



In-home TV performance in Ramadan

KSA TAM; 23 Mar-20 Apr 2023

April 2023





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

We have split this presentation into 5 broad parts-

- a) A birds' eye view of the numbers in Ramadan
- b) Some comparisons with the period before Ramadan
- c) Daily movement of viewers, and viewing on Streaming, in Ramadan
- d) Comparison of the three periods (Ashara) within Ramadan
- e) Advertising Viewership

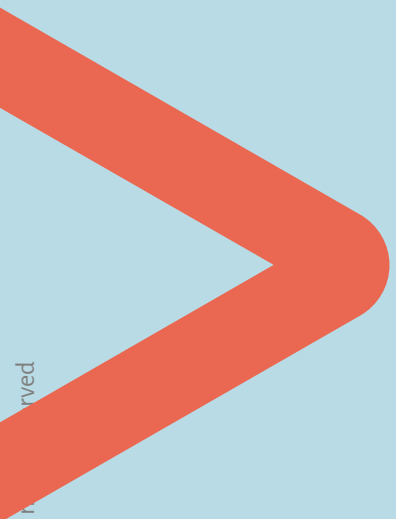
We trust this overview would be helpful to our subscribers and users of KSA TAM to get a broad picture of the In-home TV viewing patterns in this Holy Month.

Considering this is an overview, we have restricted our analysis to Total TV viewing among Saudis and Non-Saudis. 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. You can also connect with me at bandar@mrksaudi.com or with Mubin Khan, Operations Director at m.khan@mrksaudi.com.

We look forward to your feedback. Happy Reading!

Bandar AlMashhadi
CEO - MRC



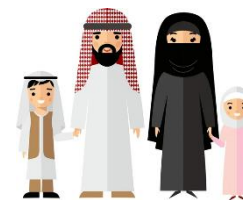
Overview



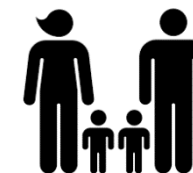
In-home TV viewing in Ramadan



All Individuals



Saudis



Non-Saudis



Unduplicated Reach

19.3 million viewers

13.1 million viewers

6.3 million viewers



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

118 billion TRPs

75 billion TRPs

44 billion TRPs



Daily Time Spent Viewing (Viewers)

5 hrs & 6 mins

4 hrs & 57 mins

5 hrs & 22 mins

Universe Size

20.3 million

13.8 million

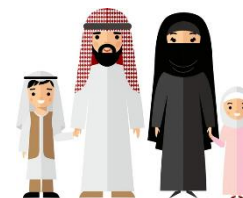
6.6 million



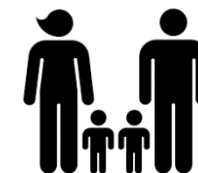
In-home TV viewing in Ramadan



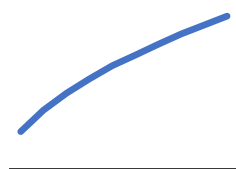
All Individuals



Saudis



Non-Saudis

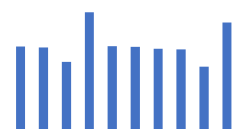


Unduplicated Reach%

95%

95%

96%



Average Daily Reach%

66%

63%

71%

15...
JUST
15 DAYS

15 or more days viewed

70%

67%

77%



Share of Satellite : Streaming

74:26

70:30

81:19



Comparison of viewing in Ramadan to the period before Ramadan (1-29 Sha'ban)



The Ramadan Effect

15+ Days Reach up by 23%

233% jump in number of ad spots viewed

Average Daily Reach up by 16%

10% increase in Streaming viewership

23% higher TRPs

18% increase in No. of Channels viewed

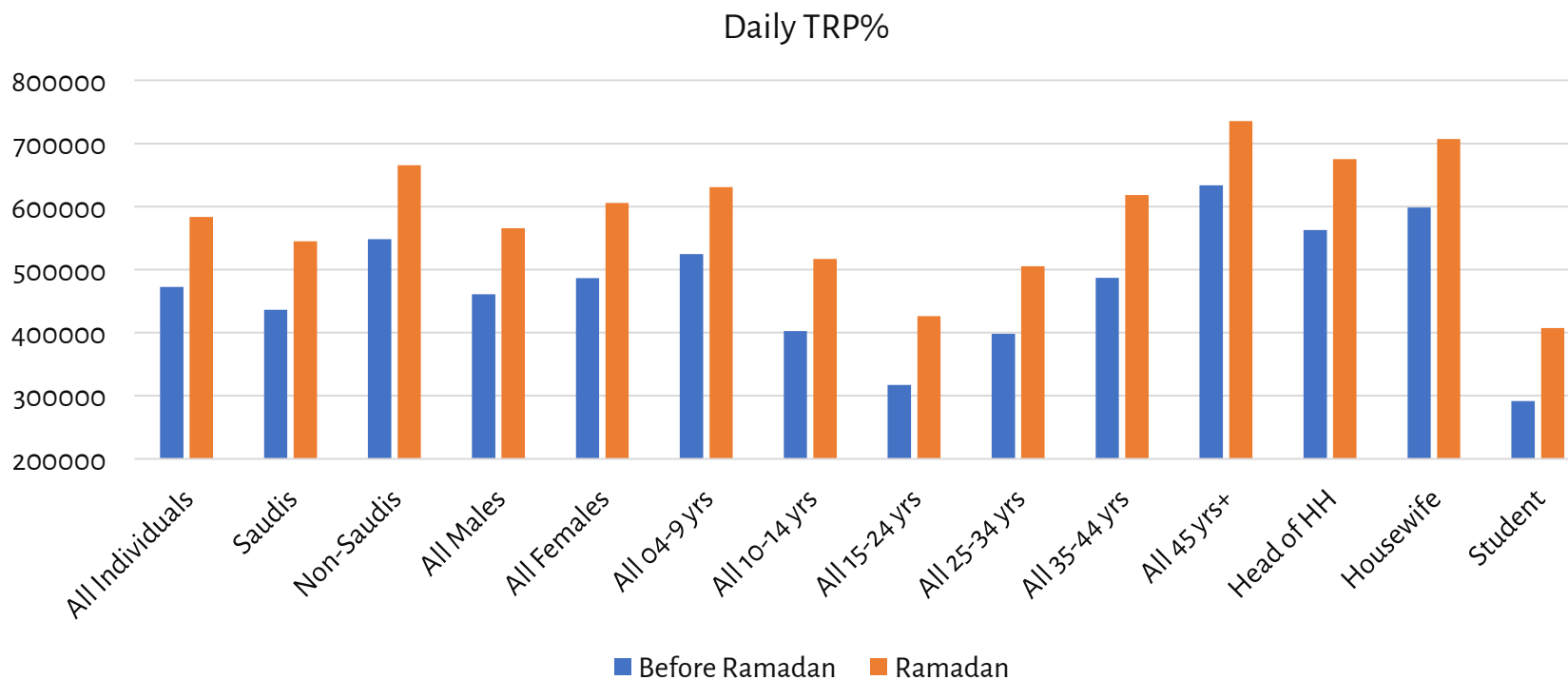
Time Shifted viewing up by 130% (3% to 7%)

Daily TSV (Viewers) up by 7%



Daily viewing increased in Ramadan by 24%

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

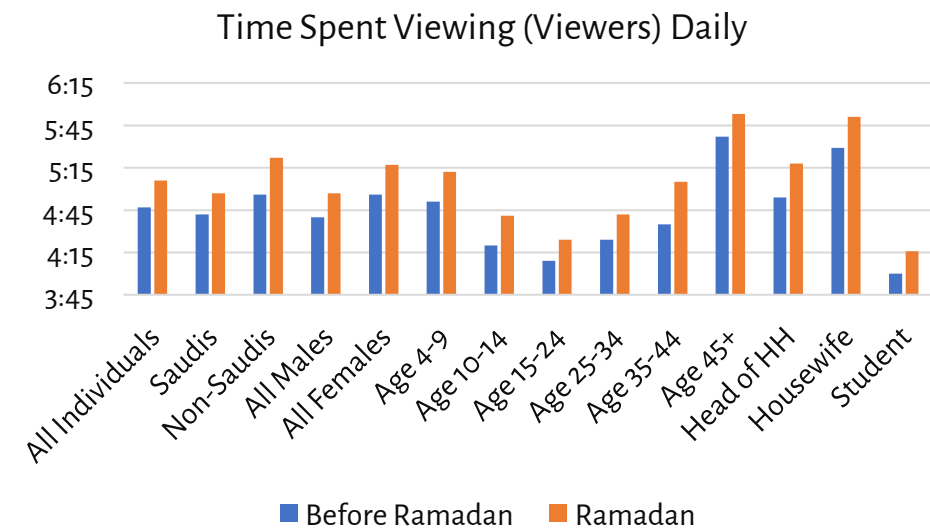
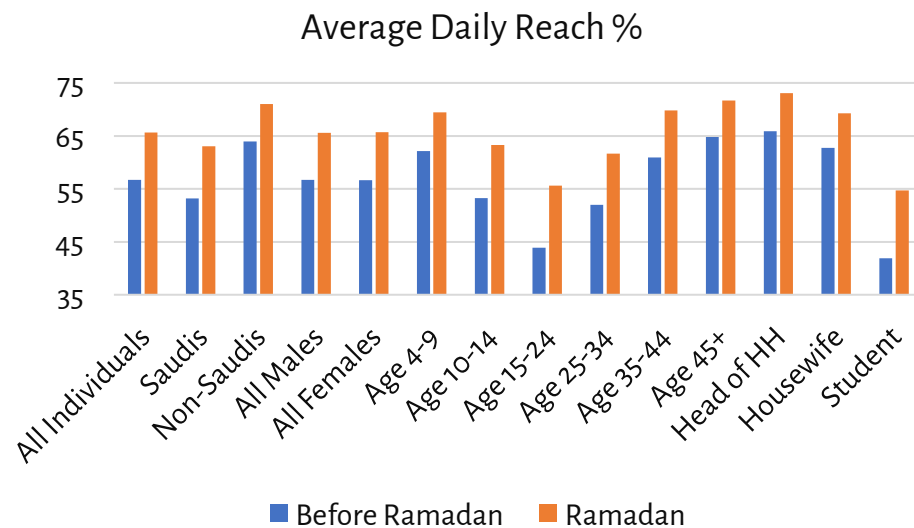


TRP: Total Rating Points (Sum of Ratings by minute)



Increase led by both Reach and Time Spent

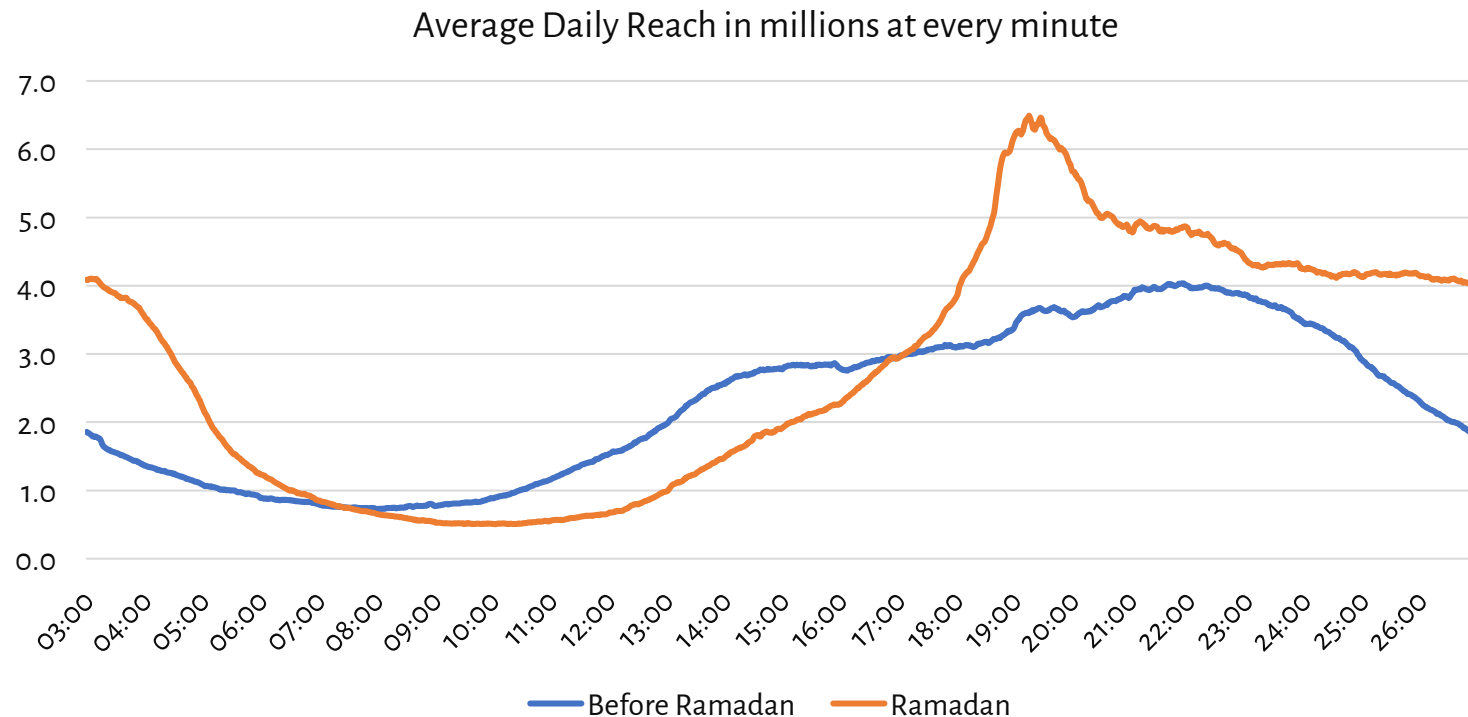
- Significant increase in reach among youth (15-34 yrs)
- Significant increase in Time Spent Viewing especially among non-Saudis, middle-age (35-44 year-olds), housewives, and children





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

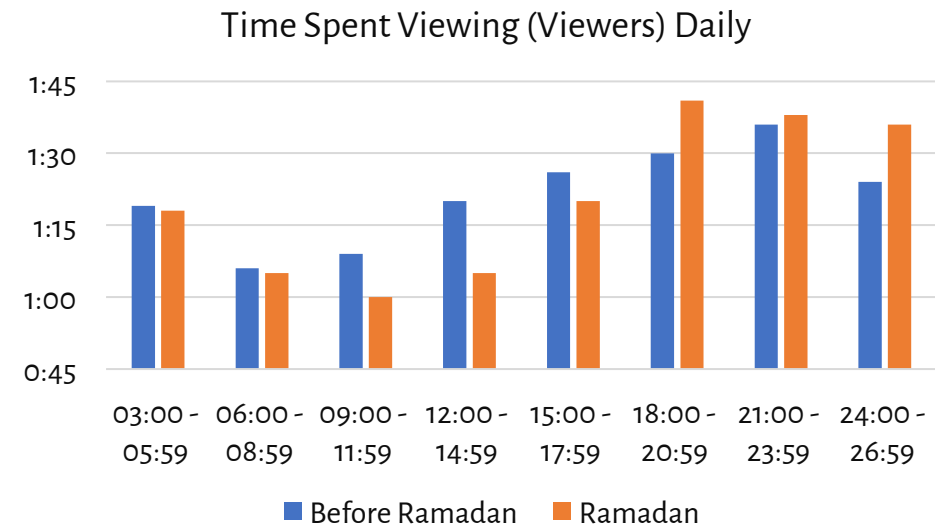
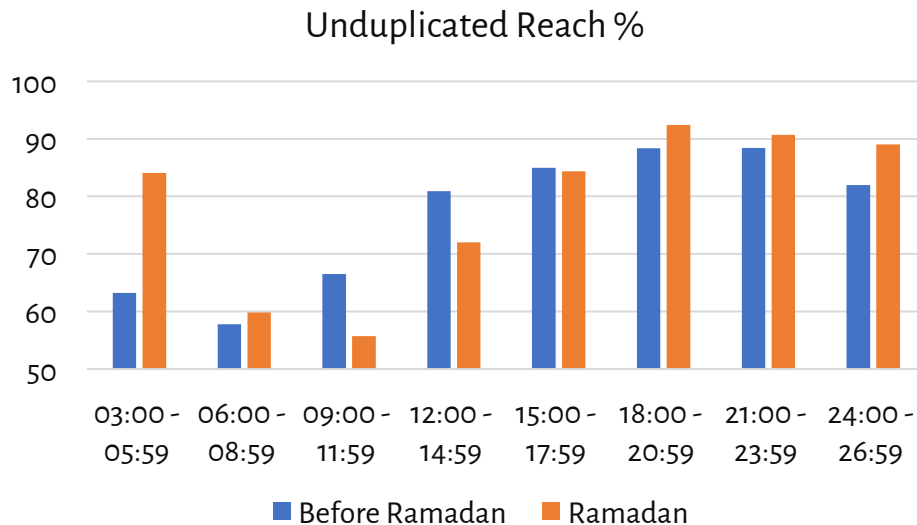
- Lower viewing after Fajr till late afternoon
 - Indication of people resting in the mornings and changed office timings





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

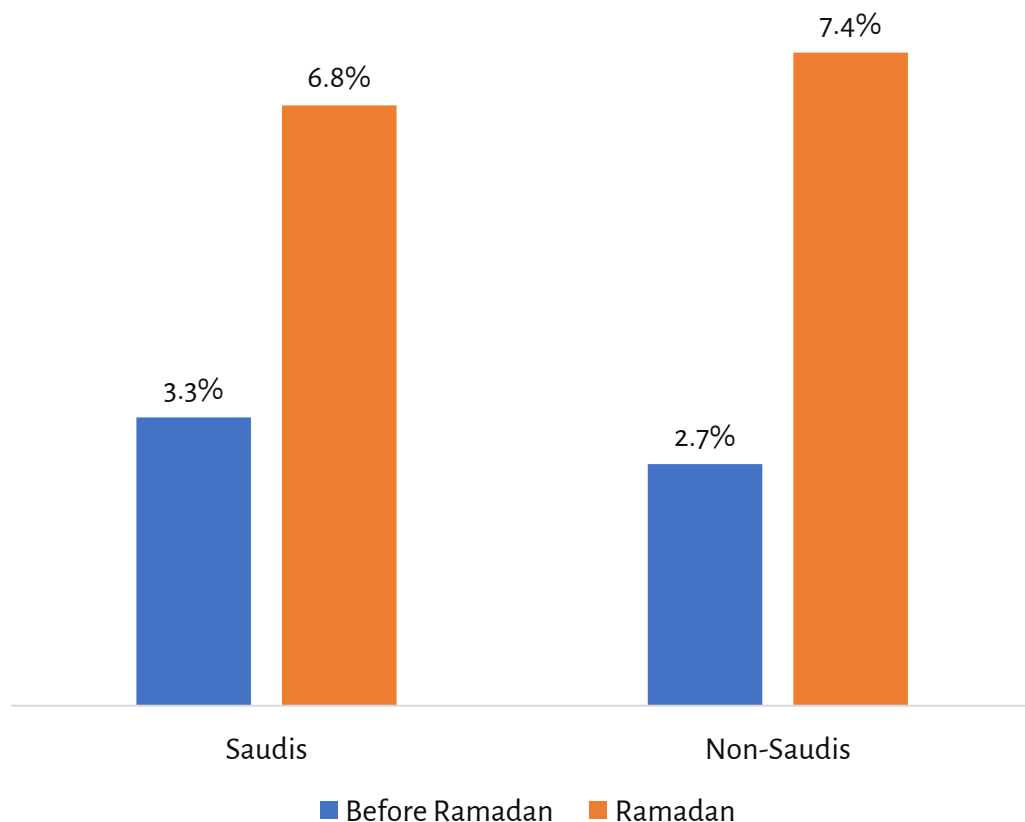
- Pre-Suhoor increase led by higher Reach
- Post-Iftaar increase in both Reach and Time Spent, i.e more people watch at this time, and they spend more time
- Dips in mornings and early afternoons a function of both Reach and Time Spent





Significant increase in Time Shifted Viewing in Ramadan

% of Time Shifted Viewing to Total Viewing
(Broadcast Video)

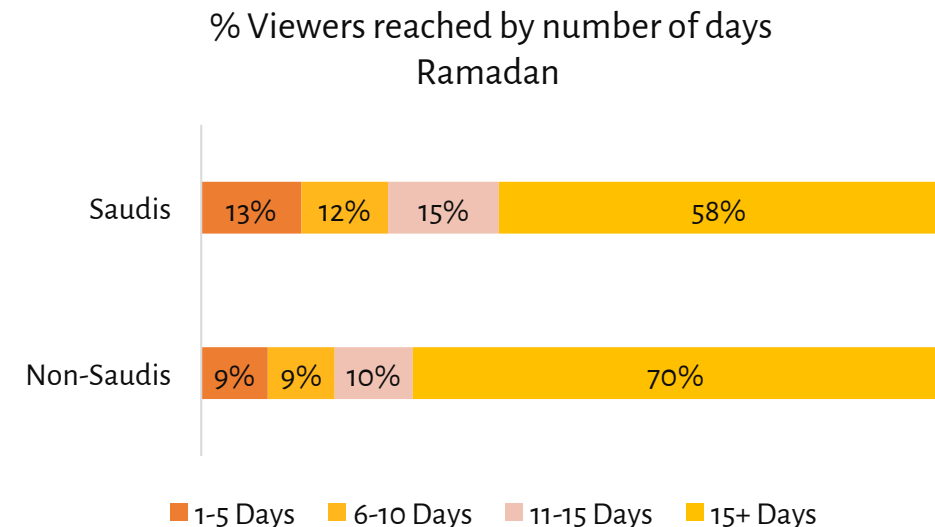
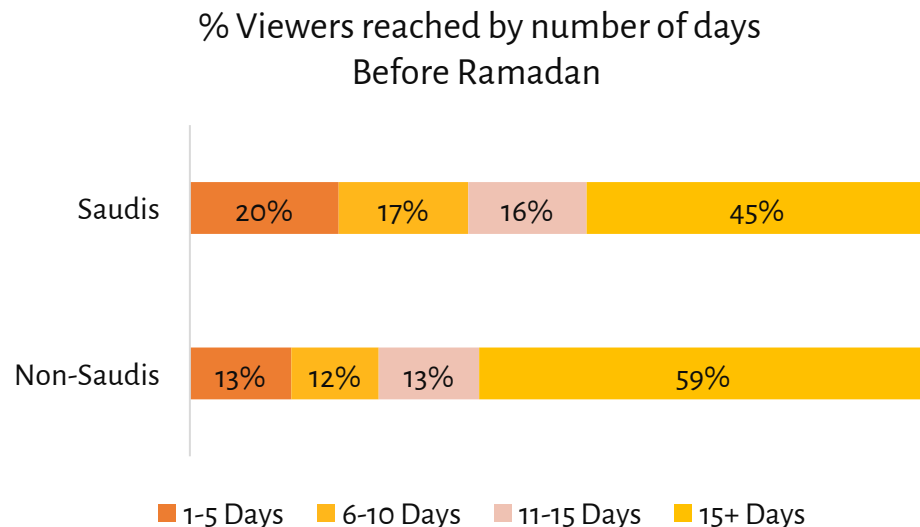


- Time Shifted viewing (Live+7) pre-Ramadan was ~3% overall; and it has increased to ~7% overall in Ramadan
- The share of Time Shifted Viewing has increased more among non-Saudis



Regularity of viewing has increased

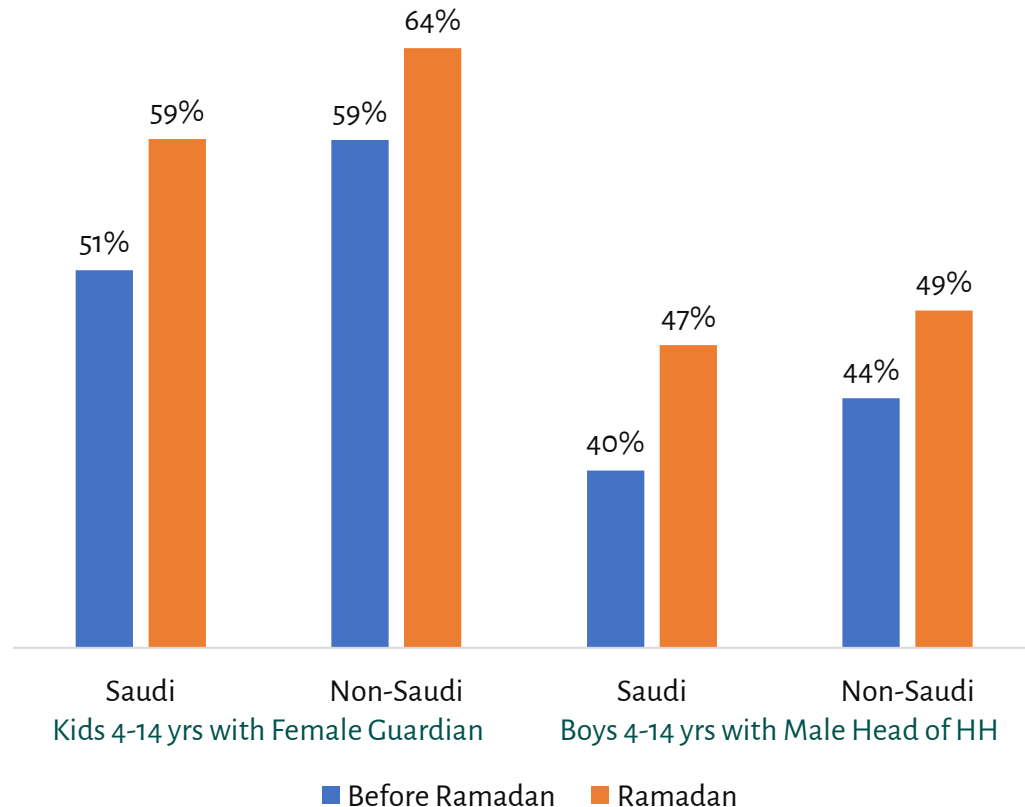
- The share of viewers watching TV for 16 or more days has jumped from 40% in the period before Ramadan to 50% in Ramadan
- This growth of 25% is similar across Saudis and non-Saudis





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

Share of co-viewing to Total TV viewing

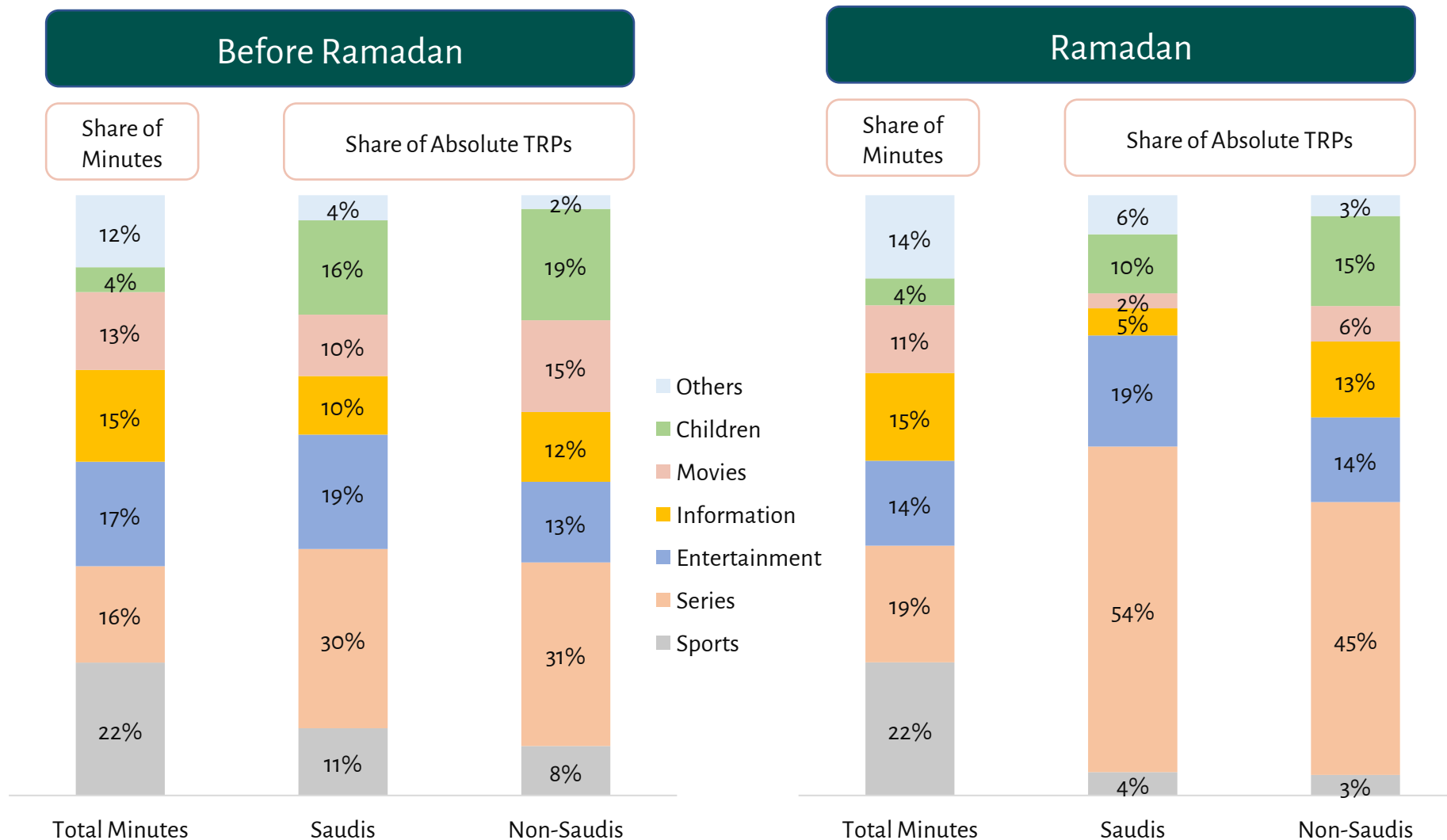


- Increase in co-viewing of kids (4-14 yrs) with their elders
- Co-viewing has increased more among Saudis (~7%) compared to non-Saudis (~5%)

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



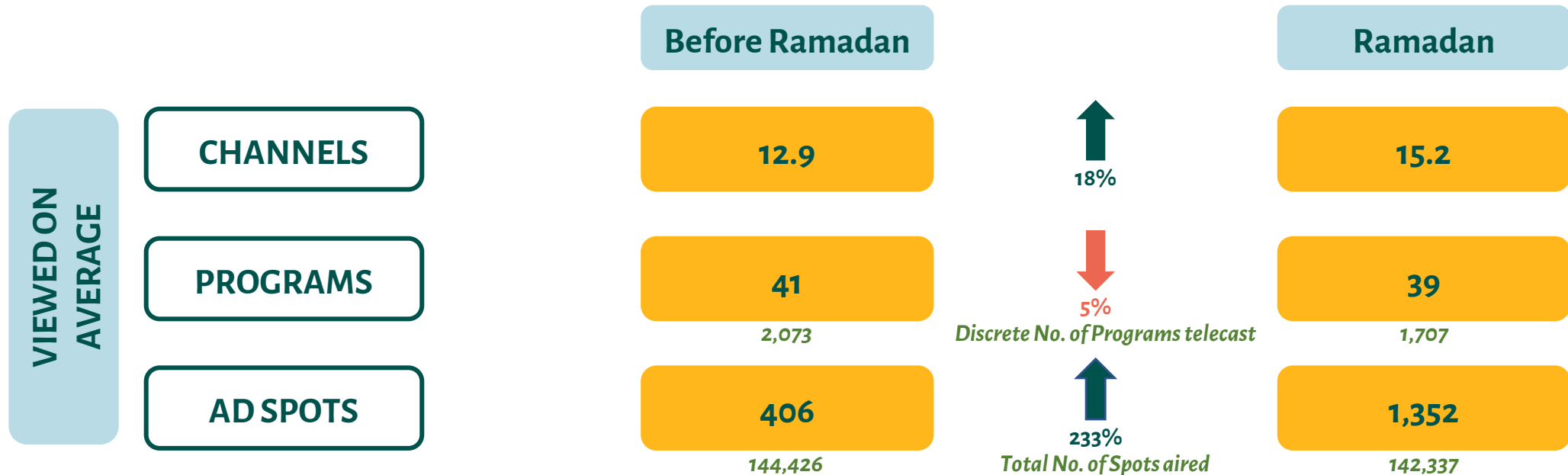
High increase in Share of Viewing of Series content in Ramadan



- 19% share of minutes on Series translated to 54% share of TRPs among Saudis and 45% share of TRPs among non-Saudis



Increase in number of channels viewed, Over-index in number of programs viewed, and a HUGE spurt in advertising spots viewed



- The total number of Discrete Programs telecast has gone down in Ramadan – a factor of the change in channel FPCs across weekdays and weekends
 - Considering the drop in number of programs, viewing of discrete programs has actually over-indexed by 16% compared to before Ramadan
- Increase in spot viewing can be attributed to the significant increase in Average Daily Reach for individual channels
 - There is a 50% increase in Average Daily Reach at Individual channel level on average



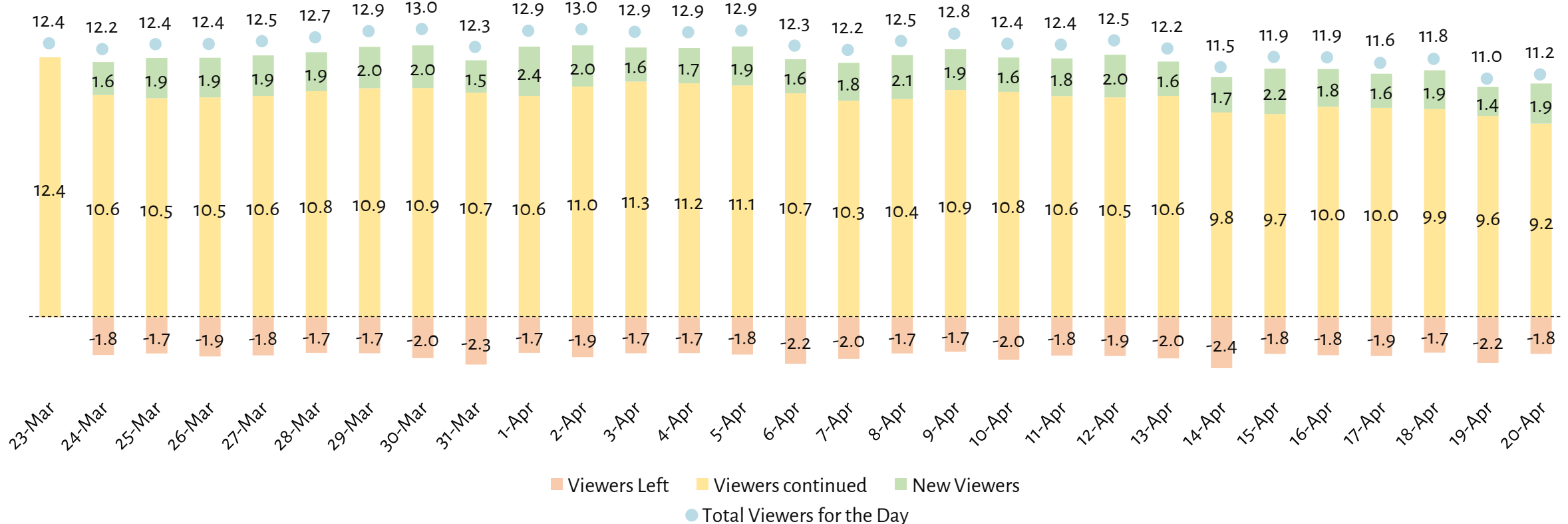
Viewer movement and Viewing on Streaming in Ramadan



Consistent movement of viewers by day

- On average, every day saw approx. 15% viewers moving out, and a similar number moving in
 - There was slightly higher (~1%) movement out compared to movement in as Ramadan progressed
 - One can also see higher dips on Fridays (24 & 31 March, 7 & 14 April)

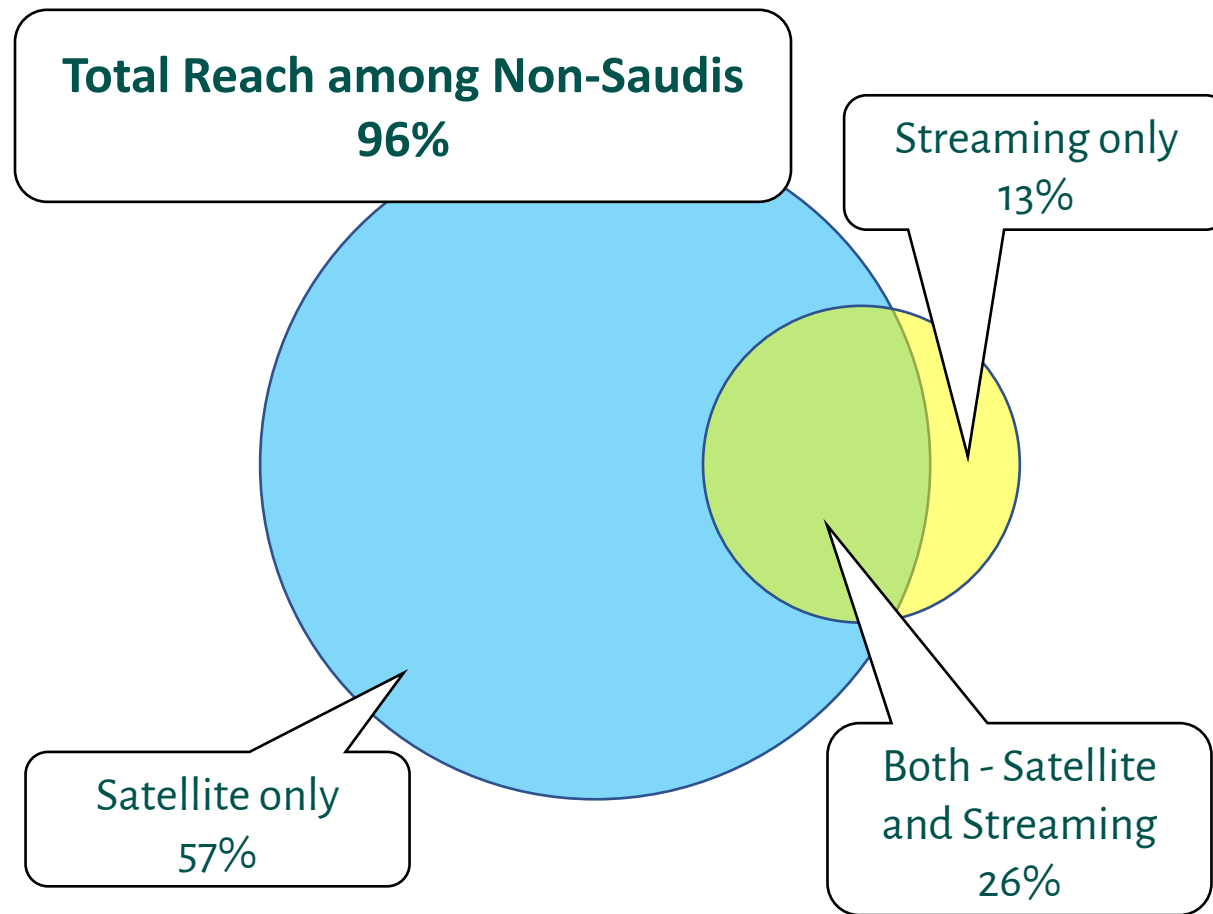
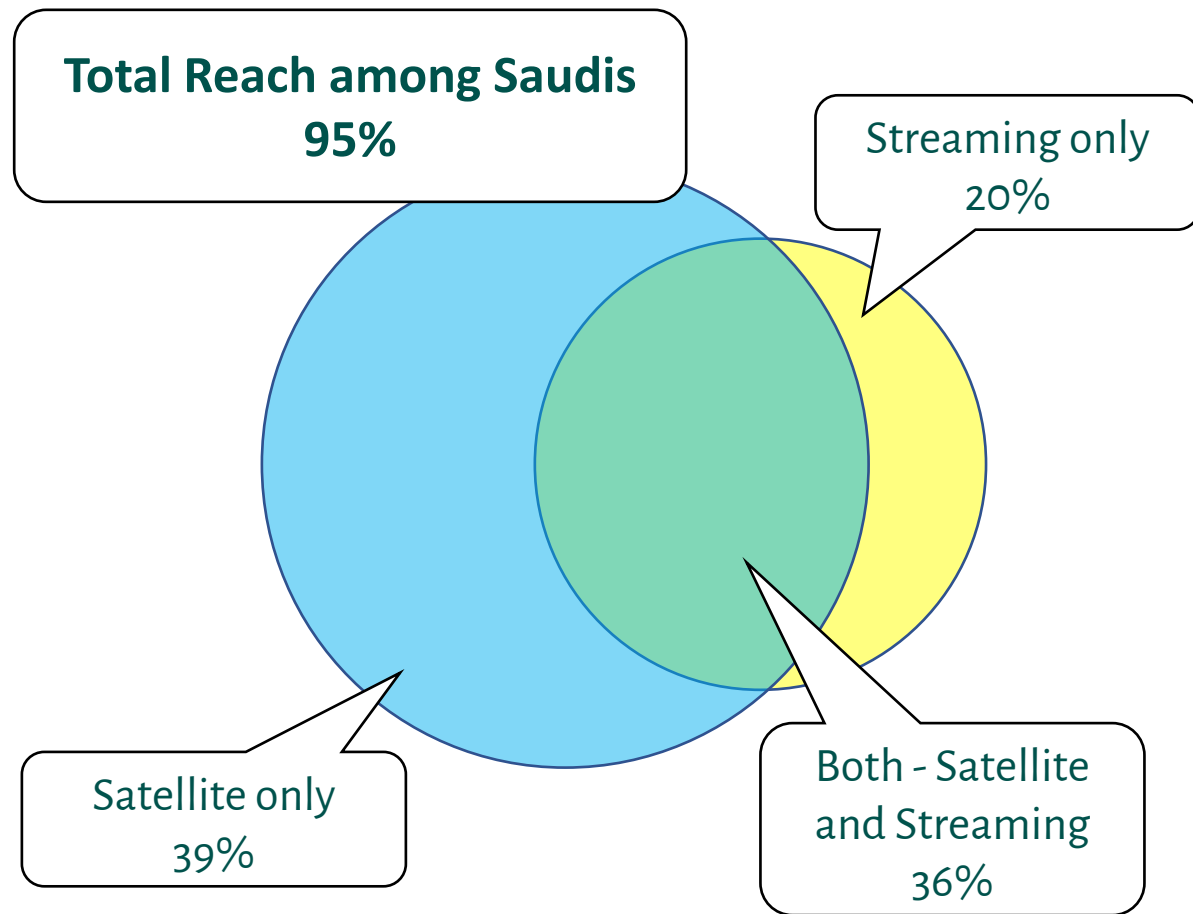
Movement of Viewers by Day (millions)





High Reach of Satellite; Streaming is significant High Duplication between Satellite and Streaming

Saudis view TV through Streaming more as compared to non-Saudis

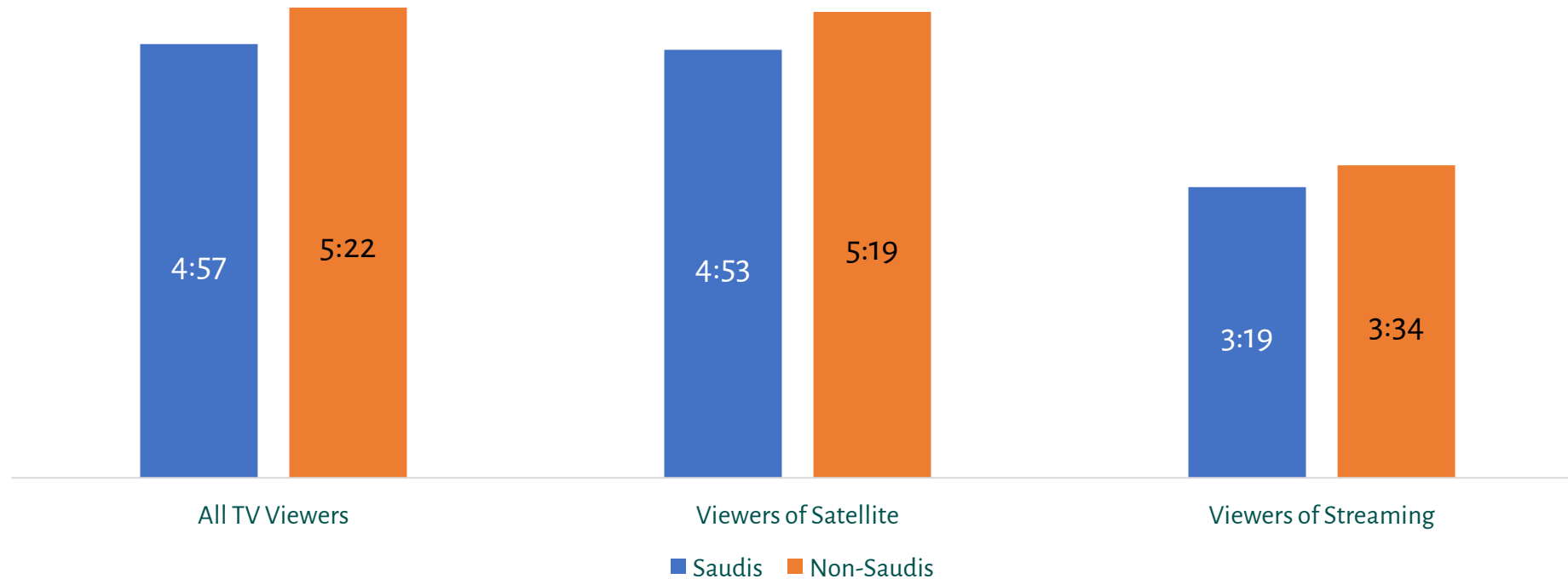




Viewers of Satellite spend more time on it as compared to Viewers of Streaming

Non-Saudi viewers spend a little more time viewing as compared to Saudi viewers

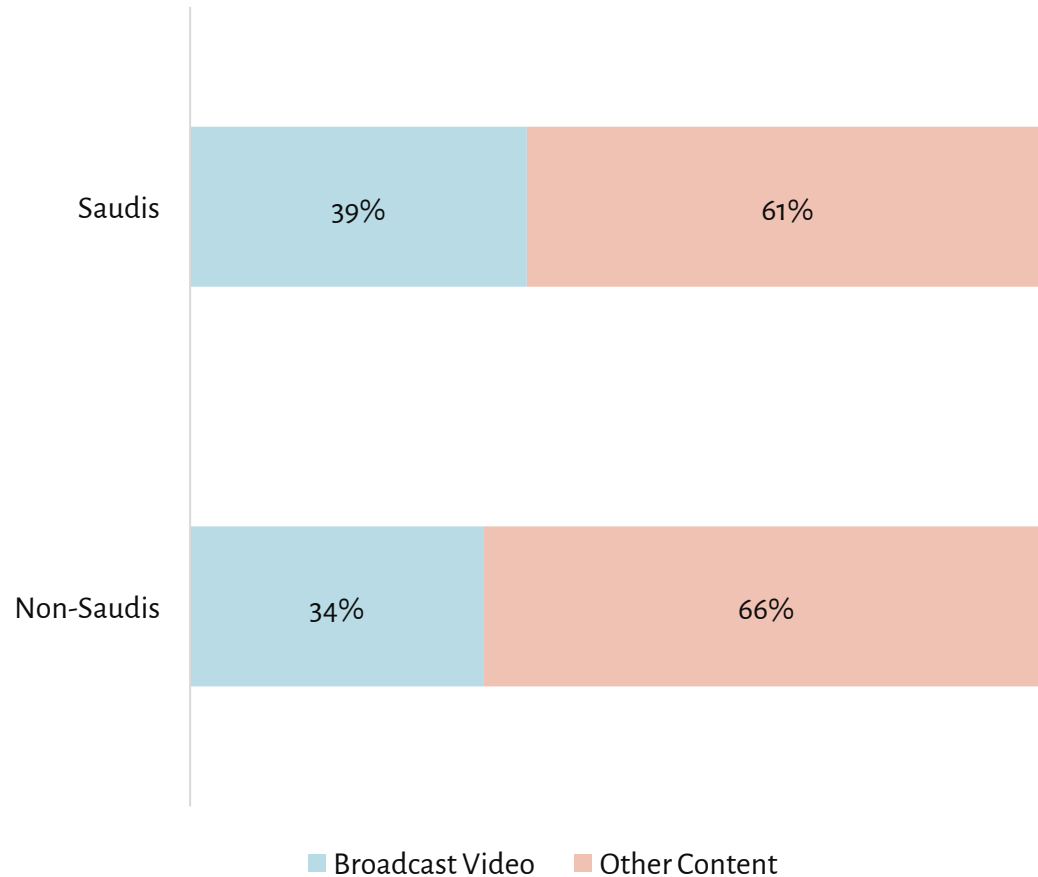
Time Spent Viewing (Viewers) Daily





Significant viewing of Broadcast Video on Streaming

% Share of Broadcast Video to Streaming



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

Comparison of viewing patterns in the

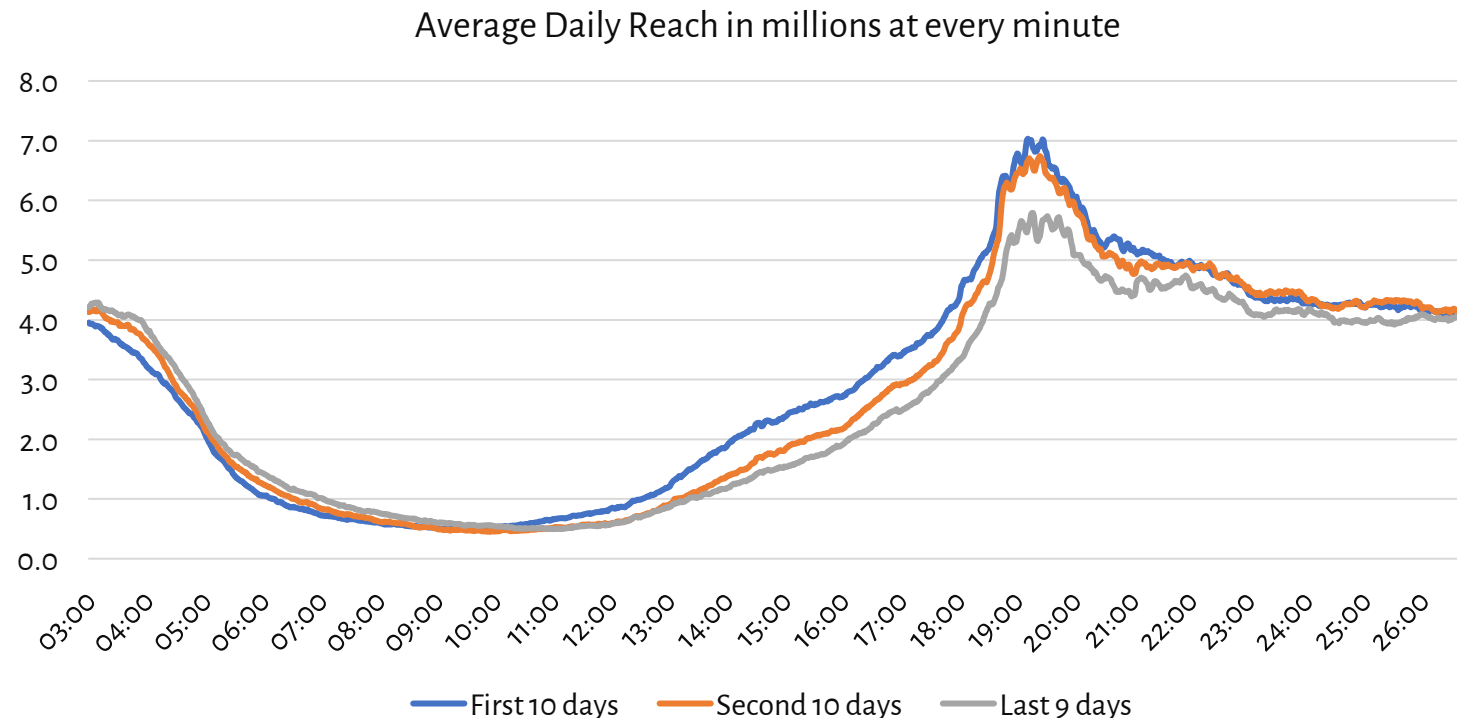
**1st 10 days,
2nd 10 days, and
3rd 9 days**

of Ramadan



Changes in Average Daily Reach as Ramadan progressed

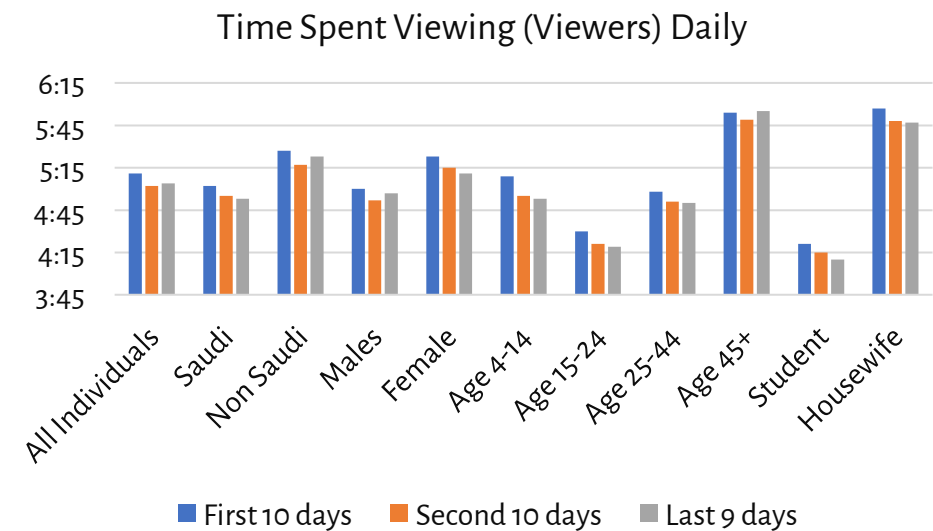
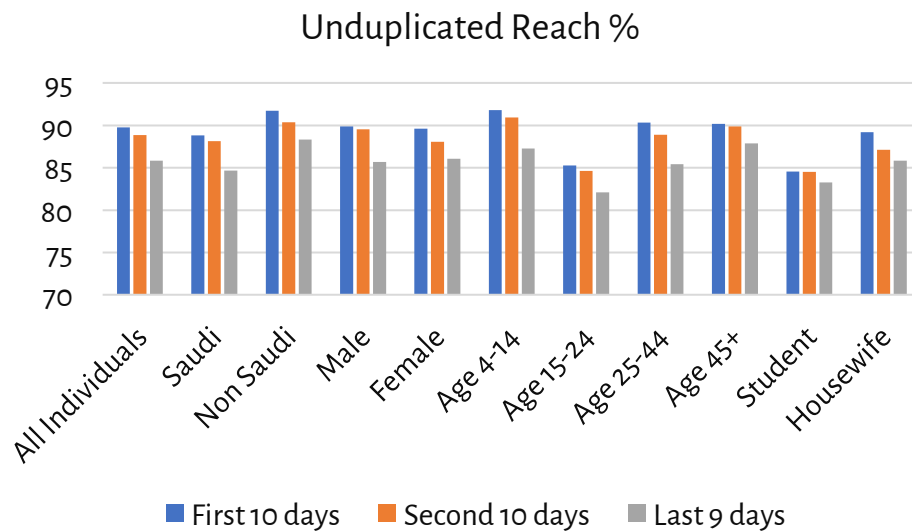
- Last 9 days had an increase during Suhoor but a decrease in viewership across the afternoon and in usual prime time
- 2nd 10 days had a drop in viewership across afternoon





Decrease in viewership in the last 9 days of Ramadan is driven by Reach rather than Time Spent Viewing

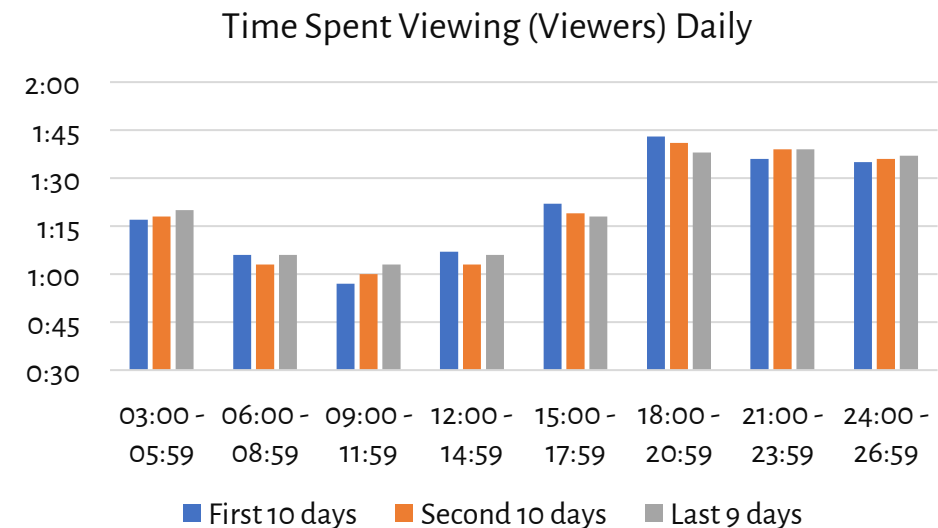
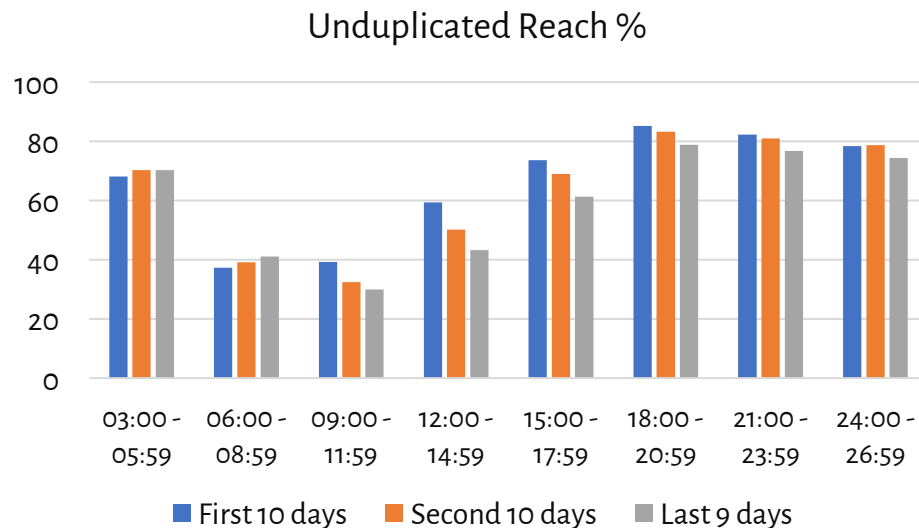
- The decrease in Reach is across all demographic groups
- Non-Saudis and Age group 45+ have maintained the time spent viewing across Ramadan, however younger age groups spent less time watching TV as Ramadan went by





The decrease in reach is driven by daytime timebands across the day (9:00-17:59)

- Less people were reached from 9:00 to 17:59 as Ramadan progressed
- There is no significant difference in time spent viewing across Ramadan
 - Certain dayparts show slight shifts





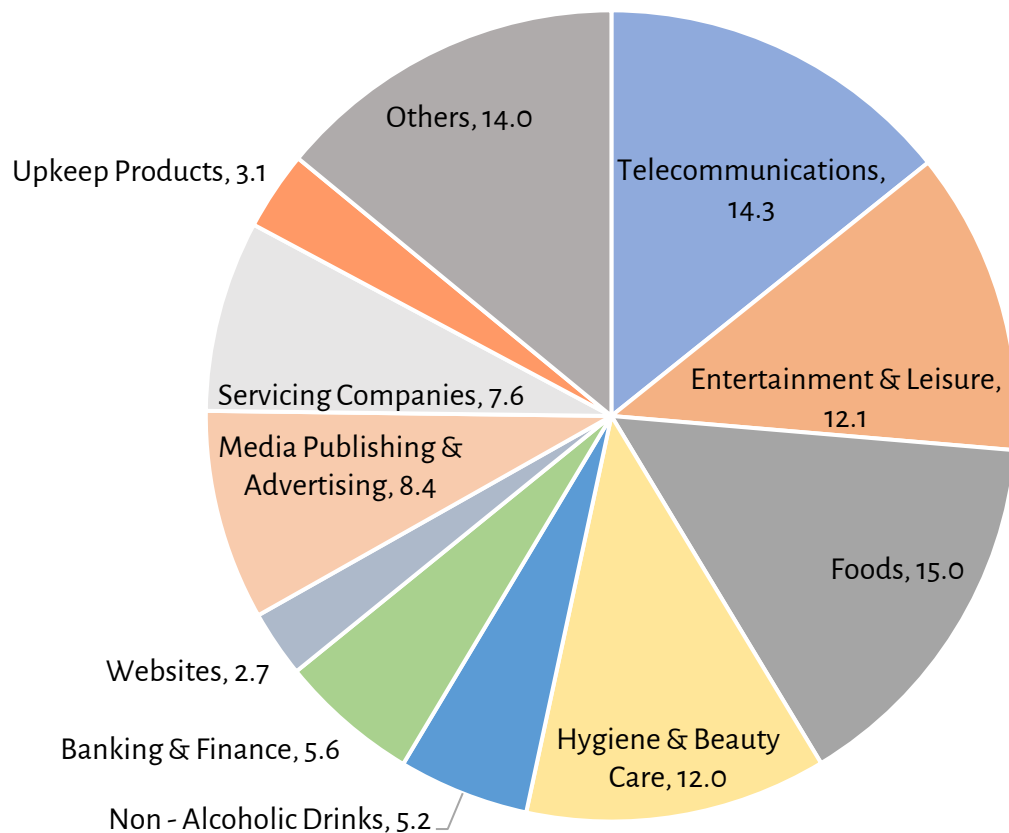
Advertising Viewership



% Share of Advertisements by Sector

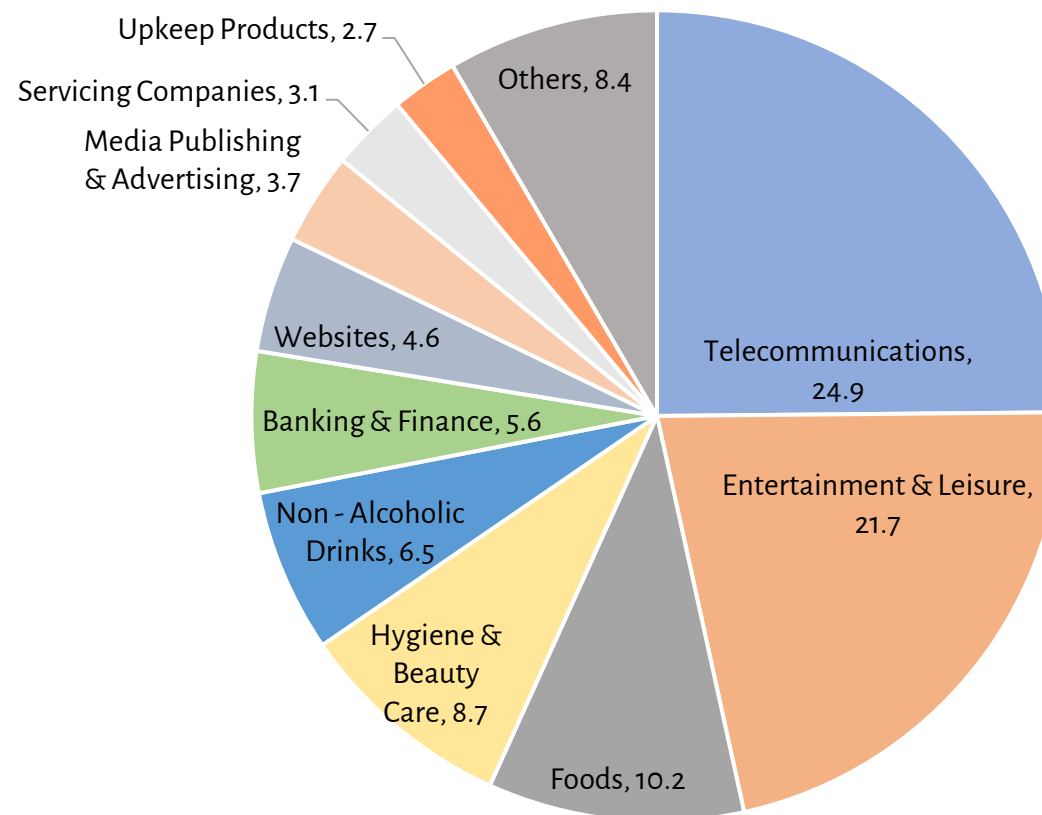
Share of Number of Spots

Total Spots: 142,337



Share of GRP

Total GRPs: 24.1 billion



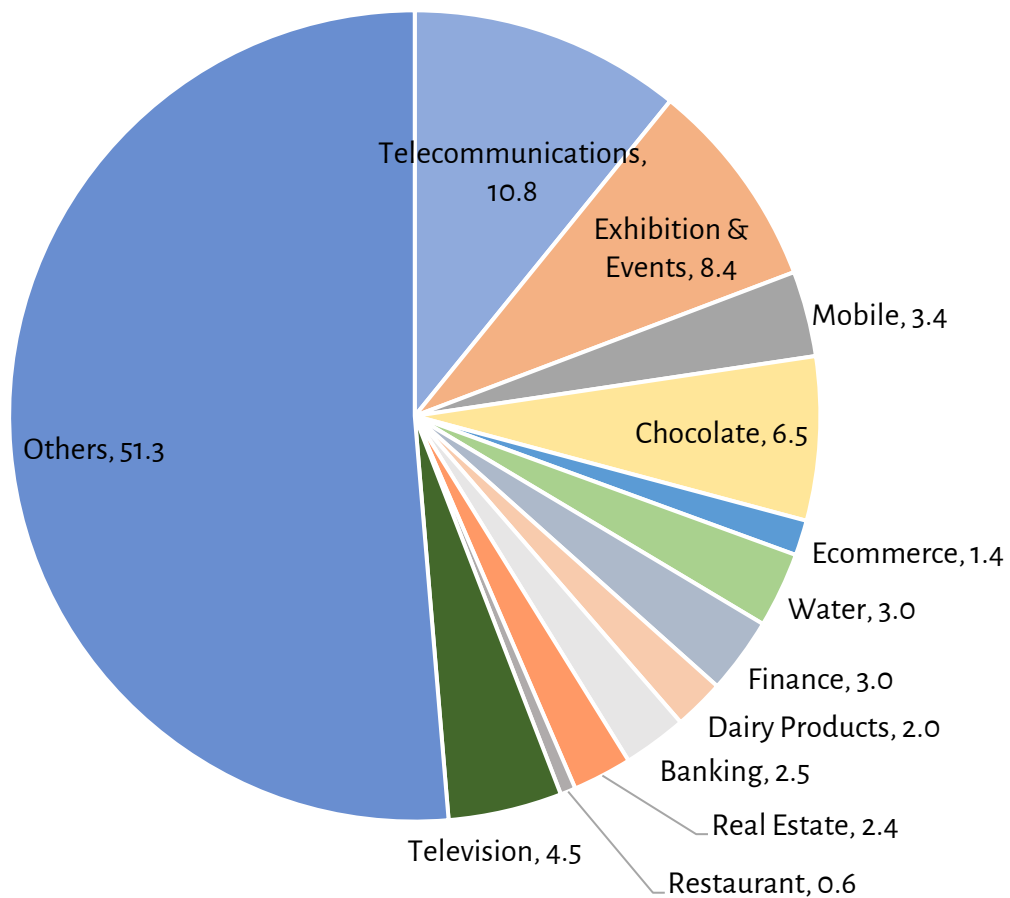
GRP: Total number of contacts cumulated for all days of the analysis and all spots in the campaign and expressed as an absolute value



% Share of Advertisements by Sub-Sector

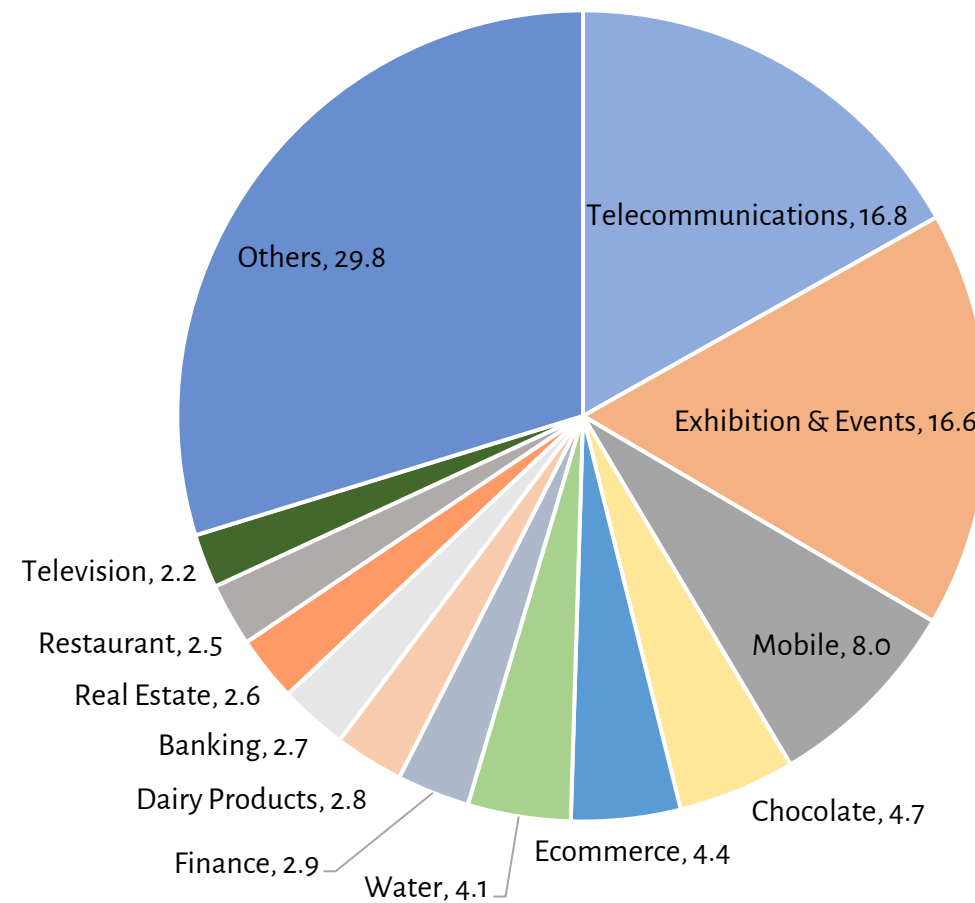
Share of Number of Spots

Total Spots: 142,337



Share of GRP

Total GRPs: 24.1 billion





Top 10 Advertisers in Ramadan (Ranked by GRP)

Advertiser	GRP (mn)	GRP (%)	Unduplicated Reach (mn)	Unduplicated Reach (%)	# Spots
Saudi Ministry of Culture	3,559	17,501	16.5	81.3	8,359
Saudi Telecom Company	2,873	14,128	16.3	80.1	9,872
Etihad Etisalat Company	1,370	6,738	15.3	75.4	3,391
MBC Group	1,206	5,930	15.3	75.3	8,455
Ferrero Spa	1,043	5,130	14.3	70.4	7,270
Foodpanda	988	4,860	15.2	74.5	1,279
Health Water Bottling Co Ltd	987	4,856	14.6	71.7	3,886
Al Faisaliah Group	731	3,595	13.2	65.1	3,258
Unilever	693	3,409	14.5	71.2	6,561
Future Investment Initiative Institute	682	3,352	15.0	73.8	875

GRP: Total number of contacts cumulated for all days of the analysis and all spots in the campaign

Unduplicated Reach: An individual who has seen the ad at least once in the month



Top 10 Brands in Ramadan (Ranked by GRP)

Brand	GRP (mn)	GRP (%)	Unduplicated Reach (mn)	Unduplicated Reach (%)	# Spots
Saudi Telecom Company	2,873	14,128	16.3	80.1	9,872
Ramadan Season	2,478	12,186	16.2	79.8	4,627
Mobily	1,370	6,738	15.3	75.4	3,391
The Year Of Arabic Poetry 2023	1,081	5,315	15.8	77.5	3,728
MBC Group	1,034	5,086	15.3	75.0	6,605
Hungerstation	988	4,860	15.2	74.5	1,279
Nova Water	987	4,856	14.6	71.7	3,886
Al Safi	731	3,595	13.2	65.1	3,258
Umm Al Qura For Dev. & Construction	682	3,352	15.0	73.8	875
Darco	580	2,853	14.4	70.8	601

GRP: Total number of contacts cumulated for all days of the analysis and all spots in the campaign

Unduplicated Reach: An individual who has seen the ad at least once in the month

Thank you



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