

MARSA

BAKU 2022

MEDIA
AUDIENCE
RESEARCH
SYSTEM OF
AZERBAIJAN

CONTENT

- **INTRO**
- **KANTAR**
- **MARSA**
- **PM7**
- **INSTAR SW**
- **AZE ESTABLISHMENT SURVEY & PANEL**
- **AZE MEDIA INDUSTRY**
- **OUR PARTNERS**



THE CHALLENGES IN AZERBAIJAN

IMPERFECT
MEASUREMENT SERVICE

DEMAND FOR
CONSISTENT,
ACCURATE AND
ROBUST DATA

DIGITAL SIGNAL IS NOT
MEASURING

NO MEDIA INDUSTRY
COMMUNITY

ADVERTISING BUDGETS –
WHEN WILL THEY
INCREASE?



KANTAR

**PEOPLE-BASED
MEASUREMENT**

**DEVICES AREN'T VIEWING –
PEOPLE ARE**

MARSA

KANTAR IN NUMBERS

75+

years of experience

61

markets where our technology and solutions are used to measure audiences

70,000

People Meters installed across 40,000 homes

4,500

TV channels referenced in our secure reference sites daily

1,640

channels watermarked with our industry-accredited content detection technology

6 million

the number of set top boxes we process viewer data from each day

Kantar panels and technology measure audiences in 61 markets worldwide

- **Yellow circle**

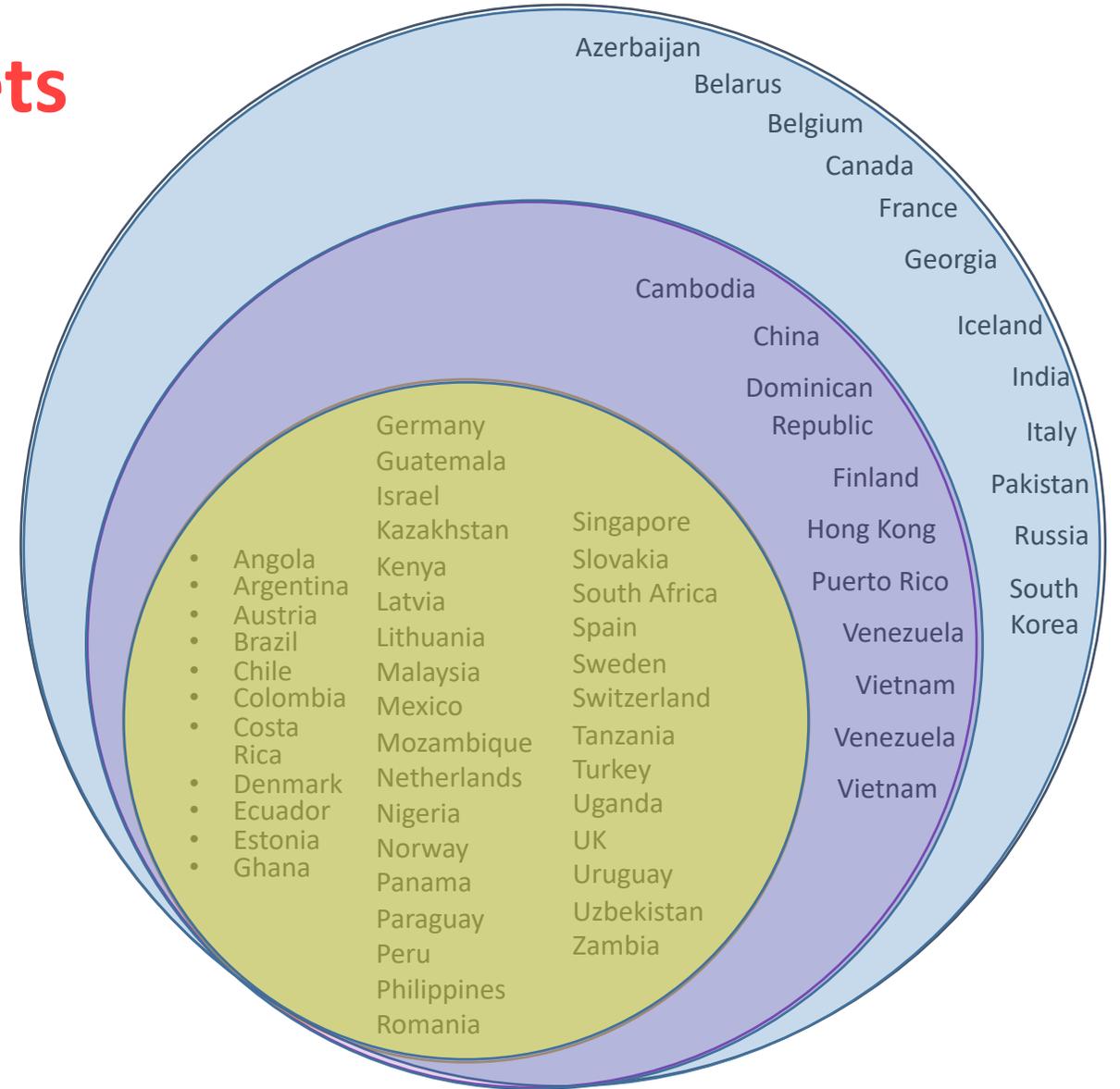
Kantar operates, for and on behalf of our clients

- **Purple circle**

Kantar has an equity stake in the audience measurement business operating in these markets

- **Blue circle**

Kantar technology is used in these markets and operated independently by a third party



Innovators in audience measurement

Kantar world-firsts...

Developed the world's first People Meter

Real-time TV audience market share

Single measure to report viewing in and out of home

Watermarking technology accredited by SMPTE

Appointed to deliver the world's first cross-media total audience measurement solution

Commercial audience measurement service using operator data through return path tech

First data science algorithm to convert household data to individual data

Design and engineer the first technology to measure viewing levels online

KANTAR – TRUSTED PARTNER

THE BIGGEST INTERNATIONAL BROADCASTERS AND ADVERTISING AGENCIES REFERRING TO KANTAR'S DATA





MARSA

MARSA - NEW TAM SYSTEM IN AZERBAIJAN

technical partner
&
official provider
of KANTAR

MARSA

MARSA – MEDIA AUDIENCE RESEARCH SYSTEMS OF AZERBAIJAN



NEWLY FORMED
INDEPENDENT
AUDIENCE
MEASUREMENT
COMPANY IN AZ

TAM SET-UP
COORDINATED AND
MANAGED

TAM OPERATION
MONITORED
BY PURE X MEDIA

... thus guarantying:

A QUALIFIED APPROACH
INDEPENDENCE
COMPLIANCE WITH
INT. STANDARDS

KANTAR AS
TECHNOLOGY
PARTNER

COMPLIANCE WITH
INT. STANDARDS

TRANSPARENT
APPROACH

WORKING CLOSELY
WITH THE INDUSTRY

OPEN TO AUDITING

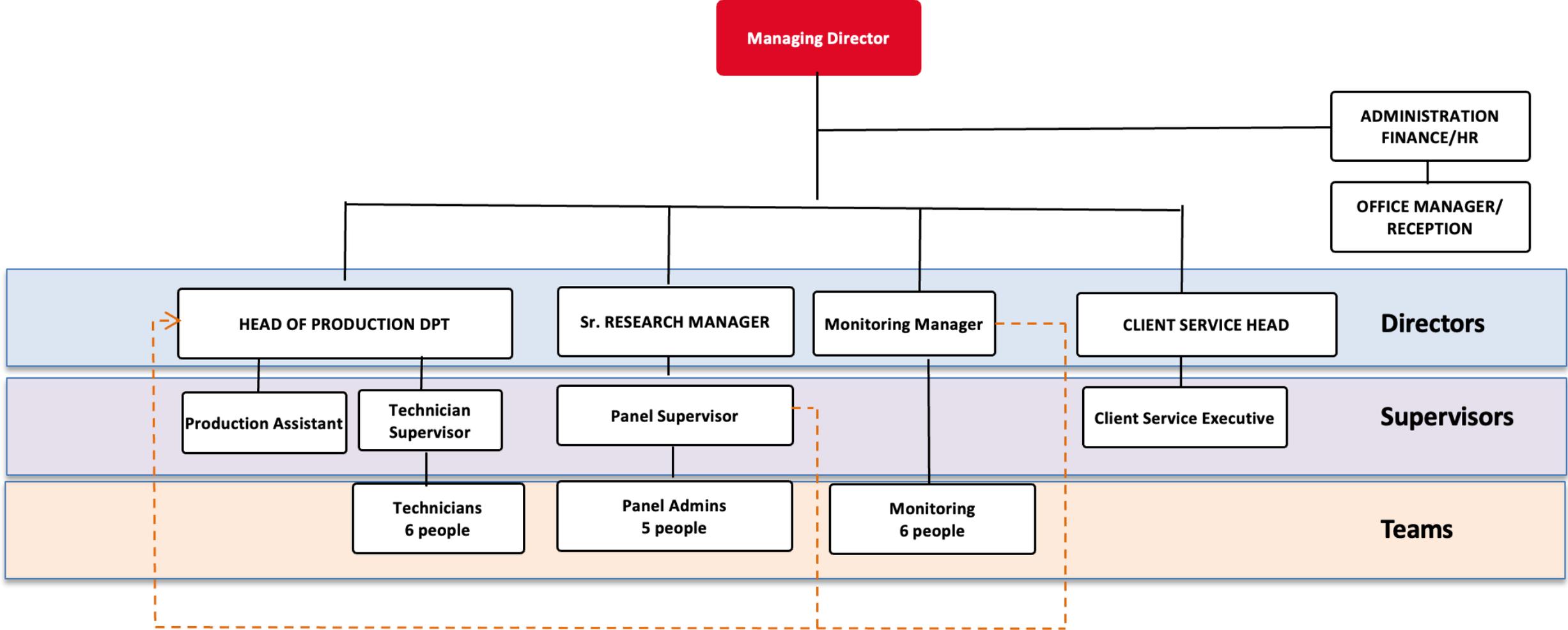
WEEKLY TOP-LINE DATA
PUBLISHED ON
MARSA'S WEBSITE

GOAL:

**TO BECOME A
A TRUSTED PARTNER
TO MEDIA INDUSTRY
STAKEHOLDERS IN AZ**

MARSA

MARSA – THE TEAM



← **Operational** **Commercial** →

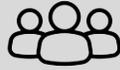
NEW TAM SYSTEM BY MARSA

TAM PANEL SIZE



National panel
950 HH gross

ESTABLISHMENT & ONGOING SURVEY



ES: 9,500 interviews
Ongoing: 4,750
interviews

PANEL RECRUITMENT



CATI recruitment from ES
25% annual panel
turnover

TAM SYSTEMS



KANTAR Technology:
PM 7 Tablet Meters
Atria data processing
Instar reporting s/w

QUALITY CONTROL



Daily QC checks by MARSA
KPIs monitored by Kantar
and compared globally

DAILY DATA DELIVERY



Next day data delivery
available in reporting
and planning SW

REPORTING



Programs & Spots
Guest viewing incl.
Time Shift viewing incl.

ROI FOR ADVERTISERS



Better monitoring
Efficiency of campaign
within TG

PM 7

27.2



People Meter 7

Kantar – Continuous Innovation



Circa 1950
Diary



1950
One of our earliest electronic meters measured channels, not people



1984
First multiple set meter for measuring TV viewing at a people level (People Meter)



2005
Set-top-box measurement (RPD)



2006
Video tagging measurement begins



2007
First portable measurement of TV and Radio consumption



2017
Measuring all home IP-delivered TV & Video (Focal Meter)



2018
RateOnAir portable meter (partnership with Mediametrie)



2019
Capturing real-time with second-by-second reporting (People Meter 7)



TBC
Set Meter



TBC
Wearable portable meter
etc.

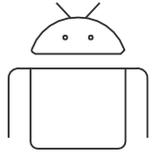


The PM7 provides an accurate and connected view of what audiences are watching on the TV set

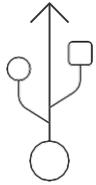
Kantar PM7

- A step change in consumer design
- Engaged panel members
- Easy installation and usage
- Guest viewing
- Time Shift viewing

PM7 Main Technical Characteristics and Functions



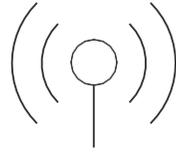
Android OS



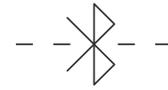
Powered with
USB port



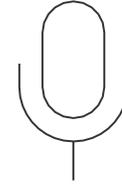
4G
communication



WiFi
communication



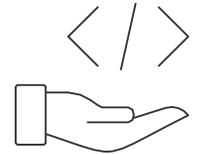
Bluetooth
communication



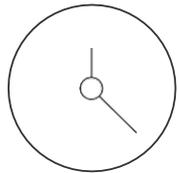
Built-in
microphone



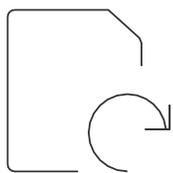
Audio
Matching



Audio
Watermarking



Real Time
Reporting



Remote
firmware
upgrades



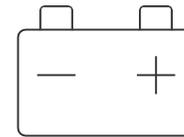
Touch screen



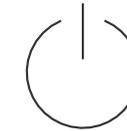
Handset
support



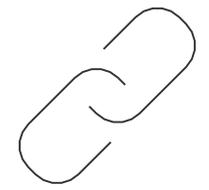
Registration
via app



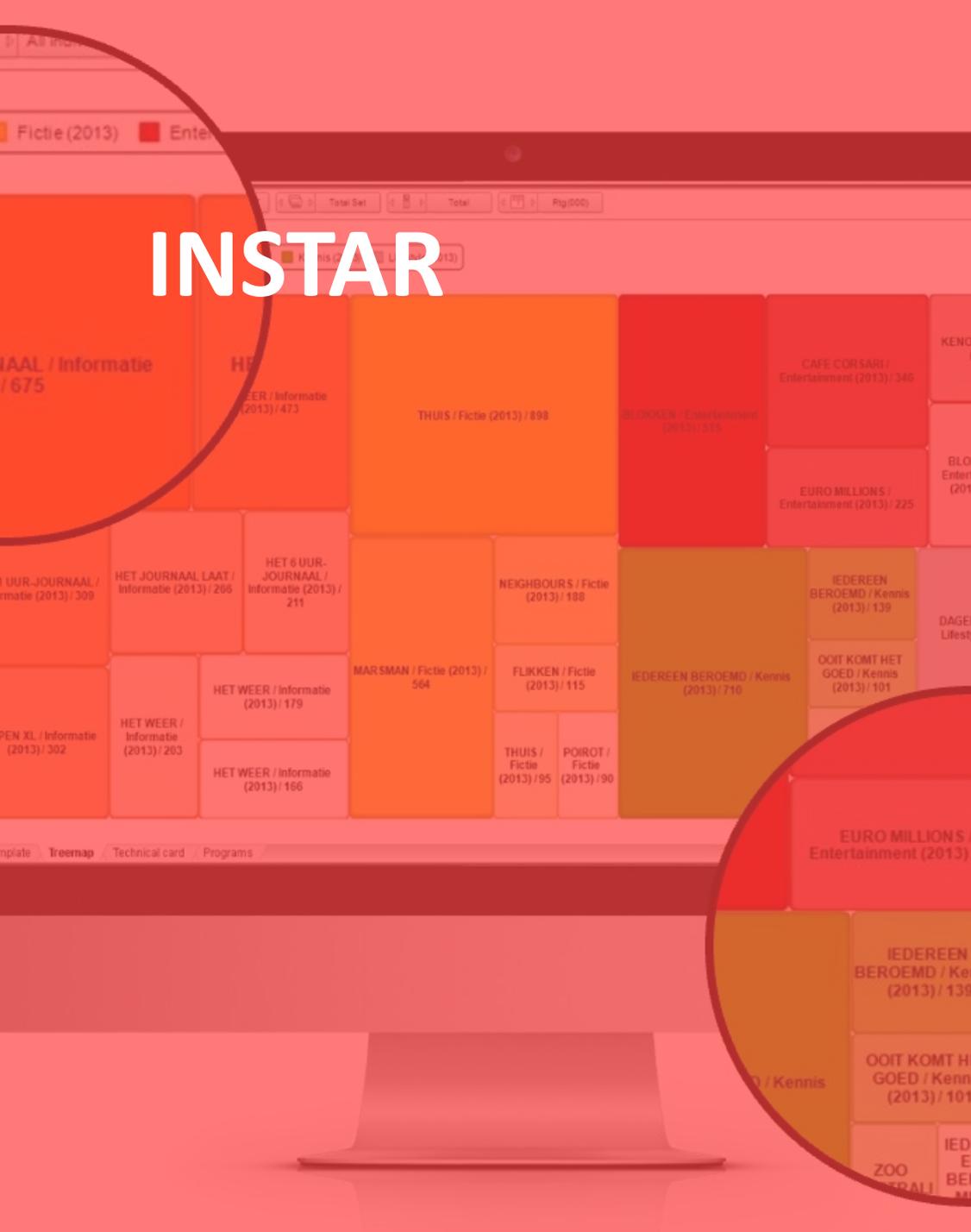
Rechargeable
battery



TV ON/OFF
detection device



Peripheral
detection device



INSTAR

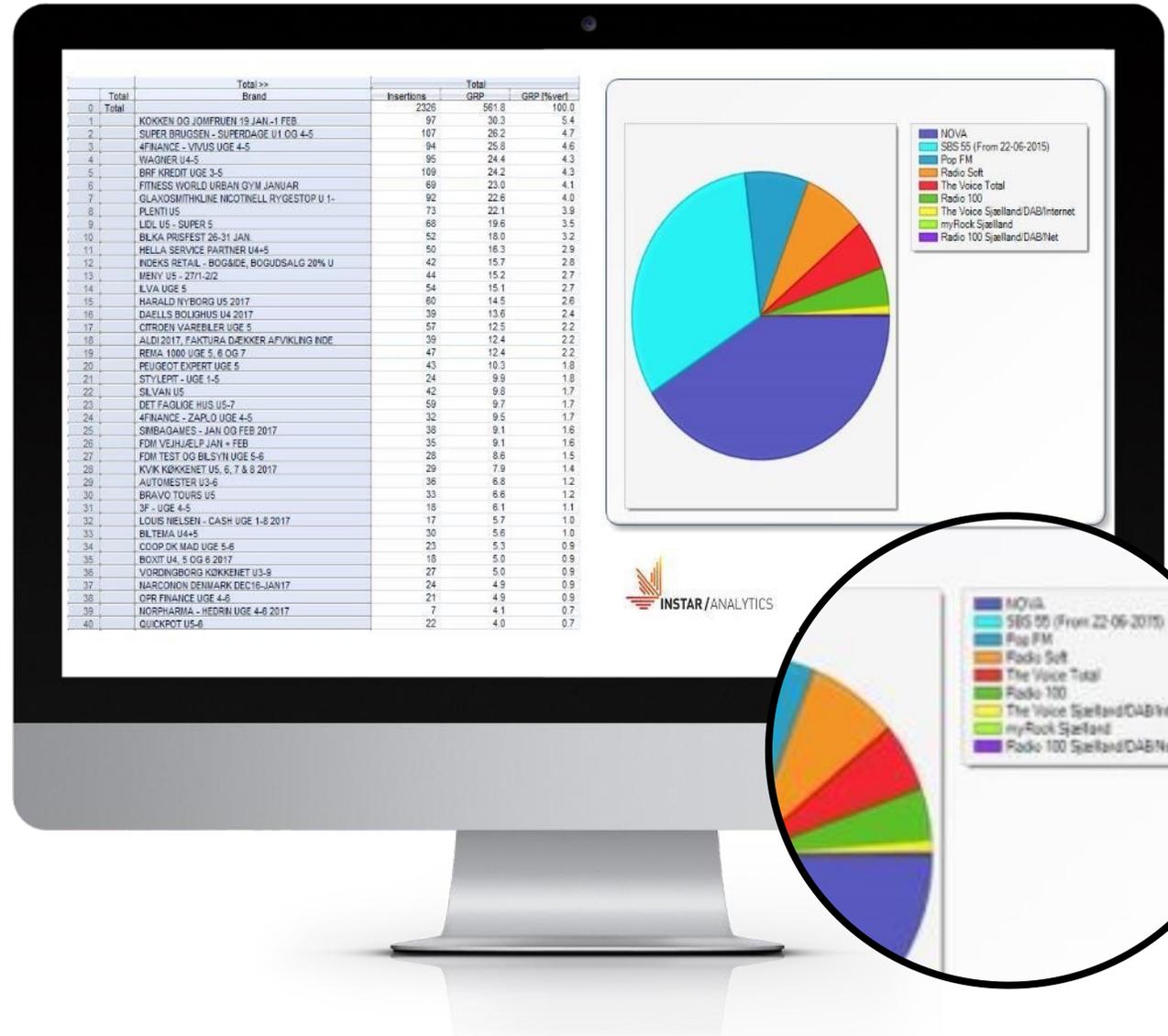
Instar Analytics is the most heavily used audience measurement software

MARSA

INSTAR

Instar enables you to analyse data in-depth to enhance your advertising planning, and make fast and easy programming decisions.

Instar Analytics combines in one single tool data processing, a powerful calculation engine and a set of report types and visualizations to present the results in a attractive way.



Instar Reporting Software

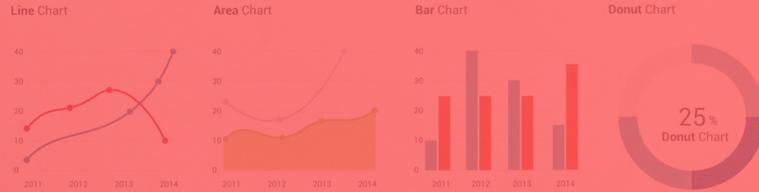
Break down ratings and audience data into meaningful reports:

- Daily Curve, Channels
- Top Programmes
- Time Slots, Channels
- Commercial Summary by Brand & Channel Share
- Planning module



ES & PANEL

Morris Charts



Sparkline Charts



Easy Pie Charts



Establishment Survey & Panel

ESTABLISHMENT SURVEY & PANEL DESIGN

A panel is only as good as the sample it's built on

- Initial ES Sample Size - 10 times the gross panel / Ongoing Survey – 5 times
- Provides universe estimates, and monitors changes over time universe estimates
- Determines panel control targets
- Source of panel homes
- Provides information about a/ socio-demographics, b/ TV viewing patterns
- Panel conforms to target audiences determined by ES
- Ensures TV viewing habits across the measured population are represented

PANEL CHARACTERISTICS

Based on the results from the Establishment survey, the panel will be well represented by all these target groups.....

Geographic	National; Urban & Rural
Age	4+ years, split into 4/5 age groups
Gender	Female / Male
Household size	1 person / 2 / 3 / 4+ people
SEC / Income	SEC A / B / C1 / C2 / D
Reception Type	Terrestrial / Digital (Satellite & Cable)

PANEL GEOGRAPHY

Coverage

Economic Regions	Total	Urban	Rural
Baku	350	350	
Absheron-Khizi	64	60	4
Daghigh Shirvan	30	13	17
Ganja-Dashkasan	62	48	14
Karabakh	35	14	21
Gazakh-Tovuz	59	18	41
Guba-Khachmaz	50	21	29
Lankaran-Astara	83	29	54
Central Aran	69	35	34
Mil-Mughan	45	15	30
Shaki-Zagatala	56	20	36
Shirvan-Salyan	47	27	20
Total	950	650	300

Robust panel

- Statistically recruited and Nationally represented
- Established as per the 'Global Guideline of TAM systems
- Designed as per the latest details obtained from the ES

Technically Superior

- State of Art Meters (globally accepted)
- Robust detection - Audio Matching
- Platform Identification
- Automatic back end processing system
- Futuristic technology

Quality Controlled

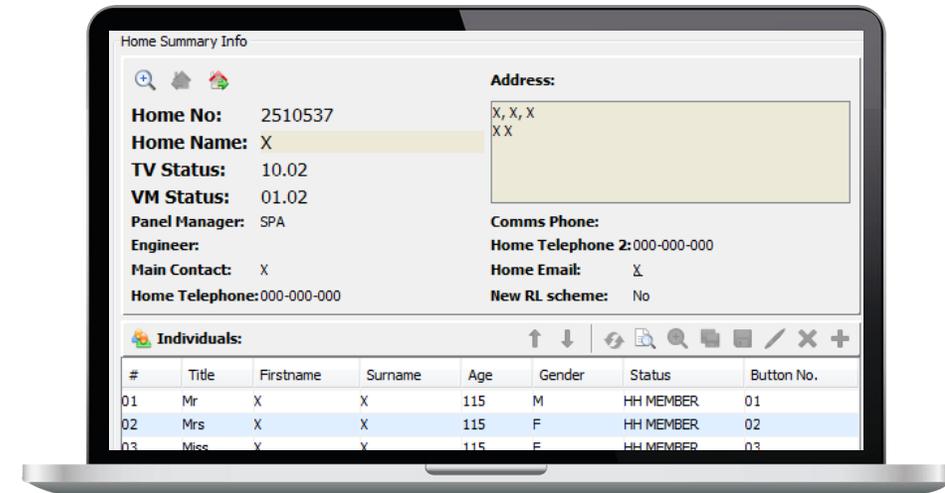
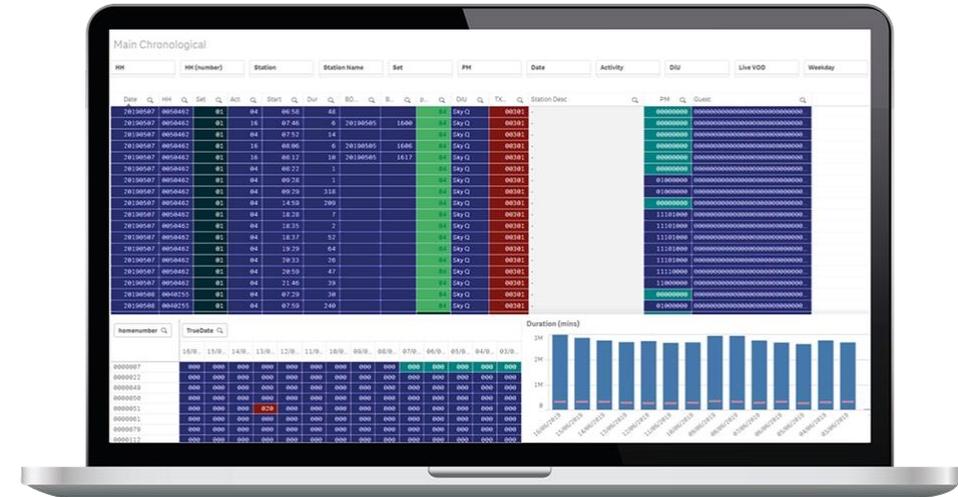
- At all levels – recruitment, installation, panel management, data processing and reporting
- As per the Global guidelines of Audience Measurement

Well Managed - Resources/Team

- Perfect blend of local and global experts

Panel Management & Quality Control Reports by Atria

- To ensure panel member compliance
- Ongoing communications with the panel
- Trouble-shooting & problem solving
- On-the-field quality control checks the field
- Panel security
- Daily, Weekly, Monthly Panel Reports
- Daily reporting and auditing by Kantar's Chief Security Officer



MARSA

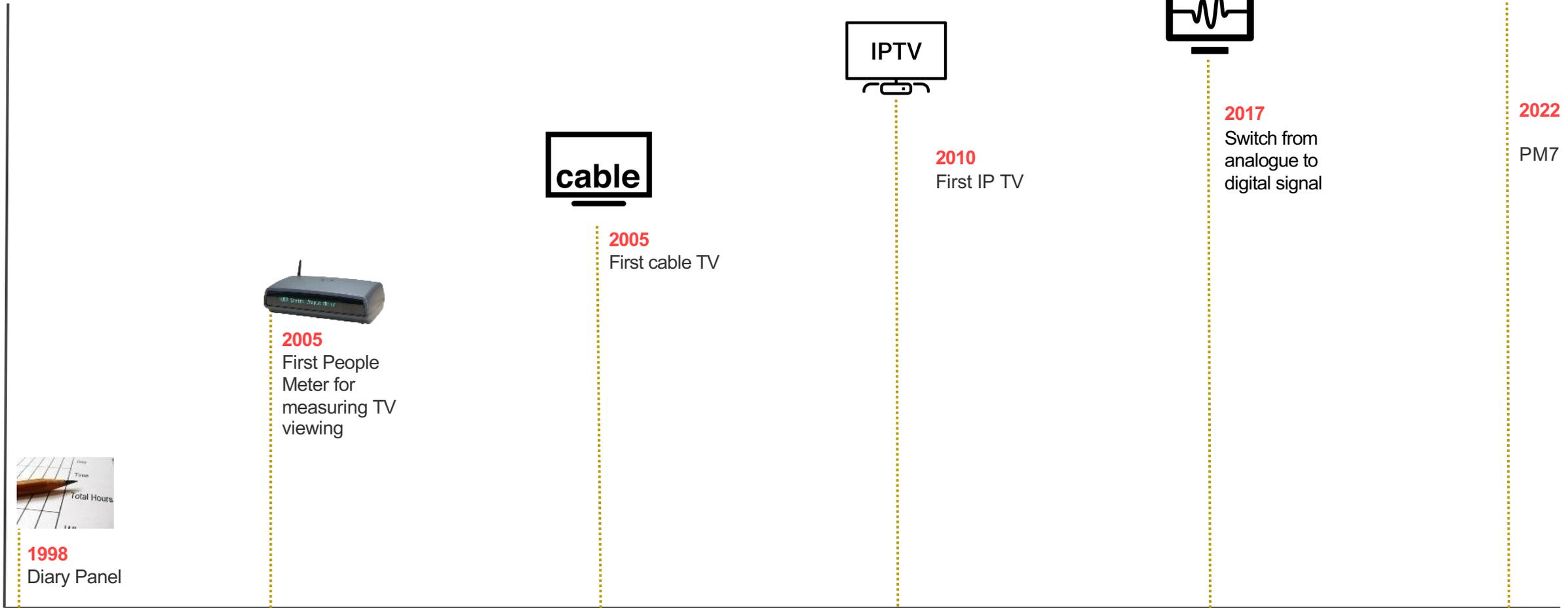
Media industry

MARSA

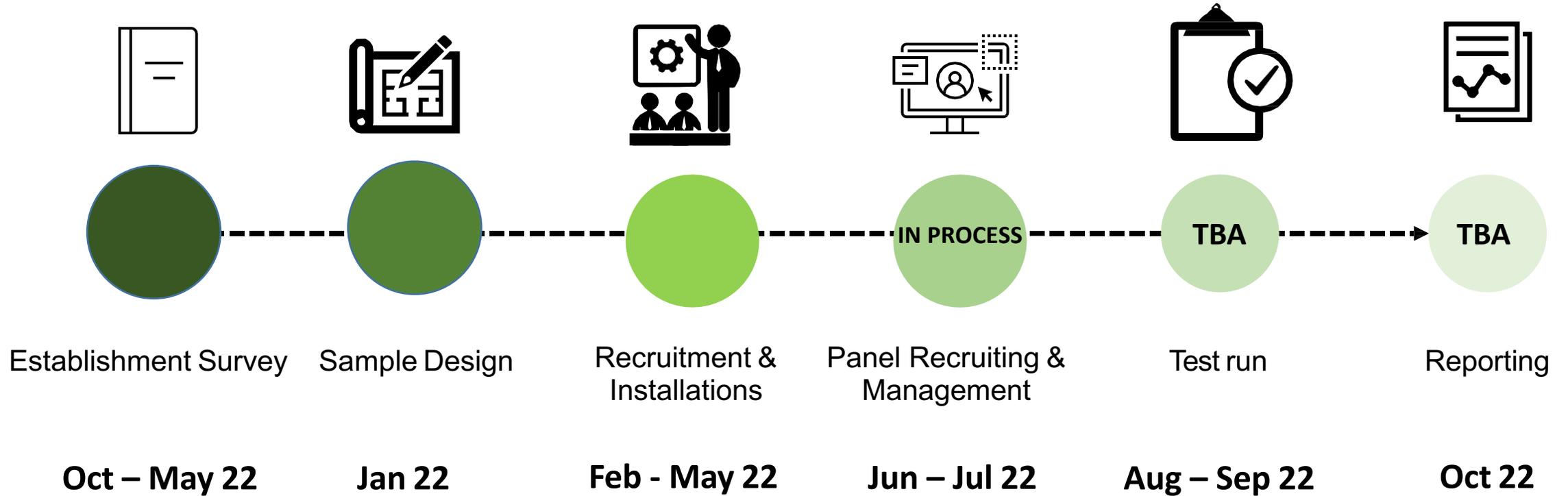
TAM PANEL SIZE – GLOBAL COMPARISON

Country	TAM / VAM	Population (ml)	TAM / VAM Panel (HHs)	Ratio
India	TAM	1,393	40,000	1 : 35,000
Indonesia	TAM	276	2,400	1 : 115,000
Russia	VAM* in process	146	9,000	1 : 16,000
Philippines	TAM	111	3,500	1 : 32,000
Turkey	TAM	85	4,000	1 : 21,000
Germany	VAM in process	84	5,500	1 : 15,000
UK	VAM in process	68	5,100	1 : 13,000
Spain	VAM in process	47	4,700	1 : 10,000
Australia	VAM	26	8,450 Metro & Regional	1 : 3,000
Romania	TAM	19	1,200	1 : 16,000
Azerbaijan	TAM	10	950	1 : 10 000

AZE MEDIA INDUSTRY MEASUREMENTS EVOLUTION



THE PROCESS & TIMELINES



MARSA



Our Partners

MARSA

WE ARE HONOURED WITH OUR PARTNERSHIP

KANTAR



pure X media



K@TV 1
by AG TELEKOM

tmj



RESPECT
solutions



 Microsoft

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THANK YOU!

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