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Market

The information age is over. Today, we live in the entertainment age. Spearheading the entertainment industry is theatre, cinema and television. For years, the popularity of theatre and cinema has waxed and waned with each fad and fashion.

However, television with its huge choice, diverse programming and the fact that it comes home to viewers – not the other way around – has been its prime-mover.

The television industry in India came to being in 1957 when black and white programmes, for a limited period each day, were launched on an experimental basis in New Delhi. But it was the Asian Games of 1982 that ushered in the industry's first real revolution: television going colour. The liberalisation of the economy in the early 1990s brought about the second revolution. Scores of international television channels came to India with several local offerings in close pursuit. The S-Antenna bristling atop homes slowly began to disappear as cable operators took control.

Launched in 2005, Direct-to-Home (DTH), a new broadcast technology brought along the third revolution. DTH was designed to dramatically enhance the audio and video quality by digitising content and beaming programmes right into people's homes. The DTH market in India has not looked back since. Defying the economic slowdown, India continues on a high growth trajectory in the Pay-TV market.

According to Media Partners Asia (MPA), Pay-TV in India will increase its penetration from 82 million homes at the end of 2007 to 153 million by 2018. MPA has also projected that the total DTH market will increase more than fifteen-fold, from 3 million subscribers in 2007 to 46 million by 2018. Conservative estimates suggest that this category will grow by a stupendous 680% over the next five years. Fuelling this magical growth is Tata Sky. In its first year of launch, Tata Sky's subscriber base crossed the crucial one million mark. This was an achievement that underscored the shape of things to come.

Achievements

In August 2006, India had two reasons to celebrate: the 59th anniversary of independence from colonial rule and the birth of the next generation DTH service. The launch of Tata Sky empowered subscribers with choice, control and convenience. The service reincarnated the television as a smart interactive medium for around-the-clock entertainment and



information.

Since its inception, Tata Sky has consistently garnered accolades. It was adjudged the Best Marketer in 2007 by Business Today; the Fourth

Most Successful launch of 2006 by the Business Standard Annual Brand Derby; one of 2008's Youngest and Fastest Growing brands by ICMR; winner of the Brand Excellence award in the Service and Hospitality category at the 16th Asia Brand Congress. Its Einstein ad campaign for Active Wizkids figured among the top ten Campaigns of the Year by Brand Equity. At the Meffys, the Oscars of Mobile Services, it won Gold in the category of Mobile Innovation for Active Mall. At the Goafest too, Tata Sky won a Gold Abby in the Interactive Digital Advertising category for its promotion of the Active Darshan service. For its media innovation, Tata Sky+ won the Gold Abby at Goafest and later the Bronze Lion at the Cannes Advertising Festival in 2009. Alexa ranking for www.tatasky.com is the best in India for the DTH category.

Tata Sky in its first year of operations crossed the one million connections mark. This was a significant achievement setting a new benchmark for the fastest subscriber ramp up in the world. Twenty months into its launch, Tata Sky crossed the two million subscribers mark. In the next six months, the service added another one million and in the process powered its way amongst the top twenty Pay-TV operators in the world.

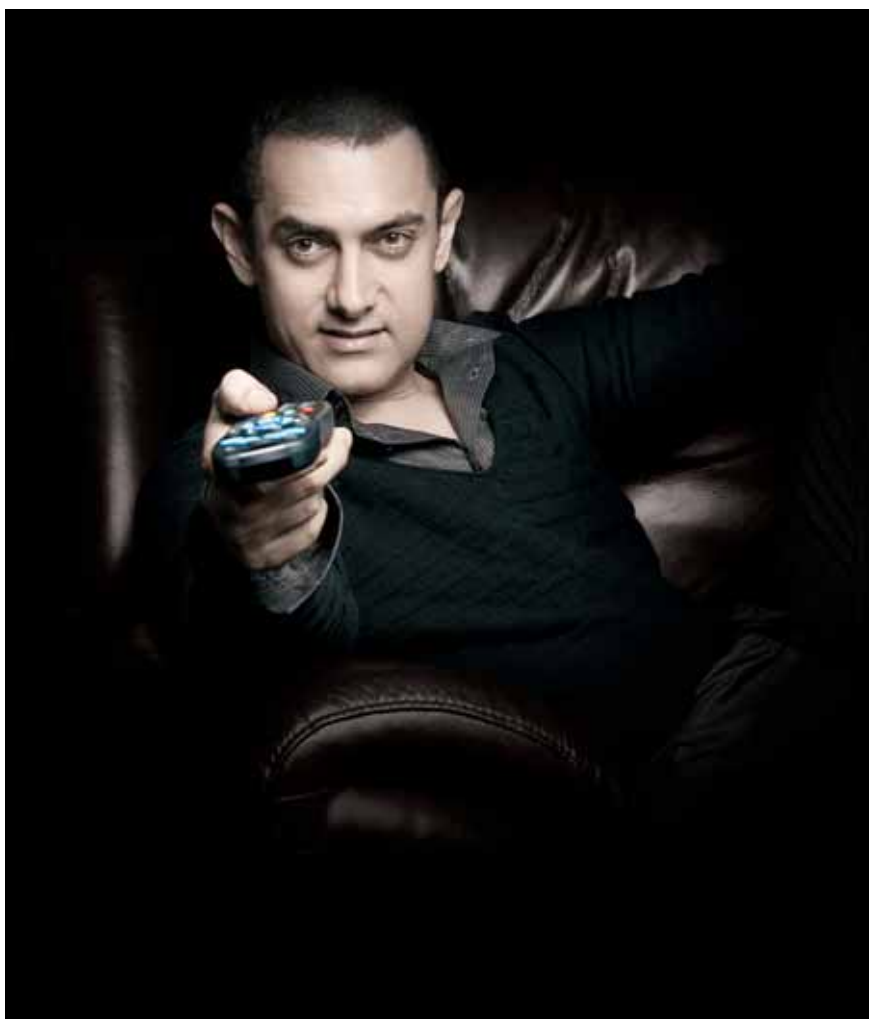
In March 2009, Tata Sky became the first Indian DTH service provider to receive the ISO 27001:2005 accreditation, as a validation of its commitment to quality.

Customer service has been a key Tata Sky strength and has proved to be a quantifiable differentiator in an ostensibly me-too market. Tata Sky achieved the Gold standard in customer service, globally the best-in-class – across durable and telecom industries – and the highest customer satisfaction scores of 88 (Source: Nielsen Study).

Felicitated at every step, Tata Sky raised the bar and became the first DTH service provider to offer multiple modes of transactions including recharge vouchers, online top ups, EPRS (Electronic Payment Recharge System) and cheque acceptance. Across 2008 and 2009, Tata Sky is the only consumer durable company in India that can boast of selling over 200,000 Tata Sky and Tata Sky+ boxes directly through its helpline. Tata Sky also became the first DTH service provider to incorporate WAP advertising.

History

With the government announcing its intent to allow direct-to-home services in the





country, India witnessed the amalgamation of two powerful, internationally recognised business names. The Tata Group joined hands with STAR, Asia's leading television network to form Tata Sky.

From its inception, this new JV sought to partner with other global leaders in the space of digital technology so that a truly state-of-the-art service could be brought to India. The results were quick to come. Within one year of its launch on 8th August 2006, Tata Sky had established itself as the fastest growing Pay-TV platform in the country.

Meanwhile, the number of television channels had boomed from 55 to over 120 – and by the end of 2008 were nudging 200. To cater to the emerging demand, Tata Sky revamped its distribution network and expanded its presence from 300 to 4500 towns and appointed nearly 30,000 dealers. To build on its success, Tata Sky identified and signed Aamir Khan, the Indian super star, as its brand ambassador in July 2008. In the same year, the company scored yet another global first with the launch of the Programming Guide in Hindi. In October 2008, Tata Sky introduced Indian viewers to the future of DTH when it unveiled Tata Sky+, a new-age service that uses the breakthrough personal video recorder technology, a first in the Indian subcontinent.

Product

Tata Sky has transformed television into an intelligent medium, which engages the viewers instead of turning them into passive zombies. The company achieved this by introducing Active Services – an interactive series with a menu designed for all ages and interests. Mothers are now happy to watch their children learn on Active Wizkids, Active Learning or Active Stories – TV-based services which encourage children

to read and watch at their own pace.

Active Cooking is a boon for viewers who can get new recipes, with Active Darshan viewers can get around-the-clock darshan from the temples of Shirdi Sai Baba, Mumbai's Siddhi Vinayak, ISKCON and Kashi Vishwanath – all at the press of a button. In addition, Tata Sky offers Active Games, Active STAR News, Active Mall and Active Astrology. The brands' Showcase feature allows viewers to order a new movie via SMS or online, and watch it at leisure, without a single commercial break.

Recent Developments

Hectic schedules make for erratic timings but TV programmes, just like time, wait for no man. With the breakthrough personal video recorder, the company has shown that time can be tamed. Tata Sky+ allows subscribers to record up to 45 hours of live TV and then view the content at their leisure. In the premium segment, this flexibility found instant takers and propelled Tata Sky to a position of significant brand strength.

Promotion

Tata Sky's high-voltage 360° brand and product communications include campaigns on TV and in the print media, supplemented by aggressive outdoor, radio and internet advertising. The first TV commercial was a teaser that showed people junking their electronic devices because they had been rendered redundant by Tata Sky. The response was so spectacular that the Tata Sky website recorded more than 17.5 million hits in its first week of launch. In fact, awareness levels of DTH, which were at a low of 35% in August 2006 before the Tata Sky launch soared to 98% within one year (Source: TAM Study, GfK Mode Brand Track Study). Not surprisingly, research carried out shows that Tata Sky continues to lead the DTH category in terms of both advertising and brand awareness (Source: GfK Mode Brand Track Study).

Tata Sky is a proactive brand and expends vast quantities of energy in promoting its offerings. Its series of television commercials featuring Aamir Khan have been huge successes. They have been able to vividly explain features such as pause, record and rewind and the absolute delight of viewing good picture quality. Its pay-off line 'Isko Laga Dala Toh Life Jingalala' has a memorable, distinctive and colloquial quality, encapsulating the complete Tata Sky experience. It creatively explores the web through interactive virals for their various products and services. Aggressive on-ground promotions include mall and cinema activations, local festivals and strategic retail tie-ups and van promotions. Each has helped in accelerating the brand's growth. Tata Sky's school contact programme was geared to promote the education services. Over the years, Tata Sky's communication has established the brand as a top quality DTH provider with campaigns that remain the most recalled in the entire category.

Brand Values

The Tata Sky brand is known



1 Million Connections.

1 Million Reasons.



for delivering on its promises and on building long-term relationships with stakeholders. The brand image is that of a young innovative company focused on providing the best products and services to its consumers and willing to go the extra mile to make their 'life jingalala.'

www.tatasky.com

LEARNING MADE FUN ON YOUR TV



Things you didn't know about Tata Sky

- Tata Sky was the first DTH service provider to launch customised interactive services in India
- On an average, viewers spend 34 minutes each day on Active Services – twenty minutes more than they spend listening to the radio
- Over 800 schools in India use Tata Sky's Active Wizkids service as a teaching aid
- Tata Sky is the first DTH service to offer its programming guide in Hindi
- Tata Sky is the only brand ever allowed to do a promotion inside the Shirdi Sai Baba Temple