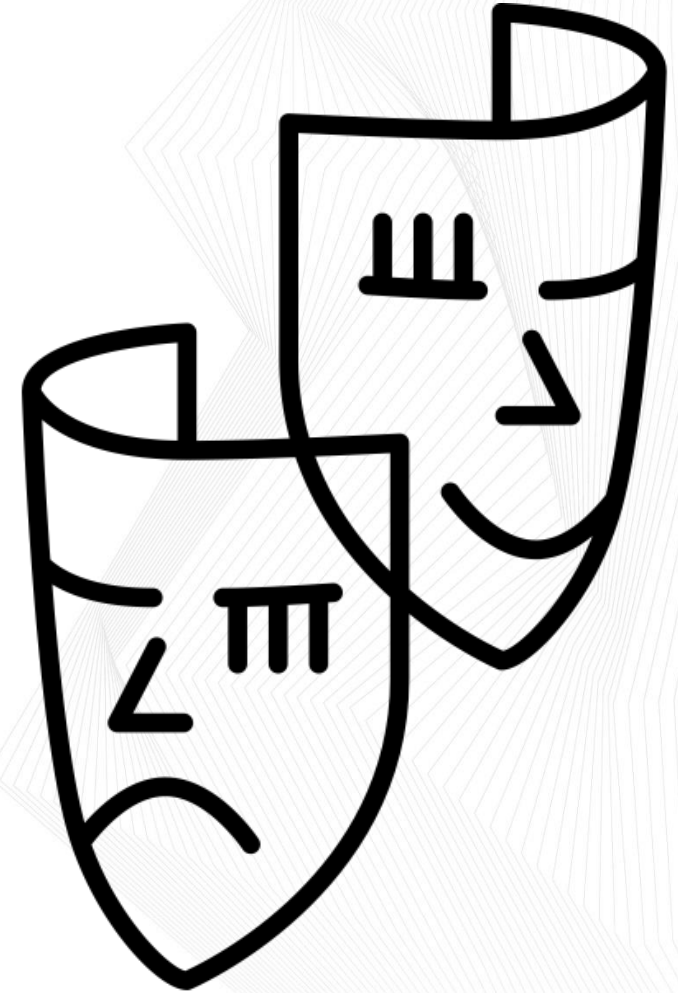


BIO GEC

Catch the Pulse of the Viewer!



- Enables GEC channels & Content Producers to understand **character**, **environment** and **sound impact** on a show
- Allows **programme content analysis** for not just own, but also competition channel
- Derive **Content specific Learnings** rather than merely viewing sliced data



Module : Production



Locale Setting

Camera Cut Rate

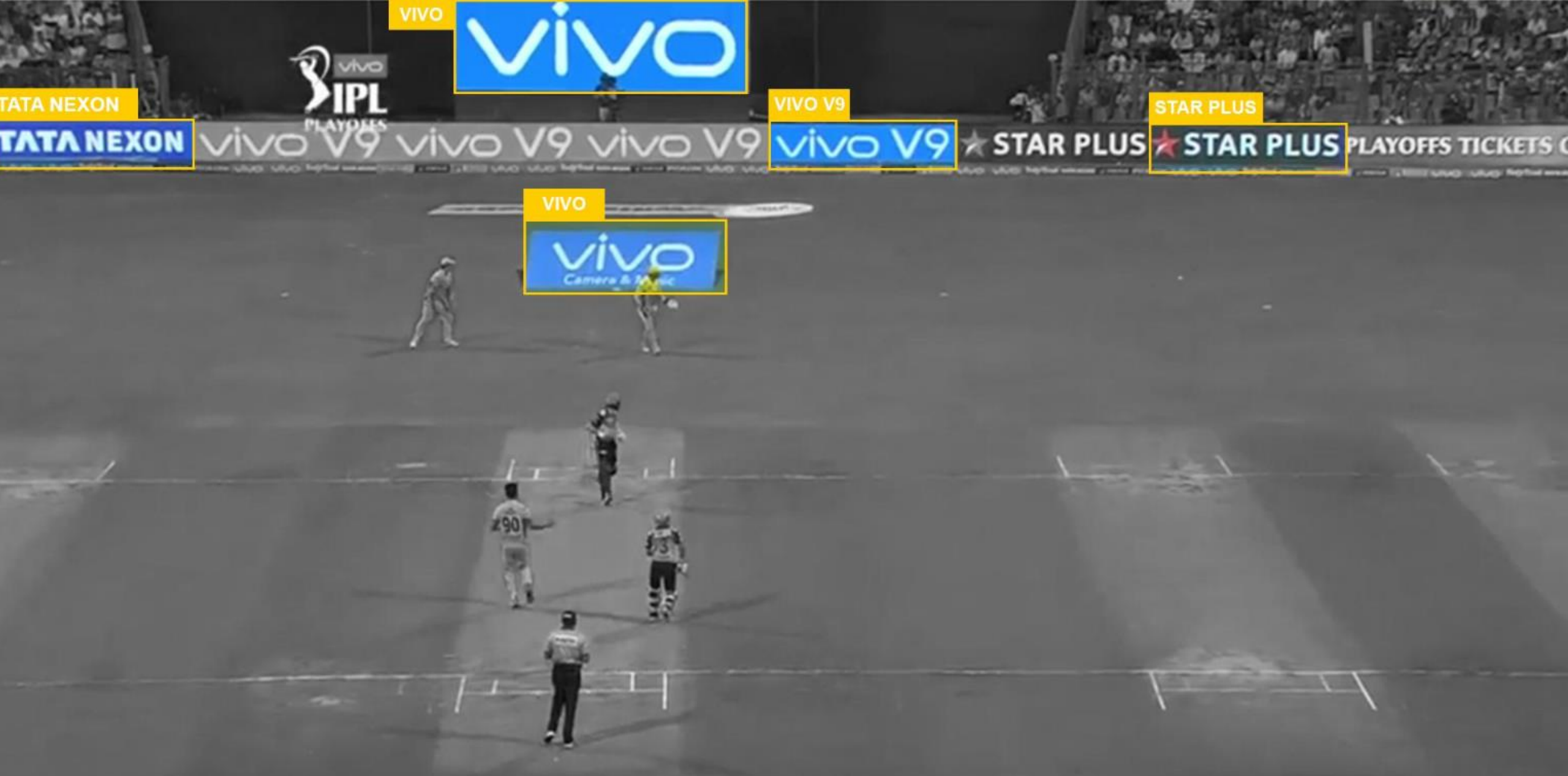
Colour Palette

Luminance

Colour
Temperature



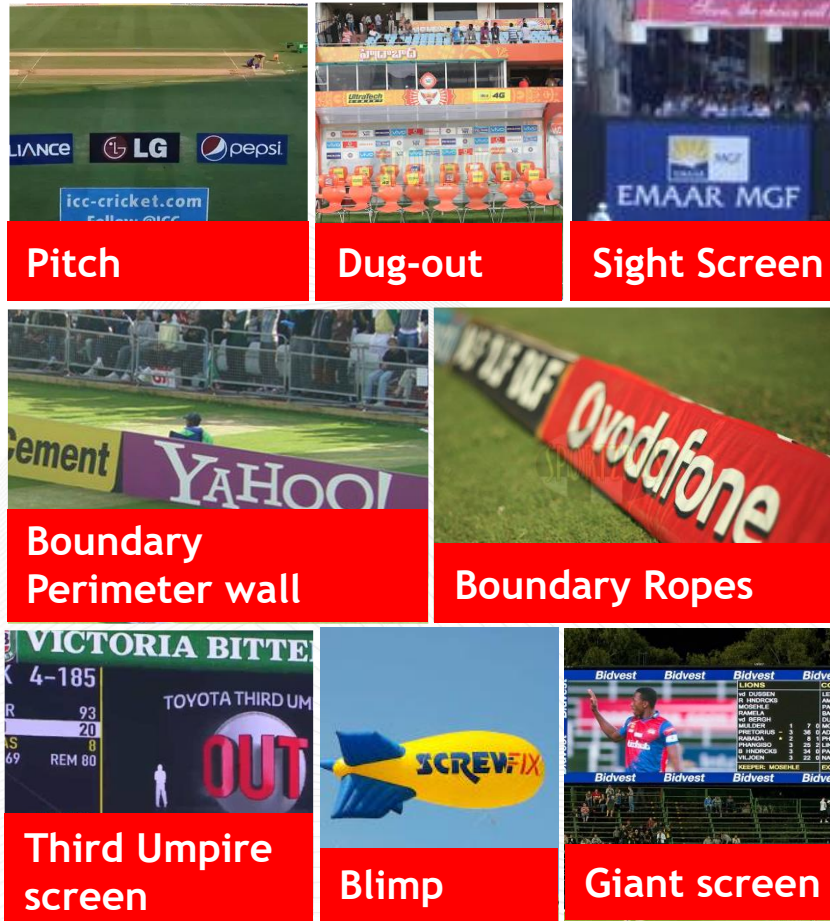
BIO SPORTS



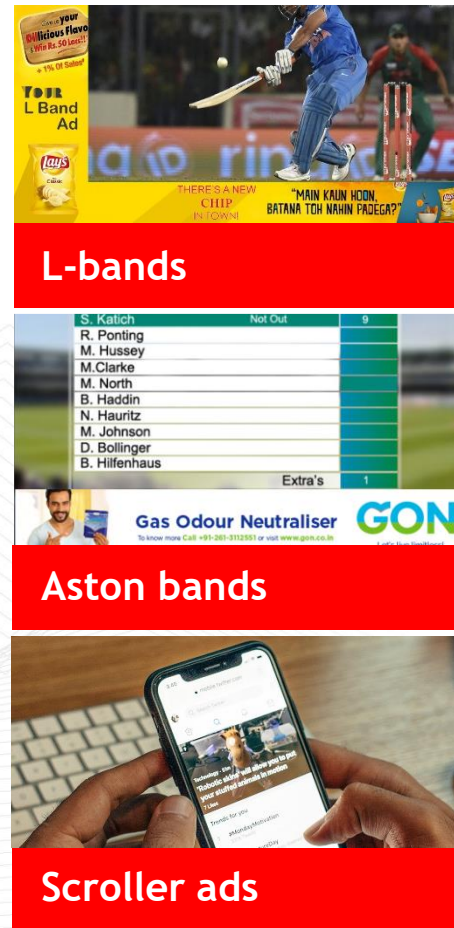
ON-GROUND & ON-SCREEN ELEMENT ANALYSIS

List of Elements

On-Ground



On-Screen



In-content



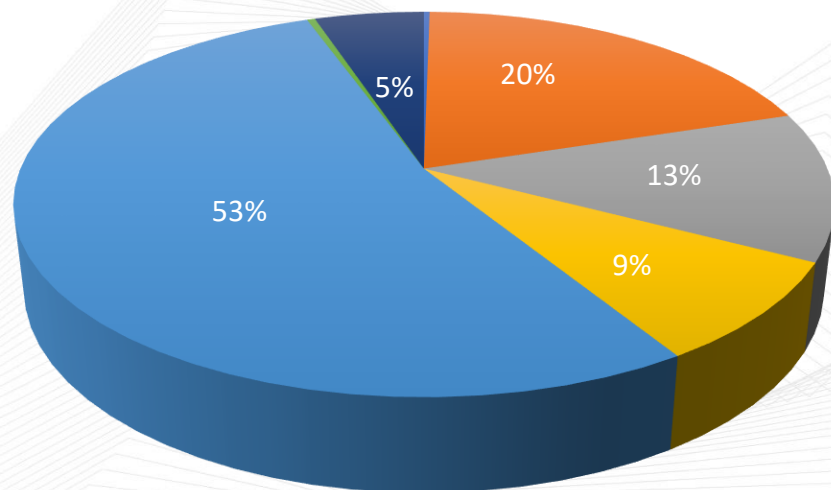
VIVO Vs JIO: Who Scores?



Element wise viewership

vivo

27.1Mn Impressions

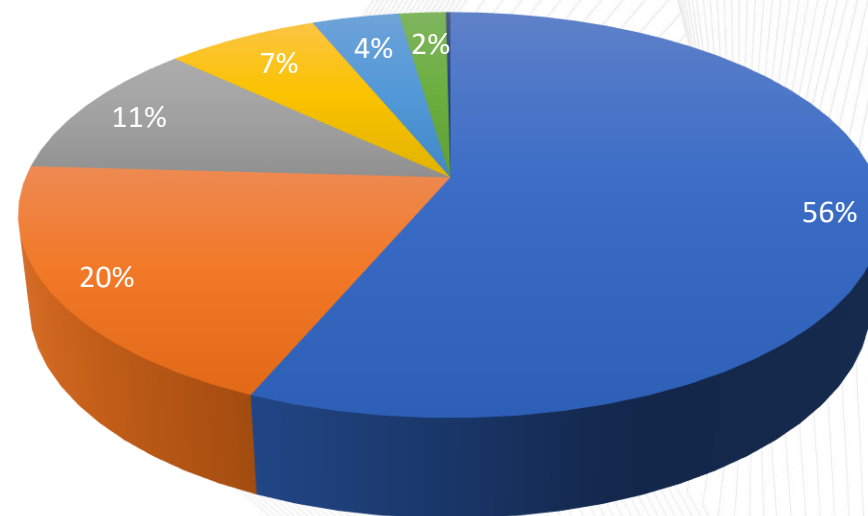


sleeves
boundary
pitch
stumps
ipl_watermark
dug_out
sight_screen



Jio

8.69Mn Impressions



Sleeves
Front Jersey
Back Jersey
Helmet
Boundary
Cap
Dug Out

More to Choose From!



PREVIEW

A custom product which gives access to viewership data of an event 3 days post its telecast.



SPOT TREK

SPOT TREK provides information about the advertising spots and promos on daily basis



First of its kind integration of customised target with TV Viewership. Helps extract a deeper understanding of TV viewing patterns of members within segments.



SELF SERVICE PORTAL

The customised reports are available at a nominal charge and is delivered to your mailbox within a few days.



New Tariff Order

Transition Updates



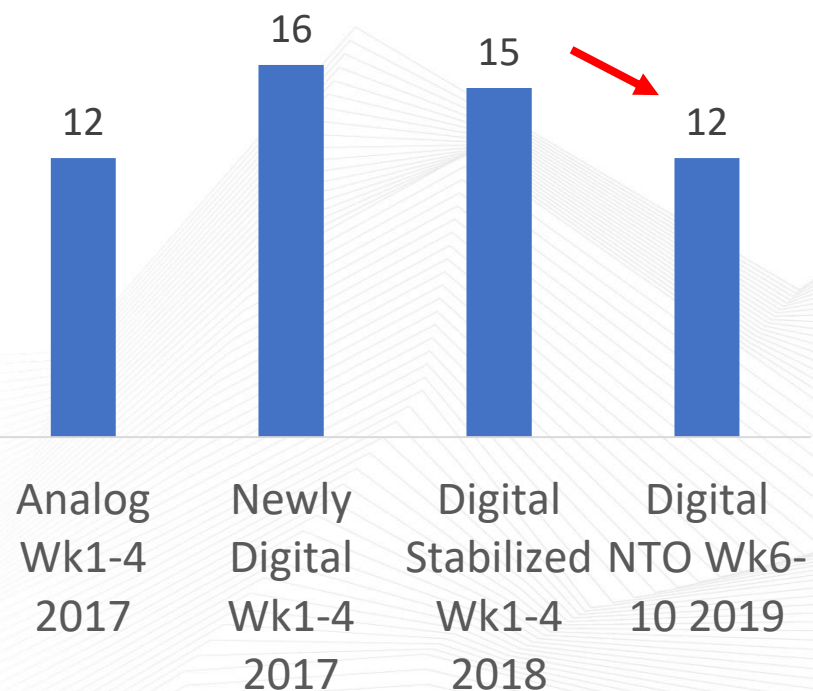
SECTION III



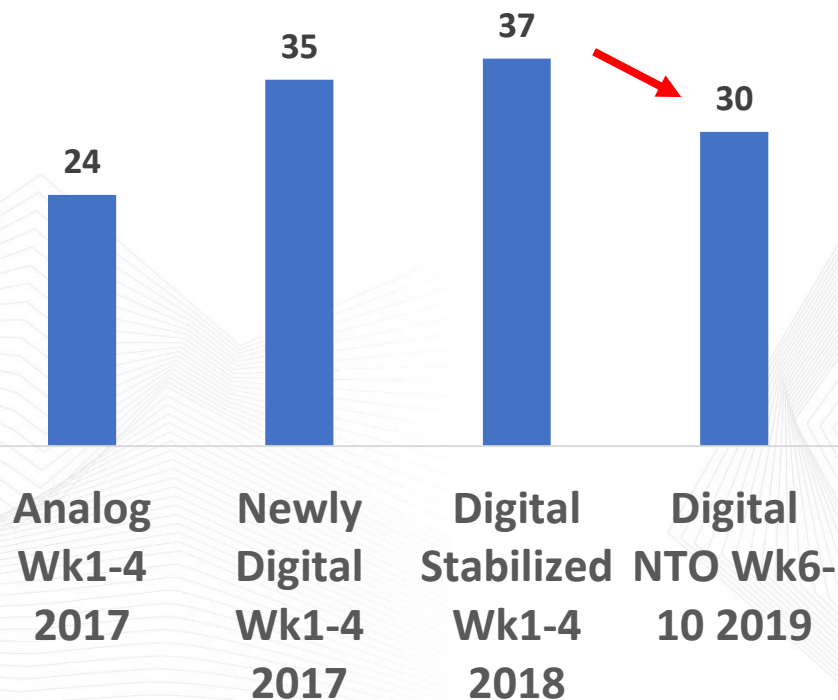
Average number of Unique Channels sampled by Households

Average number of Unique Channels sampled by Households

Number of Unique Channels Viewed by a Household in a **DAY**

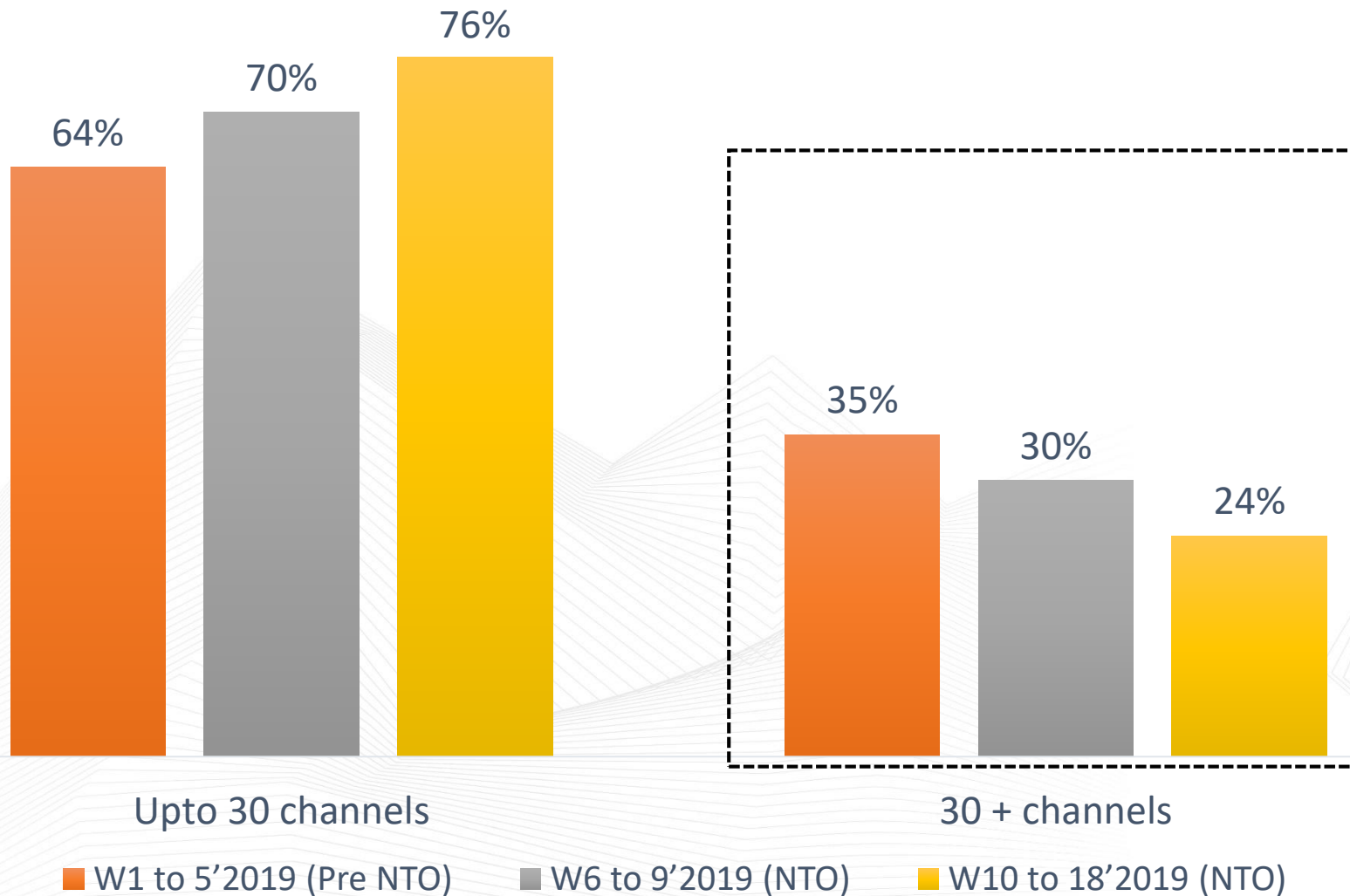


Number of Unique Channels Viewed by a Household in a **WEEK**

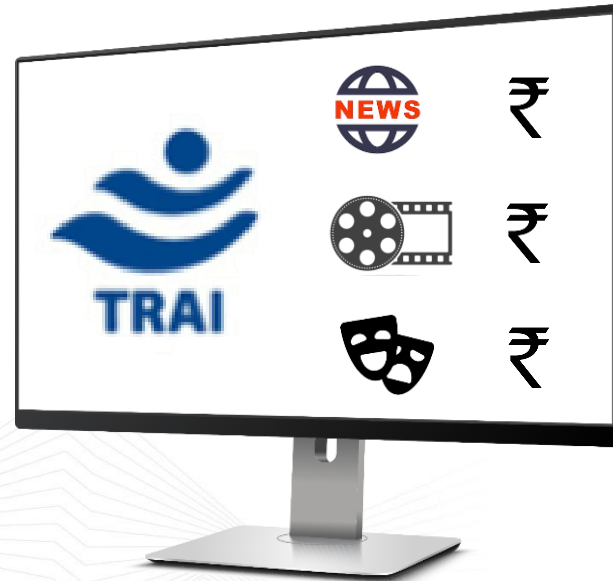


Average number of Unique channels viewed per household increased at the dawn of digital transition and maintained the levels in 2018. However, it declined in 2019 post NTO

Average number of Channels sampled by Households



- 64% of the population sampled up to 30 Channels in a week, which **has increased to 76%**
- Contrary 35% of the population sample more than 30 channels which has dropped to 24%

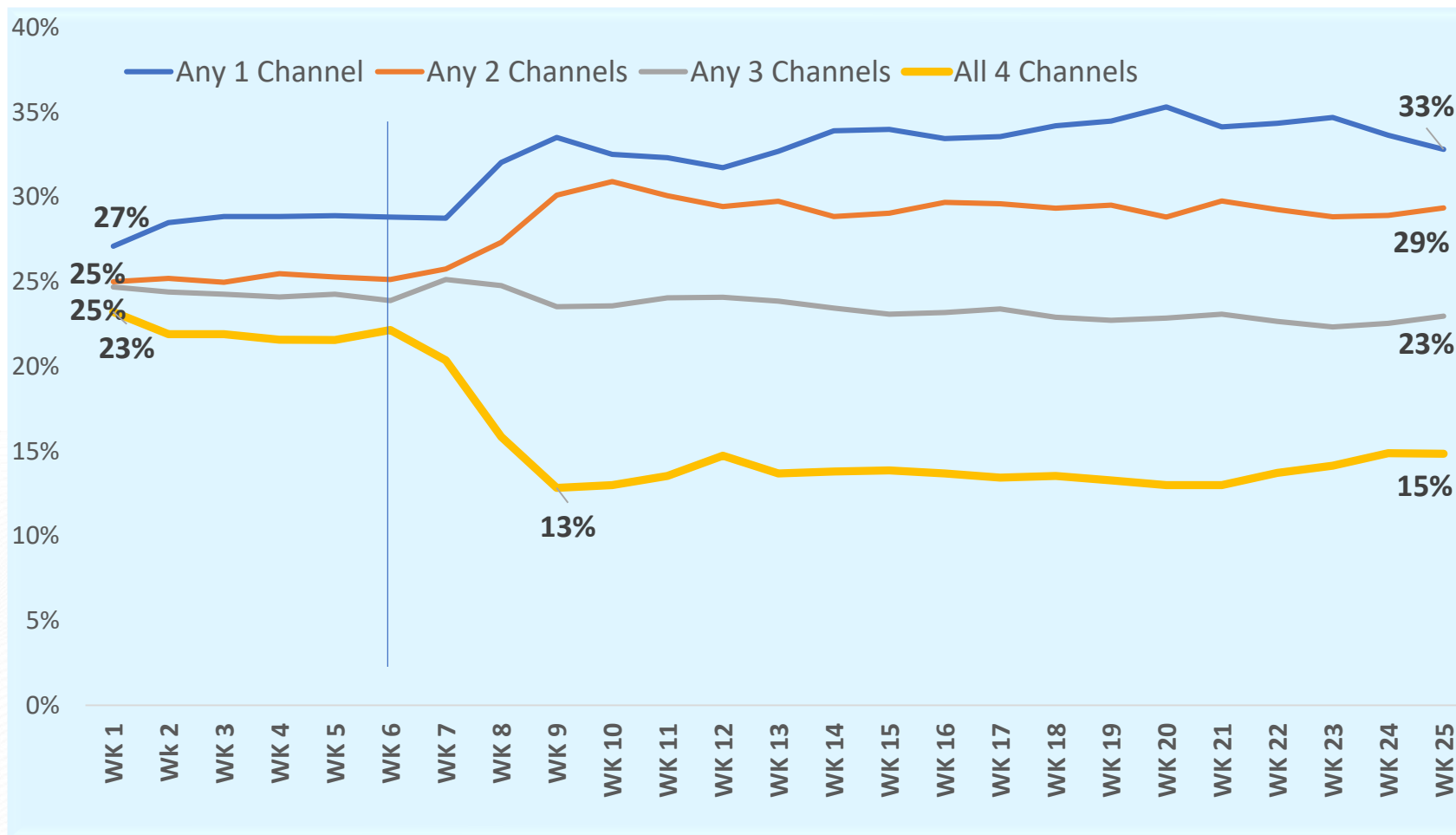


Loyalty Trend by Genres

Availability of channels : Viewership of multiple channels have reduced across all GEC

- Hindi GEC:** Around 23% of viewers of the 4 Pay GECs used to sample ALL the 4 Channels which has dropped to 15% due to NTO.

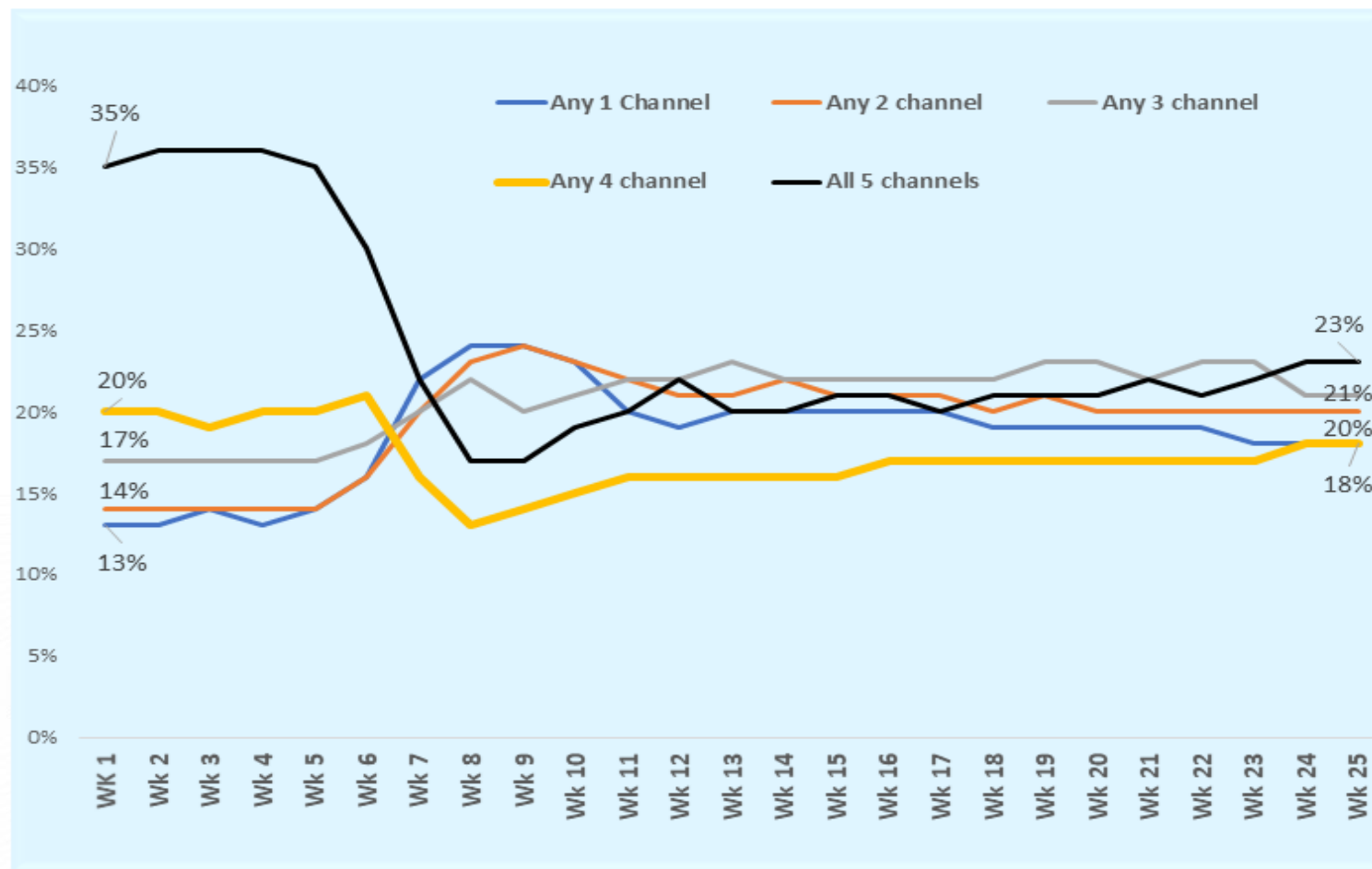
Hindi GEC



HSM Urban/2+ Viewers (STAR Plus, Zee Tv, Colors, Sony TV)

Availability of channels : Similar Trend seen in Hindi Movie

Hindi Movies

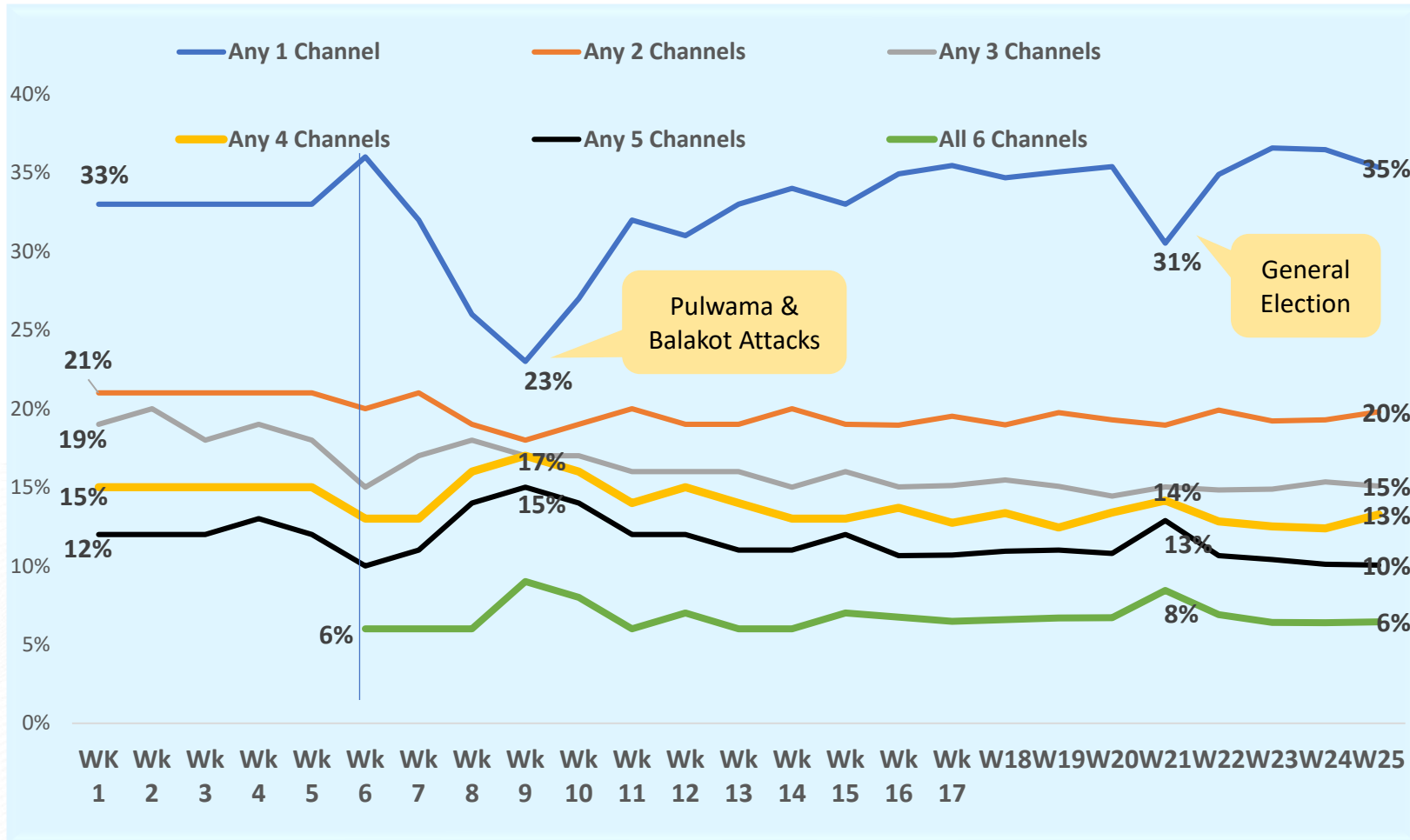


HSM Urban/2+ (Sony MAX(v) Zee Cinema STAR Gold Movies OK & pictures)

- **Hindi Movies** : 35% viewers used to sample all 5 Channels which has dropped to 21% due to NTO

Sampling of Channels has been stable for Hindi News

Hindi News



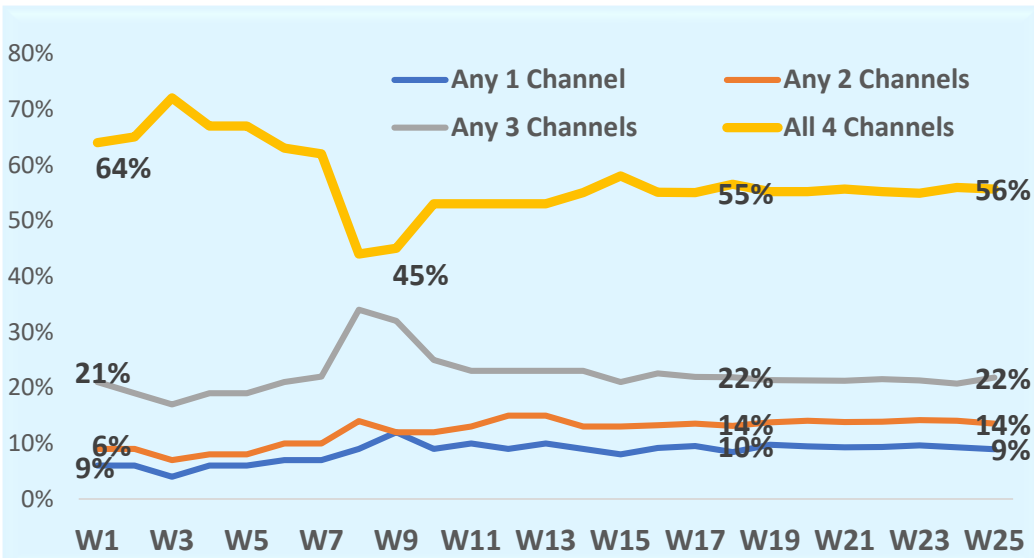
HSM /15+/ Viewers loyalty of Top 6 Channels (Aaj Tak, India TV, Republic Bharat, Zee News, ABP News, News18 India)

Note: Republic Bharat launched in Week 6 (2019)

- **Hindi News** : Sampling of Channels has been stable, showing lesser impact of NTO on News genre. During heavy News Weeks, viewers tend to sample higher number of channels such as during Pulwama attack and General Election results

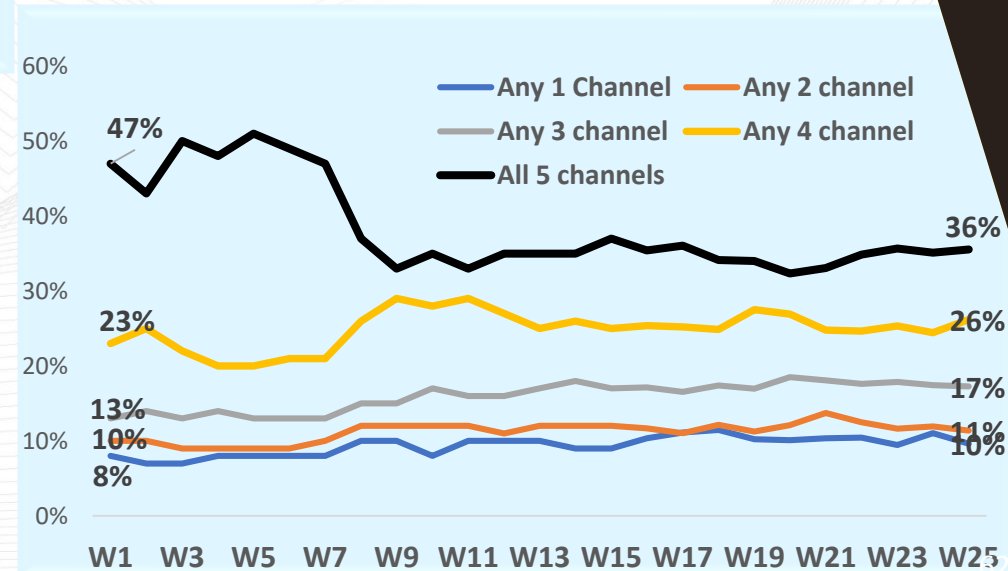
South GEC

Telugu



AP/Telangana /2+/ Viewers loyalty of Top 4 Channels (Star Maa, Gemini TV, ETV Telugu, Zee Telugu)

Kannada

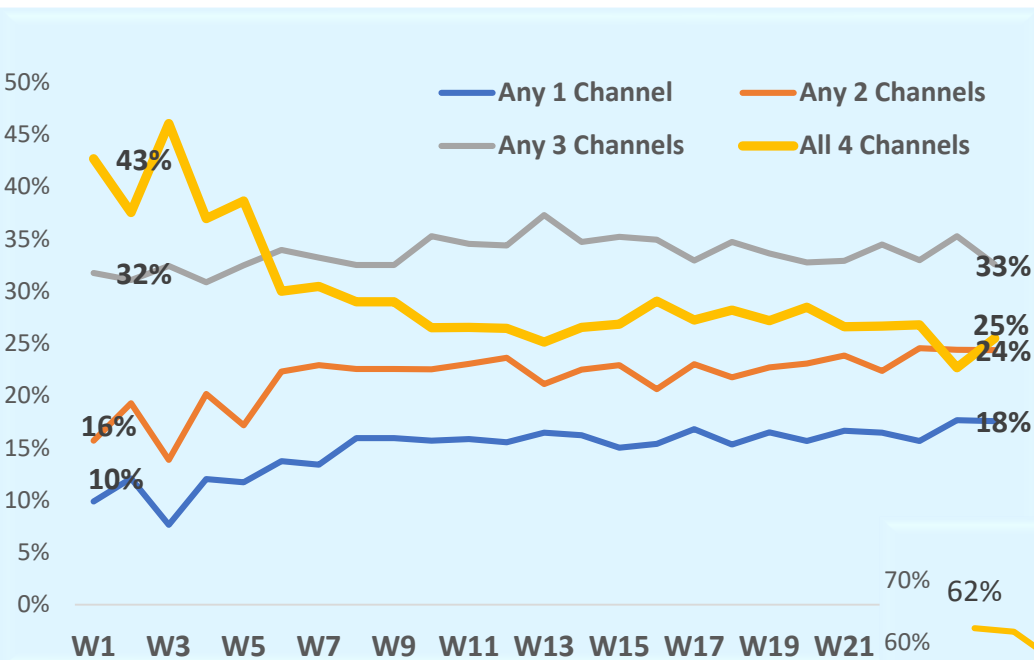


Karnataka/2+/ (Colors Kannada, Colors Super, Zee Kannada, Star Suvarna, Udaya TV)

- Telugu** : Around 64% of viewers of Top 4 GEC used to sample All the Channels which has been dropped due to NTO and is now at 56%
- Kannada**: Previously around 47% of viewers of Top 5 GEC used to sample all the Channels which has been dropped due to NTO and is now at 36%.

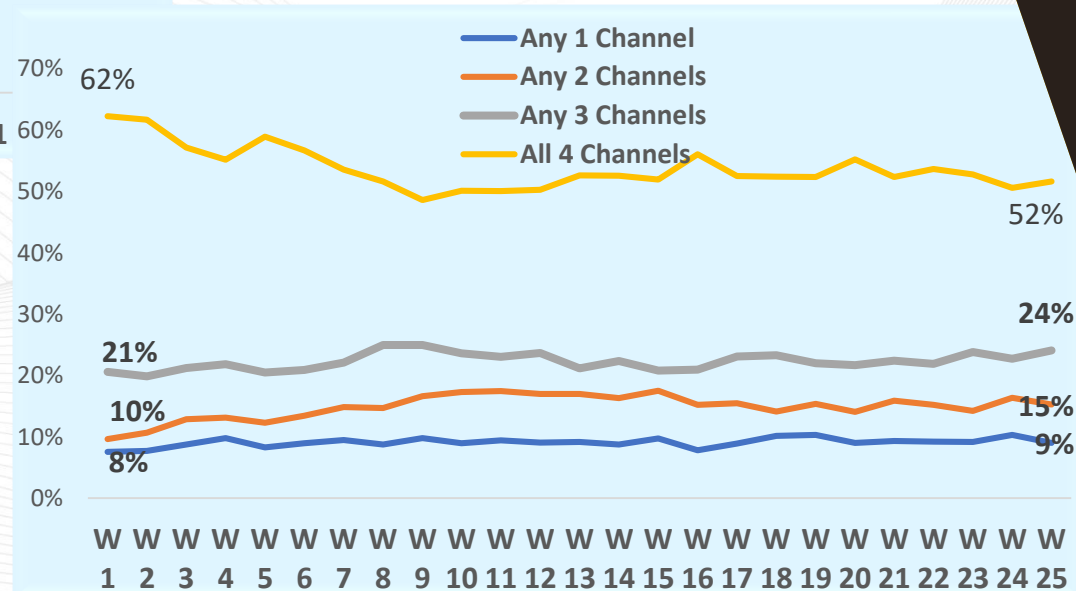
South GEC

Tamil



TN/Pondicherry /2+/ Viewers loyalty of Top 4 Channels (Star Vijay, Sun TV, Zee Tamil, Colors Tamil)

Malayalam

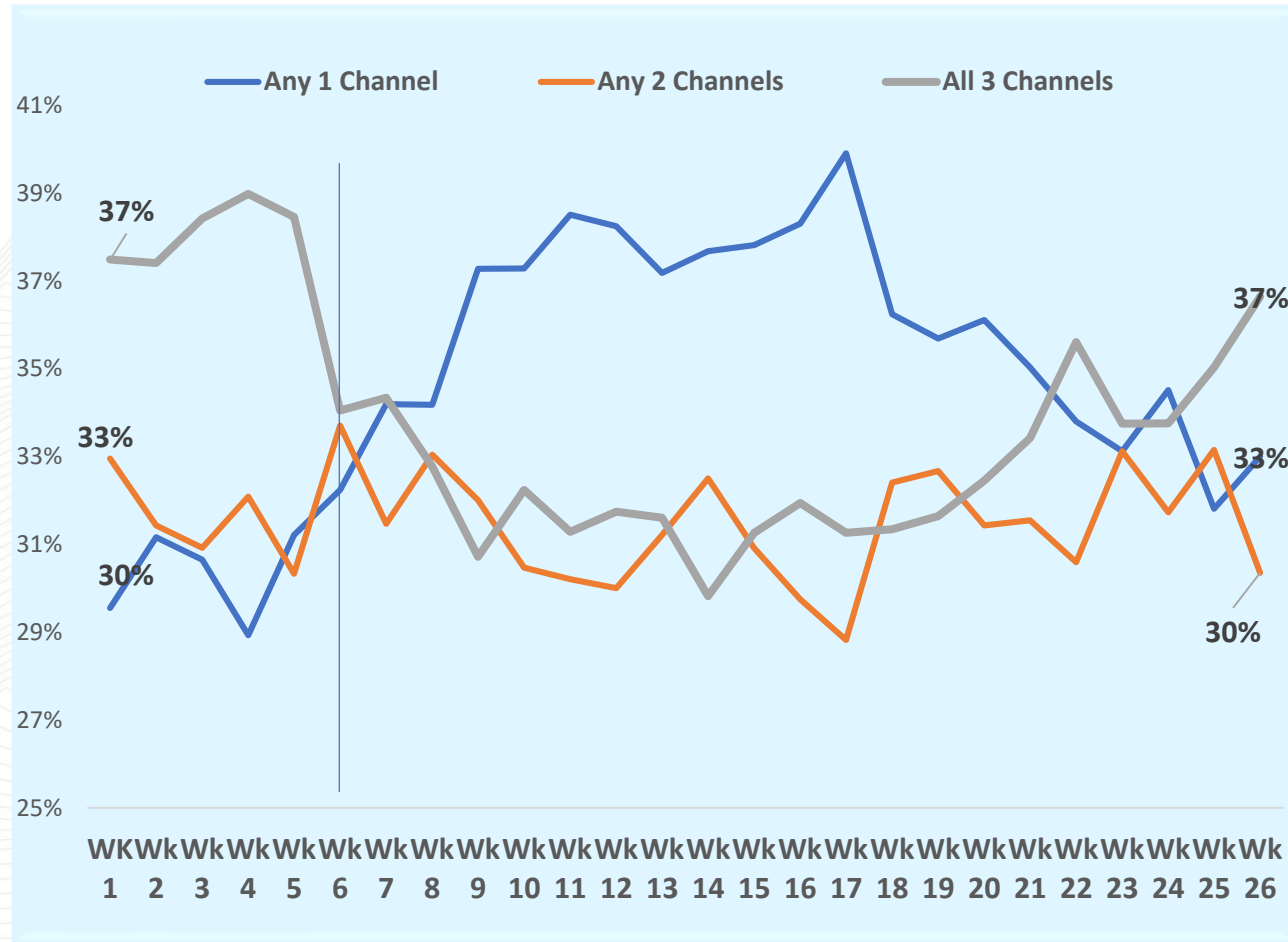


Kerala/2+/Viewers Loyalty of Top 4 Channels (Asianet, Surya TV, Mazhavil Manorama, Flowers)

- Tamil** : Around 43% of Viewers of Top 4 used to sample all the Channels which has been dropped due to NTO and is now at 25%. While 16% of the viewers who used to watch any 2 Channels has gone up to 24%
- Malayalam** : With 2 out of top 4 channels being FTA, the sampling of all 4 channels has dropped by 10% in Kerala. The sampling towards any 2 and any 3 channels have increased by 5% and 3% respectively.

Regional GEC (HSM)

Marathi GEC

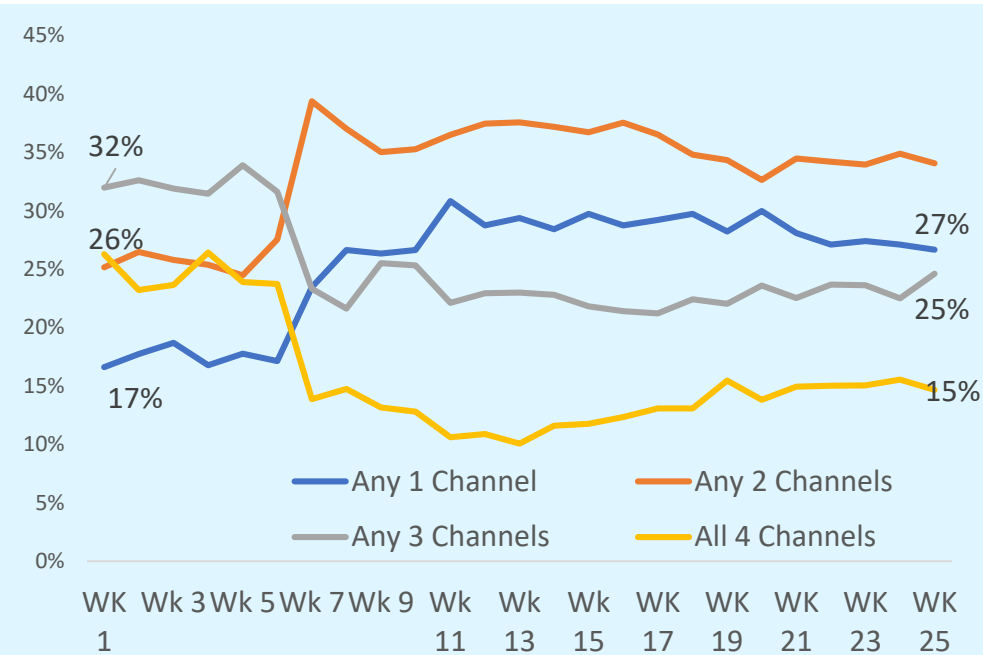


Marathi GEC : Around 37% of viewers of Top 3 GEC used to sample all the 3 GECs which had dropped but recently back to the original levels

Mah / Goa / 2+/Viewers loyalty of Top 3 Channels (Zee Marathi, Colors Marathi, Star Pravah)

Regional GEC (HSM)

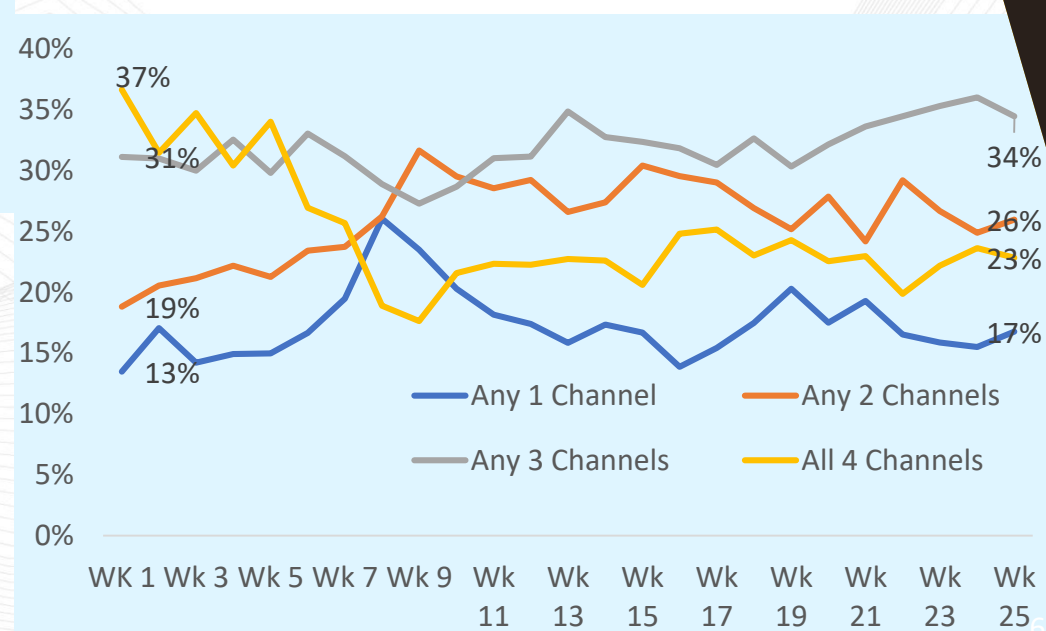
Bangla GEC

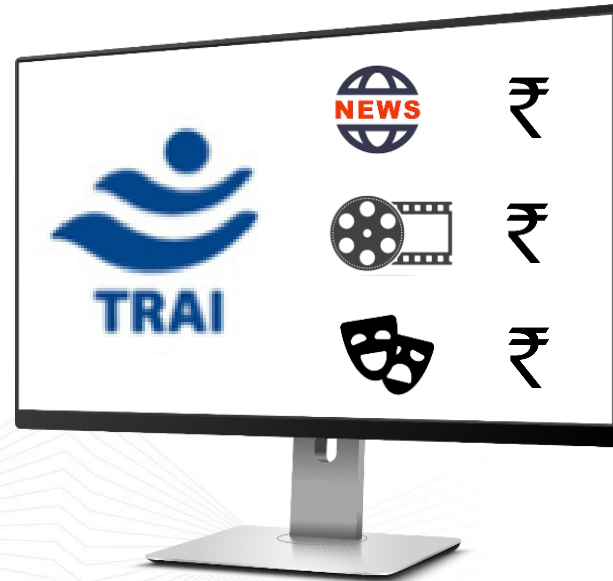


Bangla GEC: Around 26% of Viewers of Top 4 GECs used to sample all the Top 4 GECs which has dropped due to NTO and is now at 15%.

Oriya GEC: Around 37% of viewers of Top 4 GECs used to sample all the GECs which has dropped due to NTO and is now at 23%.

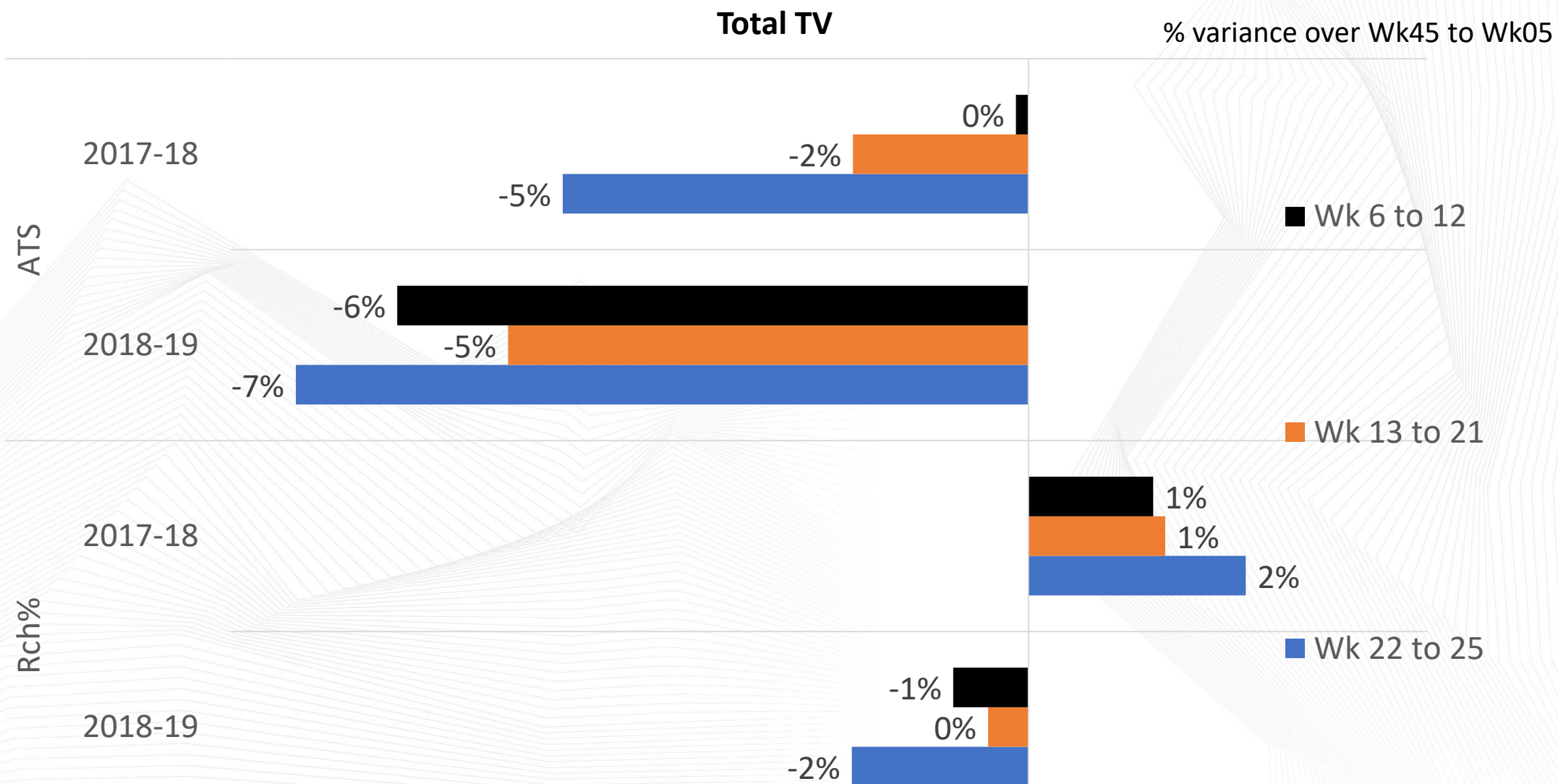
Oriya GEC





Impact On Reach & Time Spent

Total TV Reach has been marginally impacted by NTO. The time spent dropped during week 6 to 12.
Current trend is similar to last year



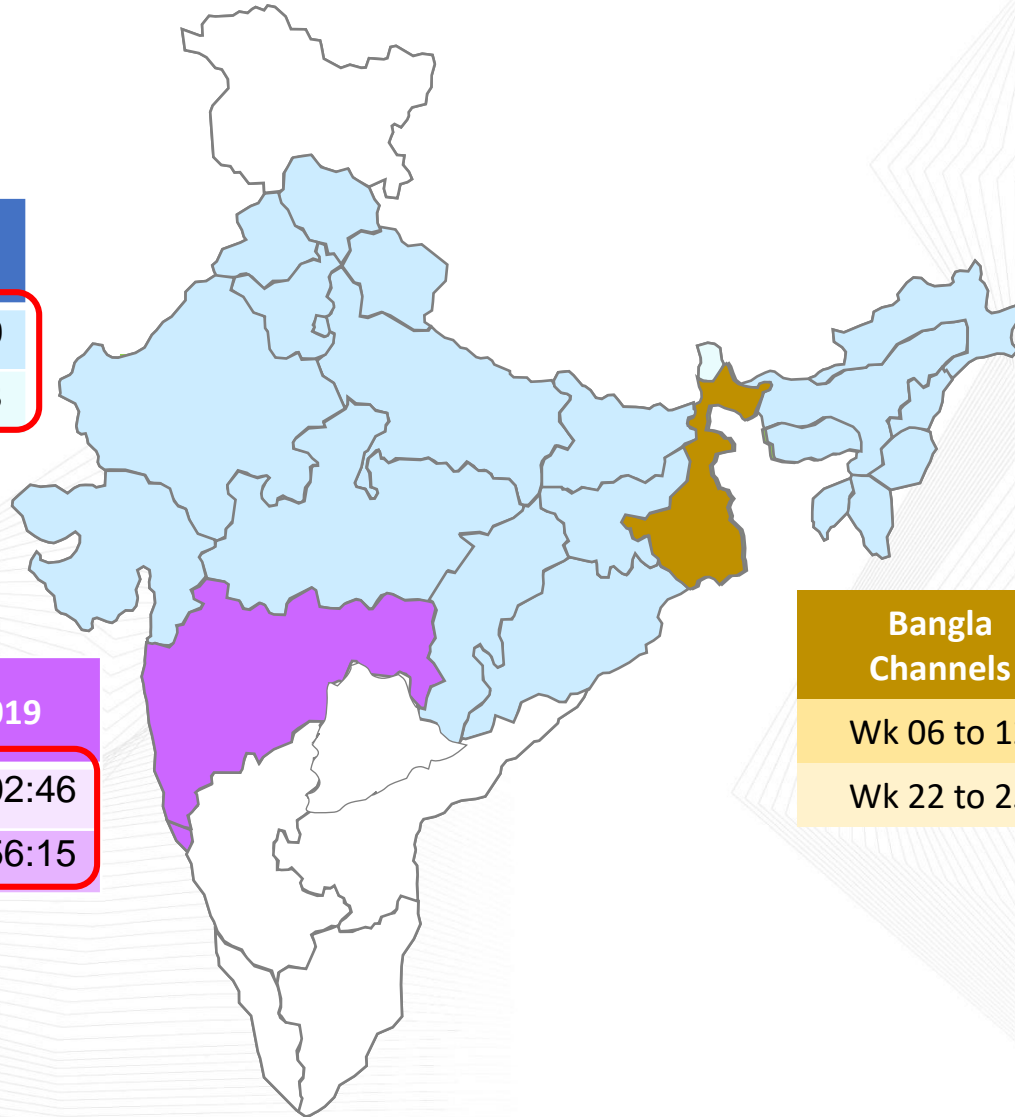
ATS at higher levels in 2019 compared to 2018 for HSM Pay GEC, Marathi and Bangla channels

B	A
R	C

Hindi Pay GEC HSM	2018	2019
Wk 06 to 12	01:16:06	01:27:40
Wk 22 to 25	01:09:22	01:31:13

Marathi Channels	2018	2019
Wk 06 to 12	01:50:47	02:02:46
Wk 22 to 25	01:48:09	01:56:15

Bangla Channels	2018	2019
Wk 06 to 12	02:19:27	02:20:39
Wk 22 to 25	02:05:28	02:18:08



South: ATS at similar levels in recent weeks in 2019 as compared to 2018

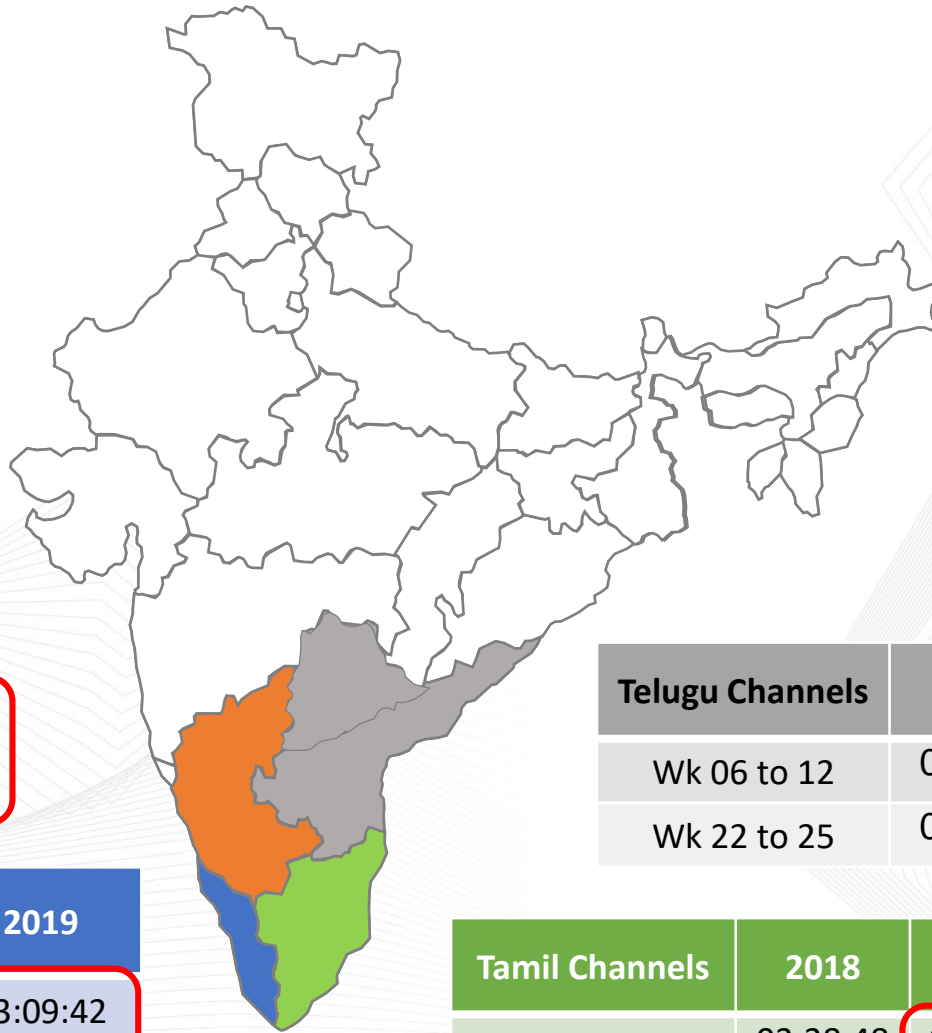
B	A
R	C

Kannada Channels	2018	2019
Wk 06 to 12	03:19:28	03:26:14
Wk 22 to 25	03:19:07	03:16:26

Malayalam Channels	2018	2019
Wk 6 to 12	03:20:46	03:09:42
Wk 22 to 25	03:15:03	03:11:35

Telugu Channels	2018	2019
Wk 06 to 12	03:55:47	03:41:12
Wk 22 to 25	03:44:14	03:48:48

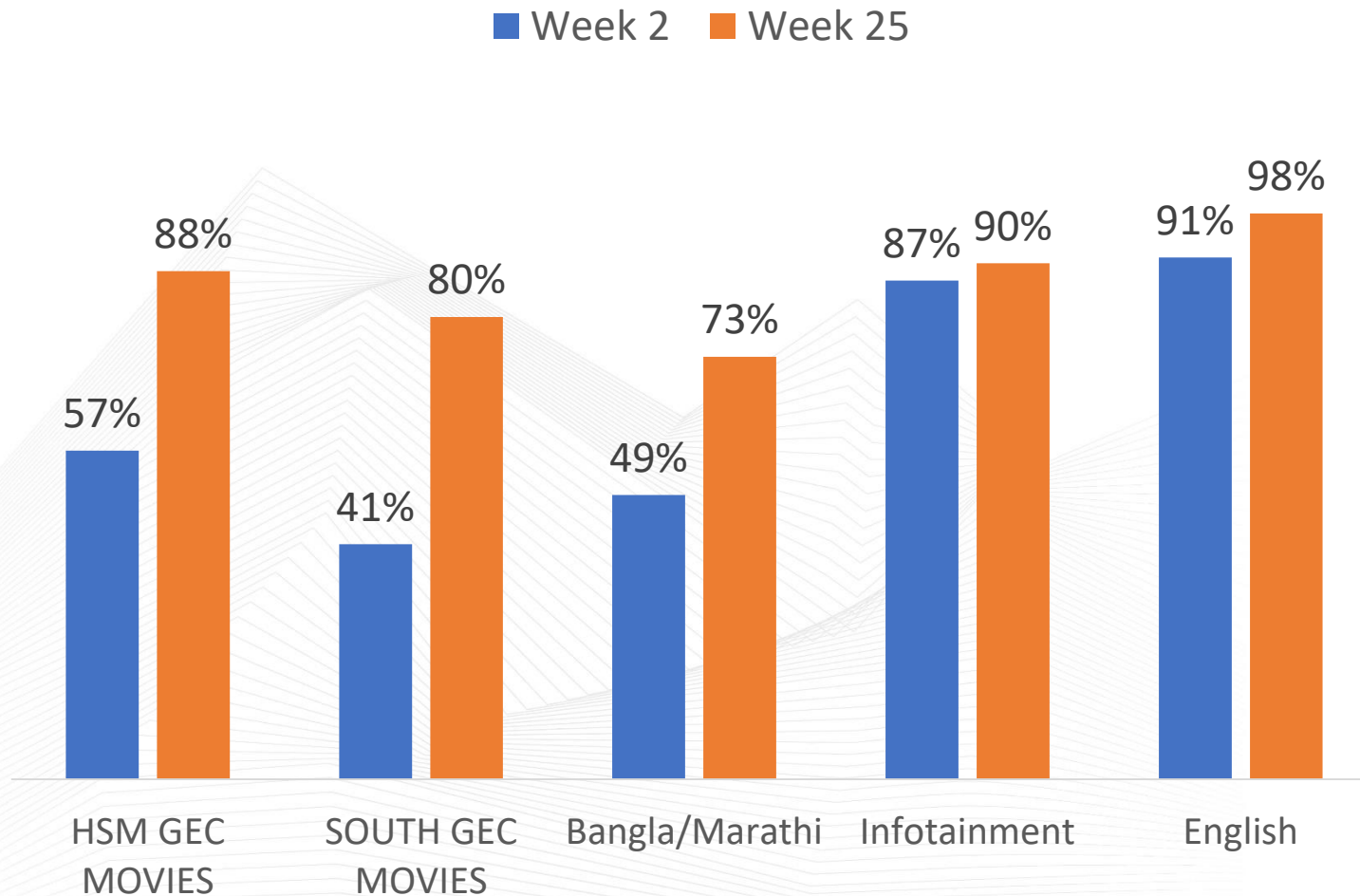
Tamil Channels	2018	2019
Wk 06 to 12	03:38:48	04:04:59
Wk 22 to 25	03:40:06	03:54:22





Impact on HD Viewership

Increase in Exclusive viewers of HD channels



Hindi GEC/Movies HD
Currently **88%** of the Hindi GEC/Movies HD viewers are **exclusive** and do not watch their SD counterpart.

In the pre NTO week it was **57%**

South and Regional :
Similar trend is seen

New Reporting Frameworks

SECTION IV



01

Reporting Pay & Free Platform



State Wise Pay TV penetration




Pay TV has its **prominent presence** in **Southern** part of the country whereas in **Central and Northern India** Free Connection has significant presence

>75% HH
Have a **Pay** Connection


>25% HH
Have a **Free** TV



PAY & FREE Platform offering for Planning & Analysis



Reporting Free & Pay Platform separately is beneficial to the Industry. Strong demand from the Market for separate reporting



Platform selection will now be available in BMW & YUMI for planning & analysis



Being offered as a separate reporting variable, over and above the current Urban/ Rural cuts

02

Viewing Minutes



Industry first “Viewing Minutes” parameter introduced



Viewing Minutes is defined as the **Sum of minutes watched** by all individuals of an event.

=Impressions(Avg.) x Total Duration
(In minutes)



Enables congruence between media types. Viewing minutes will allow comparability with the Digital medium.

It is an additional metric, available over and above the current TV metrics such as Reach (Avg. Daily Reach), Coverage (Cume Reach), Impressions and Average Time spent.

03

Other Recommended Cuts

*Subject to Necessary Approvals



Split of Kids TG



Kids are a BIG Television Audience



**211
MILLION**

**KIDS IN TV
HOMES**

**1 IN
EVERY 4**

**VIEWER IS
A KID**

21%

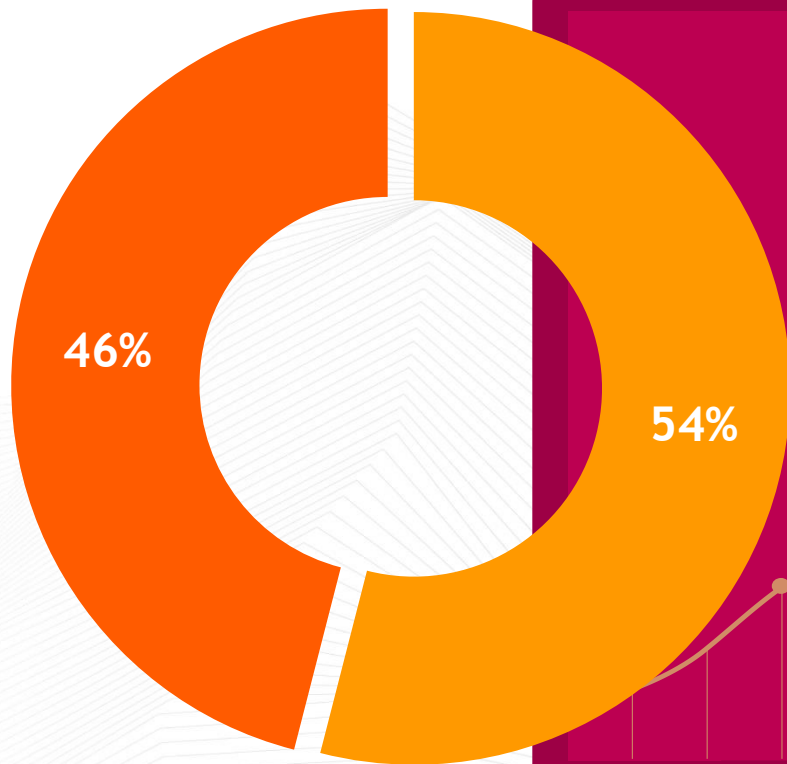
**KIDS
CONTRIBUTION
TO TOTAL
VIEWERSHIP**

As Kids Grow, their Preferences & Viewing habits evolve



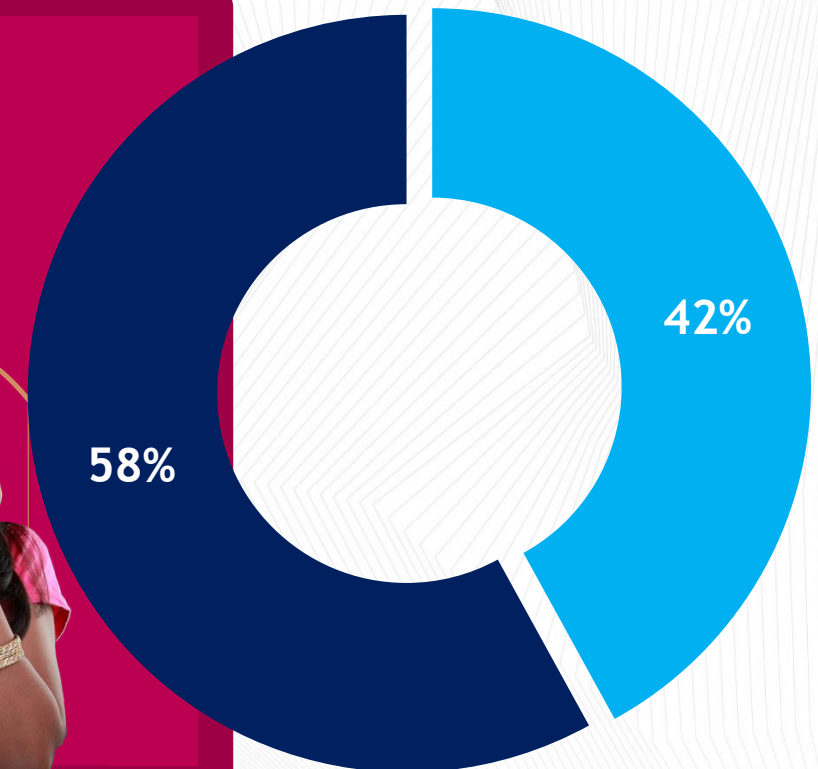
Kids Genre Viewership

■ 2-8 years ■ 9-14 years



Total TV Viewership

■ 2-8 years ■ 9-14 years



Age split for Kids TG



2-8 years

9-14 years



Would be made available in BMW for analysis & planning

On popular demand from our clients

To help understand the varying viewing behaviour of Kids as they grow

NCCS A1 & A2



SHARE OF TV OWING HOMES



NCCS A1 + A2
constitutes **10%** of
Total TV Owning
Homes



NCCS A1 + A2
Universe
is ~**50%** of NCCS A
in Urban India

NCCS A1+A2 show a higher skew towards Niche



Genre	Index (A1+A2) with NCCS A
Hindi GEC	102%
Hindi Pay GEC	103%
Hindi Movies	93%
Kids	96%
Music & Youth	89%

Hindi News	121%
Hindi Business News	175%
English News	141%
English Business News	136%

Genre	Index (A1+A2) with NCCS A
EEC	138%
Infotainment	110%
English Movies	118%
Food & Lifestyle	117%

Marathi Channels	75%
Marathi GEC	92%
Bhojpuri Channels	68%

Malayalam GEC	74%
Kannada GEC	90%
Tamil GEC	84%
Telugu GEC	76%
Bangla GEC	112%

Hindi GEC sees a minor lift in A1&A2

English and Biz News sees a sizeable lift

Niche Genres see a sizeable lift

THE BARC FOOTPRINT



Largest Audience Measurement Panel in the world



300 MN

We monitor 300 Mn minutes of video content across 575 channels



836 MN

We measure what 836 Mn Indians watch on TV everyday, every minute!



7.5 PB

Processing 7.5 Petabyte data



5.7 BN

Single currency behind transaction of 5.7 Bn USD of TV Advertising & Content Spends



5.2 MN

Impacting 5.2 Mn jobs in M&E industry & more in other allied industries



93%

We measure 93% of all video content consumption in India (all OTT combined forms only 7%)



45%

Measurement for 45% of Indian M&E industry (TV), with a vision to be the single-source measurement for entire M&E

Great Place To Work®

Certified
AUG 2018-JUL 2019
INDIA

BARC India Certified as a Great Place to Work for the 2nd Consecutive Year



THANK YOU