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SUMMIT 2013

CHANGING LIFESTYLES

How Television is driving Social
Choices in Pakistan



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KANTAR MEDIA

PAKISTAN

An Intro

- ◆ 180 Million people
- ◆ GDP (Purchasing Power Parity) USD 514 Bill
- ◆ GDP Growth Rate 4%
- ◆ Annual Media Adex USD 500 Mill
- ◆ TV Adex USD 300 Mill
- ◆ 2G Mobile Environment
- ◆ 60% population live in Rural Areas, 40% in Urban



RURAL PAKISTAN

- ◆ 60% Population (108 Mill)
- ◆ Agricultural Economy
- ◆ Joint Family living
- ◆ Combined TV Viewing
- ◆ Severe Energy Crisis
- ◆ State Channel (PTV) dominant



URBAN PAKISTAN

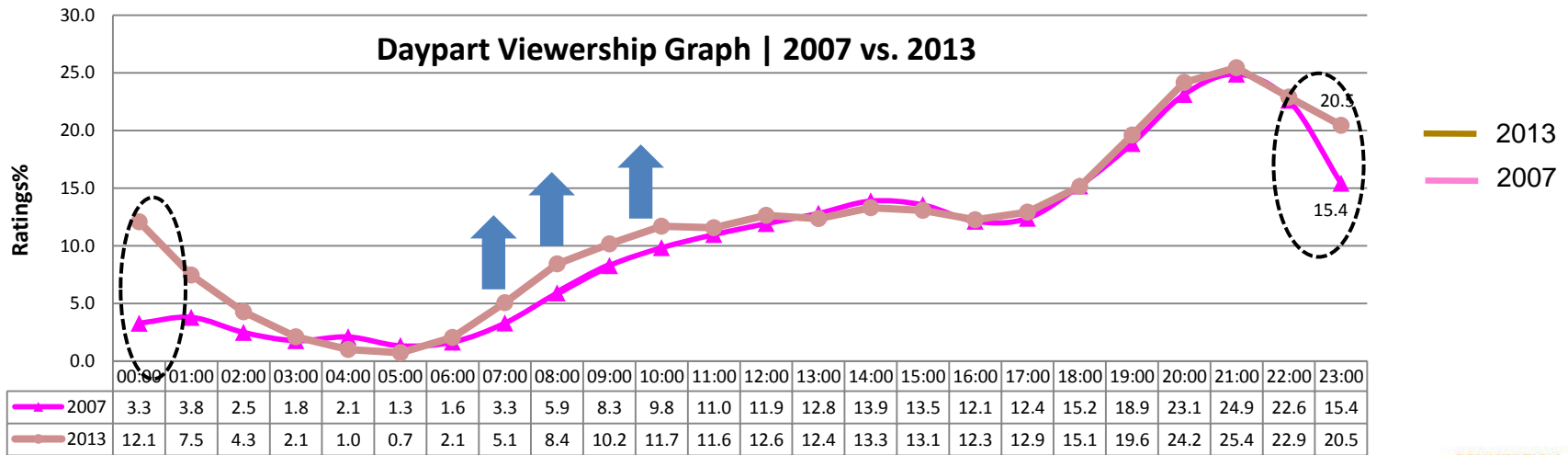
- ◆ 40% Population (72 Mill)
- ◆ Growing Middle Class
- ◆ Increasing Global Media Exposure 80+ Channels
- ◆ Almost Universal TV access
- ◆ 70%+ Mobile Penetration
- ◆ Well developed Service sector



EVOLUTION OF CONTENT

Specialized programming attracting viewership

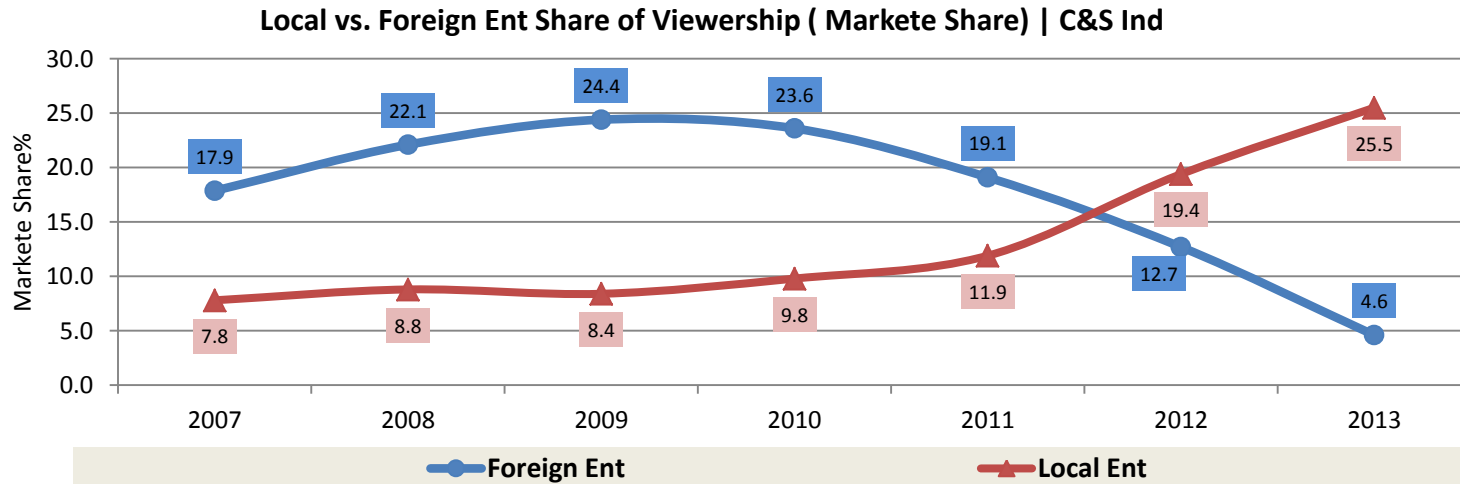
- As work routines and commutes become longer, TV viewing hours are stretched
- Morning and Late Night slots have gained significantly viewership



EVOLUTION ON CONTENT

Foreign vs. Local

- Initially foreign content dominated the Pakistan TV Market
- Local content took time in coming to terms with Indian competition



CHANGING SOCIAL NORMS

BEFORE

Women should accept the choices made for them

AFTER

Women are entitled & empowered to make their decisions



CHANGING SOCIAL NORMS

BEFORE

Accountability is for the poor and underprivileged



AFTER

Every Citizen can hold the Rich & Mighty accountable



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CHANGING SOCIAL NORMS

BEFORE

Only the empowered need to be informed

AFTER

Only those who stay informed remain empowered



CHANGING SOCIAL NORMS

BEFORE

Religion cannot be debated

AFTER

Everything can and should be debated freely



CHANGING SOCIAL NORMS

BEFORE

Democracy can never survive in Pakistan

AFTER

Pakistan cannot survive without Democracy





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Political Change

Role of Media in Pakistan's first
Democratic transition – Elections 2013

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ELECTIONS 2013

A 'first' for Pakistan

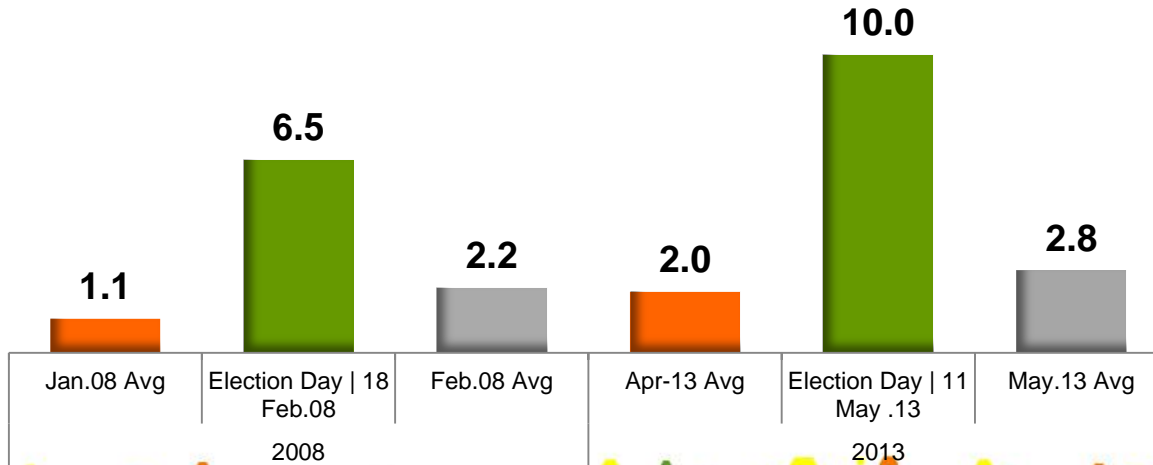
- ◆ First Democratic transition in the Nation's 66 year history
- ◆ First civilian/elected government to complete 5 year term
- ◆ First Elections to be held in a deregulated & free Media environment
- ◆ First Elections where all political parties were participating and actively campaigning on Media

MEDIA HYPE AND ATMOSPHERE PRE ELECTION

How Media built a National Hype

- ◆ Unprecedented jump in viewership for Election Day
- ◆ People were 'engaged and interested' in what was happening

News Genre | Election Day Ratings vs. Month Avg

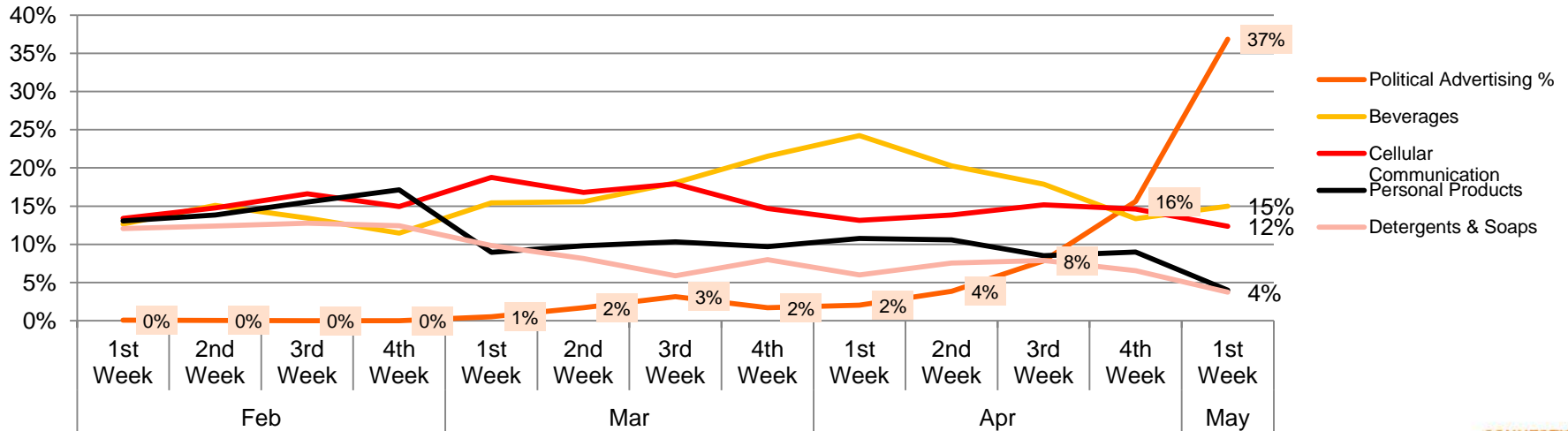


ELECTION 2013

Media Influence

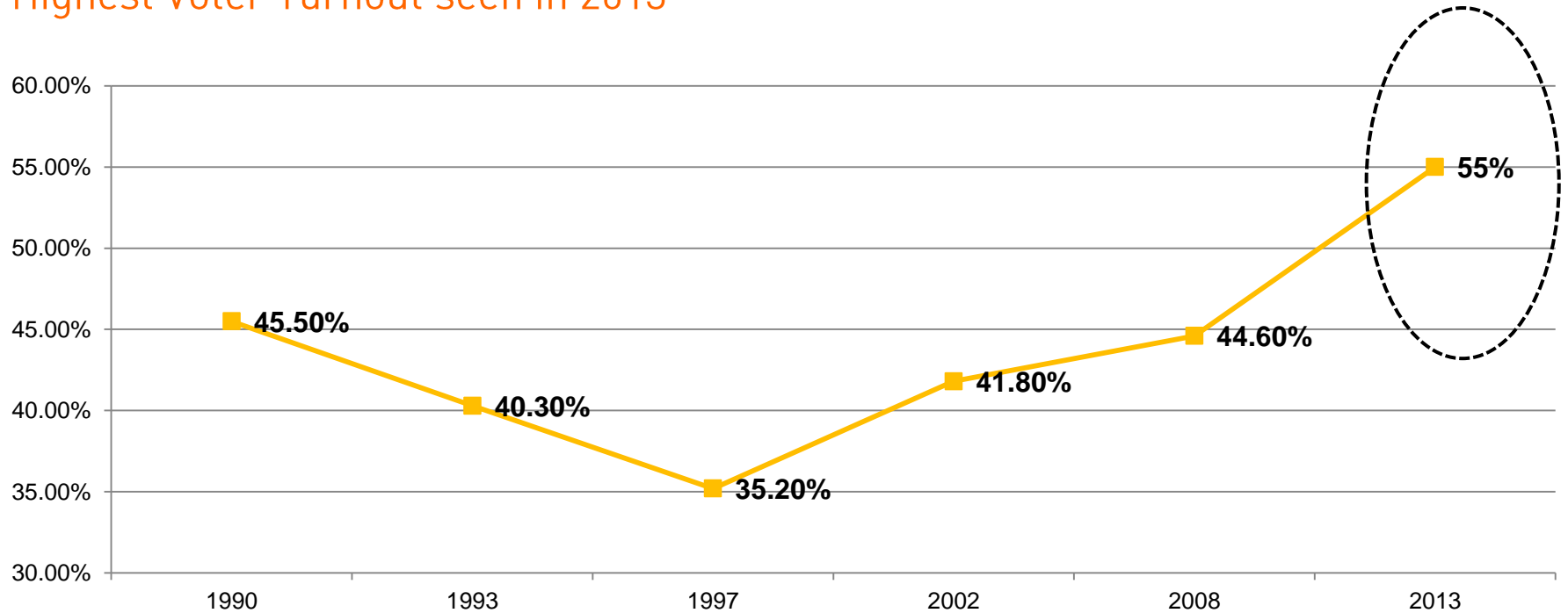
- Political campaigning on TV for the first time
- Significant spending on Advertising

Political Advertising Share% in Industry CAT



HISTORIC VOTER TURNOUT

Highest Voter Turnout seen in 2013



ELECTION 2013

Media Influence

- ◆ A significant number of people claimed that they changed their voting decision after watching the political ad campaigns

Question 6: Did you change your voting decision after watching election campaign and advertisements on TV or is it the same?

It is the same as before	84 %
It changed	12 %
Don't Know	4 %

Source: Gallup Pakistan Exit Poll Election Day Survey, 2013

THE FUTURE

Change is the only Constant

- ◆ As new technologies and distribution platforms penetrate deeper into the population, the influence of Media (esp. TV) will continue to grow
- ◆ While critics site vested interests and agendas as negatives, the power of information is generally resulting in positive mindset shifts
- ◆ In the developing World, TV continues to remain a key vehicle for information exchange and global exposure
- ◆ Entry of International Media Houses will fuel growth and sophistication of Broadcast Industry in developing markets like Pakistan

- ◆ **More Choices, More Opportunities – Better Lives**



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