



BRAINCHILD POV

Ramazan 2020 - IMPACT ON MEDIA

20th April 2020

EXECUTIVE SUMMARY

The following are the key takeaways from Brainchild Ramazan POV:

PEMRA DIRECTIVES REGARDING RAMAZAN TRANSMISSION

- **No live audience:** The licensees cannot invite any audiences to their live transmissions this year.
- **Stop display of gifts:** As the world is currently suffering from hunger, scarcity of resources and joblessness, there must be no display of gifts, bikes, cars etc.

CONSUMER BEHAVIOR

- During the lockdown we expect Digital media will be consumed throughout the day and not just in prime time.
- There has been 32% increase in online shopping activities during the outbreak period with noticeable increase in the searches of brands like Cheetay, Foodpanda, Daraz, KFC, McDonalds & Hum Mart.
- Due to the extended locked down, the audience will continue to stay at home during Ramazan. Hence, Ramazan 2020 viewership will be higher compared to previous Ramazans.
- We have seen after the COVID outbreak is that the viewership across all dayparts has increased.
- In this Ramazan we expect evening to remain the highest performing daypart, but the ratings across all dayparts will be higher than previous years.
- Currently in pre Ramazan 2020, news genre captures **21%** genre share. We expect the share to decrease in Ramazan 2020, however the news genre share will still remain higher than previous Ramazans.

TELEVISION

- Due to the lock down which extends till 30th April 2020, we believe that Ramazan 2020 viewership will be greater than Ramazan 2019's.
- **28%** increase in viewership of news genre has been seen during COVID outbreak vs pre-COVID.
- We expect that ARY Digital, Geo TV and Express Entertainment will come up with the best performing Ramazan transmissions due to the superiority of their content and popularity of hosts as compared to other channels.
- In Ramazan 2019 there was a drop of **12%** in spend & **3%** in Minutes compared with Ramazan 2018.
- Ramazan 2018 & 2019 both were **8%** of whole year spend.
- The expected **drop** in Adex in Ramazan 2020 is **10% - 13%** as compared to Ramazan 2019.

DIGITAL

- There has been a **42%** increase in YouTube streaming.
- Millennials turn to YouTube more than others and contributed in majority of watch time during Ramadan 2019.
- 73% of individuals in Ramazan use mobile while watching TV. In Ramazan 2020, this number is expected to be higher.

AGENCY POV

- 10% drop in Adex was seen after lockdown. Cold Drink, Pack Food, & Milk categories haven't started their Ramazan campaigns yet.
- OTC, Banks and floor & cleaners categories have all increased their spending in pre Ramazan 2020 vs pre Ramazan 2019.
- **15%** increase in digital usage has also been observed by PTA due to people using more internet during lockdown and the usage is expected to be throughout the day.
- We expect the online grocery and fashion ecommerce along with spices category to increase their spending this Ramazan.
- Corporations, government departments and NGOs will keep advertising on digital platform with an increased focus on Zakat disbursement during Ramazan.
- The advertising of construction sector and other related categories may increase.