



INTRODUCTION

23.9.2010

About Us

- NDTV Through the Years
- Diversified Media Presence
- Our Channels

Global Pedigree

- International Presence
- International Partners- Past and Present

Indian Market Overview

- The Broadcasting Opportunity
- The Media Dollars

NDTV Japan Partnership

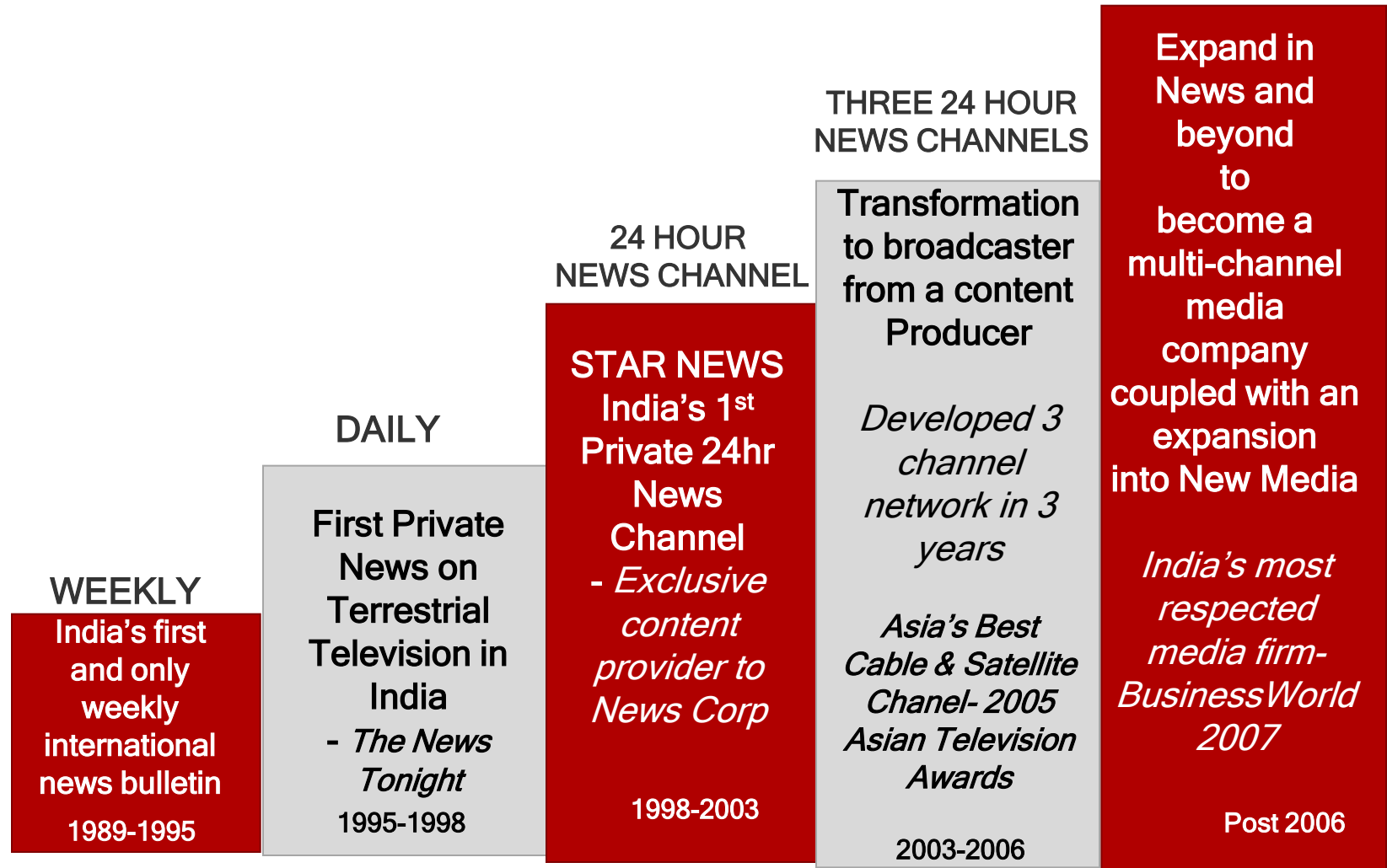
- The NDTV Advantage
- Areas of Collaboration

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- Our channels

NDTV Through The Years

CHANNEL
BOUQUET



Diversified Media Presence

India's Premier Broadcasting Service

- Four 24-hour national and regional channels in News and Business
- Own and Operate India's leading and only homegrown lifestyle channel

Successful New Media Ventures

- **NDTV Labs**- Cost effective, award winning media graphics and technology solutions
- **NDTV Convergence**- India's most visited website- news, travel, showbiz, technology, matrimonial, job services
- **NDTV Worldwide**- Media consulting, channel set up and broadcast operations training
- **NGEN**- Back end media and content services- digitization, subtitling, transcription etc.



Undisputed leader in English News
Award winning shows and formats
60% market share (Nielsen- UMAR survey 2009)



India's only non-tabloid format Hindi News Channel
Reputation for credibility draws advertiser premium



Launched in 2005
India's leading business news channel
Business News from India and across the world



24-hour Channel specific to India's 4th largest metro, Chennai
Lifestyle, Entertainment, News and Sports content from around the city



India's leading and only homegrown lifestyle channel launched in 2007
Shows Catering to the new emerging India- fashion, travel, food and wellness
Available in USA, Canada, Singapore, Sri Lanka

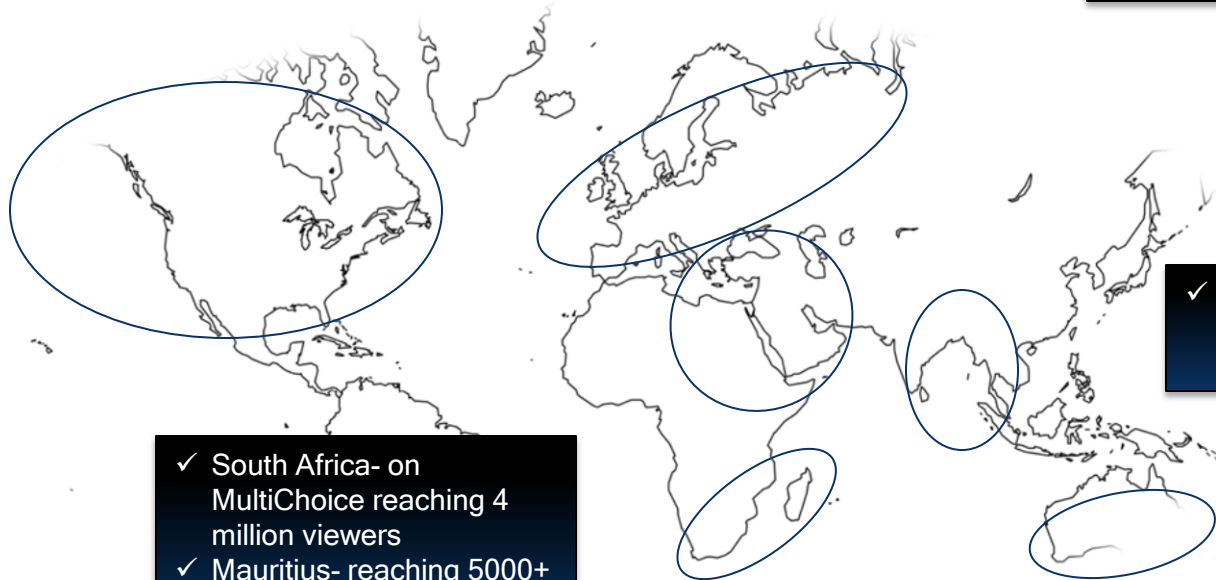
Global Pedigree

- International Presence
- International Partners- Past and Present

- ✓ United States- on DirecTV and ComCast- 150,000+ viewers
- ✓ Canada- 160,000 viewers across platforms

- ✓ UK- on SKY reaching 36 million viewers
- ✓ Europe- on World TV(DTH) and Free TV (IPTV)

- ✓ Middle East- on Pehla and E-vision reaching 600,000 viewers



- ✓ South Africa- on MultiChoice reaching 4 million viewers
- ✓ Mauritius- reaching 5000+ viewers

- ✓ Singapore- on Singtel reaching 50,000 viewers

- ✓ ANZ region- reaching 45,000 viewers

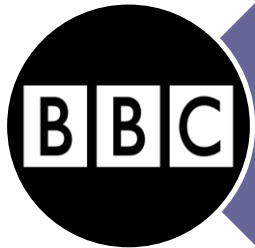
- ✓ South Asia- reaching 750,000 viewers through various platforms in Sri Lanka, Maldives, Bangladesh & Nepal



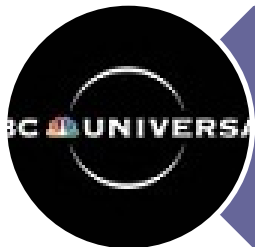
Exclusive content partner for Star News in India from 1998-2003



Exclusive consultants and JV partners for Astro Awani in Malaysia
Strategic partners in NDTV Lifestyle



Content producer for BBC World Service Asia for India specific shows



Joint venture partners from 2007-2009
TV Channels in Entertainment, Lifestyle and Showbiz



Current owners of NDTV Imagine (General Entertainment channel in Hindi)

Forthcoming Distribution Tie-ups



Indian Market Overview

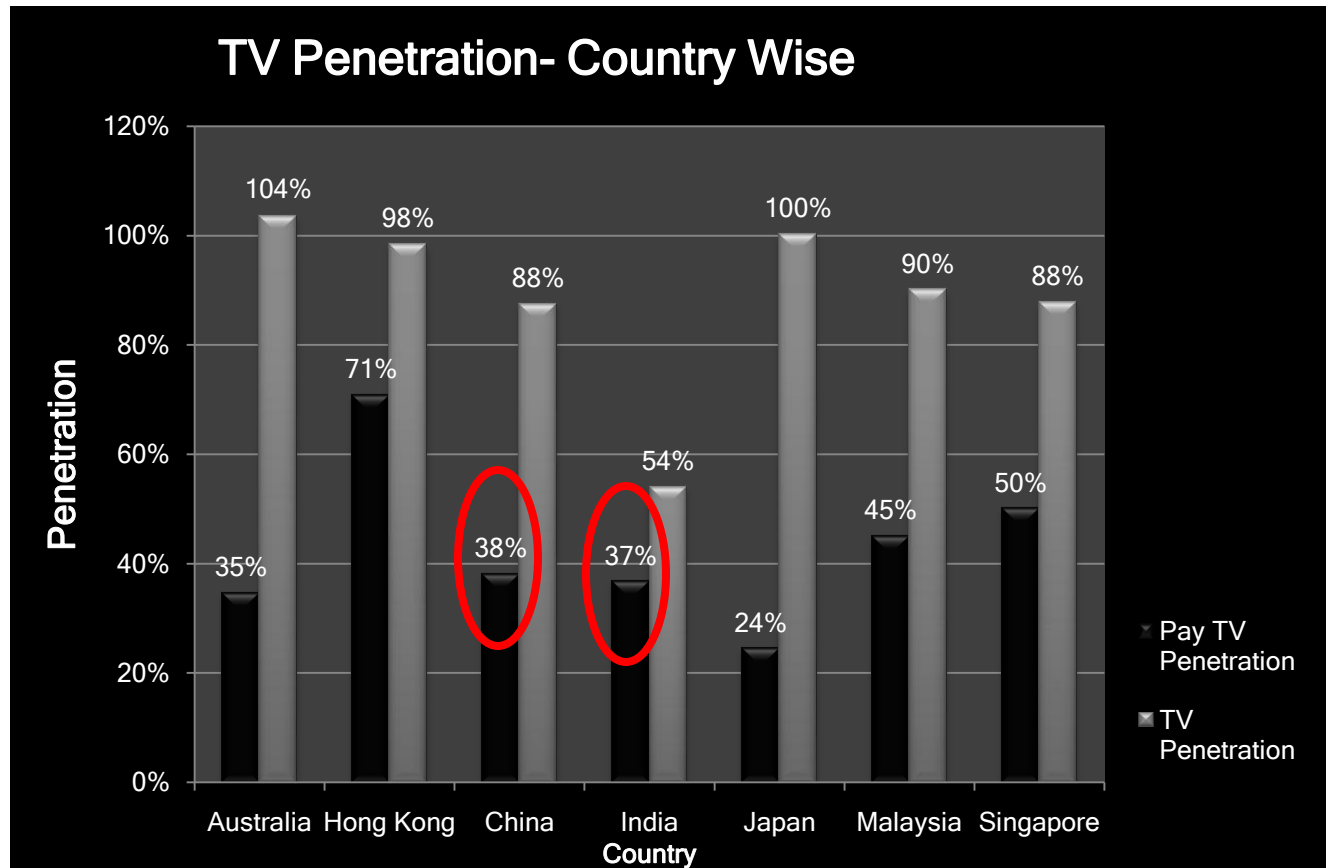
- The Broadcast Opportunity
- The Media Dollars

The Broadcast Opportunity

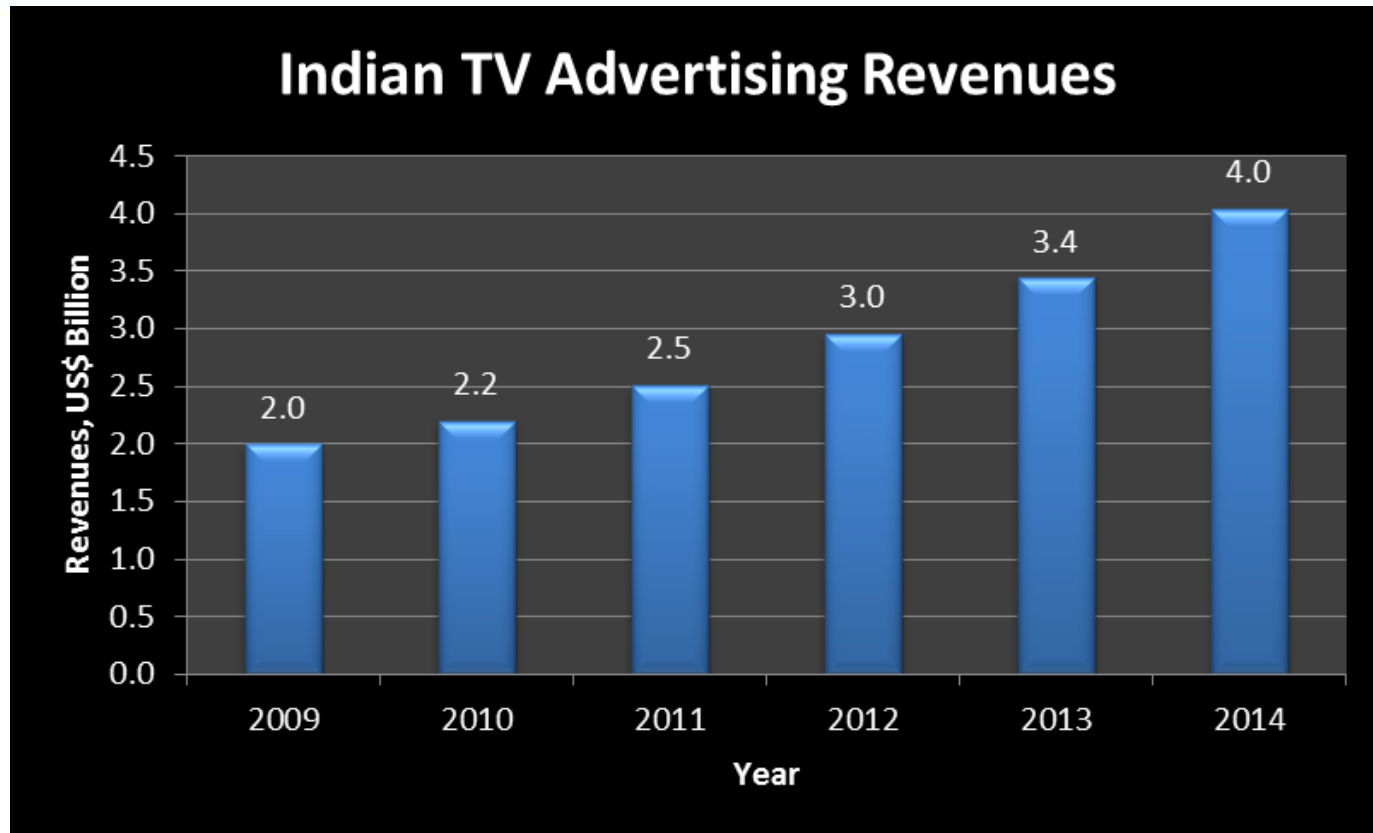
Country	Population, million	No. of Households	No. of TV Homes	C&S Connections
Australia	21	7.8	8.1	2.7
Hong Kong	7	2.4	2.4	1.7
China	1336	440	385.1	167.5
India	1167	259	139.7	95
Japan	128	48	48.1	11.7
Malaysia	28	6	5.4	2.7
Singapore	4.6	1.2	1.1	0.6

- ✓ **2nd highest Cable & Satellite Subscribers in Asia Pacific after China**
- ✓ **Nearly 9 times higher than Japan**

✓ Source: Media Partners Asia, CASBAA

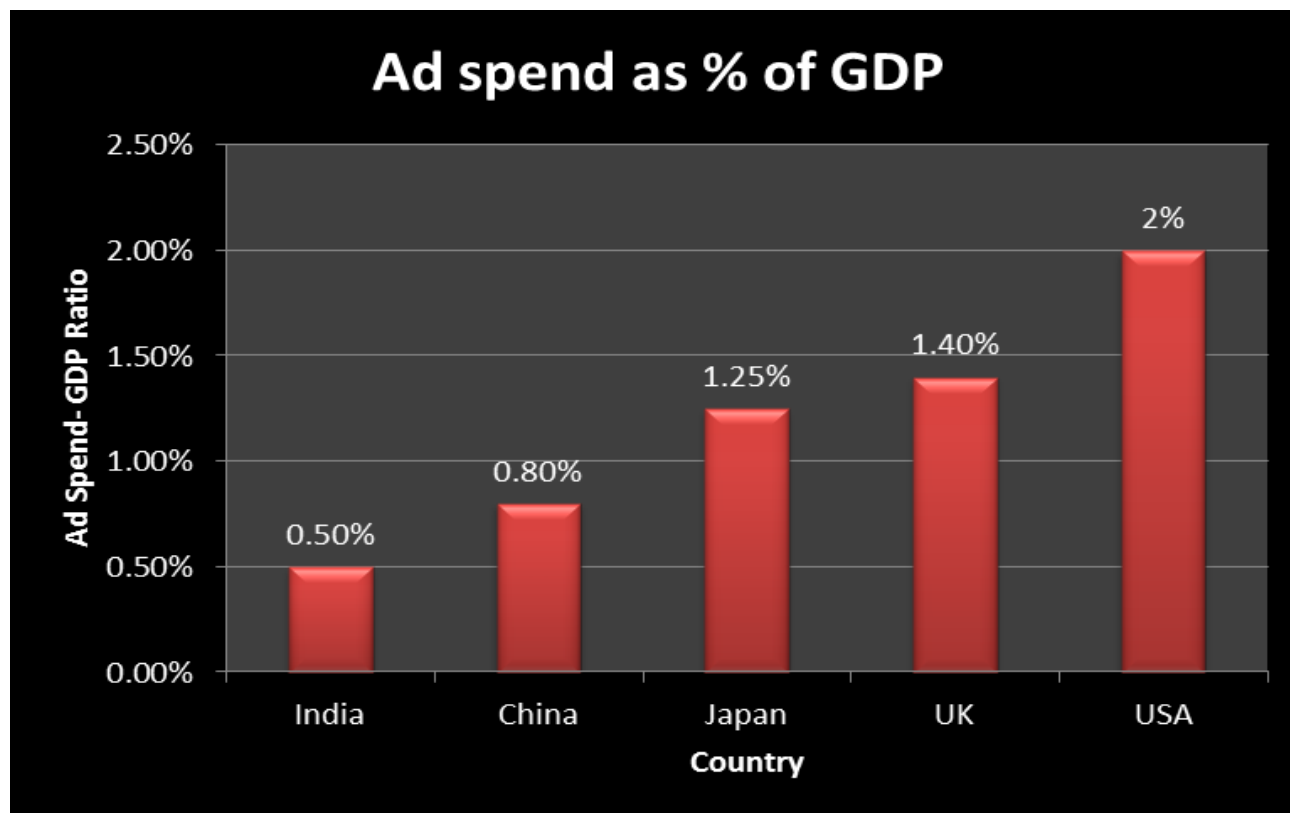


- ✓ Only 1 in 2 households has access to Television
- ✓ Scope to double the market in next few years
- ✓ Higher Propensity to Pay for TV– Equal C&S penetration as China despite lower TV penetration



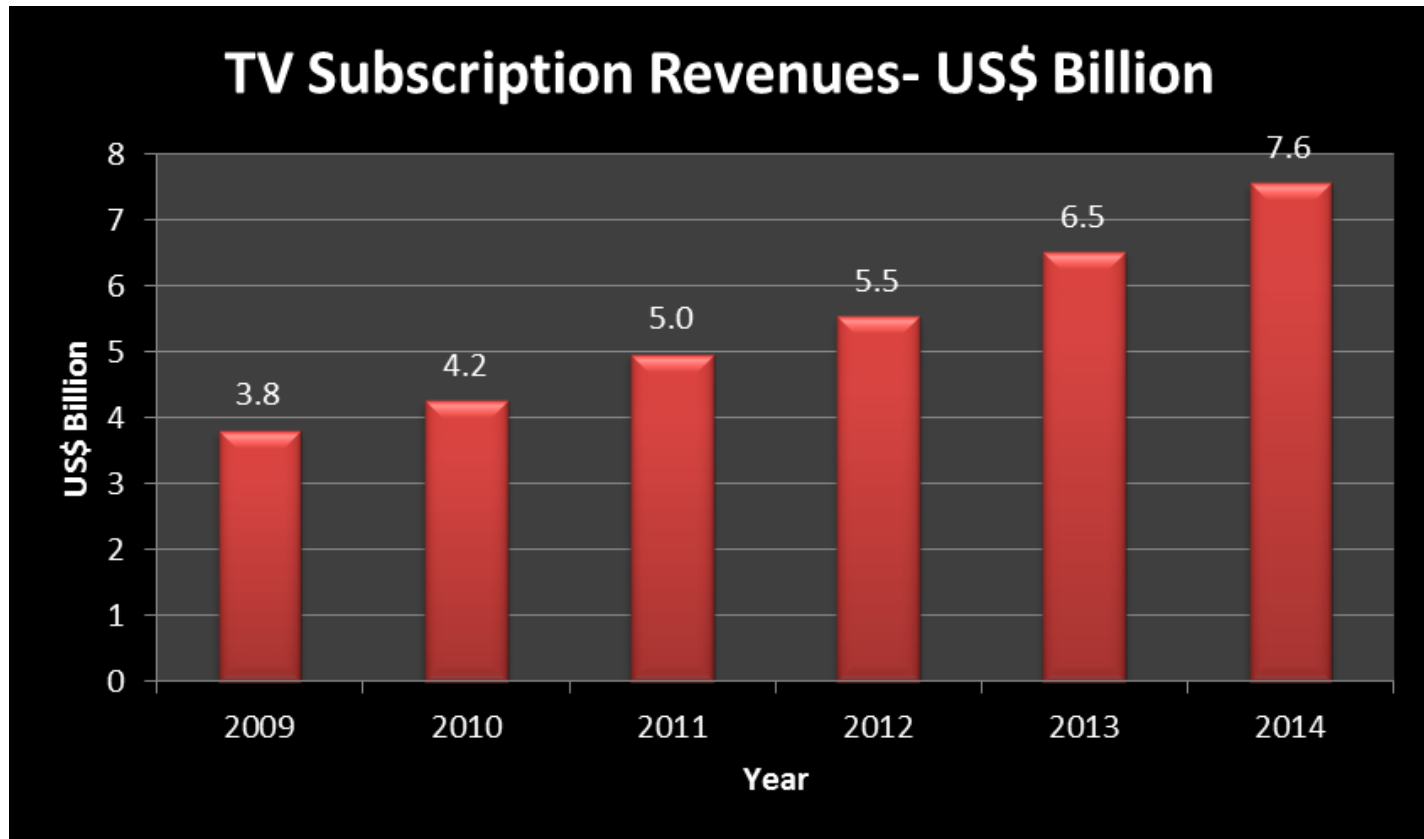
- ✓ **7% growth witnessed in TV ad spends during recessionary year in 2009-10**
- ✓ **CAGR of 16% annually until 2014**

✓ Source: KMPG 2010



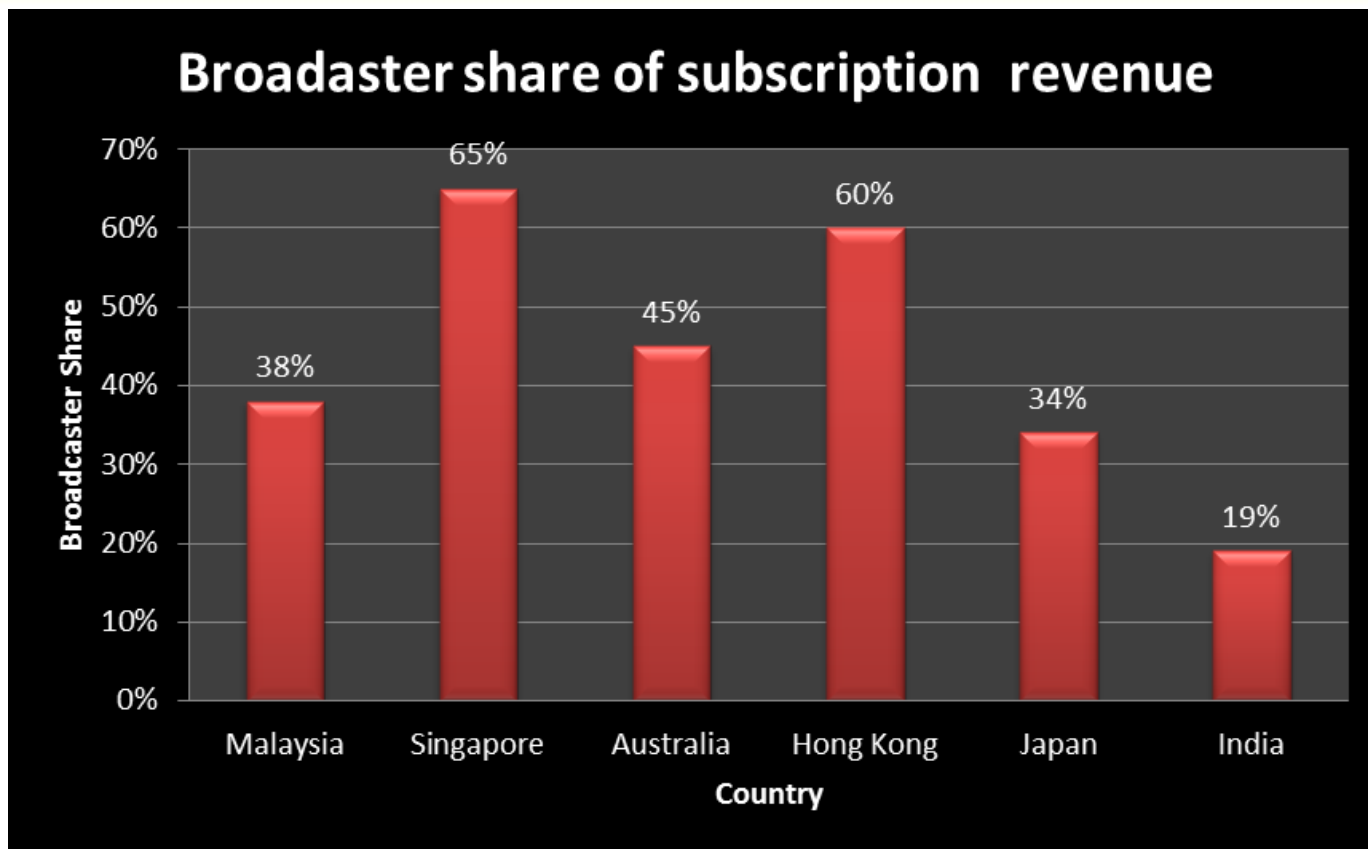
- ✓ **Ad Spend- GDP ratio- 60% of China**
- ✓ **Opportunity to catch up with developed economies**

✓ Source: KPMG, Dentsu, Zenith, UBS



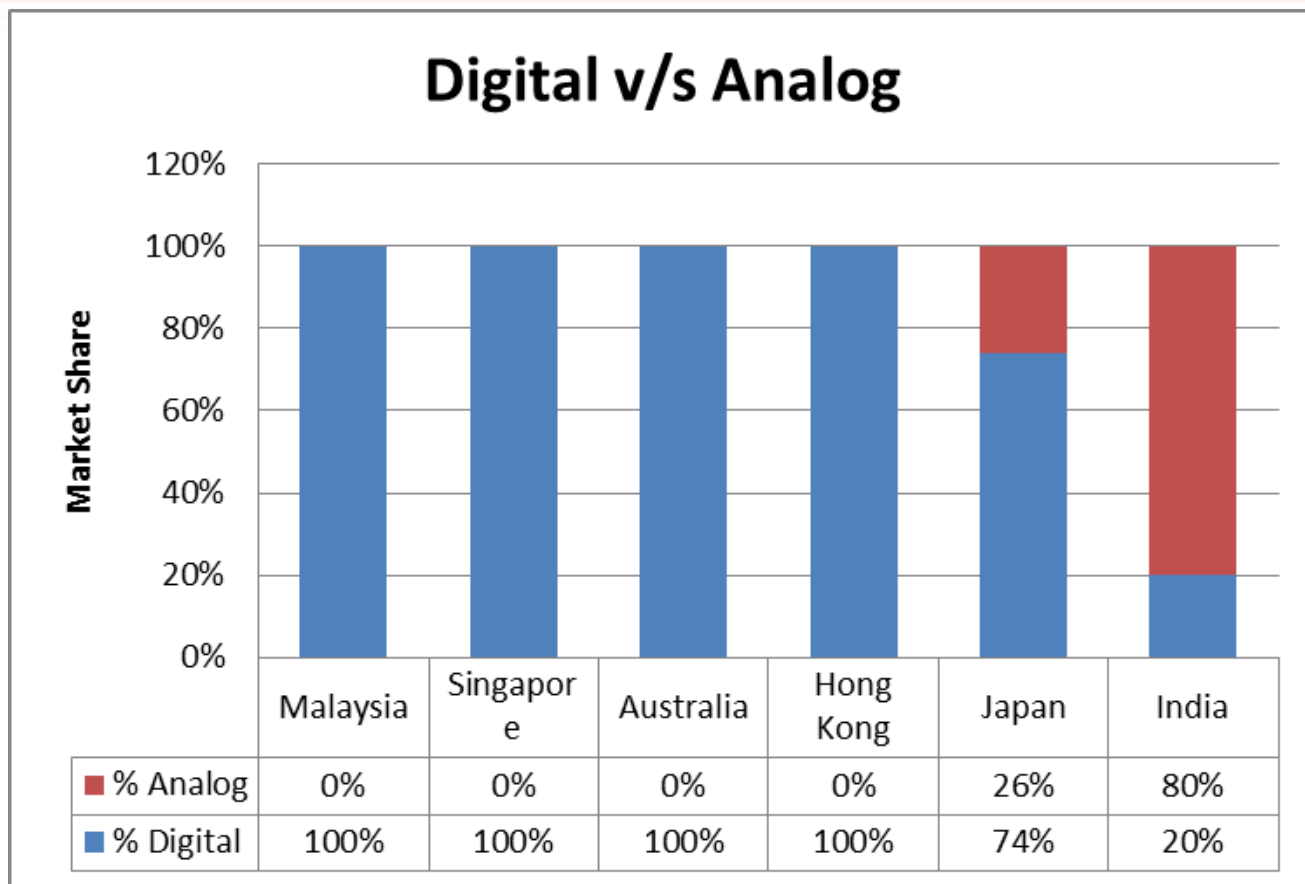
- ✓ **Projected CAGR- 15% pa until 2014**
- ✓ **2009- actuals; 2010-14: projections**

✓ Source: KMPG 2010



✓ **Scope for broadcasters to raise subscription income in line with other global markets**

✓ Source: Media Partners Asia



- ✓ **Bring in new technology and value added services**
- ✓ **Simultaneously develop broadband and TV penetration**

Fastest growing market in Asia Pacific

- US\$ 6 billion at end of 2009
- Projected CAGR of 15%+ till 2014
- Subscription revenues of US\$4 billion collected in 2009-10
- 95 million pay TV homes (cable and satellite)

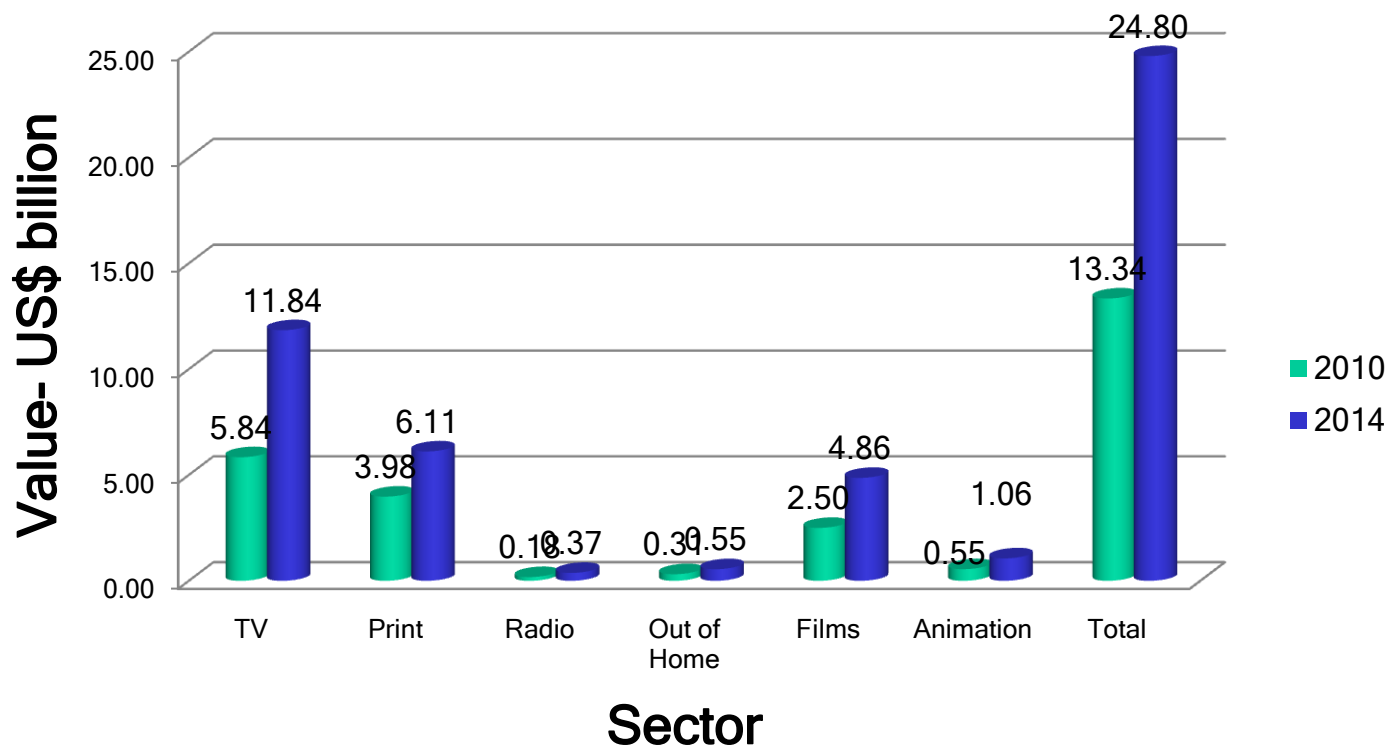
Robust television advertising market

- Advertising revenue = US\$ 1.8 billion,
- Growing at 15% YoY
- High ad revenue dependence for major broadcasters

Headroom for High subscription revenue growth

- Total subscription revenue collections = US\$ 4 billion
- **Total broadcaster share of subscription revenue = 19%**
- Emergence of digital platforms a plus for broadcasters to address the imbalance

Indian Media Sector- Value- US\$ Billion



Year	TV	Print	Radio	Out of Home	Films	Animation	Total
2010	5.84	3.98	0.18	0.31	2.50	0.55	13.34
2014	11.84	6.11	0.37	0.55	4.86	1.06	24.80

✓ Source: KPMG Indian Media Sector Report 2010

NDTV- Japan Partnership

- The NDTV Advantage
- Partnership Opportunities

Synergies

- India's most credible broadcaster
- Vibrant media market with changing technological landscape
- World-class Japanese technical know how

Complimentary Approaches

- Ability to execute complex media projects at minimal cost
- Capacity to husband long term projects with definite ROI
- Introduce the Japanese way of thinking into Indian homes

Content Development and Training

- Develop New age content suited to young emerging audiences
- Target both traditional and new media platforms
- Professional exchange programmes between editorial, production and technical personnel

Broadcasting Joint Ventures

- Broadcast world events with an Indo-Asian point of view
- Grow niche categories in the Indian market
- Develop high end platforms like Video on Demand and Mobile Television

Technology Collaboration

- Introduce Japanese technology in Indian broadcast operations
- Create a global hub for global media process solutions



Thank You