PAKISTAN MEDIA LANDSCAPE FY 22-23

Brainchild

A BRIEF HISTORY OF FY 22-23

FY 22-23-A MAJOR TURNING POINT FOR ECONOMIES

FY 22-23 was a year of significant economic changes, affecting nearly everyone in the world. These changes held significant importance for Pakistan, which saw major economic changes and consequential effects on Media Industry.

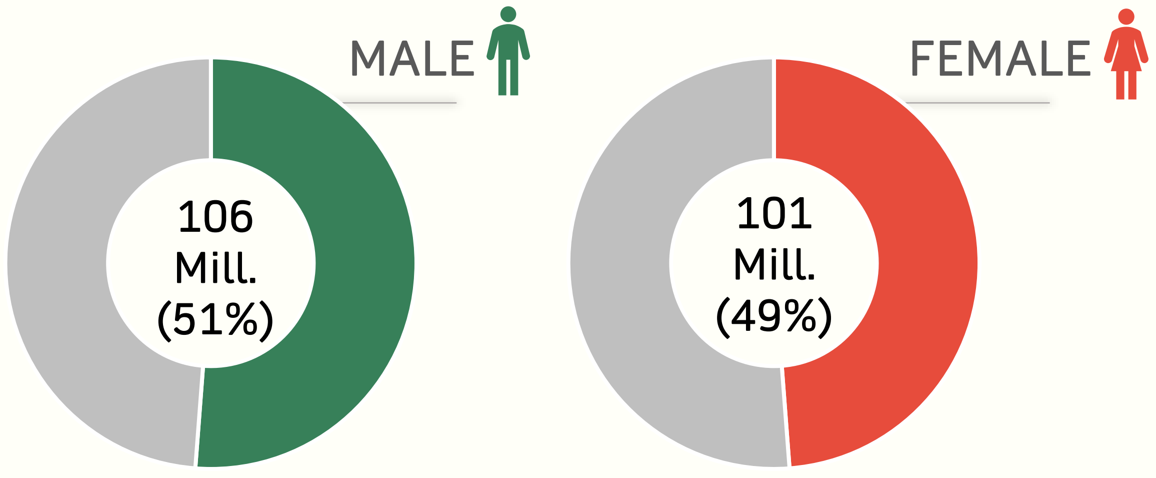
TURBULENCE IN GLOBAL LANDSCAPE

FY 22-23 was a year of ups and downs for the global economy. The post COVID economy along with Russia Ukraine war resulted in slower economic recovery than projected by many economic models while the consequential inflation was extremely hard to control. This ultimately resulted in hyperinflation in the entire world resulting in economic stagnation and causing mass layoffs in multiple industries.

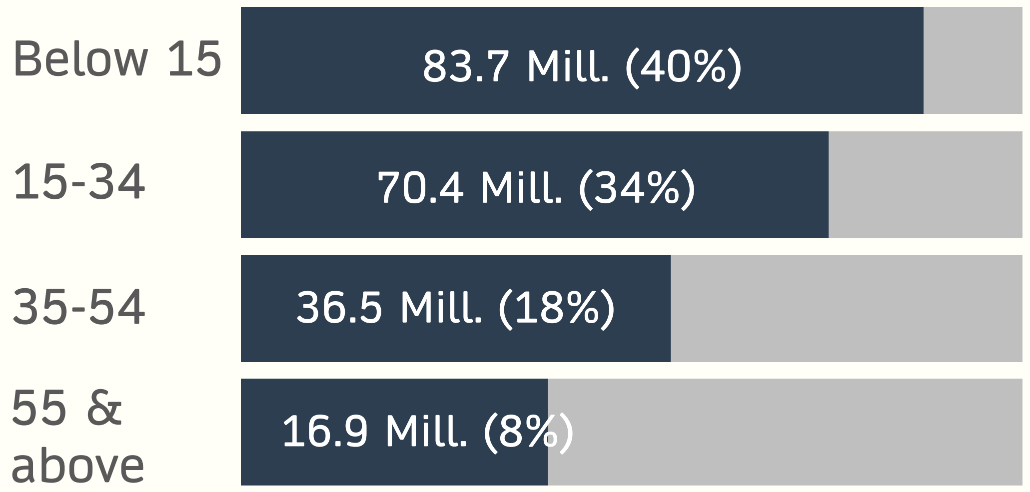
Like other countries, Pakistan also saw economic shortcomings in the year 22-23. Political instability and flooding caused massive losses. These were followed by import bans and payment restrictions which hampered different industries. After the bans were lifted, there has been a steady recovery albeit very slowly. With dollar rate stabilizing slowly and inflow of USD, there is hope of economic recovery.

PAKISTAN DEMOGRAPHIC SNAPSHOT

GENDER



AGE GROUP



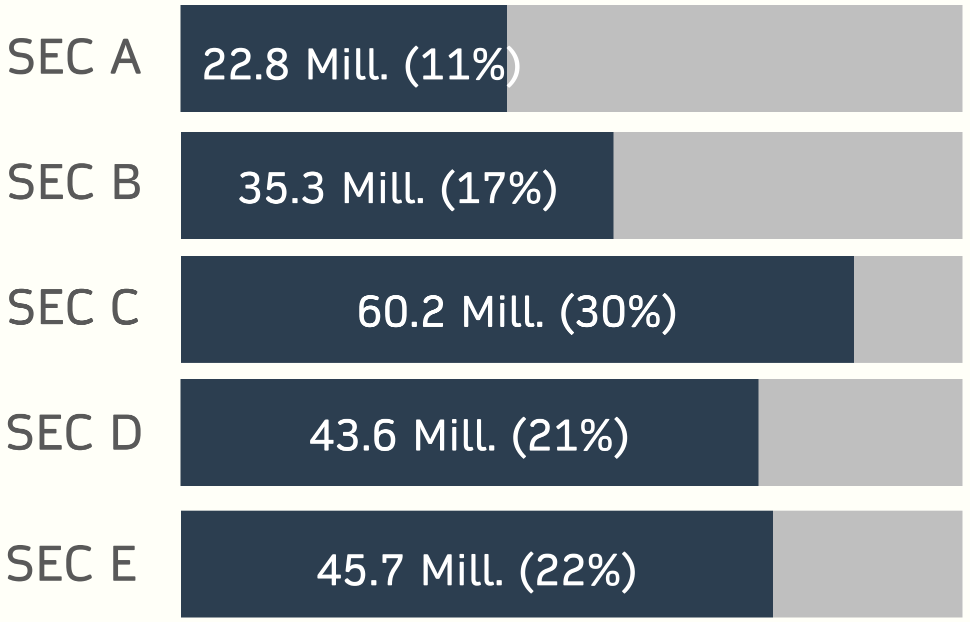
TOTAL PAKISTAN POPULATION

207.6 MILL.

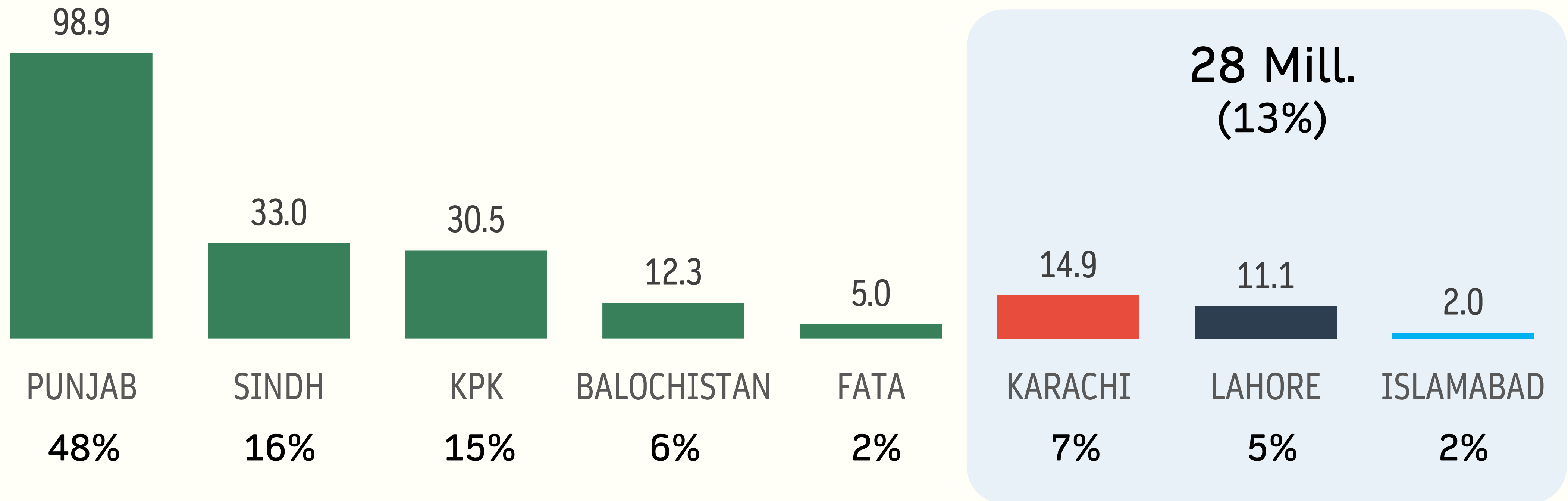
RURAL 132 Mill. (64%)

URBAN 76 Mill. (36%)

SOCIAL ECONOMIC CLASSIFICATION



REGION



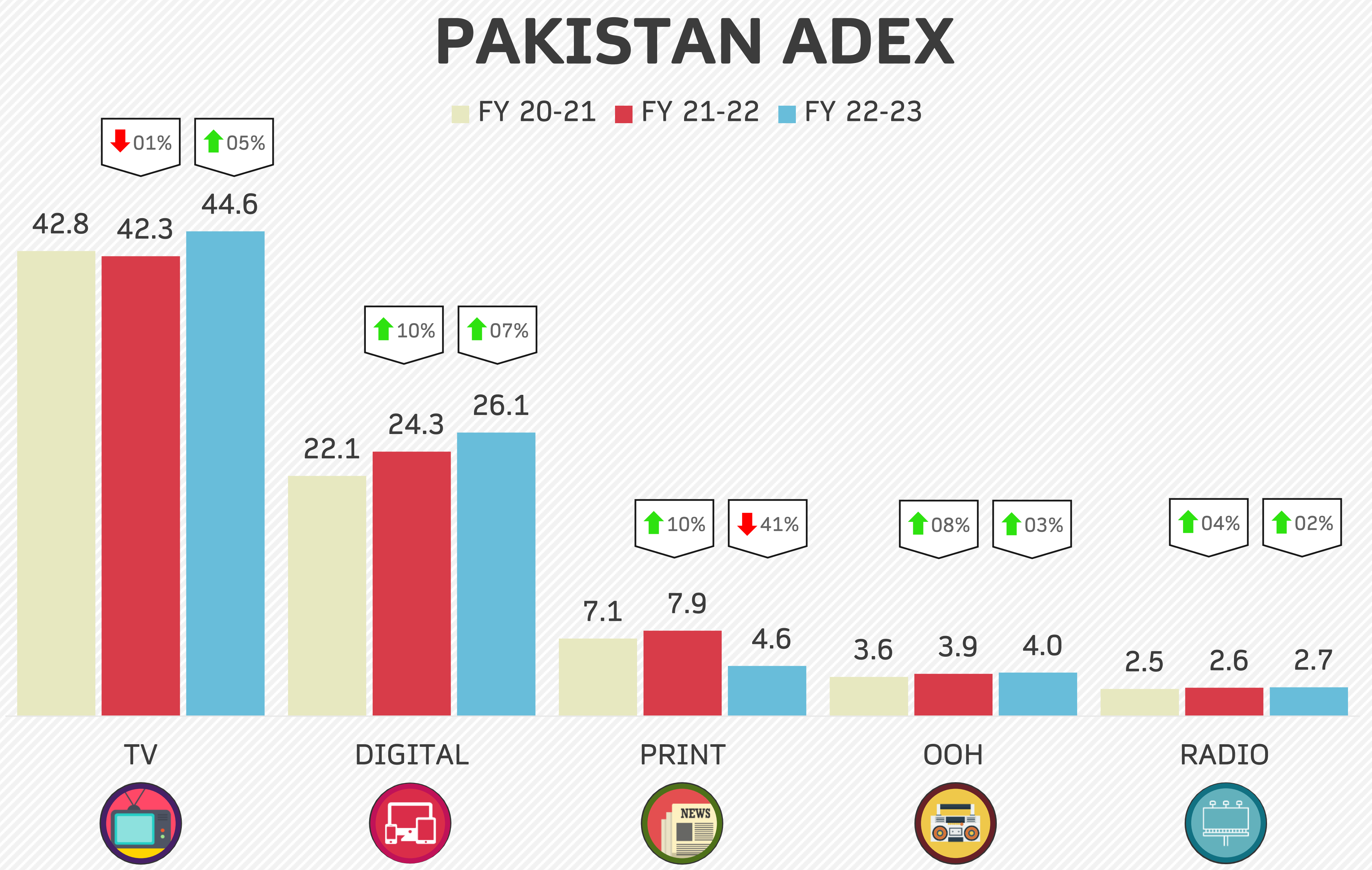
Source: PBS (Census 2017), SEC Medialogic

INDUSTRY OVERVIEW

MEDIA INDUSTRY EXPERIENCING GROWTH

Despite the economic troubles in Pakistan, overall industry managed to thrive, showing an increase in Advertising Spend, albeit by a very small index. The most significant increase in visible in Digital followed by TV, showing that these 2 mediums are the most dominant in Pakistani market.

THE MEDIA LANDSCAPE HAS GROWN DESPITE ECONOMIC CRISIS

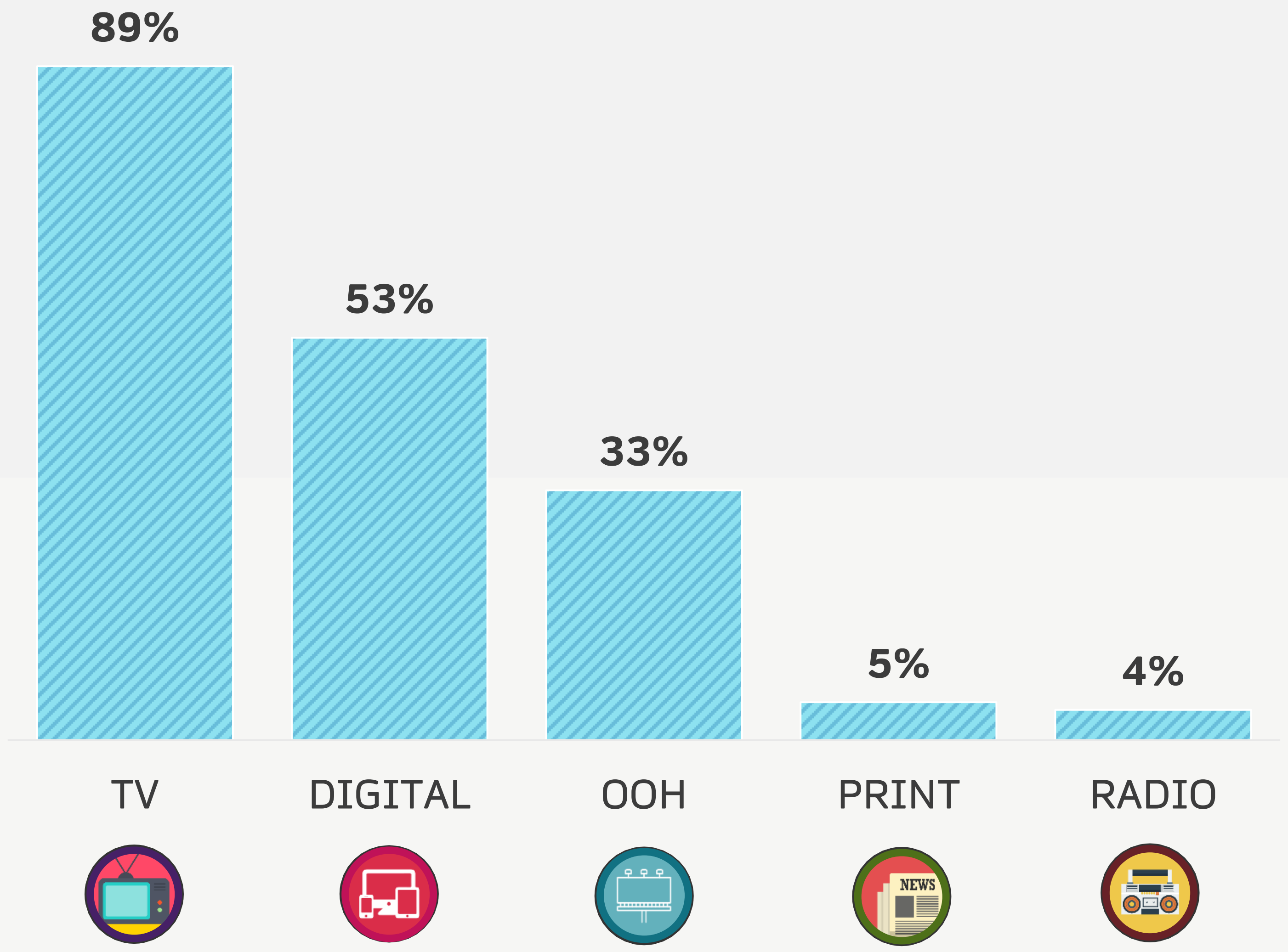


OVERALL ADEX HAS INCREASED BY 01% VS LAST YEAR

- **TELEVISION** has maintained its dominance as the majority shareholder in the overall spend. It is expected to hold its top position over the other mediums in the following years
- **DIGITAL** media follows closely, with significantly greater increase over the last 2 years. This growth might hamper due to worsening economic conditions affecting payments to different platforms
- **PRINT** is the only medium which experienced a significant decline.
- **OOH** and **RADIO** both experienced small degree of growth.

Note:
1. The above ad spending estimations are based on Z2C rates (and on Spot TVC only for Television)
2. Digital media spending estimations are based on BCP internal market understanding
3. Print spending estimation are based on BCP In-House Print Tracker
4. OOH estimations are based on BCP internal market understanding
5. Radio spending estimations are based on market intel

MEDIA PENETRATION



- **TELEVISION** viewers dominate the Media market, with highest media penetration rate of **89%** and having **40%** exclusive viewers, who are not available on any other media channel
- **DIGITAL** is the second most dominant medium, hosting **127 million** users with a penetration rate of **53%**
- **OOH** has **33%** penetration rate because with greater innovations, this number has substantially increased
- **PRINT & RADIO** have lowest media penetration numbers, currently at **5%** and **4%** respectively

Source: TV – Kantar, Digital – PTA, OOH, Print & Radio – CMI 2020

TV INDUSTRY OVERVIEW

TV maintaining its dominant streak

Television has always been the most dominant medium in Pakistan with a significant market share. TV AdEx saw an increase in overall value unlike last year where it saw a decrease.

OUR TV MEDIA INDUSTRY IS GROWING CONSISTENTLY

PAKISTAN TELEVISION NETWORK

1964	1990	2000	2002	2004	2008	2013	2018	2023
PTV	NTM	INDUS TV, ARY DIGITAL	GEO	17 Channels	65 Channels	86 Channels	97 Channels	110 Channels

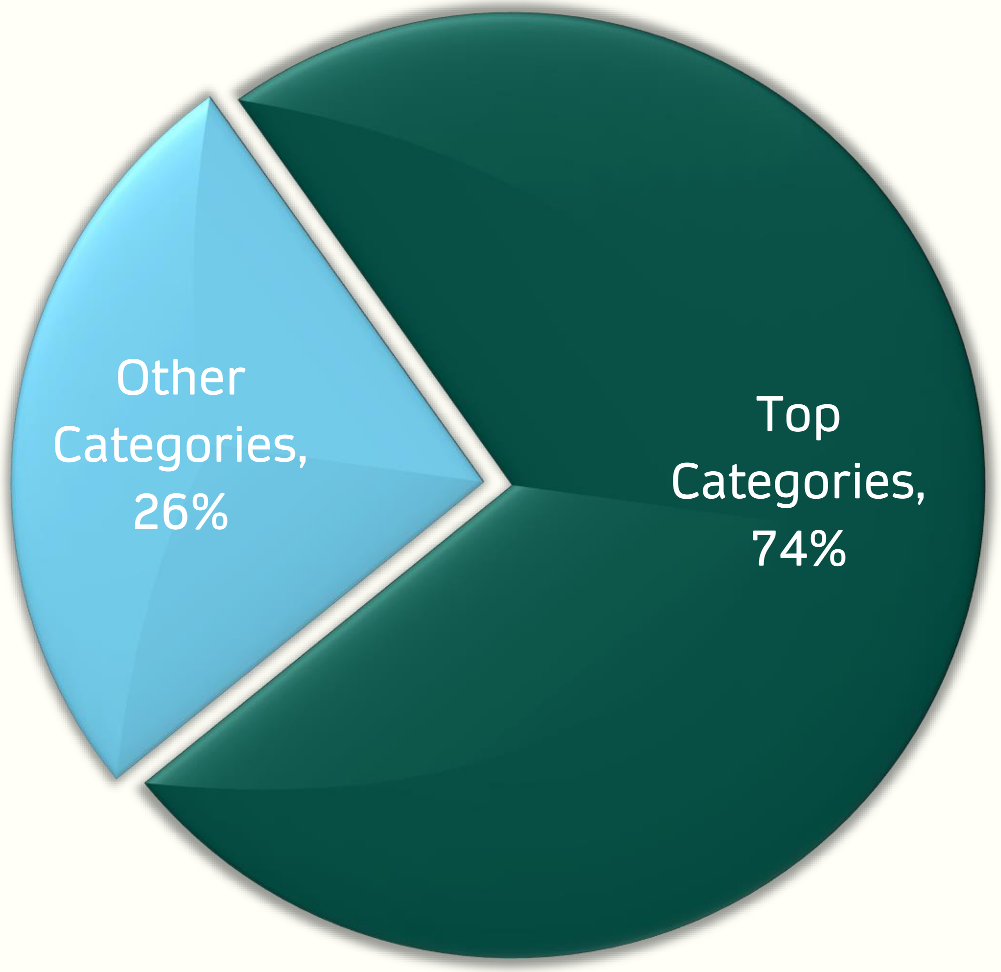
01
40 NEWS

02
32 ENT.

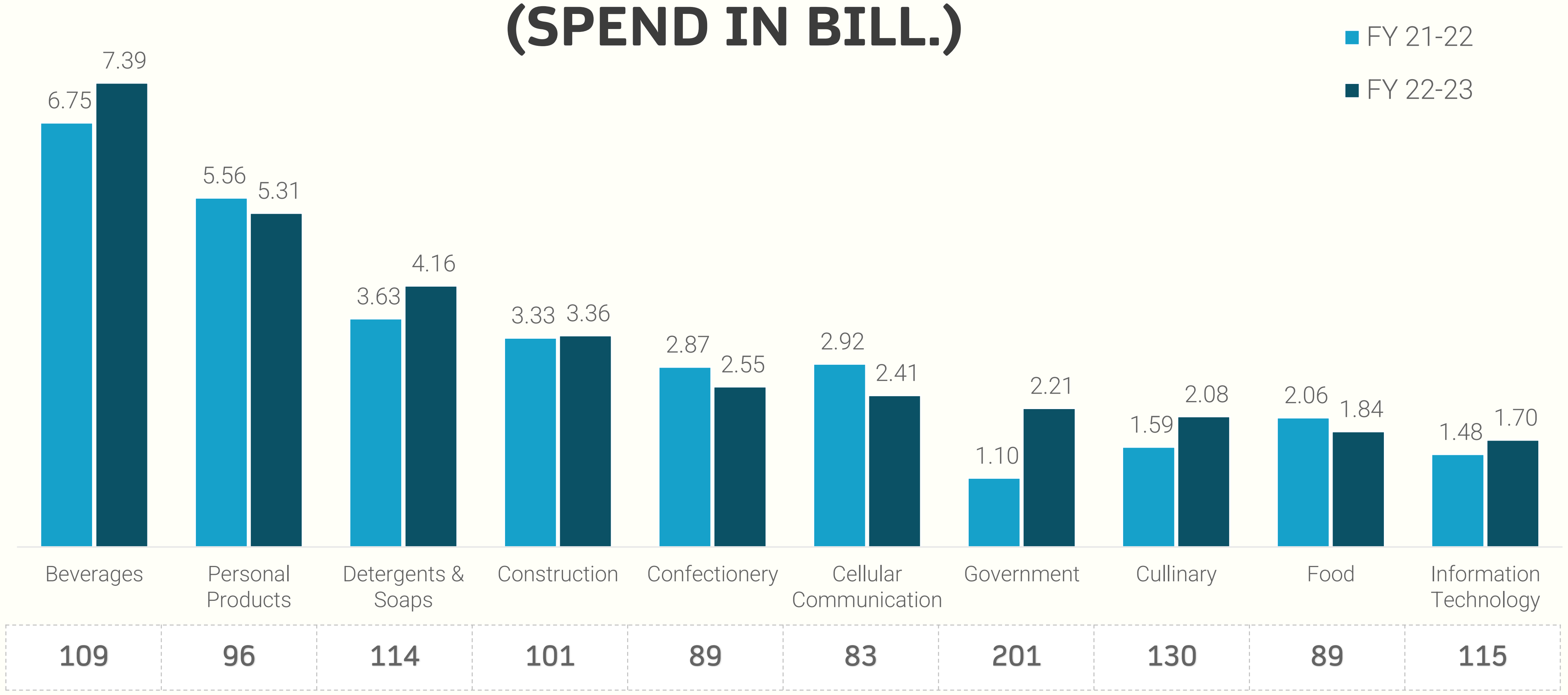
03
16 REGIONAL

04
22 OTHERS

TOP CATEGORIES SUSTAINED THEIR POSITION BY MAINTAINING THEIR SPENDING MAGNITUDE

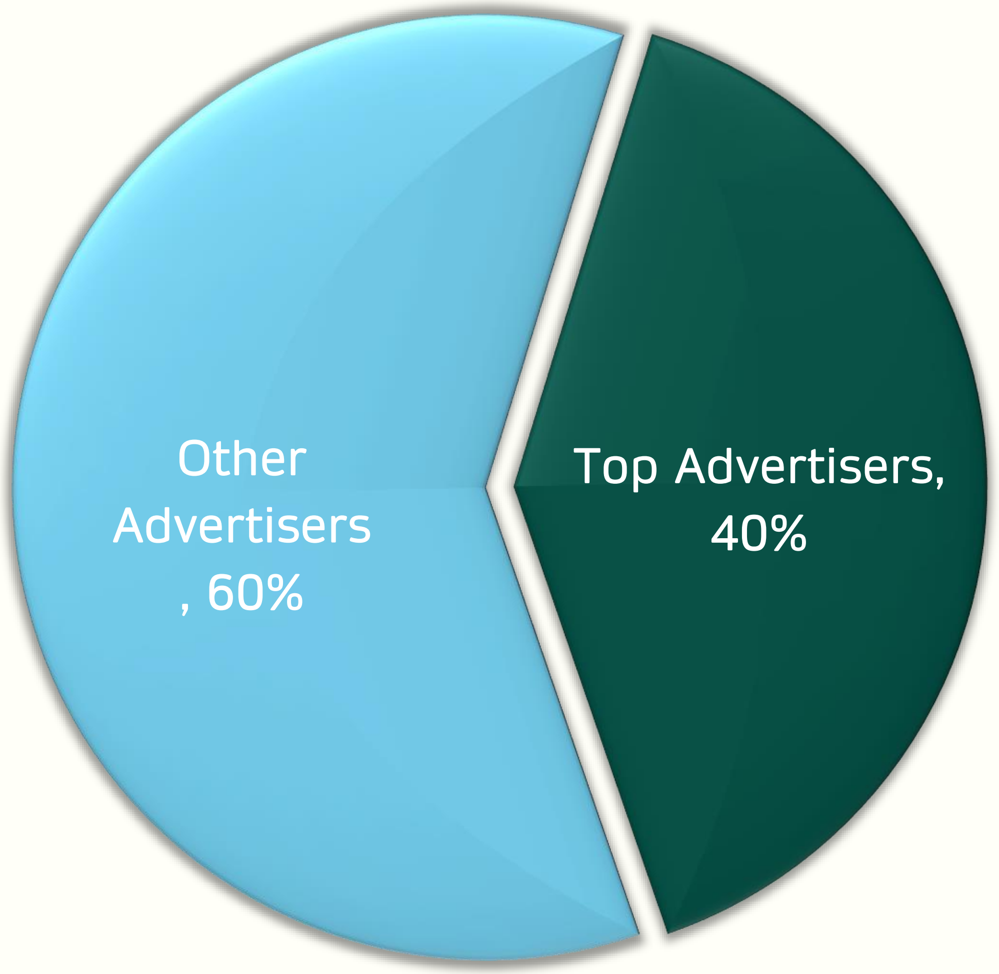


TOP CATEGORIES FY 21-22 vs FY 22-23 (SPEND IN BILL.)

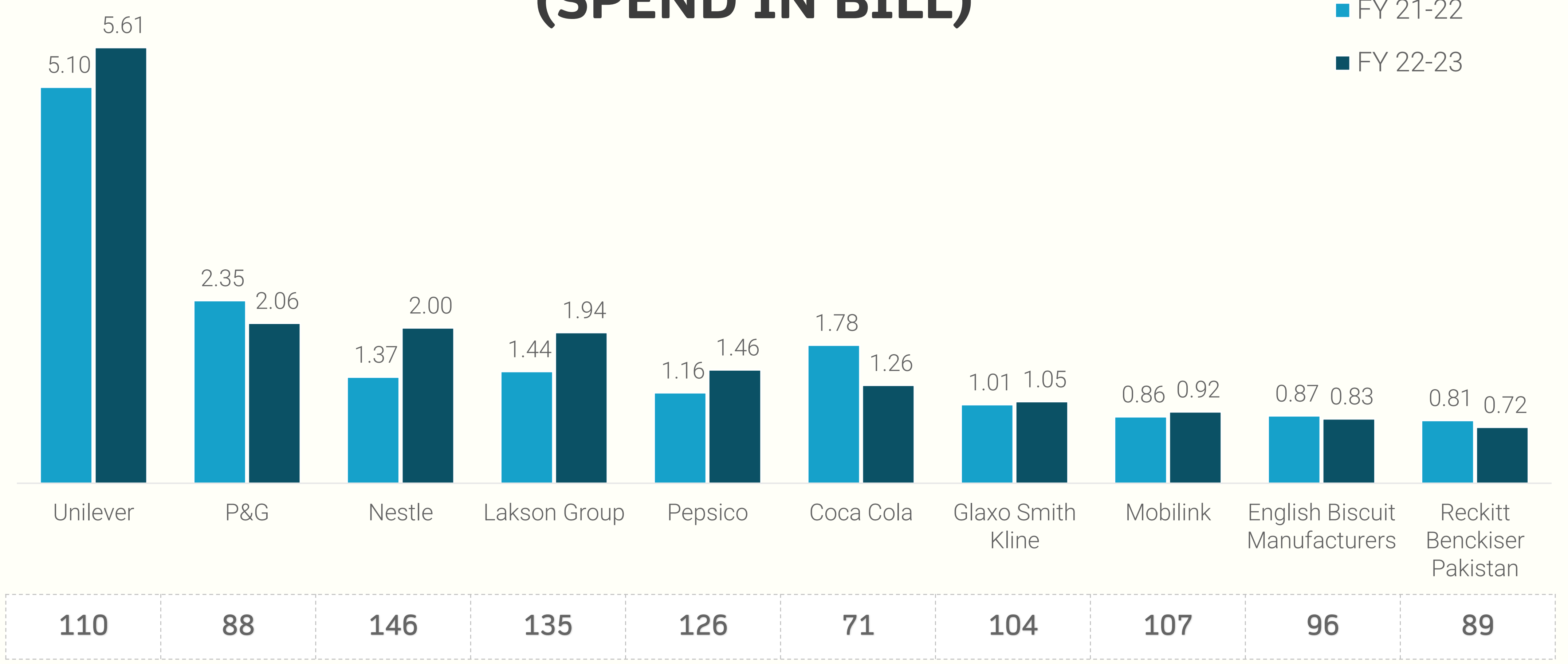


Top 10 categories contributed to 74% of total TV industry spend. Beverage's industry scooped up 17% of the growth portion while the rest of the categories experienced very little change. Government is another category which doubled its spending and became a major contributor to the overall growth. Cellular Communication experienced decline despite increase in Spend by major players.

TOP ADVERTISERS SUSTAINED THEIR POSITION BY MAINTAINING THEIR SPENDING MAGNITUDE

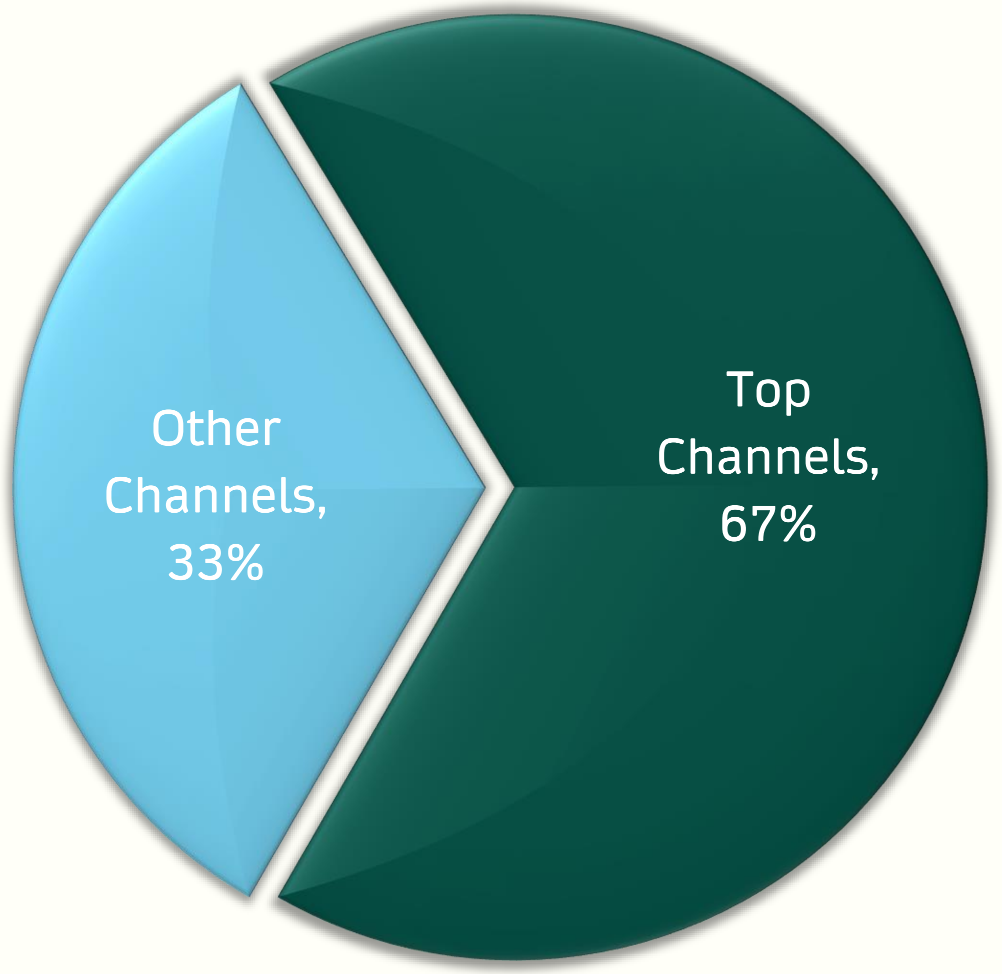


TOP ADVERTISER FY 21-22 vs FY 22-23 (SPEND IN BILL)

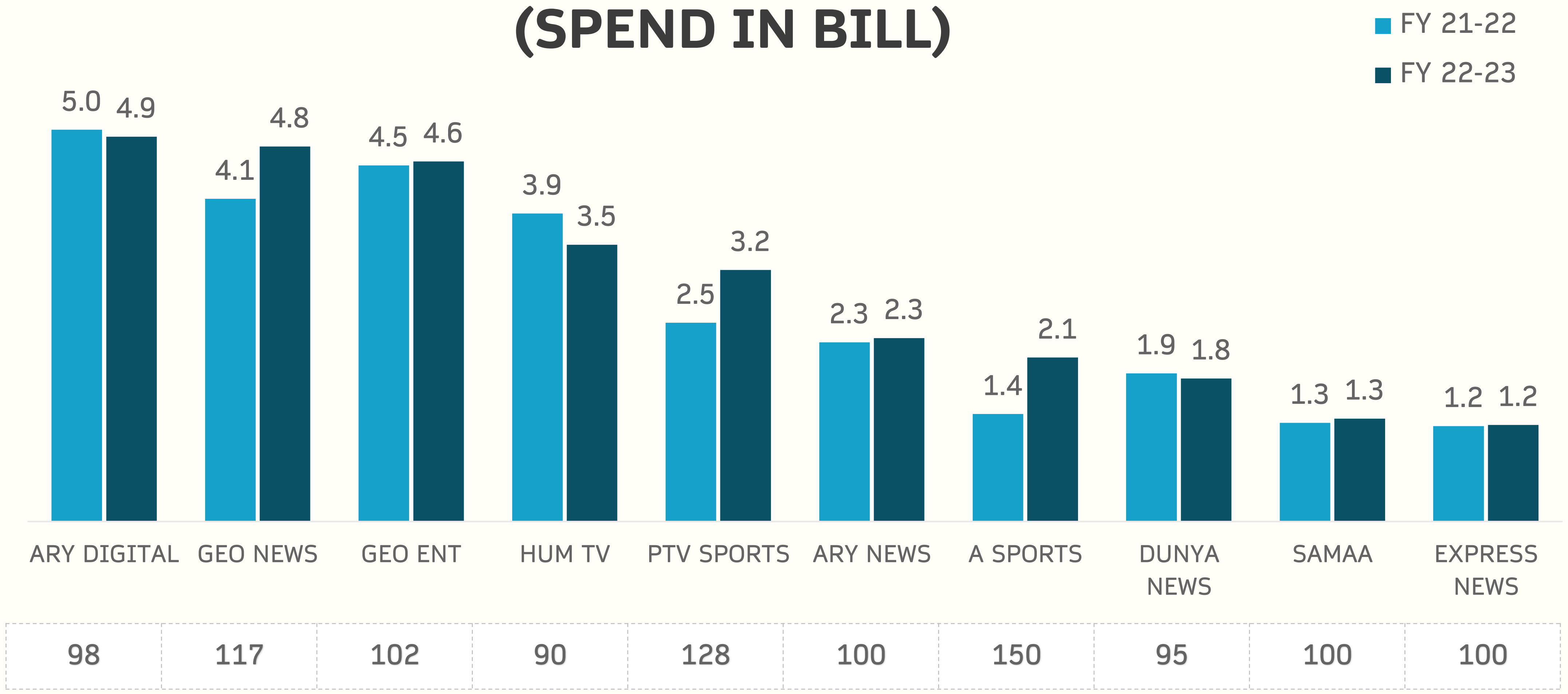


Top advertisers contributed 40% to the total AdEx. Out of that portion, majority of the players have increased their spending except P&G and Coca Cola who have greatly decreased their AdEx. Nestle has also increased their spends by a huge margin after decreasing it the previous year.

TOP CHANNELS SUSTAINED THEIR POSITION BY MAINTAINING THEIR SPENDING MAGNITUDE



TOP CHANNELS FY 21-22 vs FY 22-23 (SPEND IN BILL)

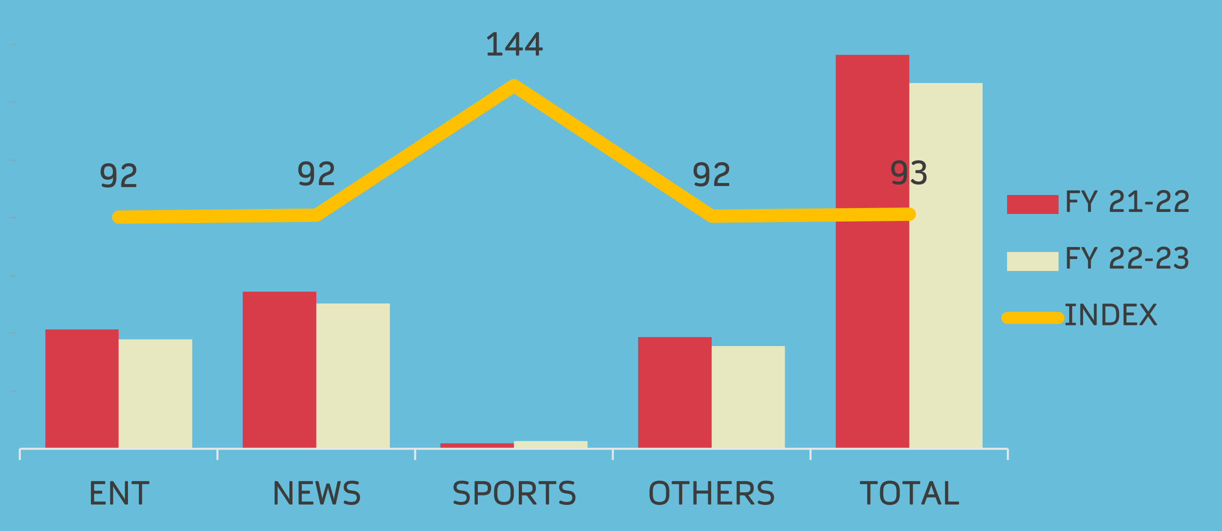


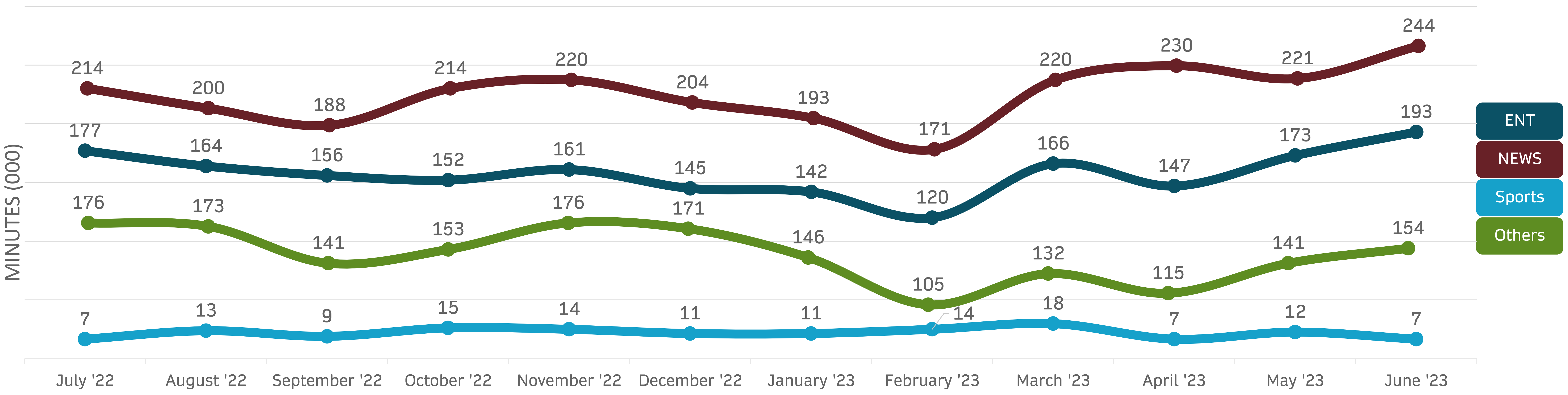
Top channels contributed 67% to the total AdEx. Major channels maintained their spending at nearly the same degree. This is visible in ARY Digital and Geo Entertainment where the spend index is very close to 100. In other channels, GEO News and PTV Sports have shown a remarkable increase in advertising spending.

TV ADVERTISING MINUTES DECREASED BY 7% COMPARING FY 22-23 VS FY 21-22

ENTERTAINMENT & NEWS SAW A MAJOR INCREASE

MINUTES ADVERTISED

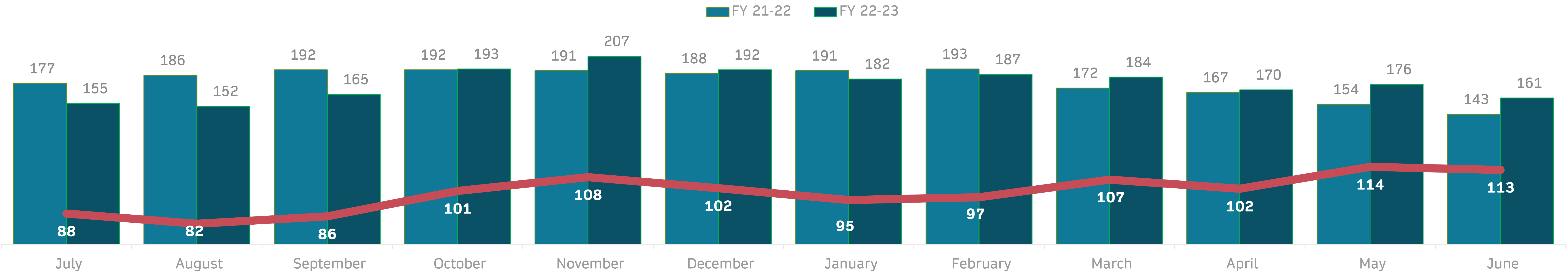




NEWS GENRE SAW A RISE IN OC AND NOV 2022 BECAUSE OF EXTREMELY VOLATILE POLITICAL ENVIRONMENT, RESULTING IN EXTREME POLITICAL COLLAPSE IN MARCH, RESULTING IN DECREASE IN NEWS MINUTES

FEB AND MAR 2023 SAW PSL SEASON 8, RESULTING IN AN INCREASE IN MINUTES, DECLINING IN APRIL AS THERE Were NO MAJOR CRICKET SERIEST

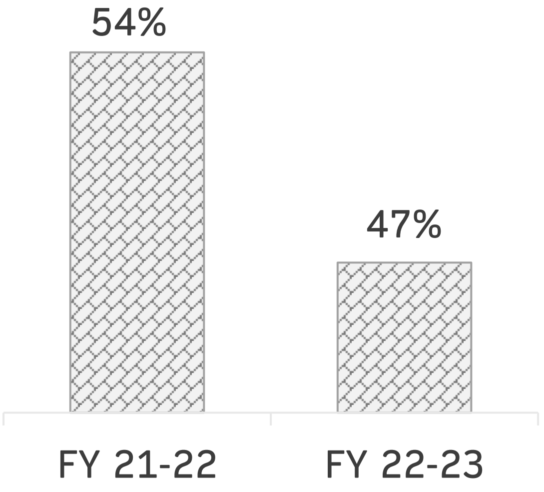
MONTHLY UIM – FY 22-23 VS FY 21-22



GENRE SHARE

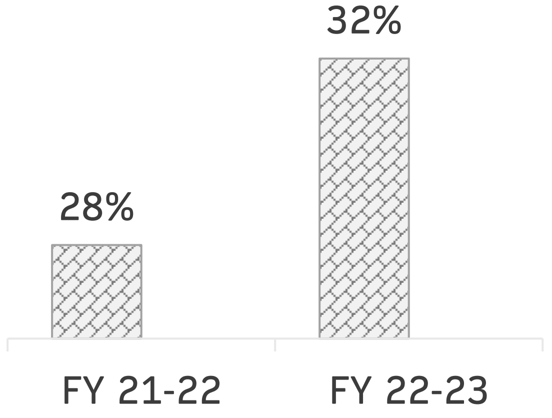
ENT GENRE

↓13%



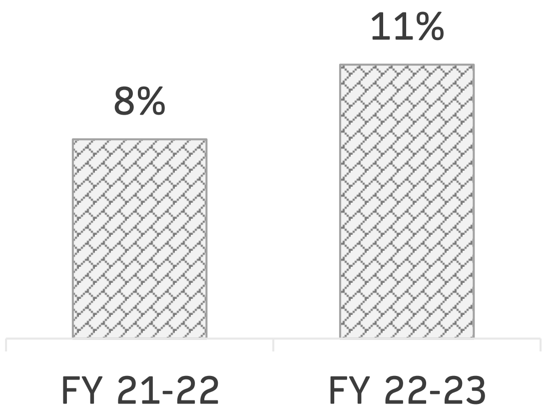
NEWS GENRE

↑14%



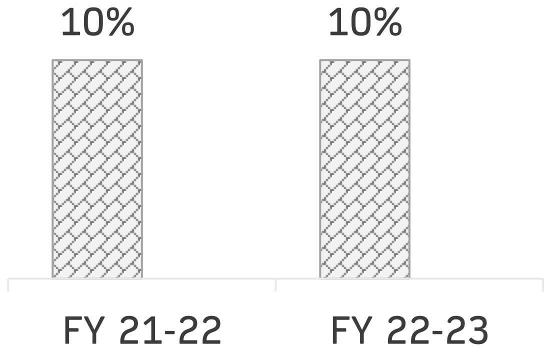
SPORTS GENRE

↑38%

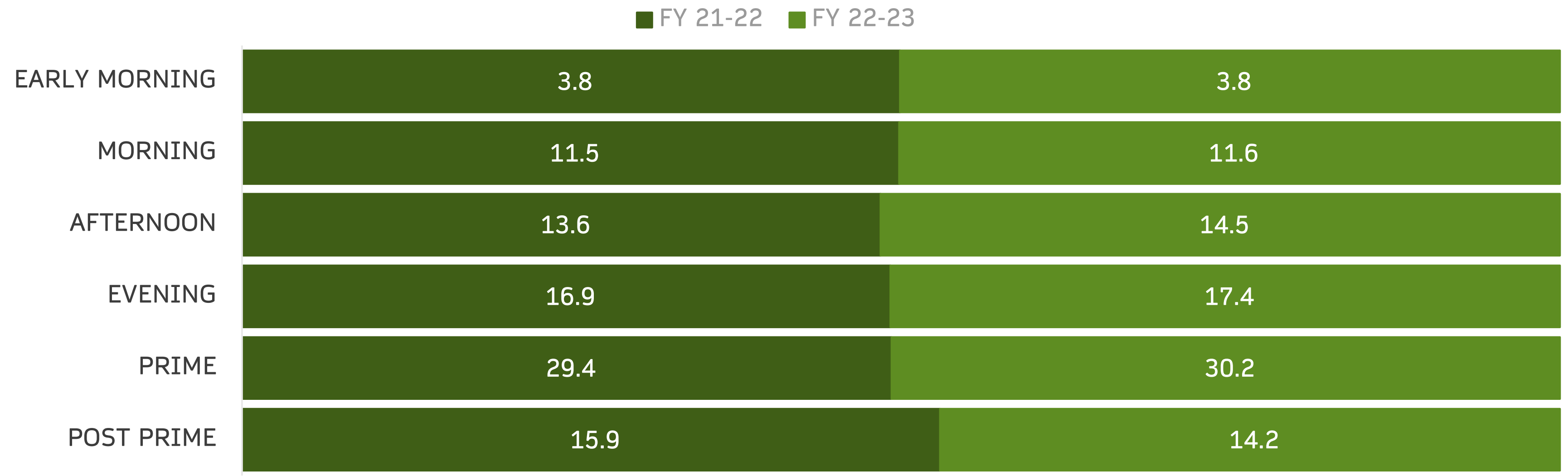


OTHER GENRE

↑



DAY PART WISE RATINGS



AVERAGE RATINGS FY 22-23

12.0

TOTAL **TV RATINGS**
DECREASED BY **1%** VS LFY

UIM FY 22-23

177 MIN PER DAY

TOTAL **TV UIM**
DECREASED BY **1%** VS LFY

AVERAGE REACH FY 22-23

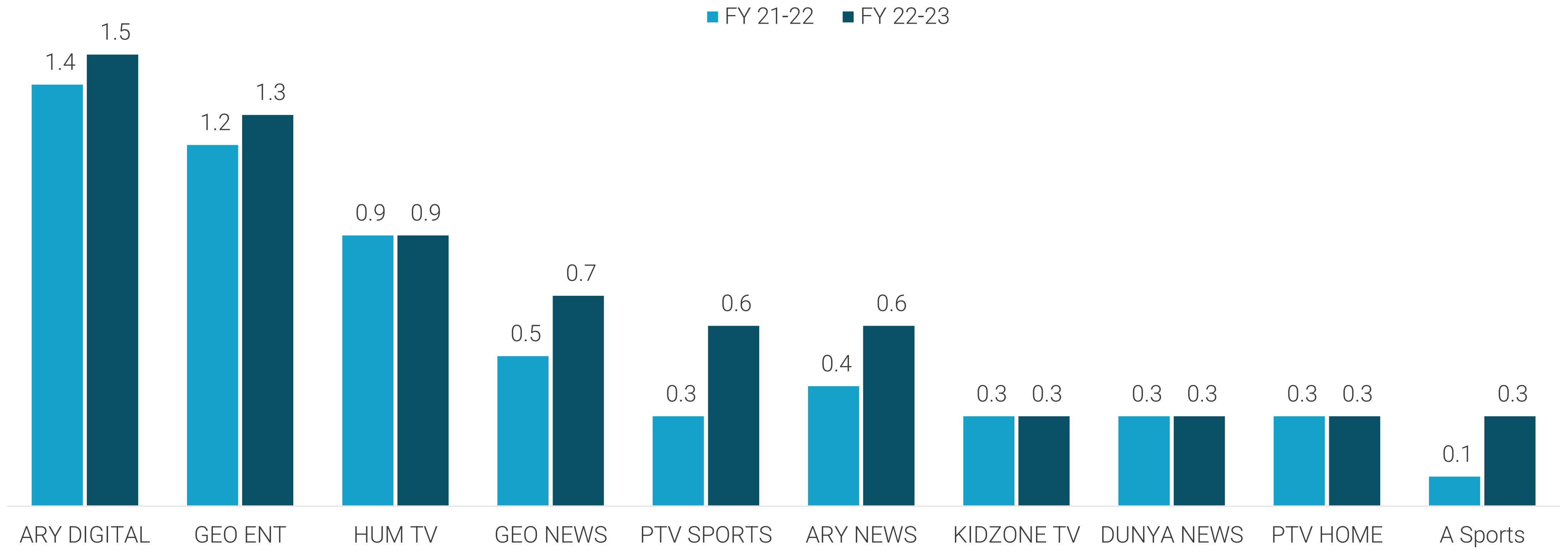
91%

TOTAL **TV AVERAGE REACH**
INCREASED BY **7%** VS LFY

DESPITE 17% DECREASE IN SOV, ARY DIGITAL AND HUM TV SAW A SIGNIFICANT INCREASE IN VIEWERSHIP

TOP CHANNELS CONTRIBUTING 66% OF TOTAL TV VIEWERSHIP

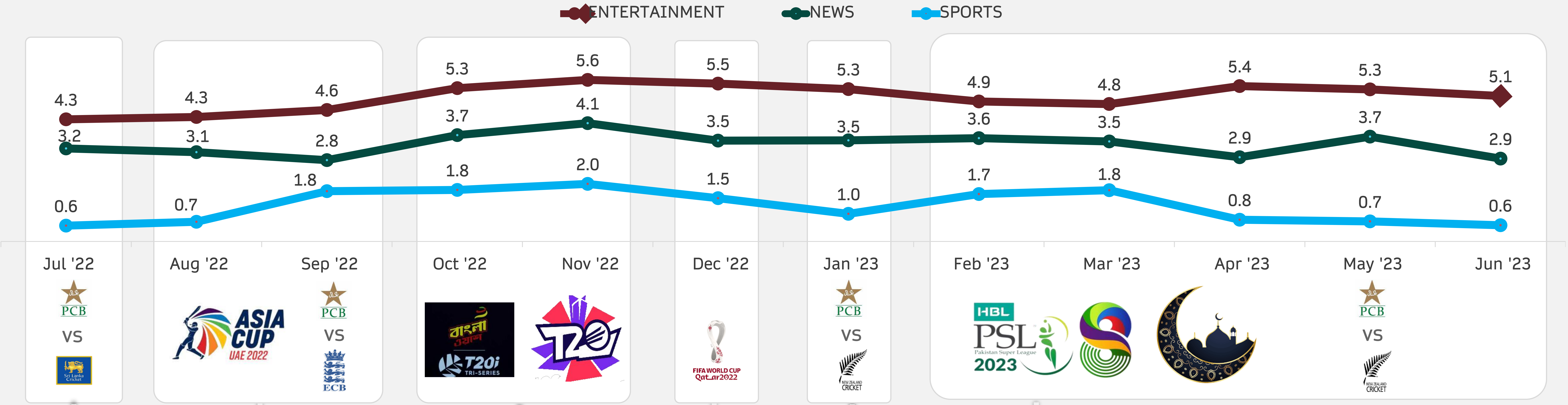
TOP CHANNELS FY 22-23 vs FY 21-22



107	108	100	140	200	150	100	100	100	300

ARY Digital followed by GEO ENT remained the top viewed channel in Year FY 22-23. All the news genre saw a massive increase in viewing since FY 22-23 was a year of major political events.

GENRE WISE MONTHLY RTG% - FY 22-23



Men's Asia Cup 2022 starting in end of August and continuing in September. Additionally, Pak vs Eng T20 series takes place in September. IK speeches barred by PEMRA. ARY and BOL taken off air.
Major Flooding in Mid of August which destroys majority of Punjab, Baluchistan and Sindh.

Pak vs England Test Matches
Pak vs New Zealand Test Matches
FIFA matches continue for majority of the month

PSL Matches started in the Mid of February and continue till the 3rd week of March, This had a negative impact on entertainment genre.

Ramazan had a positive impact on Entertainment genre which is increased by 12%

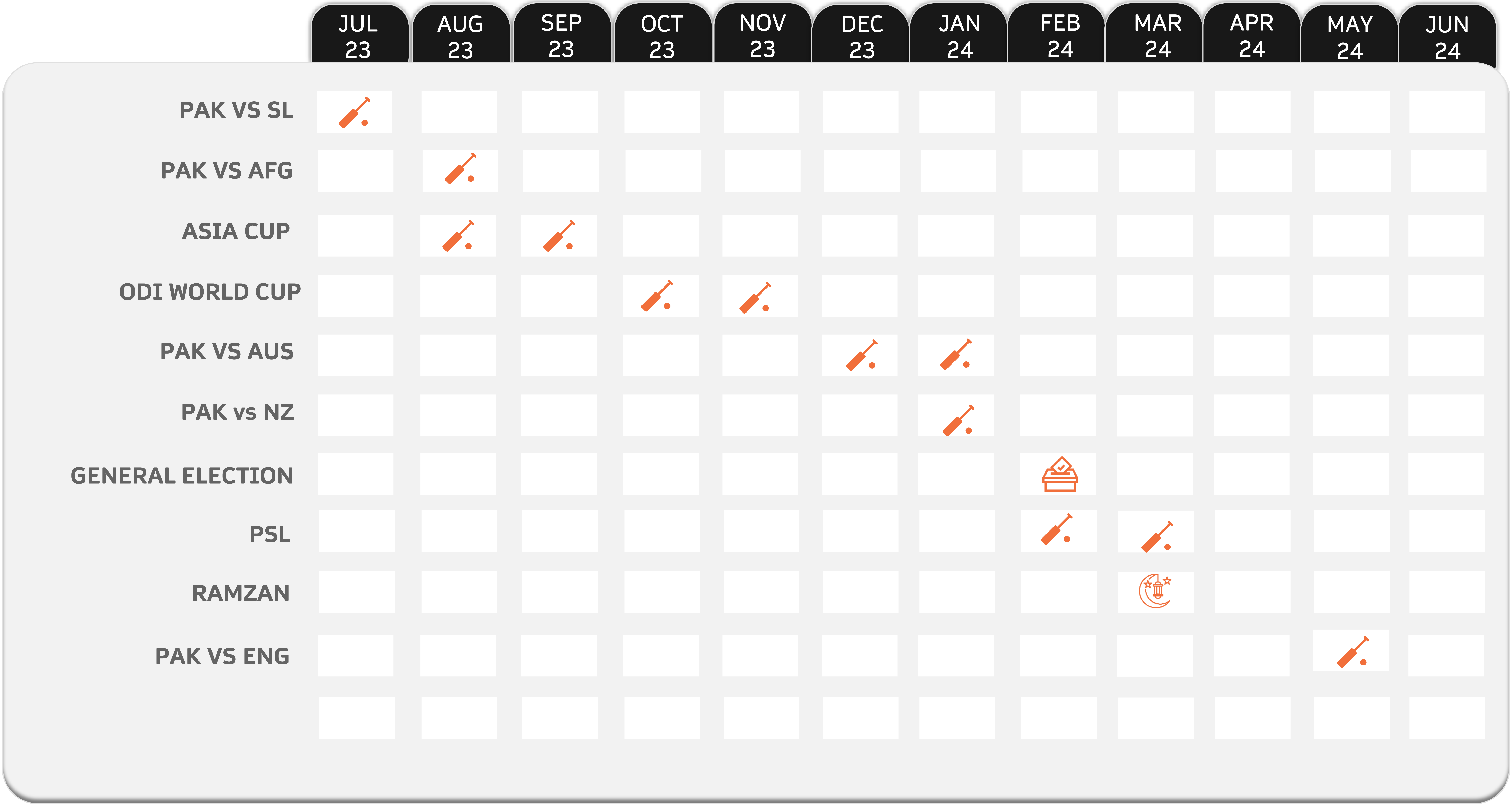
Drastic increase in the viewership of News Genre due to political instability in May

Pakistan vs Sri Lanka
Elections held in Punjab and major political drama, resulting in changing of CM.

Tri-series & T20 World Cup takes place in October and November
FIFA world cup starts in November
Journalist Arshad Sharif shot and killed in Kenya. IK starts a Long March and change in COAS takes place.

Pakistan vs New Zealand
CM Punjab signs assembly dissolution

MAJOR EVENTS IN FY 23-24



THANK YOU