BARC Digital - ASI APAC 2017

BARC Stands Out as TV JIC

- Measurement System Built Upon 30+ Vendors
- Measuring 550+ Watermarked Channels
- Launched Data in Under 20 months
- Indigenous Meter @ $400, now looking at sub $150

BARC
BROADCAST
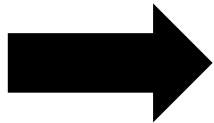AUDIENCE
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TV Viewing in India

786 bn min/week

13 bn hours/week

1.9 bn hours / day

TV & Digital Landscape

TV Universe

1.2 bn

780 mn

64% → **36%**

Digital Universe

1.2 bn

~300 mn

75% ← 25%
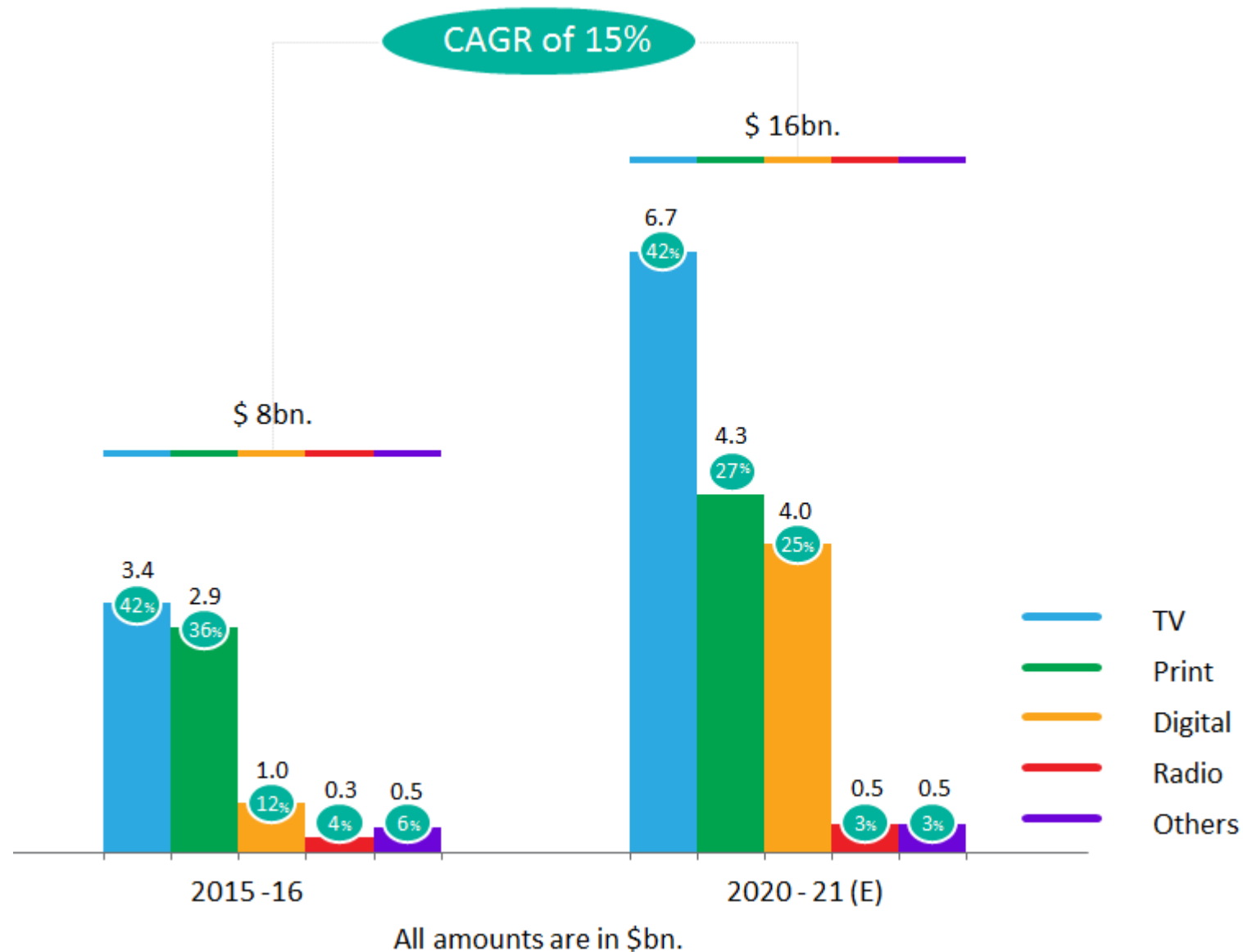
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Current Ad Revenue

Print - $ 2.9bn
36%

Digital - $ 1bn
12%

TV - $ 3.4bn
42%

AD REVENUE
~ $8 bn

Others – $ 0.5bn
6%

Radio - $0.3bn
4%

Source : KPMG, Pitch Madison avg

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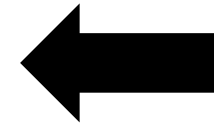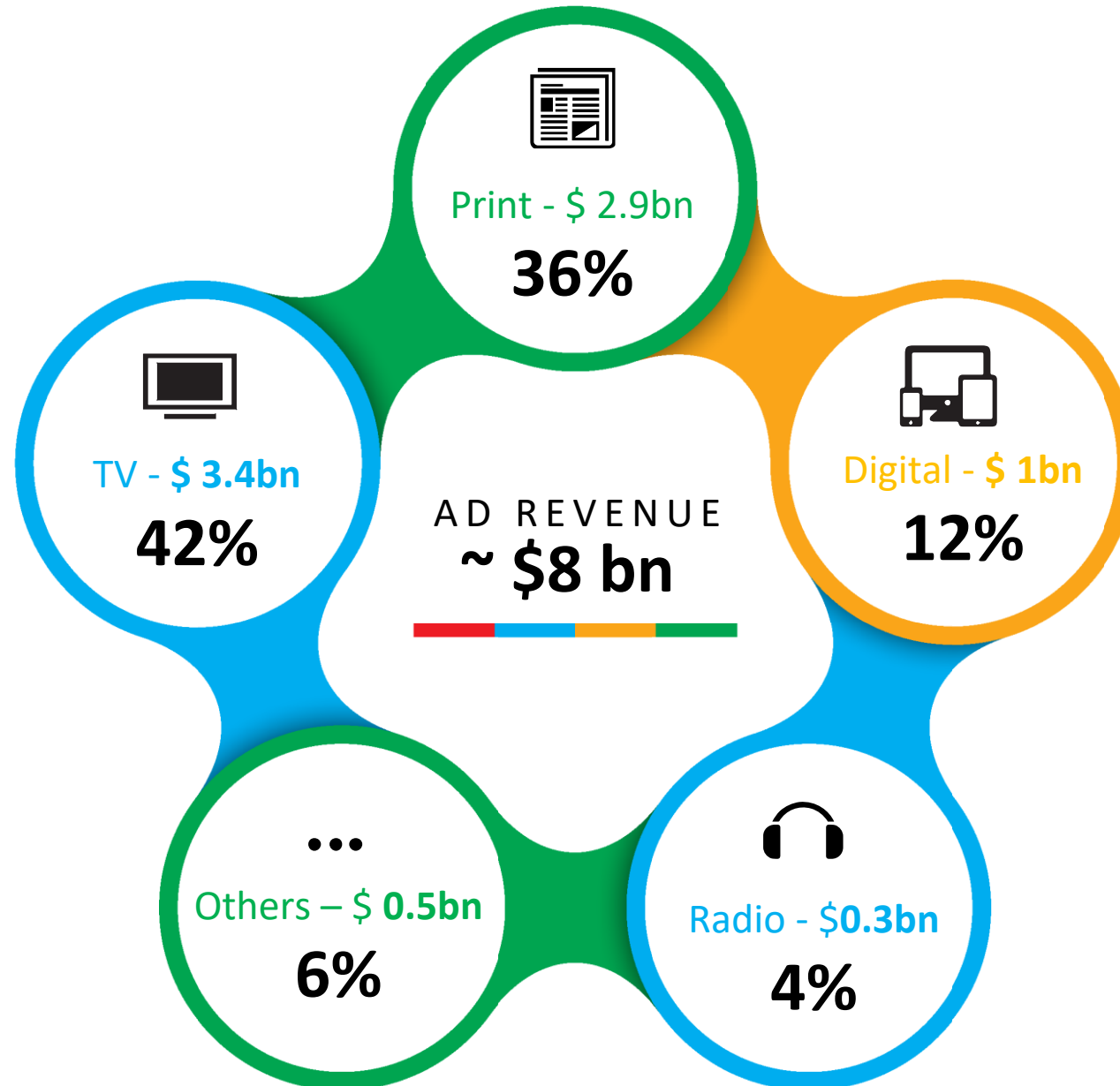
Ad Revenue Growth Potential

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CAGR of 15%

$ 16bn.

$ 8bn.

6.7
42%

4.3
27%

4.0
25%

3.4
42%

2.9
36%

1.0
12%

0.3
4%

0.5
6%

0.5
3%

0.5
3%

Legend:
- TV
- Print
- Digital
- Radio
- Others

2015 -16

2020 - 21 (E)

All amounts are in $bn.

TV – will remain the dominant medium of ad spends

Digital – to exponentially grow

Source : Mckinsey study

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Top Channels and Shows

CHANNEL	People Viewing (mn) *
Sony MAX	108
STAR Plus	76
Zee Cinema	72
STAR Gold	71
Zee TV	69
Colors	68

PROGRAMME	People Viewing (mn) *
IPL Cricket Match	52
Sultan (Movie)	48
Baahubali	44
Zee Rishtey Awards	43
Rising Star	33

* Average Daily Reach, previous 5 weeks

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Panel Expansion

TARGET

30K

Q3' FY 17

TARGET

50K

FY 18-19

Other Initiative: RPD

Thought on RPD

- ❖ Will help to up the panel size significantly

- ❖ Will be global first to be integrated as a part of the currency

- ❖ Large Key players involved

- ❖ Cost Effective

- ❖ Will be HH measurement

Unique Aspects in India -

Diversity of - 29 States, 7 Union Territories & 22 Official Languages

47% Local Language Internet users across Urban & Rural India

Less than 3% of households with Wi-Fi Router or Smart TVs

40% of 3G data is driven by Online Video consumption on Mobiles

YT & FB on site & app covers over 70% of total digital video impressions

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Unique for TV JIC to Start on Digital With-

All Streaming Video, Not Just TV Broadcaster

Big Data along with Launch of Single-Source and Digital Panels

5 Product Roll-Out including TV+Digital

Attempt to Launch All 5 Products in less than 2 Years

Common Video Asset Link ID – (VAL-ID)

Mobile First Approach in Mind

What BARC Digital Includes

Media Format

Currently Focused on Streaming Video only (Ads & Content)

Devices Covered

- PC/Laptop, Smartphones, Tablets
- Other devices will be added soon

Content Type

Will include both Broadcast and Non-Broadcast content
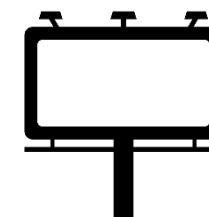
Exclusions:

Not covered at start but Will Look to Include
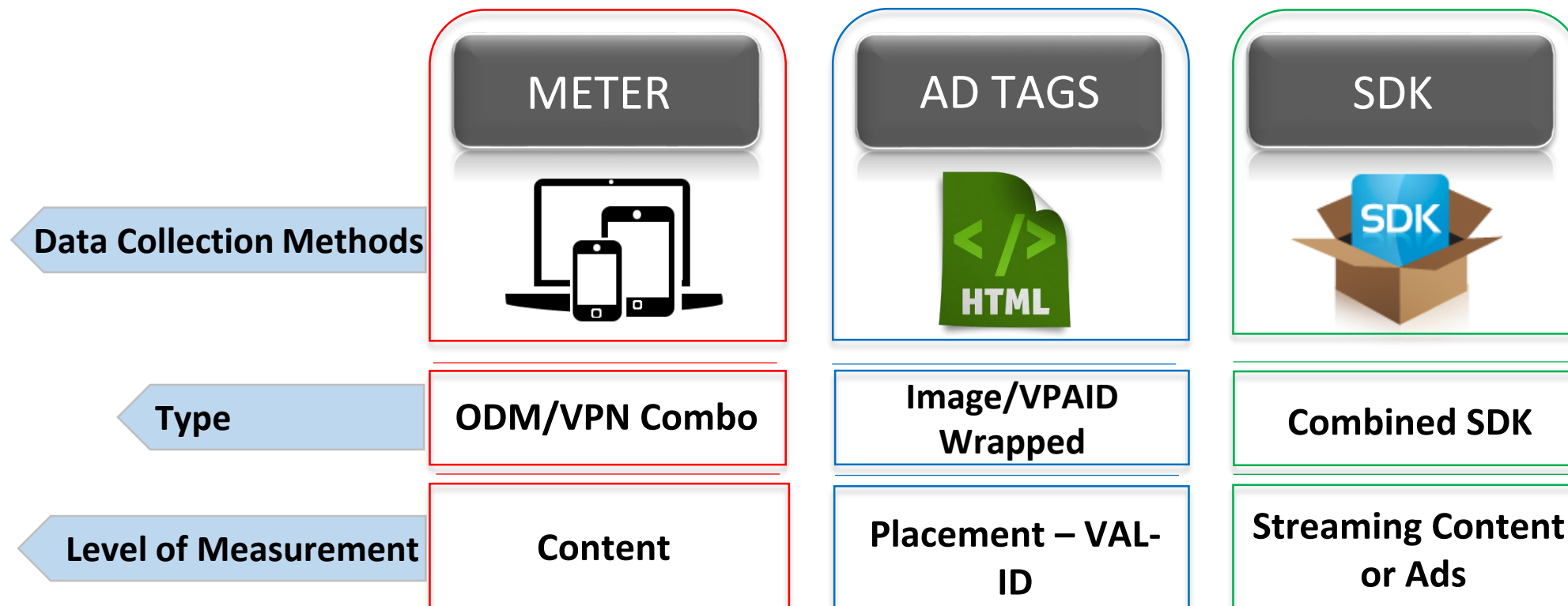

Not part of the current product roadmap
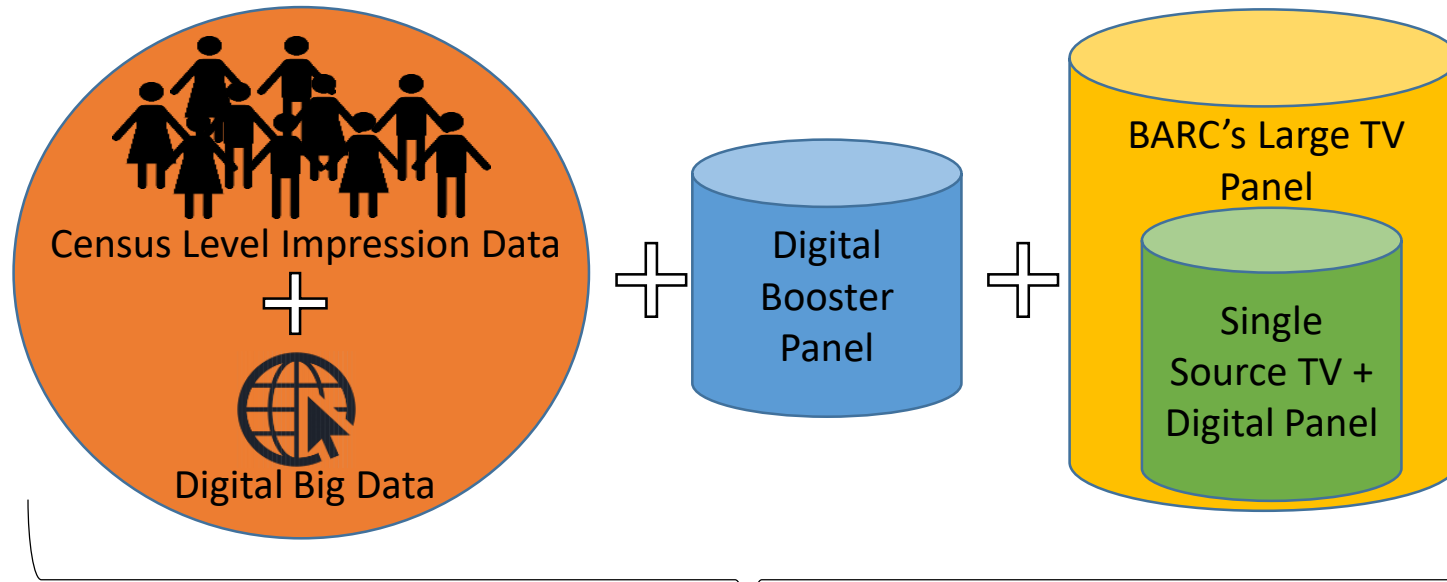

Torrents   Out Of Home Ads   Theatres

Digital Collection Methods

	METER	AD TAGS	SDK
Data Collection Methods			
Type	ODM/VPN Combo	Image/VPAID Wrapped	Combined SDK
Level of Measurement	Content	Placement – VAL-ID	Streaming Content or Ads

BARC Digital Measurement

Census Level Impression Data
+
Digital Big Data

+

Digital Booster Panel

+

BARC's Large TV Panel

Single Source TV + Digital Panel

Accuracy of Independent & Robust Measurement for Comparable Currency Level Metrics

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ekam stream

ekam ad-scan

ekam integra

Digital - Product Suite
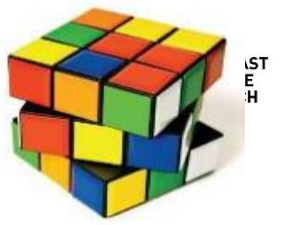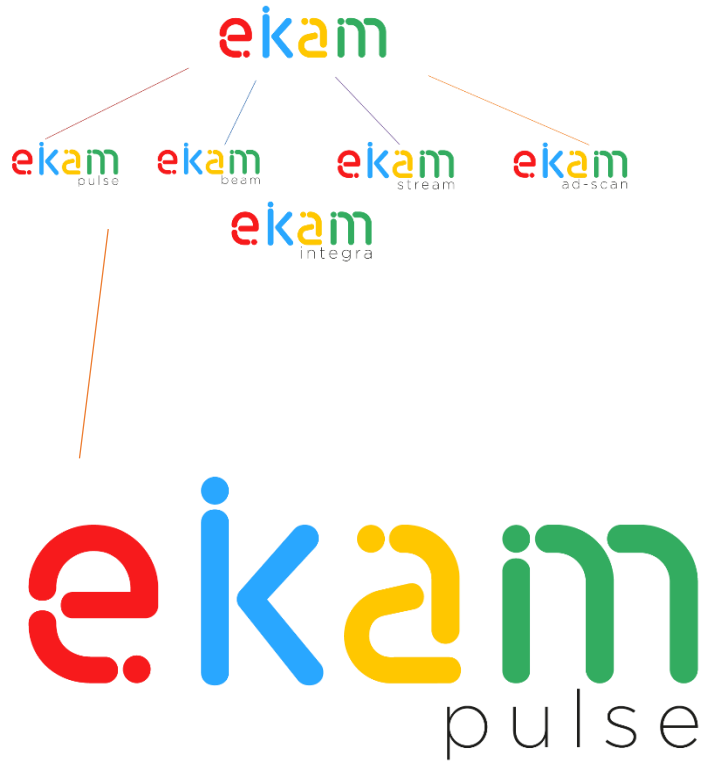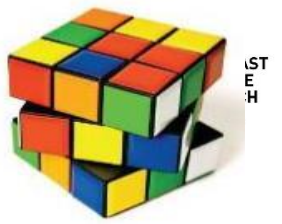
Focus

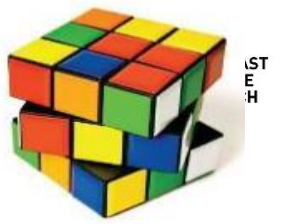- **Granular Level Ad Campaign Measurement**

Scope

- **Reach of Ad Campaigns at Brand, Campaign, Site, Placement levels**
- **Metrics like – Unique Reach across devices, Frequency, On-Target %, Demo by Geography**

Key Application Areas

- **Daily Reporting for In-Flight Optimizations**
- **On-Target Guarantees**
- **Viewability and Sophisticated Invalid Traffic**

Digital - Product Suite
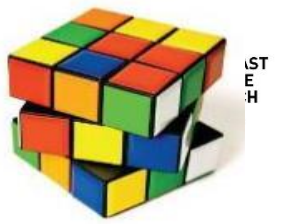
Focus

- **Linear TV Broadcast Content and Ads on Digital Devices**

Scope

- **TV <u>Broadcast content</u> that is beamed to <u>Digital Devices</u>**
- **Different metrics for Same ad load as TV vs. Dynamic Insertion**

Key Application Areas

- **Extension of TV viewership on Digital**
- **Will show Digital viewership across Devices and Providers**
- **Feeds into Ekam Integra's TV+Digital product metrics**

Digital - Product Suite

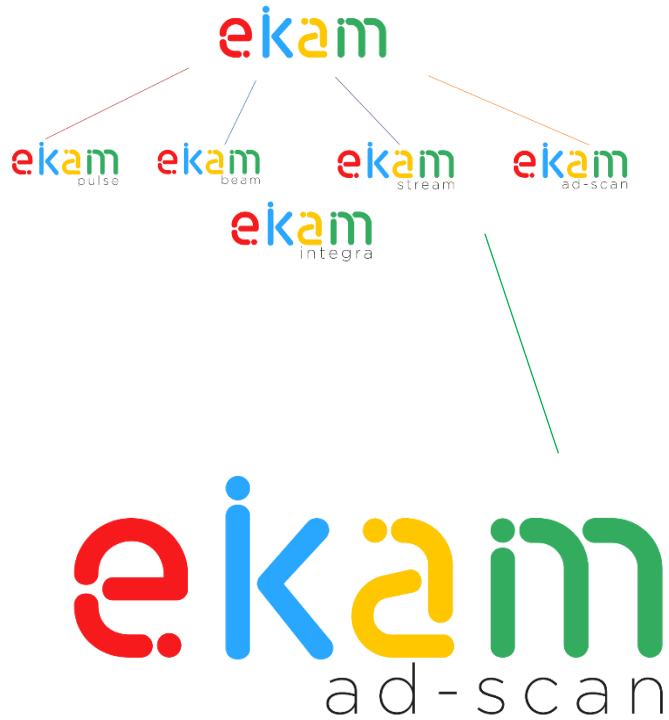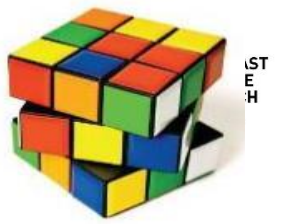## Focus

- **Streaming Digital Video Content**

Scope

- **Includes both Broadcast and Pure Play Digital Content**
- **Integrated Streaming Content**

Key Application Areas

- **Common measurement and metrics across Digital Publishers, Platforms and Broadcasters**
- **Reach and Audience Potential**
- **Evaluate Digital Video Landscape and Ad Potential at Different Levels**

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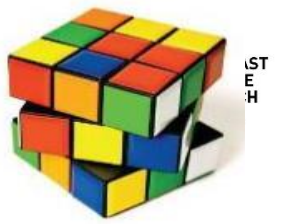# Digital - Product Suite

Focus

- **Industry Level - Digital Video Ads**

Scope

- **BARC VAL-ID Encoded Video Ads**
- **Tagged/Integrated Players**

Key Application Areas

- **Industry First Digital Ad Trends**
- **Digital Video Competition Tracking**
- **Gives Advertisers Unique Tracking Opportunities**

Digital - Product Suite

Focus

- **Unified TV+Digital Measurement and Metrics**

Scope

- **Video Ads and Content**
- **Integrated Players**

Key Application Areas

- **Incremental Reach (TV over Digital or Digital over TV)**
- **Enhanced Robust Measurement for TV+Digital Planning**
- **De-Duplicated Fusion of Linear Broadcast**
- **Full Reach of Content across devices and delivery types**

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Way Forward - Timeline

Vendor Selection

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