



# In-home TV performance in the first 10 days of Ramadan

KSA TAM; 23 Mar-1 Apr 2023

April 2023





We are happy to present to you an overview of the In-home TV viewership in the first 10 days of Ramadan.

We have split this presentation into 3 broad parts-

- a) A birds' eye view of the numbers in the first 10 days of Ramadan
- b) Some comparisons with the 10-day period before Ramadan
- c) Daily movement of viewers, and viewing on Streaming, in the first 10 days of Ramadan

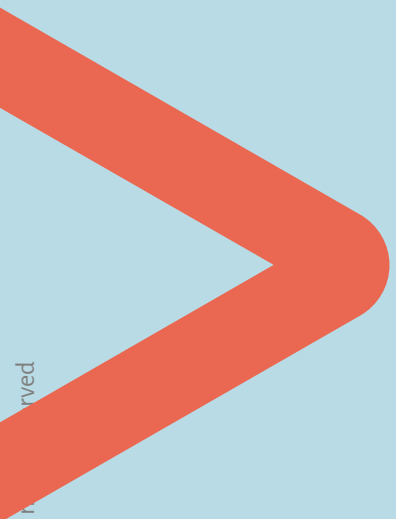
We trust this overview would be helpful to our subscribers and users of KSA TAM to get a broad picture of the In-home TV viewing patterns in this Holy Month.

Considering this is an overview, we have restricted our analysis to Total TV viewing among Saudis and Non-Saudis at an all day / 3-hour daypart level. You can get granular details by various demographics for minute-by-minute viewership for upto 150 channels and program / spot level viewership for upto 50 channels in the software. These details are available overnight, to help our stakeholders make quick informed decisions related to their content planning, scheduling and advertising campaigns.

In case you have any queries or need more details, please connect with us at [connect@mrksaudi.com](mailto:connect@mrksaudi.com). You can also connect with me at [bandar@mrksaudi.com](mailto:bandar@mrksaudi.com) or with Mubin Khan, Operations Director at [m.khan@mrksaudi.com](mailto:m.khan@mrksaudi.com).

Happy Reading, and Ramadan Kareem!

Bandar AlMashhadi  
CEO - MRC



# Overview



# In-home TV viewing in the first 10 days of Ramadan



All Individuals



Saudis



Non-Saudis



Unduplicated Reach

18.2 million viewers

12.2 million viewers

6.0 million viewers



Total Rating Points  
*(sum of Ratings by minute across the day)*

43 billion TRPs

27 billion TRPs

16 billion TRPs



Daily Time Spent Viewing (Viewers)

5 hrs & 12 mins

5 hrs & 3 mins

5 hrs & 27 mins

Universe Size

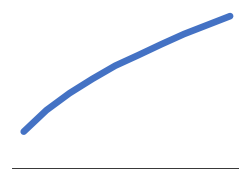
20.3 million

13.8 million

6.6 million



# In-home TV viewing in the first 10 days of Ramadan

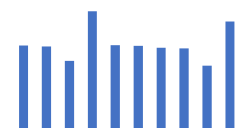


Unduplicated Reach%

90%

89%

92%

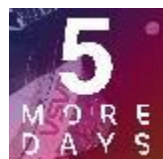


Average Daily Reach%

68%

65%

73%



5 or more days viewed

73%

71%

78%



Share of Satellite : Streaming

74:26

70:30

81:19

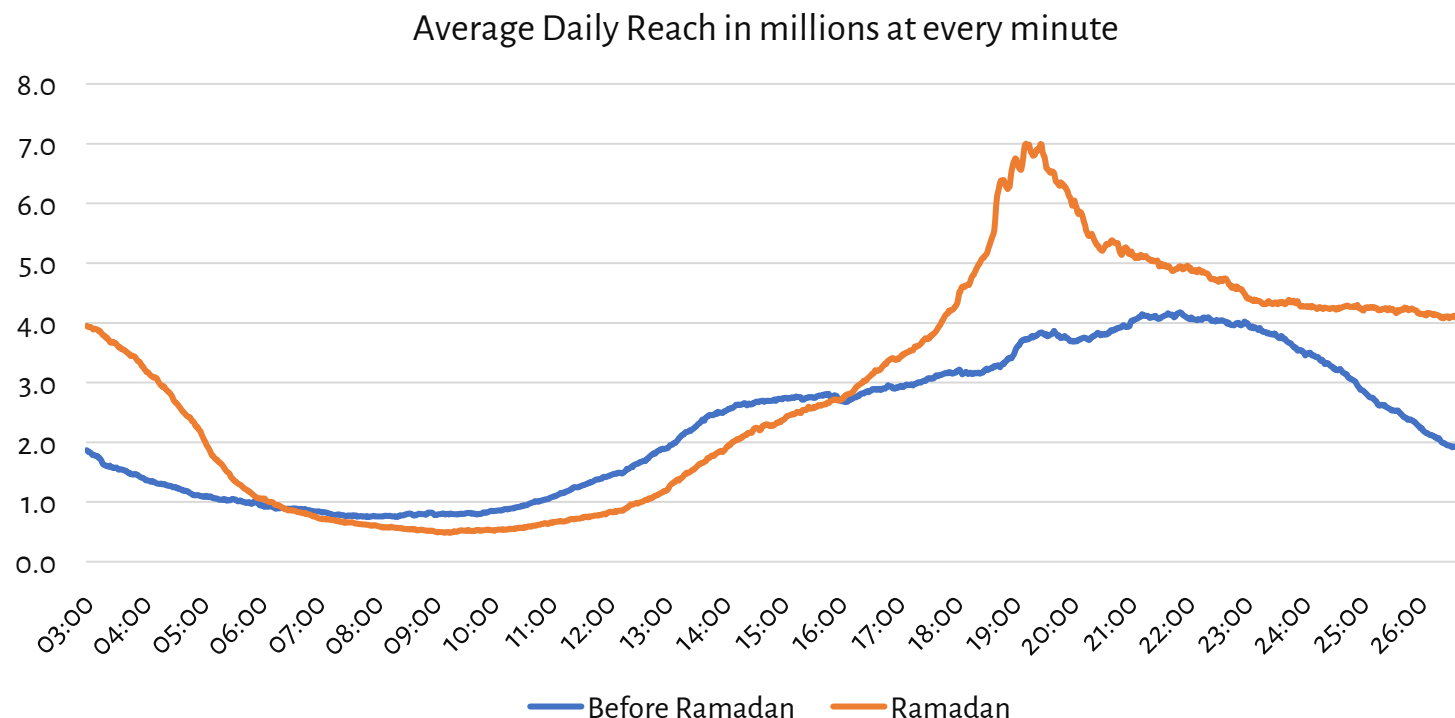


# Comparison of the first 10 days of Ramadan to the 10-day period before Ramadan



# Average Daily Reach doubled at pre-Suhoor and post-Iftaar

- Lower viewing after Fajr till late afternoon
  - Indication of people resting in the mornings and changed office timings

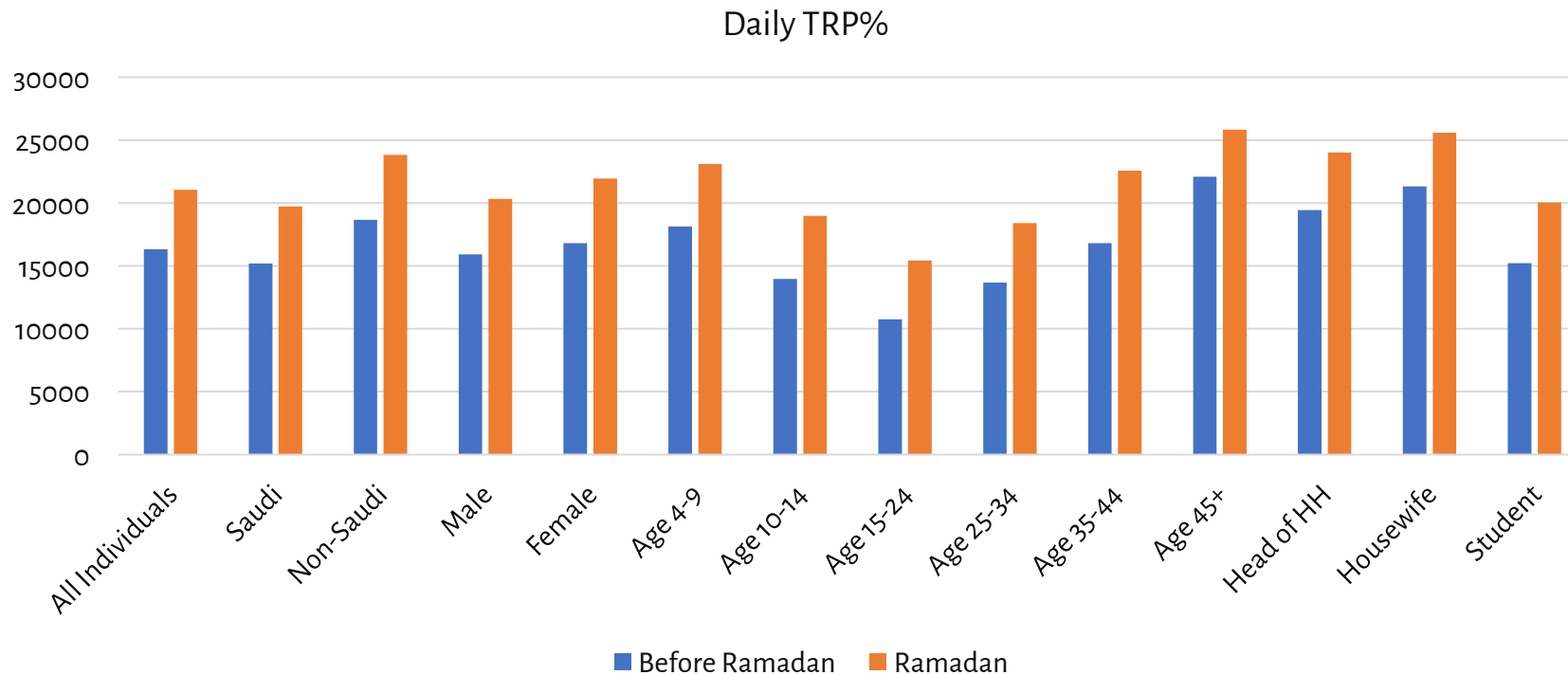






# Daily viewing increased in Ramadan by 29%

- Significant increase in daily TRP across demographic groups compared to the previous 10 days before Ramadan

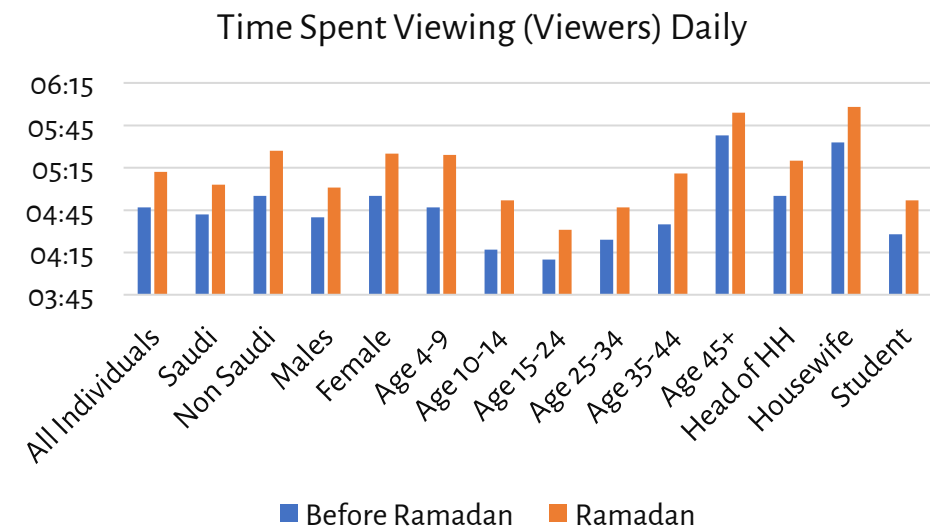
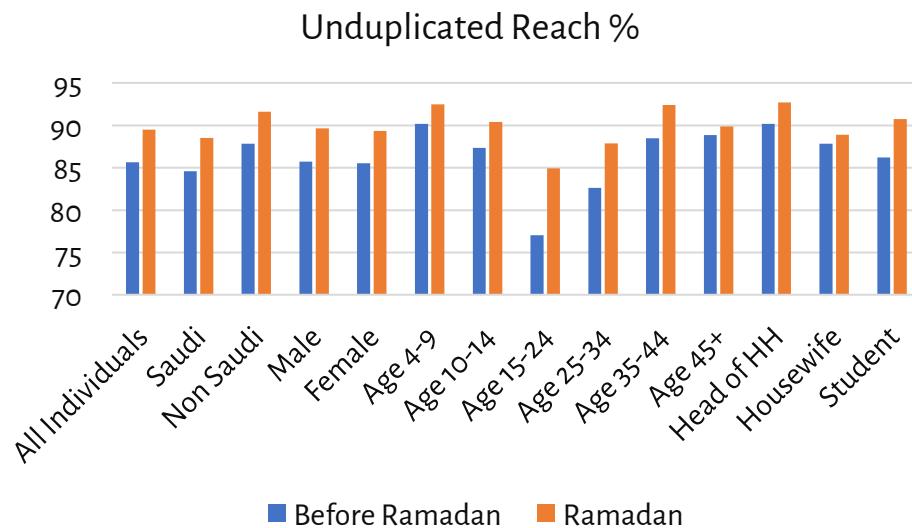


TRP: Total Rating Points (Sum of Ratings by minute)



# Increase led by both Reach and Time Spent

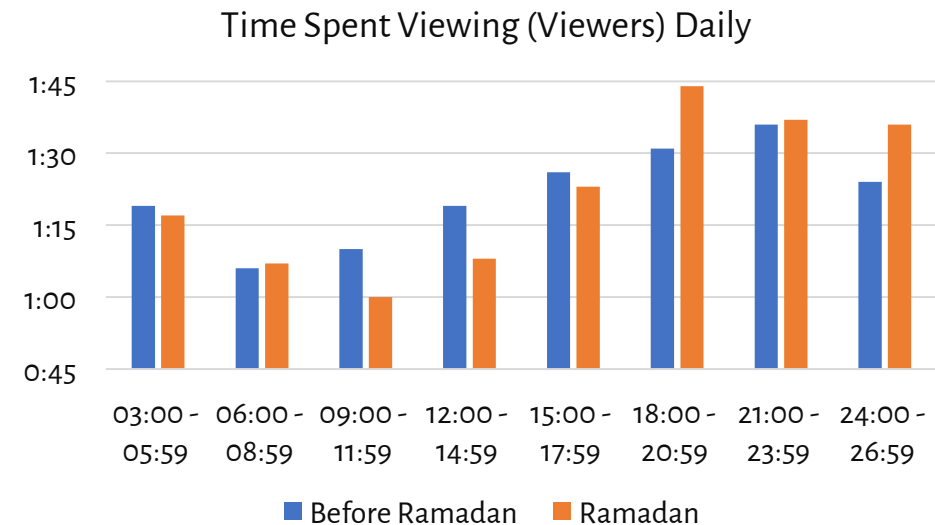
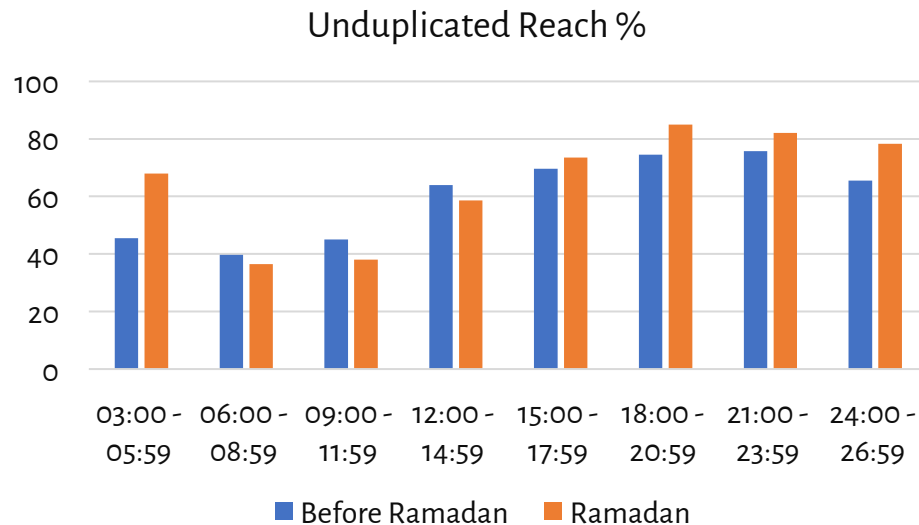
- Significant increase in reach among youth (15-34 yrs)
- Significant increase in Time Spent Viewing especially among Arab Expats, youth, housewives, and children





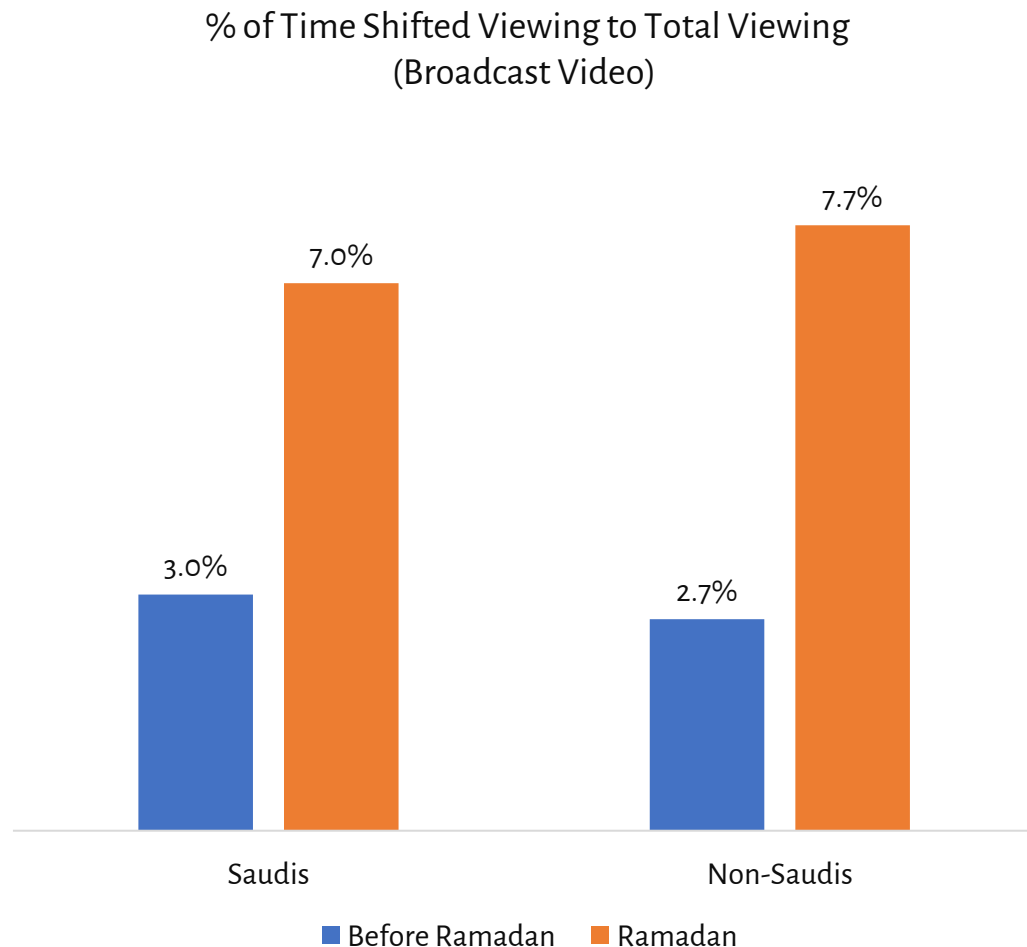
# Significant increase in viewing during pre-Suhoor and post-Iftaar

- Pre–Suhoor increase led by higher Reach
- Post-Iftaar increase led by both Reach and Time Spent, i.e more people watch at this time, and they spend more time
- Dips in mornings and early afternoons a function of both Reach and Time Spent





# Significant increase in Time Shifted Viewing in Ramadan

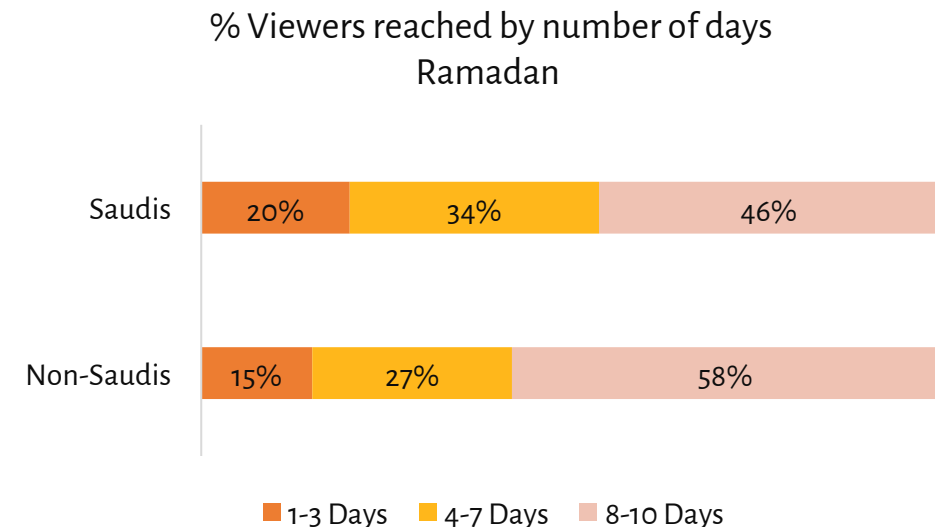
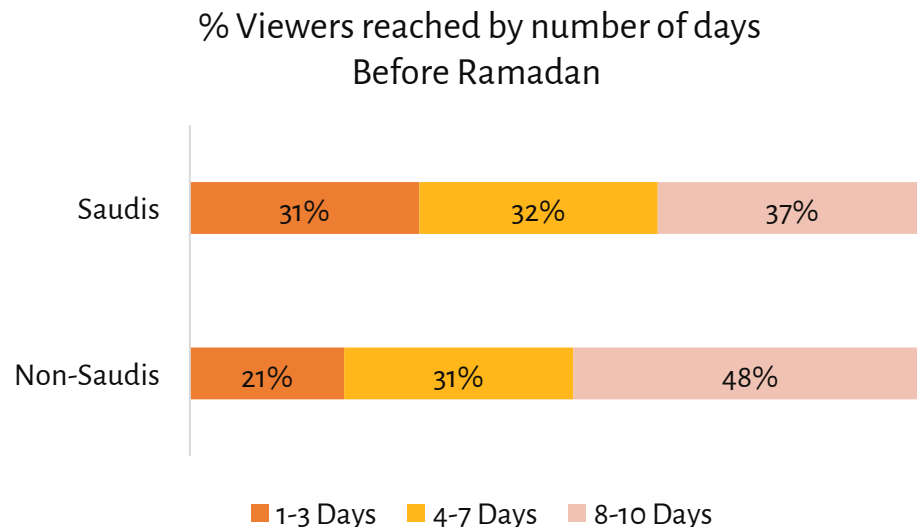


- Live+7 for viewing for the 10 days pre-Ramadan was ~2.9% overall, while Live+7 (or lesser) days in Ramadan has jumped to ~7.3% overall
- The share of Time Shifted Viewing has increased more among non-Saudis
- Time Shift viewing for the pre-Ramadan period is of Live+7 days, while Time Shift Viewing for the Ramadan period is for lesser days – Live +1 for 1 April, Live+2 for 31 March, Live+3 for 30 March and so on
  - The significant increase over lesser number of days is a pointer to a change in viewing behavior in this month



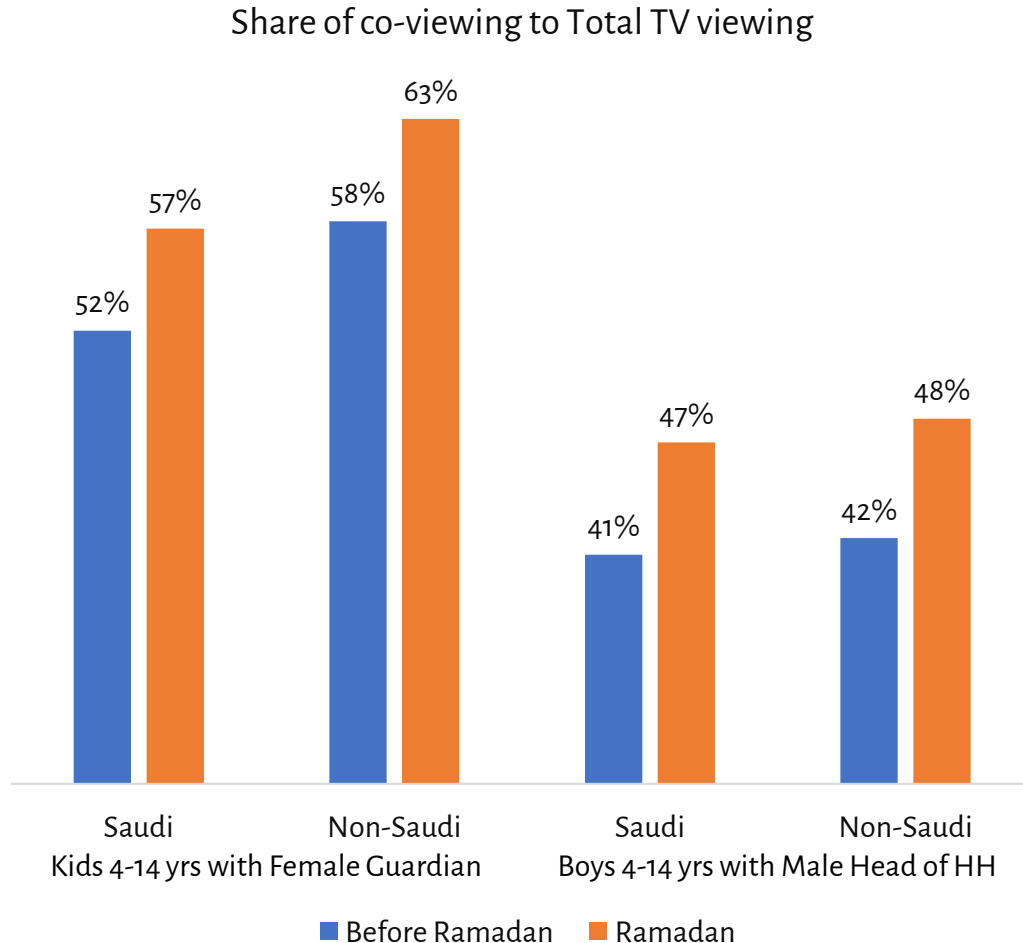
# Regularity of viewing has increased

- The share of viewers watching TV for 8 or more days out of 10 days has jumped from 40% in the period before Ramadan to 50% in Ramadan
- This growth of 10% is similar across Saudis and non-Saudis





# Co-viewing by youngsters with their elders has increased in Ramadan

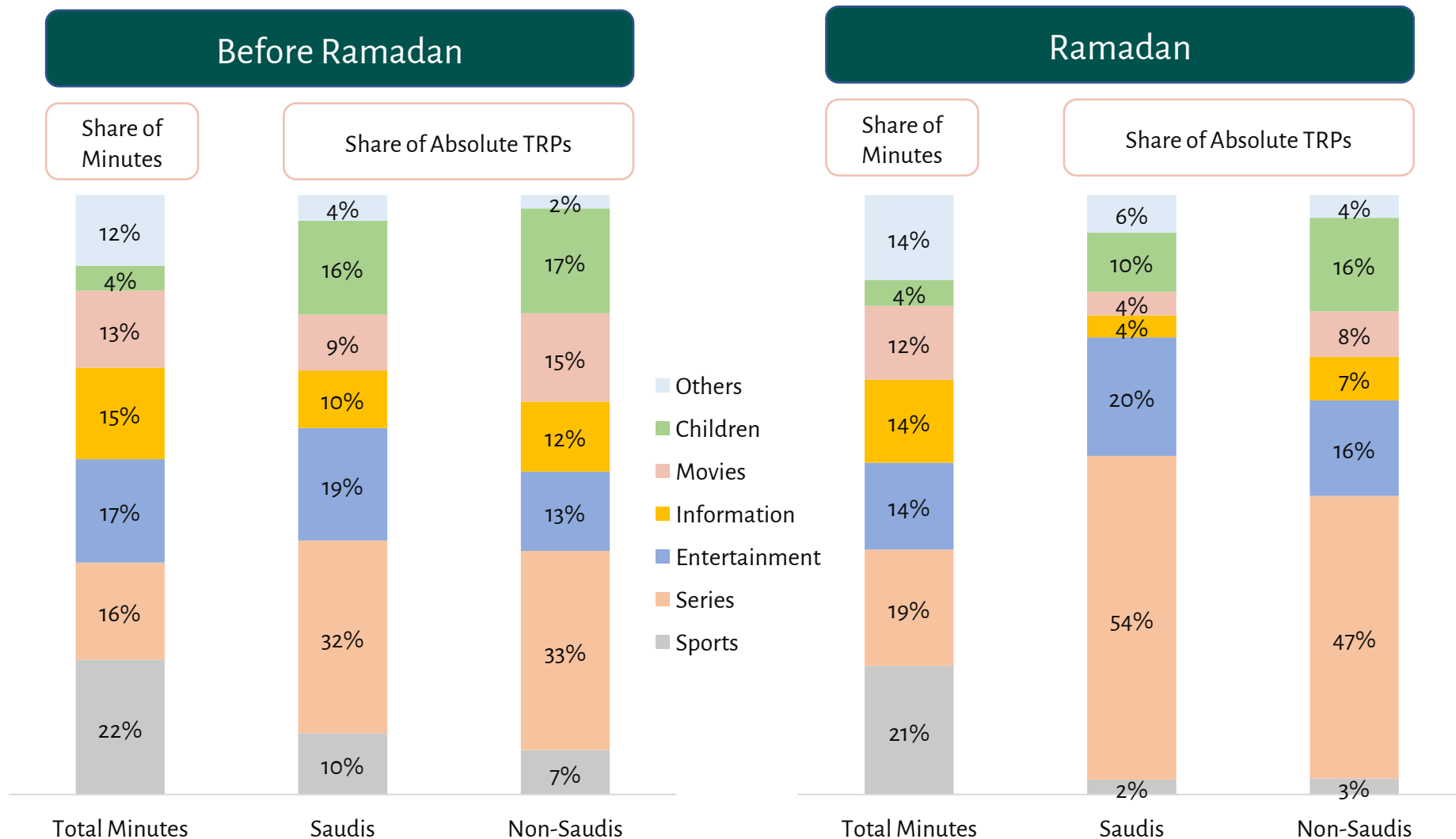


- Similar increase in co-viewing of kids (4-14 yrs) with their elders
- Trends similar across Saudis and non-Saudis
  - 5% increase in co-viewing between kids and female Guardians
  - 6% increase in co-viewing between boys and male Heads of Households

Female Guardian is taken as a proxy for the mother and Male Head of Household is taken as a proxy for the father



# High increase in Share of Viewing of Series content in Ramadan



- 19% share of minutes on Series translated to 54% share of TRPs among Saudis and 47% share of TRPs among non-Saudis



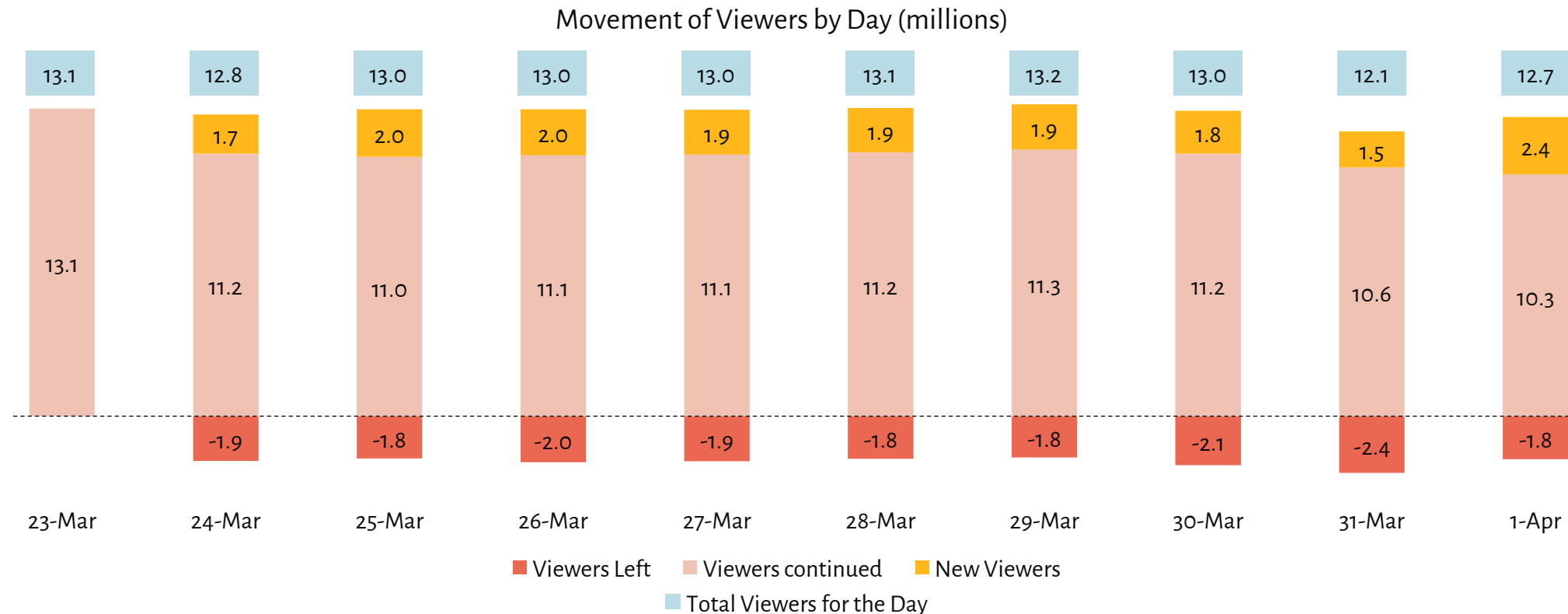
# Viewer movement and Viewing on Streaming in Ramadan





# Consistent movement of viewers by day

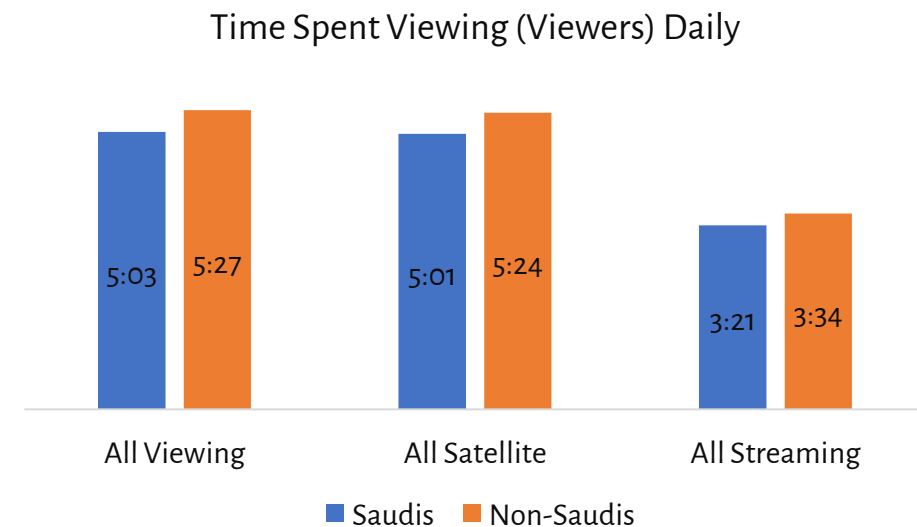
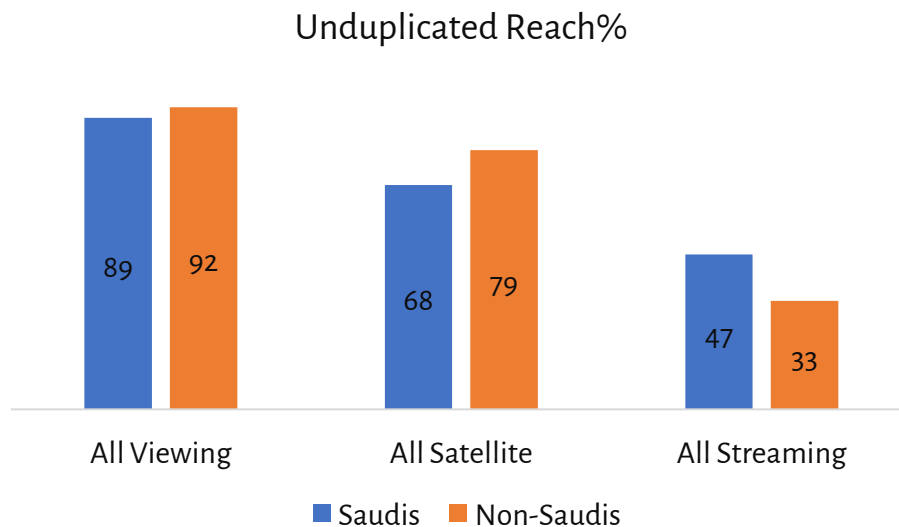
- On average, every day saw approx. 17% viewers moving out, and a similar number moving in





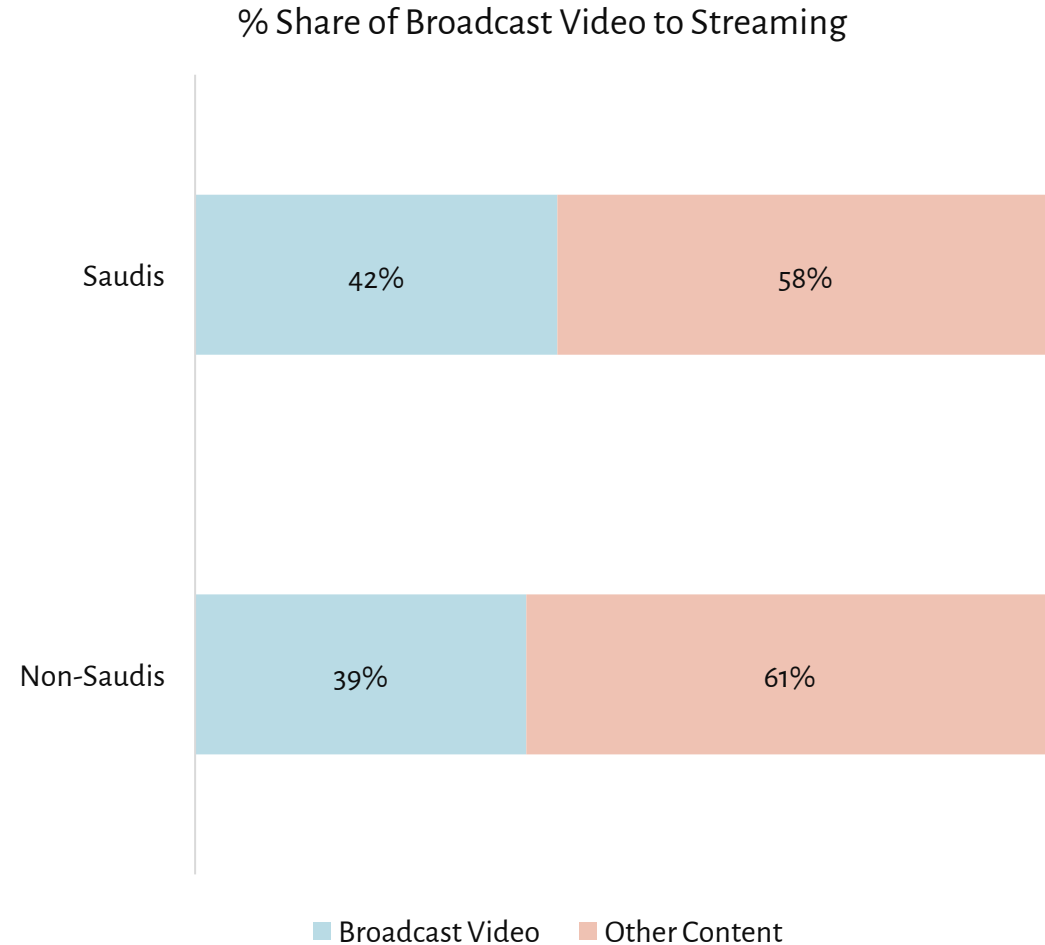
# Viewing through Satellite still big; Streaming is significant

- Saudis view TV through Streaming more as compared to non-Saudis
- In terms of Time Spent, non-Saudis spend a little more time on Streaming as compared to Saudis





# Significant viewing of Broadcast Video on Streaming



- Saudis tend to watch more Broadcast Video content on Streaming as compared to non-Saudis

# Thank you



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