

March 19, 2021

<p>1. <b>National Stock Exchange of India Ltd.</b> Exchange Plaza, 5<sup>th</sup> Floor Plot No. C/1, G Block; Bandra (East) Mumbai 400 051</p> <p>NSE Scrip Code: RADIOCITY ISIN: INE919I01024</p>	<p>2. <b>BSE Limited</b> Corporate Relationship Department Phiroze Jeejeebhoy Towers Dalal Street; Fort Mumbai 400 001 BSE Scrip Code: 540366 ISIN: INE919I01024</p>
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Dear Sirs,

**Sub: Investor Presentation**

Pursuant to Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, we are enclosing herewith a copy of Investor Presentation.

The aforesaid Investor Presentation will also be uploaded on the website of the Company i.e. [www.radiocity.in](http://www.radiocity.in)

Kindly take the above on record and oblige.

Yours faithfully  
**For Music Broadcast Limited**



**Chirag Bagadia**  
Company Secretary and Compliance Officer

Encl: a/a



# Music Broadcast Limited

## Investor Presentation

RAG RAG MEIN  
DAUDE CITY.



March 2021



# SAFE HARBOR

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# RADIO CITY POST COVID – STRONGER, SMARTER, BETTER



Emerging out of the crisis with a stronger Balance Sheet- Zero debt and Cash /Cash Equivalents improved to Rs. 226 Cr ( Q3 21)



Permanent Cost Savings of Rs 25 crs - Translating into a margin upside of 10%



Radio Medium - Gained both on credibility and engagement in the crisis



New opportunities for revenue opened out – SMEs/Micro entrepreneurs/Smaller cities/Local clients using a low cost medium to build their brands



Huge reach inroads made by legacy media brands into the digital universe have created massive opportunities for monetizing

# RADIO CITY – THE REVENUE LEAP

With volumes back to pre-covid levels, we see yield improvement as the next step

## Q3 Ad-Volume Growth – YoY

9%

Radio City

-2%

Industry

New advertisers who moved to radio will give it an upsurge as ticket size goes up

## No of new clients/ advertisers on RC/Radio

Market share

1,696

Radio City

5,079

Industry

The leap from radio only to Radio + Digsphere trebles the reach we deliver

## Presence across platforms (Reach In Mn)

69

Radio

+

172

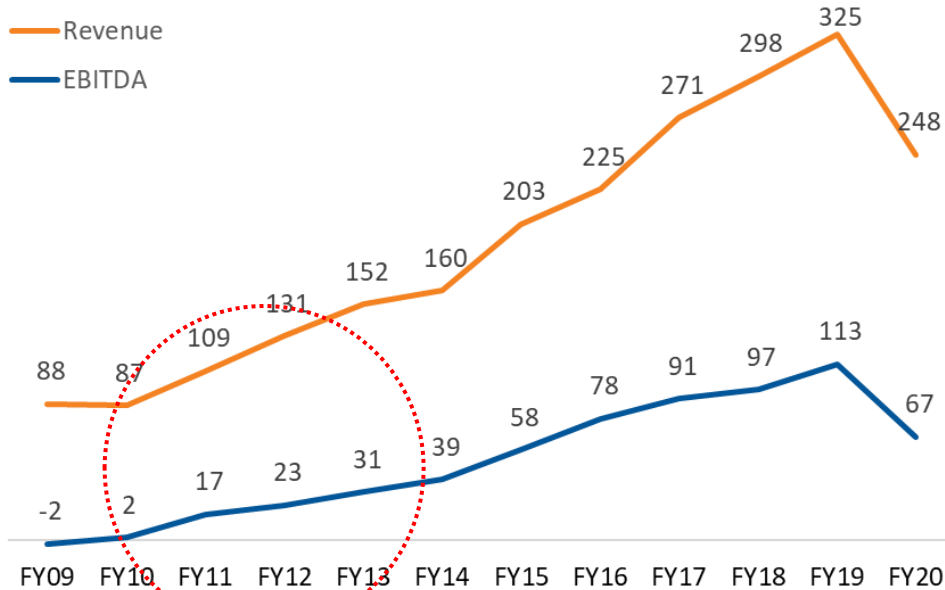
Digsphere

+

241

Radio City Presence

# Radio City – Experienced at Bouncing Back !



Radio City emerged stronger post the Sub Prime Crisis with CAGR of 15% over next 6 years including 2 years of 25%+ growth



This time the scope to grow even bigger

- More experienced team
- Far greater revenue opportunities
- Substantial cost savings implemented



# REACHING THE MULTIVERSE

Always with the listener;  
anytime, anywhere

# INCREASED CONTENT CONSUMPTION:

*More time at home has led to a heightened demand for content and an expansion of fan bases*



## *New routines are redefining the idea of prime time*

- Entertainment is no longer primarily an after-work or after-school affair.
- A quarter of respondents watch TV or stream content without sound while working every day and 30% listen to spoken word audio, such as podcasts, radio or talk shows at least once a week.



# HYBRID CONSUMPTION HERE TO STAY:



## *People want a hybrid social experience*

- People are likely to take the best of both worlds, continue using digital for experiences that are convenient, but are likely to return to live events and concerts once it is safe
- 42% of global consumers who watched a livestreamed concert or play for the first time due to the pandemic saying they could see themselves continuing to do so for years to come. *Ex: Concert from Home*

# INCLUSIVE DIVERSITY:

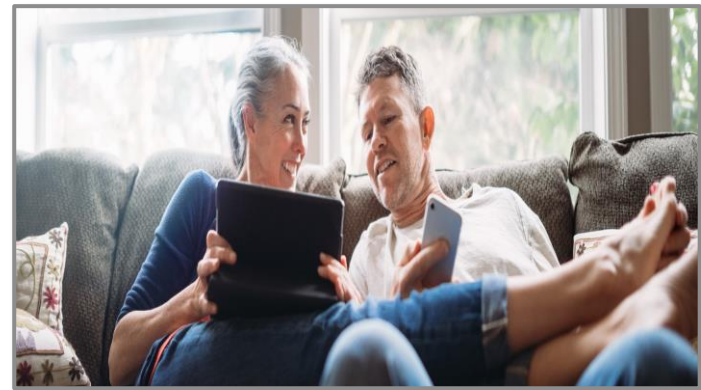


## ***People's appetite for culturally diverse content is growing***

- People have been exploring a diverse range of content, 49% of Americans listening to music in a non-English language. Similar trend of increase in Regional Music is seen in India
- *Example:* across a survey of 17 countries, 38% of people say that K-pop from South Korea is very popular

# PROLIFERATION OF CHOICE:

*From content to services, people are navigating the sea of options with help from others and algorithms*



## ***UNPLATFORM: Fresh and original content drives people across platforms***

- When people are deciding which entertainment platforms to try, original content is a key influencer.
- 69% respondents who tried a new service because of a specific piece of content, say they did so because of an original series exclusive to the platform.

## ***Friends and family are tastemakers for new content discovery***

- Suggestion and reinforcement from trusted social connections give consumers greater confidence that they'll like the content they choose
- 73% of global respondents say that when they're with friends and family, they're open to seeing genres or listen to music that they would not have considered alone

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While the days of the whole family huddling around the radio to listen to the evening news are long gone – it does not mean radio has lost its place. It just has a different role to play in the 21st century.

- Nelsen

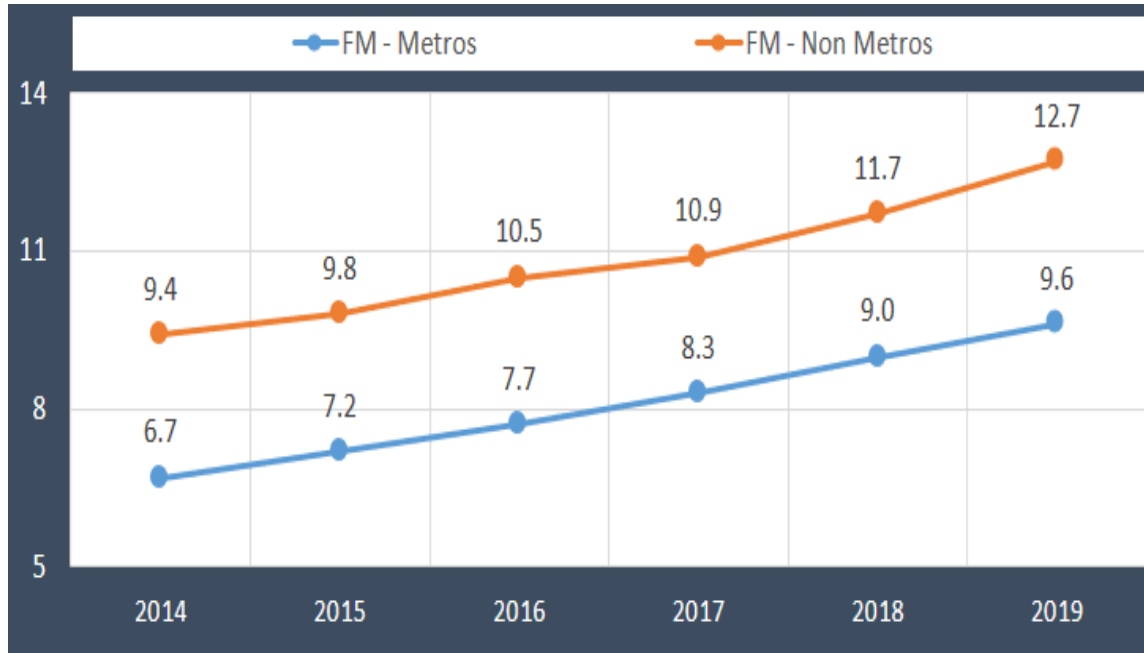
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**As per MRUC, nearly 20 crore people in India listen to FM radio every month, split nearly in half between urban and rural areas**

**As per MRUC, Radio listenership grew by 13% in urban areas since the last research in 2019**

# FM RADIO IN INDIA: *RISE IN ENGAGEMENT*

Time spent → Time (in hours) listened to radio in a week (amongst regular listeners)

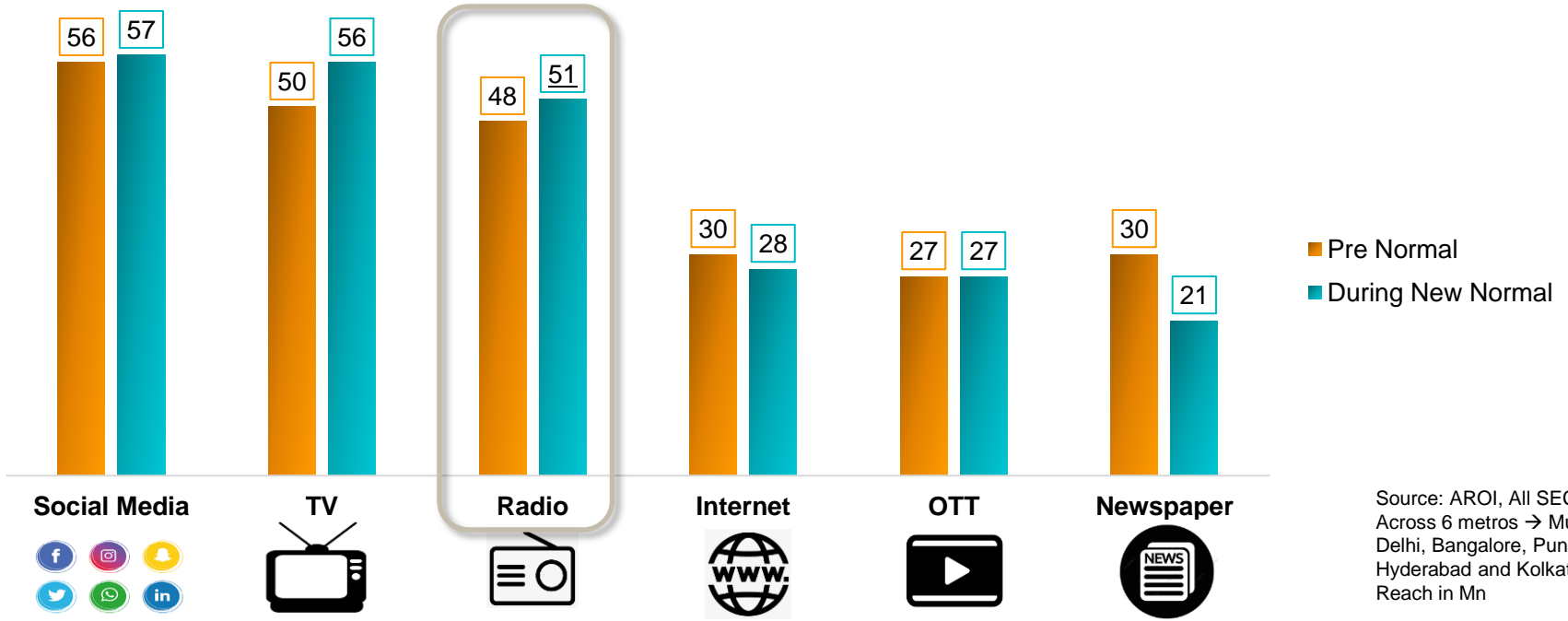


Source: AZ Research, TG 14+, Non metro 9 cities – Metro 6 cities, SEC ABC

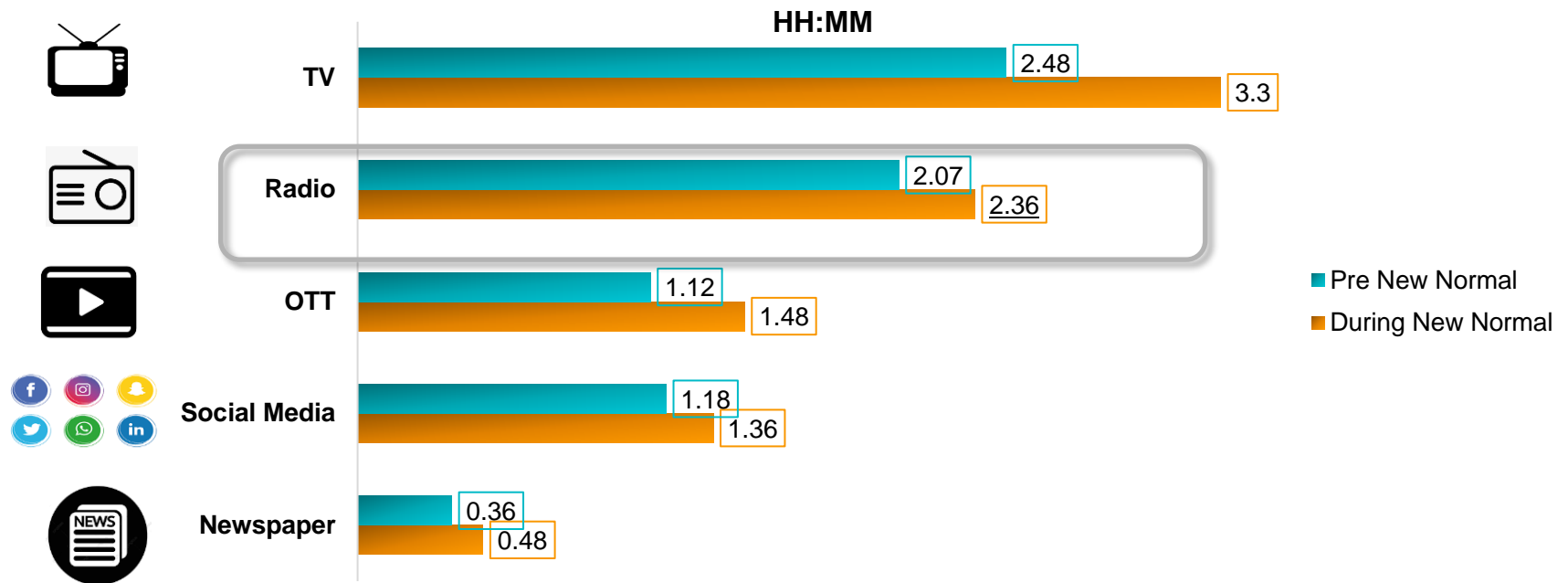
TSL on radio continues to grow in India amongst regular listeners

# RADIO HAS A COMPETITIVE REACH

Number of regular consumers of media options (in Millions)



# RADIO AMONG TOP2 HIGH *ENGAGEMENT* MEDIUM





# RADIO IS 2ND MOST *CREDIBLE* MEDIUM

## Credibility Score



Internet

6.44



Radio

6.27



Television

5.74



Newspaper

5.15



Social Media

4.66

# EVEN GOI BELIEVES IN THE *REACH* and *CREDIBILITY* OF THE MEDIUM



Narendra Modi  
@narendramodi

Thank you for your efforts to further  
togetherness across India,  
[@radiocityindia](#). #9pm9minute

Radio City [@radiocityindia](#) · 54m

Don't forget to offer your prayers tonight at  
9PM 🙏

@PMOIndia @narendramodi @radiocityindia

#RadioCityBengaluru #coronavirusindia  
#LightsOfHope #April5th #BeSafeBengaluru  
#COVID2019 #AaoPhirSeDiyaJalayen

DON'T FORGET TO OFFER YOUR PRAYERS

*April 5th, 9PM*



Honorable Prime Minister of India Mr. Narendra Modi asked all Radio players to create positive environment in society to avoid fake news. He created a separate group along with RJs & engaged with different Radio stations to propagate positive & real stories to over come this situation. This shows there is a huge belief in the medium

PM has also Thanked Radio City for its efforts in this testing times.

Mr. Modi choose Radio to do "Mann Ki Baat" and featured positive aspects of Lockdown & stories related to it, even after addressing the nation via TV about lockdown

This shows that even the Government believes in the Power of the Medium & hence has given a responsibility to create positive impact in the Society.

Twitter Link

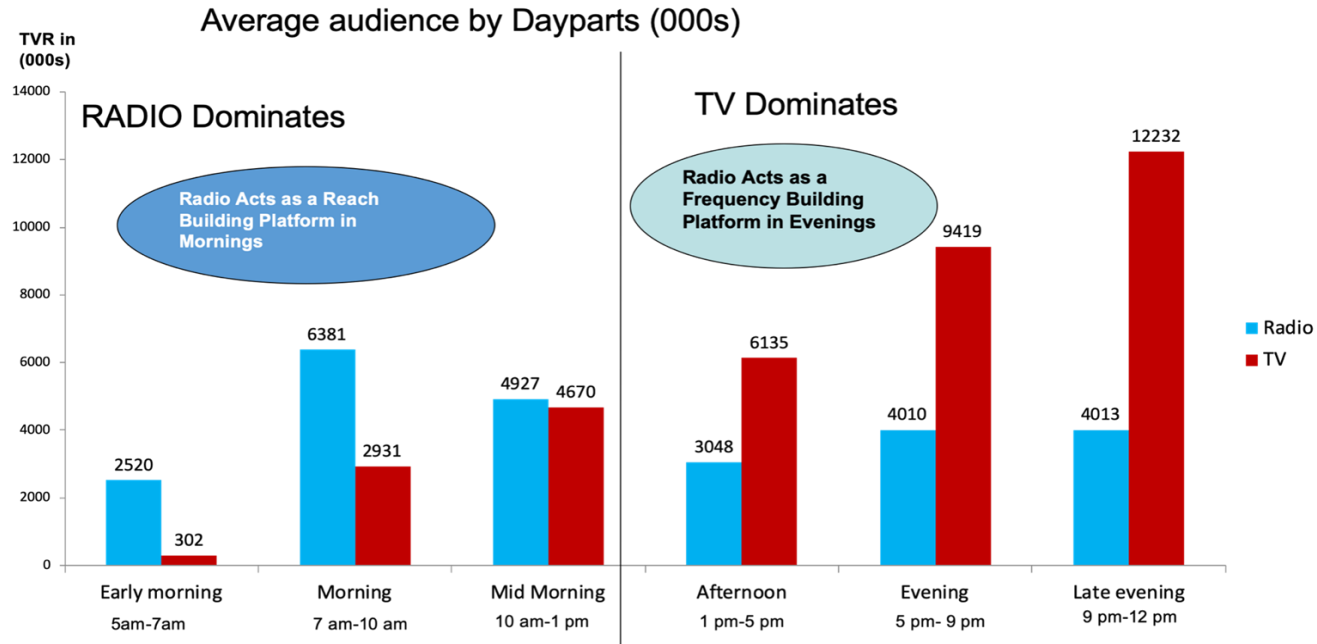
<https://twitter.com/narendramodi/status/1246795030532145152?s=09>

# POWER OF RADIO

## Radio performs different roles during the day

Radio performs different roles during the day.

It plays a significant role in building the reach in the morning time bands while it acts as a supplement medium in the evenings.



# RADIOCITY - The First FM in India

## *Continuing the pioneering spirit*

### CONTENT IPs

#### LOVE GURU

Ranked #1 in Mum, Blr and Del for 7 years+. The award-winning show based on relationship counselling for the last 19 years.



#### KAL BHI AAJ BHI

Ranked #1 in Mum for 7 years +. The most-loved retro show on radio



#### BABBER SHER

Award-winning sparkler is running successfully on-air for 10 yrs +



#### RC JOKE STUDIO

A laughter riot featuring India's best Comics and their Sketches



### EVENT IPs

#### RADIO CITY SUPER SINGER

A country-wide talent-hunt for singing, running successfully for 12 years. **Reach: 60.9 Million**



#### RADIO CITY FREEDOM AWARDS

Recognising & honouring independent musicians across genres and languages for the last 6 years. **Reach: 8.85 million**



#### CITY CINE AWARDS

To recognise and applaud regional film stars in Telugu, Tamil, Kannada, Gujarati, Bhojpuri, Marathi, and Punjabi. **Reach: 20 Million**



### INTERNATIONAL COLLABORATIONS

#### RADIOCITY+APPLE MUSIC

Radio City became the first Indian radio network to offer curated playlists on Apple Music.



#### RADIOCITY + SPOTIFY

Radio City has partnered with Spotify, to provide the former's content exclusively to Spotify users. The content is in 6 languages with multiple genres.



# RADIOCITY WAY FORWARD

## Industry leader

1. Pioneer in content – Day 1 FM brand
2. Leadership in Listenership and market share
3. Very strong local city proposition “rag rag mein”
4. High Credibility
5. 82 RJ influencers
6. 39 cities stations with ideal mix of big and medium cities
7. Support of Jagran

## Extending dominance in the New Age

1. Reaching the increasingly Hybrid Media consumers
  - I. Multi Media deal
  - II. Radio plus digital
2. Content
  - I. Audacity
  - II. Be one stop shop for all audio+digital entertainment
  - III. RC Original Music Label to create independent music
3. Podcast
4. Digital unplatform

# AHEAD OF THE CURVE – DIGITAL FIRSTS



- 1<sup>st</sup> Web radio network in India
- 1<sup>st</sup> FM Player to create a launch pad for Independent artists with Radio City Freedom Awards
- 1<sup>st</sup> FM player to have a curated playlist on Apple music to worldwide audiences
- 1<sup>st</sup> FM player to launch Web Radio on Amazon Alexa.
- 1<sup>st</sup> in Rank on Facebook

# DIGITAL STRATEGY : 1. AUDIOSCAPE

## WEB RADIO

- No geographic limitations
- Fuelled by availability of wifi
- Radio City the 1<sup>st</sup> Indian Network to launch web radio in 2010.
- 17 web radio stations across key genres.

## STREAMING APPS

- On-demand content
- Discovery of Song, Artist,
- Cost of content acquisition very high
- Low monetization opportunities.

## PODCASTS

- Variety- Music/Non-Music, series & spoken word
- Highly differentiated
- Engaging & customizable
- Platform agnostic, format agnostic.
- High monetization opportunities

Future of Audio 

# DIGITAL STRATEGY : 2. REACH MONETISATION

## CONTENT

- Genres – Entertainment, Health, Humor, Finance, Sports
- Multiple Languages - vernacular
- Personalization- for every age group, for multiple platforms

## INFLUENCERS

- Category experts, problem solvers.
- Authentic voice, personal connect
- Engaging content and better retention of brand message.
- Opinion leaders



# CONTENT ISN'T KING, IT'S THE KINGDOM

- In this ever-evolving digital space nothing is permanent.
- Brands are publishers and employees too.
- The influencers too ride the temporary wave.
- The formats of content – long or short or even platforms, come and go.
- But what is here to stay is - Content

# CONTENT – ANYTIME, ANYWHERE



## Distribution

- While content is King, distribution is the 'King Maker'.
- Unplatform your content. Let it follow your listener.



## Personalization

- One size does not fit all.
- Personalization is the key to content consumption.



## Credibility

- Fake news and Deep Fake are the biggest problems online
- Authentic content is GOLD today.



## Language

- Vocal for local languages
- Digital economy shifting to Middle India
- Big Platforms making a play for Regional

# DIFFERENT STROKES FOR DIFFERENT FOLKS

## YT SHORTS + REELS

- Who: Target Gen Z
- What: Short form content
- Types of content: Humor, Fitness, Infotainment, Sports
- Duration 15 – 60 seconds

## FB & YT

- Who: 8-80 yrs.
- What: Long form content which enables stickiness.
- Types of content: Celebrity content, Humor, Crime and Horror, Motivational and mythology, Food
- Duration : 3 Minutes +

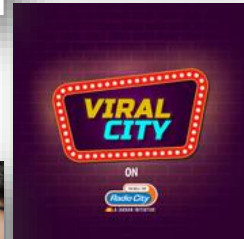
## TWITTER

- Who: Gen X and Millennials
- What: Topical & trending
- Types of Content: Current affairs, News, Song /movie releases, Health tips.

# CONTENT IN 9 LANGUAGES



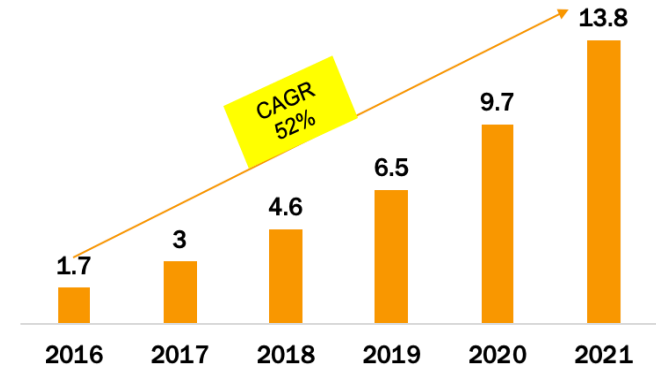
- Radiocity has created hit regional IPs like Peli Vaato (Gujarati), Style Mantra( Kannada), Viral City (Multiple languages), Taste of series( Tamil, Kannada), Star Katta (Marathi)
- 67 Radiocity RJ influencers are from Tier 2 & Tier 3 markets specialising in regional language content across various genres like Food, Humor, Lifestyle, Wellness in 9 languages.
- These IPs are distributed through various social media platform. We are on YouTube and Instagram in other languages and genre: RC Indie, RC hip-Hop, RC Marathi and RC Tamil and RC Gujarati on YouTube.



# POWER OF INFLUENCERS

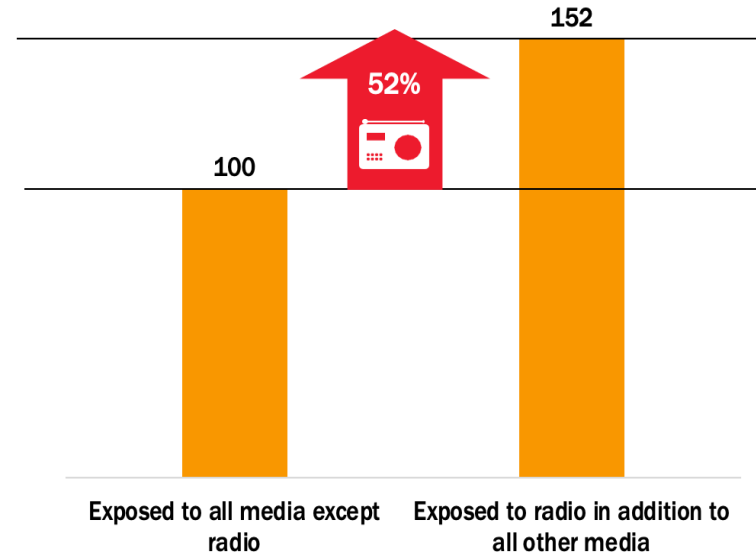
- People have high dependence on social media to take multiple decisions ranging from political to brand affiliation.
- All Influencers are adept at Social listening i.e cashing in on what's trending
- Brands that are willing to associate with them see higher interactivity.
- 83% of consumers act because of trusted recommendations.
- 61% find information from “a person like me” to be credible.
- 2 out of every 3 consumers trust influencer messages about a brand more than a company's advertising about their own brand.

Estimated Influencer Marketing Growth (Y-O-Y) in \$ Billion



# POWER OF RADIO+DIGITAL

- It is the age of Hybridisation - workstyles, retail spaces, cars and above all media consumption.
- Radio has the perfect blend of local content, music and RJs that listeners are loyal to and has mass reach.
- Digital provides the ability to have one-on-one interactions, be multiplatform and has mass reach
- According to a study\*, when people are exposed to radio advertising for a brand, they are 52% more likely to include that brand name in their internet browsing.
- Digital provides the crucial final stage of customer acquisition to “turbo charge” this part of the marketing process.



# STRADDLING MULTIPLE MEDIA SPACES

REACH

Radio  
City  
69 Million  
Reach



Radio City  
Digi –  
Sphere  
241 Million  
Reach

REVENUE

Radio  
2000  
Crs



Digi  
Universe  
12,000 Crs

Radio and  
Digi –  
Sphere  
14,000 Crs



An aerial view of a city skyline at sunset. The sky is filled with dramatic, colorful clouds in shades of orange, red, and blue. The city below is densely packed with skyscrapers and buildings, many of which are illuminated with lights. The overall scene is vibrant and inspiring.

“The Sky is not the Limit,  
It’s just the beginning of things limited by our sight”

Katusiime Stephen



# Thank you



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