Ipsos Consumer Book '22

AN ALL-IN-ONE GUIDE FOR MARKETERS IN PAKISTAN

DECADE-LONG MEGATRENDS IN CONSUMER BEHAVIOR AND MULTI-MEDIA CONSUMPTION
BASED ON MOST ROBUST SINGLE-SOURCE RESEARCH

CMi
Consumer Multimedia Index

IPSOS IN PAKISTAN • 10 YEARS OF INSPIRING INSIGHTS (2011-2021)
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ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people. Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques. Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999.

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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater. At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth. This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People. To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do. So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:

> **“YOU ACT BETTER WHEN YOU ARE SURE”**

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FOREWORD

In the last decade, Pakistan has witnessed numerous highs and lows. Having made the journey from feature phones to smartphones, sailing through economic, political, and social instabilities, and persevering through looming terrorism threats, energy crises, and ultimately facing a traumatic global pandemic.

As we met these challenges, we adapted to the needs of the time, and we evolved. However, each of these events, particularly the pandemic, will also have longer-term transformative effects on the way people talk, collaborate, and negotiate with each other.

The next 10 years may present additional crises, from cybersecurity or environmental risks to geopolitical volatility, new pandemics, biological or otherwise. Against such a backdrop of uncertainty and instability it will be essential for all organisations to have the latest accurate and reliable information at their disposal. As Ipsos founder Didier Truchot puts it, "Ultimately, success comes down to a simple truth; You act better when you are sure".

Such transformation in consumer behaviour and multimedia consumption calls for a more advanced lens to analyse and synthesize these key trends. To mark the 10th birthday of Ipsos in Pakistan, as a gesture of gratitude to our valued clients who have helped us to grow from scratch to the number one market and social research agency in Pakistan, we are publishing the "Ipsos Consumer Book". Based on data from the last decade, this book provides the opportunity for evidence-based agile planning for the coming decade and beyond.

Using the most robust single-source syndicated pan-industry research in Pakistan Consumer Multimedia Index (CMi) archives, the "Ipsos Consumer Book" would be highlighting mega trends and key shifts in:

- Pakistanis' demographics and psychographics
- Behaviour towards 70+ categories pertaining to food, home & personal care, durables, gadgets, and services sectors
- Reach and consumption frequency of electronic, print, out of home media, and digital and social platforms
- Rural markets' potential to augment staggering business growth

Readers need to bear in mind that our latest CMi wave data collection concluded just before the COVID-19 lockdown in Pakistan, hence comparisons drawn in this book with the 2010-11 wave remain valid. While browsing through above datasets, I observed some mega trends emerging during last decade which may help inform public policy makers, entrepreneurs and marketers in their future strategic planning and communication. These are listed below.

- Overall infrastructure, housing quality, literacy, connectivity, home appliances usage and other wellbeing indicators have improved significantly
- Rapid urbanization and reduced agriculture activity appear to erode Pakistan's traditional rural identity and character
- There has been an explosion of mass and social media but led to numerous fragmented audience segments with ever diminishing attention span. Once giants of 20th century, some mediums are becoming obsolete
- Polarization in psychographic orientation has intensified leading to a more divided society in terms of mindsets. Pakistani youth seem to aspire for modernity while preserving traditional cultural values
- Family as 'institution' has undergone drastic changes. Average family size and time spent together; both have decreased while 'joint family' system is no longer a preference
- An interesting paradox is observed where people have lot more 'activities' to do now but feel less engaged and report more boredom than was the case 10 years ago
- The uptake of 'heathier' categories and 'branded' products has increased which enabled our local brands to strengthen and compete
- Hanging out and outdoor dining has increased manifolds across all segments. Similar upward movements can be seen in online shopping, ready-made clothing, and leisure travel

Here I would like to acknowledge and thank those corporate leaders in Pakistan who have contributed towards this book through their invaluable special messages commenting on the recent evolution of consumer marketing and highlighting avenues of potential growth in Pakistan. I am also indebted to our worthy clients who sponsored this initiative through their advertisements and helped us transform our idea into a tangible asset. Last, but not the least, I also appreciate my colleagues for their relentless hard work in making it happen.

ABDUL SATTAR BABAR

Founding CEO
Ipsos in Pakistan

Committed to improving Pakistani lives

P&G is committed to improving Pakistani lives, now and for generations to come. For over 30 years, P&G has fulfilled its purpose by introducing premium quality brands and making significant investments in the industry, community and talent development.

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FROM THE DESK OF CHIEF EDITOR

What an experience! Going through piles of data, surfing through rows upon columns of oversized spreadsheets, diving deep into every data-point, sensing the soundless differences between various societal segments, cross-tabbing various questions, making temporal comparisons spanning a decade, and then, finally that *eureka* feeling, when you unmask the key insights lying below the surface. Following closely comes an even more demanding stage, condensing a decade's worth of insight into a coherent whole. Summarizing trends via bespoke infographics in conjunction with an economy of words. A tiring project, for sure, but one which is my privilege to bring to you.

This book, the latest of many publications by Ipsos during its first decade in Pakistan, is a perfect example of 'seize what is highest and you will seize what is between' as it endeavors to capture the major trends and shifts of Pakistan's socioeconomic climate. These insights are primarily derived from most robust syndicated pan-industry research Consumer Multimedia Index (CMi) whose overview is available on next page. None of this would have been possible without our amazing, hard-working operations' team who braved all weathers to gather data from the diverse geographies of Pakistan.

Organized into eleven sections, starting from a brief overview of Pakistan which provides the context of Pakistan's socioeconomic landscape followed by sections dedicated to demonstrating how consumer behavior has evolved over time. The next section covers the psychographic evolution. Shifts in the mediums of communication have been documented in the next two sections. Succeeding chapters focus on the penetration of different products and service categories. The emergence of retail chains, shopping malls and e-commerce platforms along with general shopping habits are captured in the next chapter. The rapid urbanization of rural Pakistan is a new, exciting reality, aptly billed as 'the great opportunity' in the final chapter.

Throughout this book, changes are compared across a ten-year period. However, in some cases, owing either to the recency of specific phenomenon, or data compatibility challenges, we have utilized other CMi waves from 2012 to 2018.

I would like to thank my colleagues for their assistance in this endeavor and I wish the readers good luck on a journey of insights. May you enjoy it as much as I did!

ABDULLAH UMAR KHALID

Chief Editor

IPSOS IN PAKISTAN • 10 YEARS OF INSPIRING INSIGHTS (2011-2021)

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OVERVIEW OF CMi

This book is a byproduct of Consumer Multimedia Index (CMi), a proprietary single source research methodology protected and registered by Intellectual Property Organization (IPO) of Pakistan. Official trademark CMi is also registered with Trade Marks Registry (TMR), a premier body of IPO-Pakistan under the Trademarks Ordinance, 2001. Over time, CMi has become a multi-object tracking & hierarchically organized single source data bank that entails a panoramic 360° media reach and frequency, and selected categories' market dynamics in all urban and rural areas across Pakistan. Latest data collection wave was carried out from January to March 2020. CMi offers all-inclusive research data as one-stop solution inevitably required for marketing & media planning. Since its endorsement by Pakistan Advertisers Society (PAS) in 2009, this syndicated study is the most cited reference all over the country that captures basic information for 10 media vehicles such as penetration, channels/titles reach, frequency and recency, cross-media usage, genre/section preferences, place and audience profiling and much more. Over 70 products/services categories' consumption data, lifestyle and psychographic profiling of consumers are also included in the scope of this unique research.

ADIL JAMIL

Head of BHT

CMi at a glance:

What?	How?	Who?	Where?
A National Representative Study with country's most robust sample & coverage since 2009, to yield unprecedented single source data about Pakistani Consumers.	• Face to Face Interviews • Computer Assisted Personal Interviews • Door to Door Methodology	• General Public of Pakistan, aged 12 years and above with equal gender split • All SECs (excluding E2 in urban)	• Nationally Representative Sample • 15,000 Respondents • 15 Key Cities (Individually Reported) • 35 small-medium cities' panel as 'Rest of Urban' • 500 Villages across all provinces

IPSOS IN PAKISTAN
10 YEARS OF INSPIRING INSIGHTS (2011-2021)

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*N°1 Brand Worldwide in the Female Face Care Segment. Source: Nielsen Database. N°1 in both unit and value sales. Female Face Care Market in 35 countries (= 80.4% of World GNI), December 2019
**Among the serums L'Oréal Paris. ***Clinical scorage, 53 women.

ORIENTmcMcCANN

BELIEVE IN PAKISTANS' GROWTH POTENTIAL

Defined by its iconic resilience and magnificent determination, Pakistan is truly a fertile land of enormous opportunities. Having sailed through varying and challenging geo-political and socio-economic phases, many local players as well as multinationals have posted high growth in last decade across all sectors, ranging from food to non-food categories, from durables to apparels from online platforms to better quality living for some sections of the society. Most recent testimony of our national strength is as how Pakistan's economy seemed to have weathered the pandemic shock quite well relative to its peers despite less-than-ideal healthcare infrastructure and lower literacy levels.

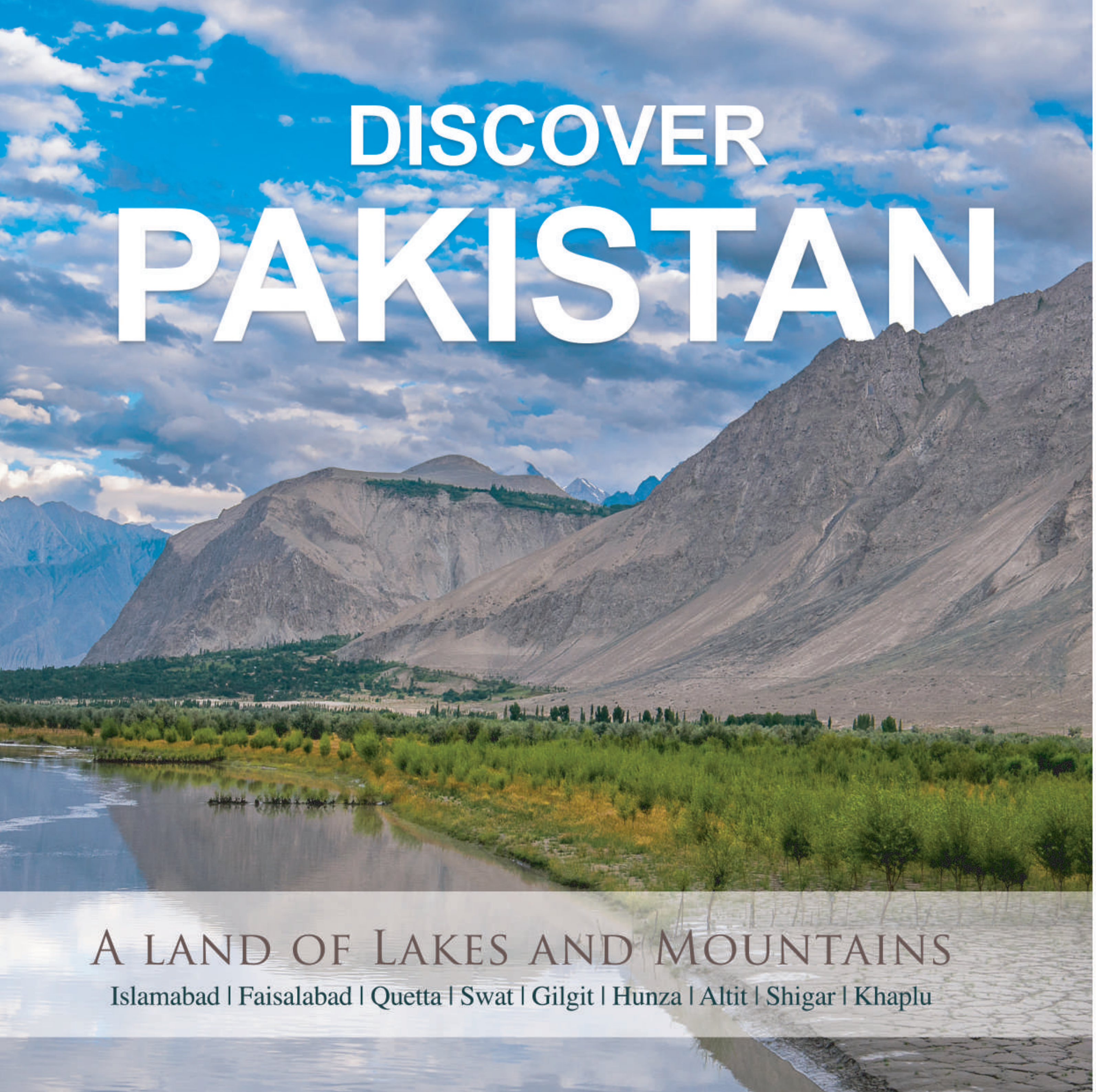
Being a firm believer in Diversity and Inclusion, as one of the critical success factors, I would like to encourage my countrywomen to be part of active workforce and lead from the forefront. Our religion Islam, Pakistani culture, and constitutional legal framework all in spirit espouse not only equity for both genders rather more respect and protection for women. Regardless of discipline, position, or role at any public or private organisation, my advice to female colleagues is to believe in their competence and skills and keep on climbing up career growth ladder with confidence. None can stop you if you have the will to reach at the helm of affairs. Familial changes in your personal lives shouldn't come in your way to attain leadership.

Effective communication is key to win and retain customers for the products and services we offer in the marketplace. As advertisers' fraternity we need to nurture and foster such an advertising in Pakistan which evokes favorable emotional bonding towards brands on the one hand and makes us proud of our rich local traditions and values, on the other. While pursuing our business goals, we also need to preserve our worthy heritage and legacy we inherited from our ancestors.

Capitalizing on the accomplishments by Pakistan Advertisers' Society to date, I would emphasize institutionalizing best global practices among media stakeholders and patronizing pan-industry research and innovation initiatives. Among other priorities, we need to help concerned authorities regulate already prescribed decent 'balance' of airtime between content and commercials on various media touchpoints. We need to work together to elevate our standards across all the stakeholders. And most importantly, we need to strive for a higher purpose in the interest of Pakistan.

DR. ZEELAF MUNIR

Chairperson
PAKISTAN ADVERTISERS SOCIETY



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PAKISTAN
AN OVERVIEW

PAKISTAN KEY FACTS

ISLAMIC REPUBLIC OF PAKISTAN

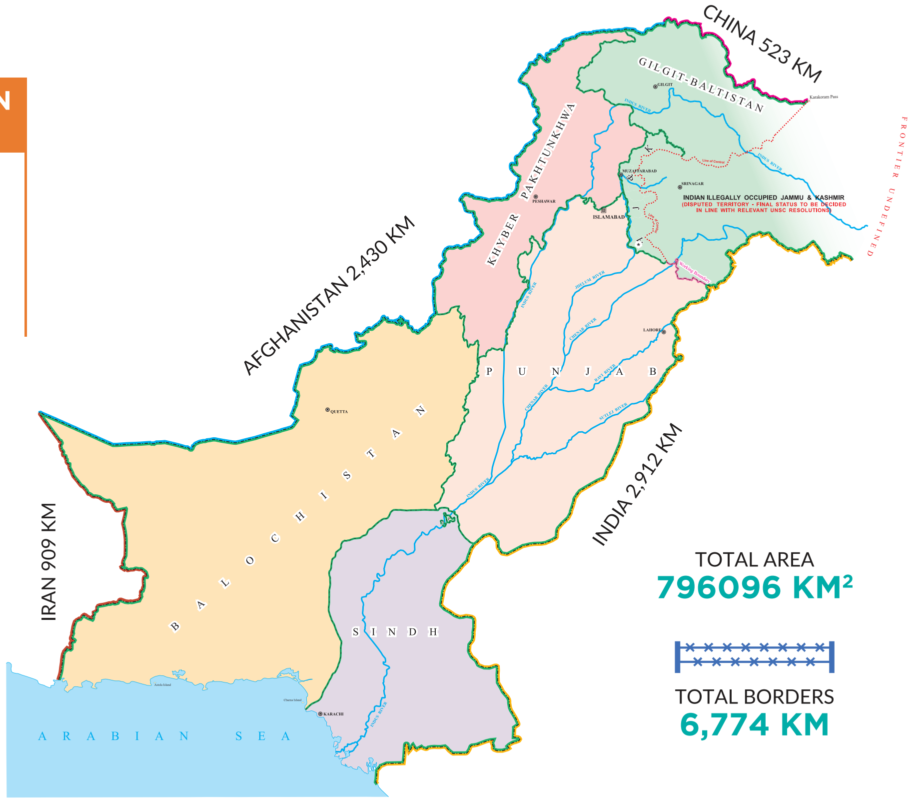
ADMINISTRATIVE DIVISION	CAPITAL	AREA SHARE	POPULATION SHARE
Balochistan	Quetta	44%	5%
Islamabad Capital Territory	Islamabad	0.1%	1%
Khyber Pakhtunkhwa	Peshawar	13%	17%
Punjab	Lahore	26%	54%
Sindh	Karachi	18%	24%

APPROX. TOTAL NUMBER OF CITIES:

500

APPROX. TOTAL NUMBER OF VILLAGES:

45,000



TOTAL AREA

796096 KM²

TOTAL BORDERS

6,774 KM

MAJOR LANGUAGES SPOKEN*

Language	%
Urdu	14%
Punjabi	36%
Pushto	17%
Saraiki	13%
Sindhi	11%
Hindhko	4%
Balochi	4%
Others	1%

GEOGRAPHICAL NOMENCLATURE OF THIS RESEARCH

15 Key Cities: These are the major urban centers that make 22% of the total country's population i.e. Karachi, Lahore, Faisalabad, Gujranwala, Hyderabad, Rawalpindi/Islamabad, Peshawar, Multan, Quetta, Mardan, Sargodha, Sukkur, Bahawalpur, Sialkot & Sahiwal.

Rest of Urban (RoU): These are the remaining 35 cities other than the 15 key cities of Pakistan, they make another 22% of the total country's population.

Rural: All rural areas combined, they make 56% of the total country's population This research (CMi-2020) sampled 500 villages from all provinces/regions to give robust representativeness of rural Pakistan.

*Source: Consumer Multimedia Index 2020 | Source for all other data: Government of Pakistan

PAKISTAN POPULATION FACTS

DEMOGRAPHIC FEATURES

	1998	2017	CUMULATIVE CHANGE (%)
0 – 14 years	43.4	40.3	-7.1% ↓
15 – 29 years	17.4	27.1	55.7% ↑
30 years and above	39.2	32.6	-16.8% ↓
Household Size (Number)	6.96	6.39	-8.2% ↓
Share of Urban Population (%)	32.5	36.4	12.0% ↑
Population Density per Sqr. KM	166.3	260.88	56.9% ↑

PROJECTED POPULATION* (2021)

215.25 MILLION

5TH RANK IN THE WORLD

TOP 5 CITIES

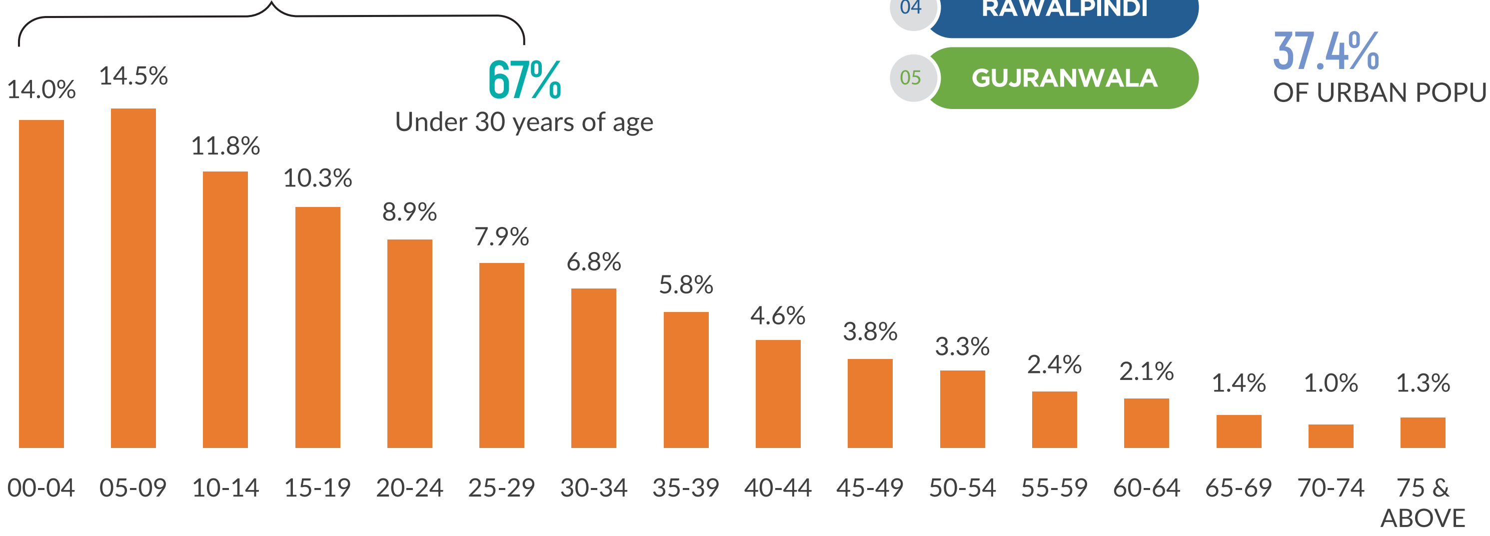
01 KARACHI
02 LAHORE
03 FAISALABAD
04 RAWALPINDI
05 GUJRANWALA

35.4 MILLION
COMMULATIVE POPULATION

16.4%
OF NATIONAL POPULATION

37.4%
OF URBAN POPULATION

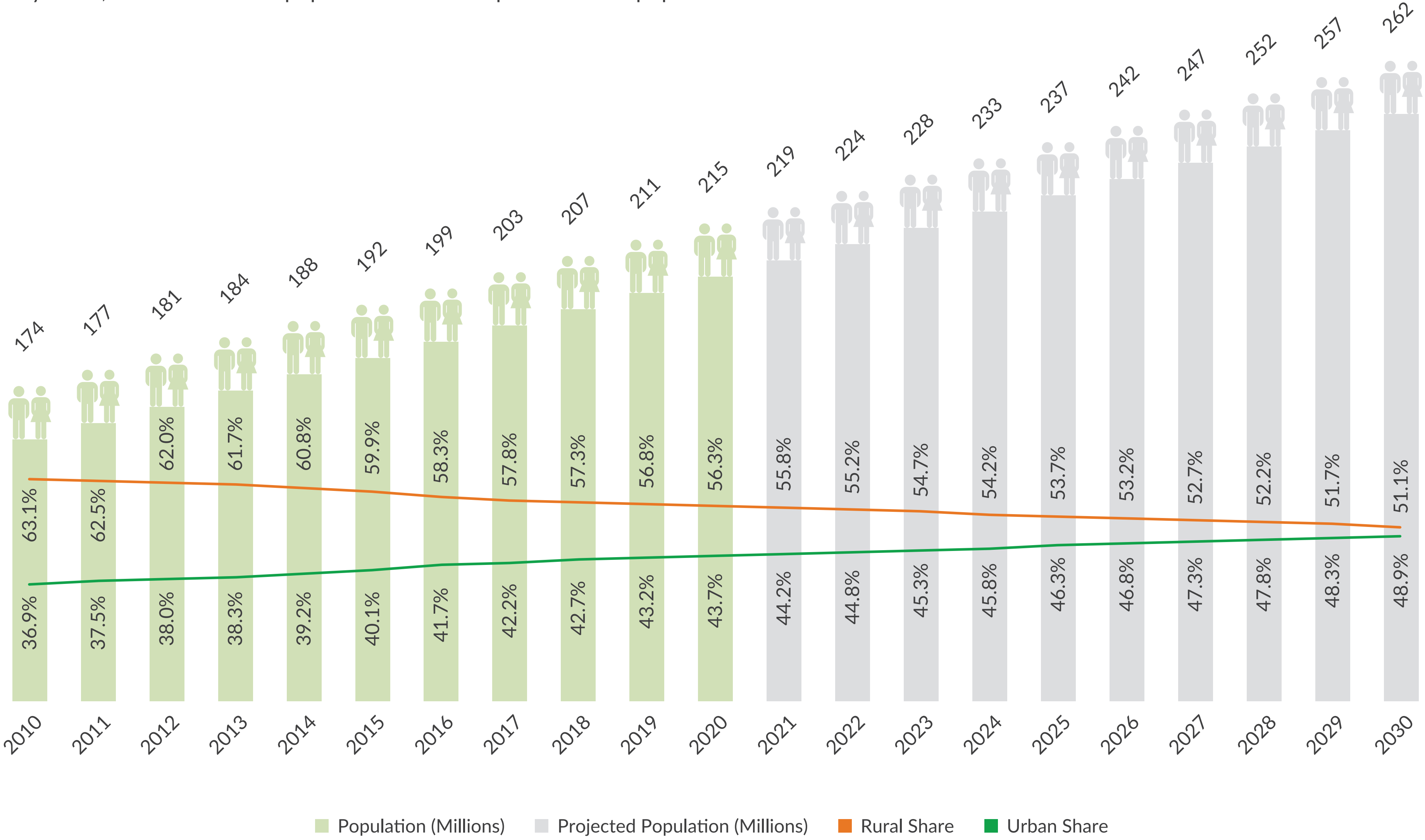
AGE DISTRIBUTION (%)



Source: Pakistan Bureau of Statistics | *Economic Survey of Pakistan 2020-21

PAKISTAN POPULATION GROWTH

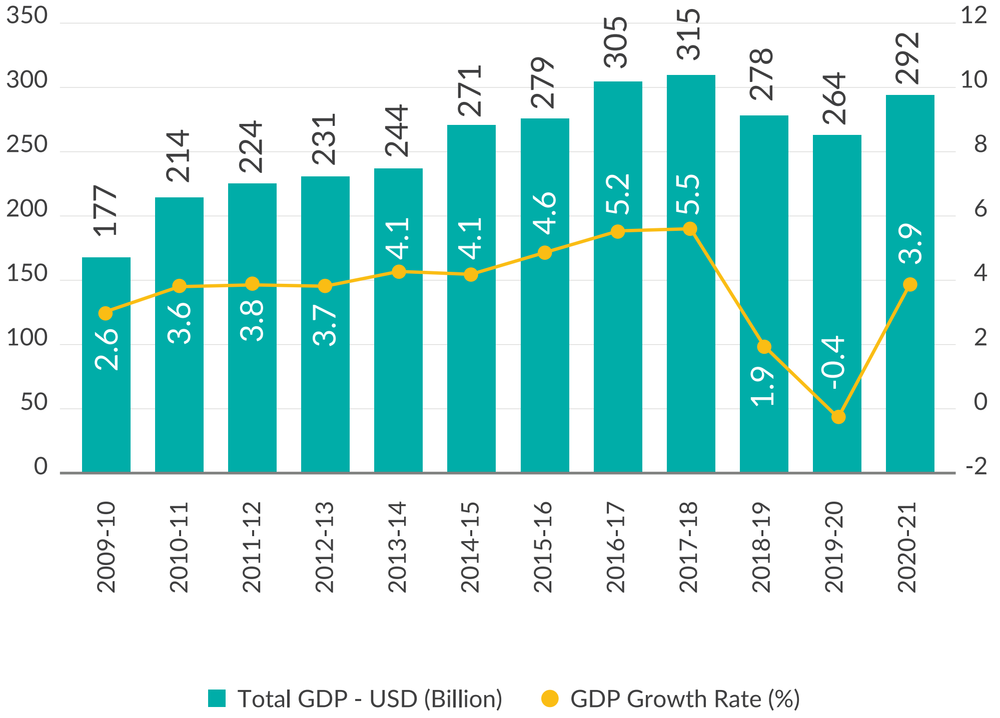
By 2033, Pakistan's Urban population would surpass the rural population



Source: Pakistan Bureau of Statistics

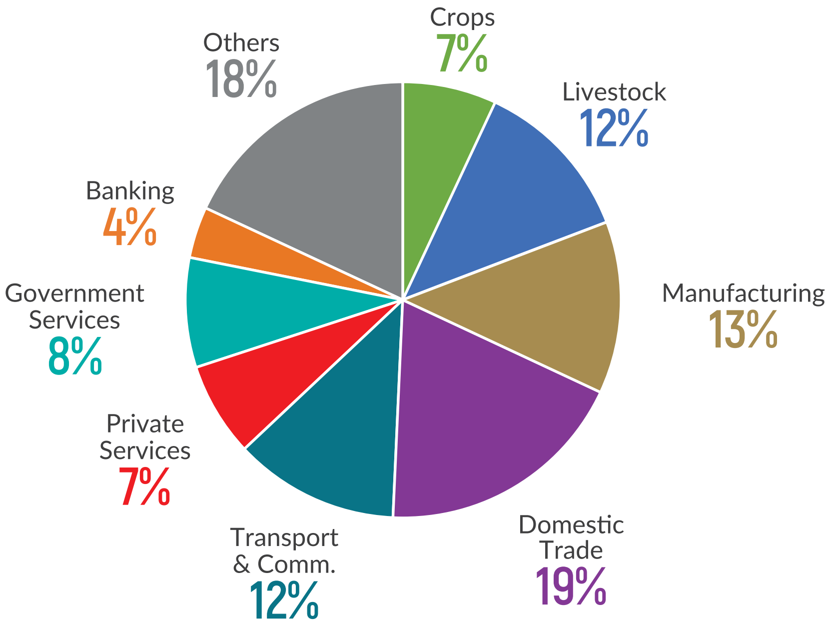
KEY ECONOMIC FACTS

GROSS DOMESTIC PRODUCT (GDP)*



CONTRIBUTION TO GDP

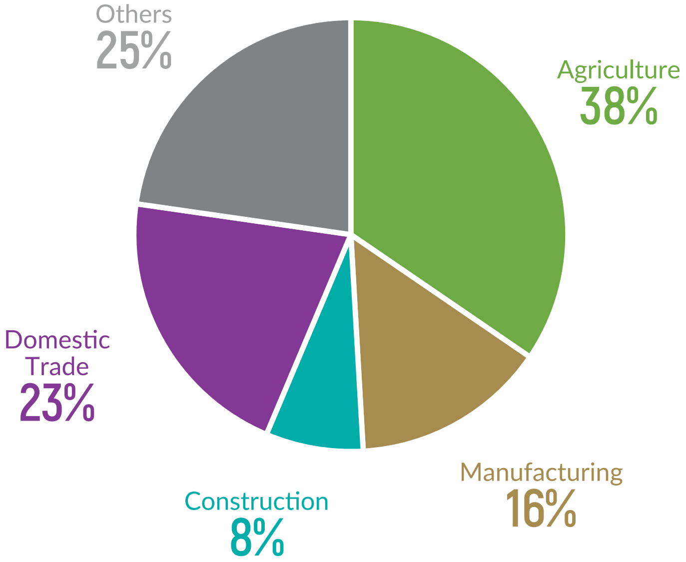
2020-21 BY SECTOR**



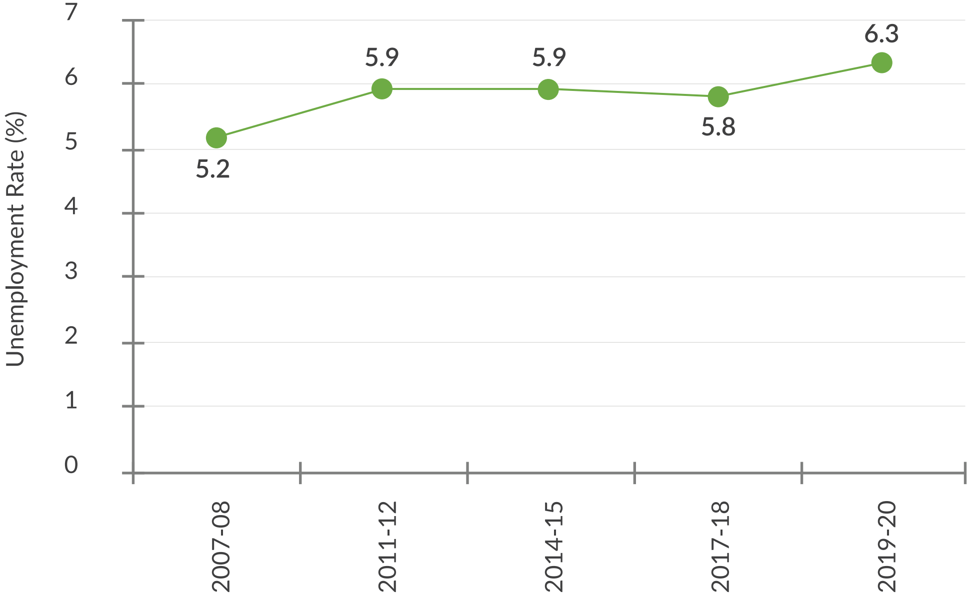
*Source: World Bank | **Source: Pakistan Economic Survey 2020-21 (https://www.finance.gov.pk/survey_2021.html)

TOTAL EMPLOYMENT = 64 MILLION

SECTORAL DISTRIBUTION OF EMPLOYMENT 2019-20



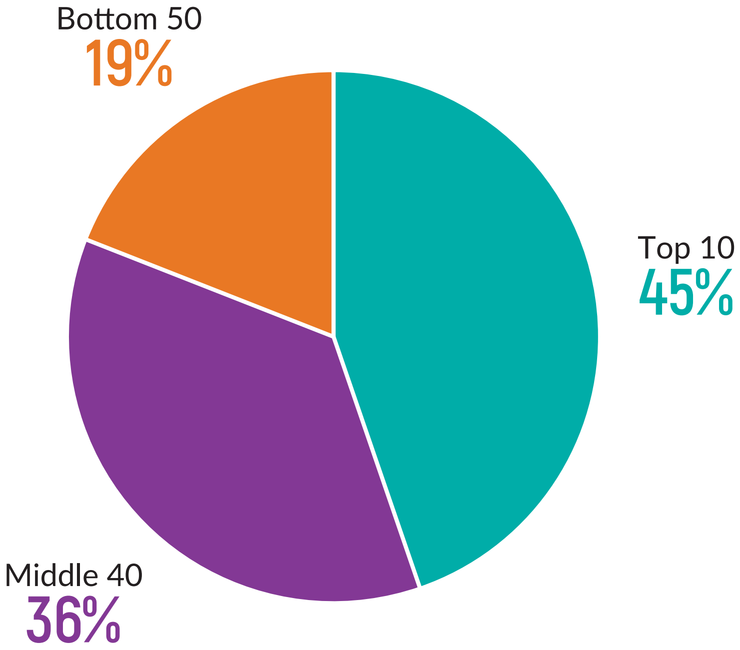
UNEMPLOYMENT RATE



Source: Pakistan Social & Living Standards Measurement Survey (PSLM) -Pakistan Bureau of Statistics (PBS)

KEY ECONOMIC FACTS

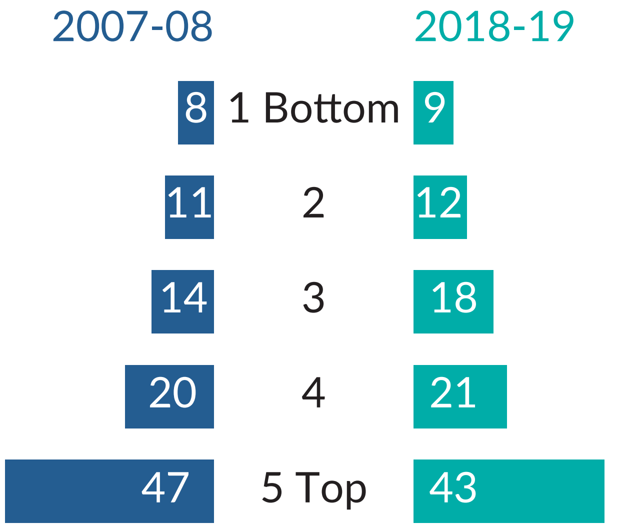
INCOME DISTRIBUTION*



THE TOP 10% ONLY ACCOUNTS FOR

20 MILLION CONSUMERS

INCOME SHARE BY QUINTILE** (%)



PALMA RATIO*

2007-08	2018-19
5.93	4.78

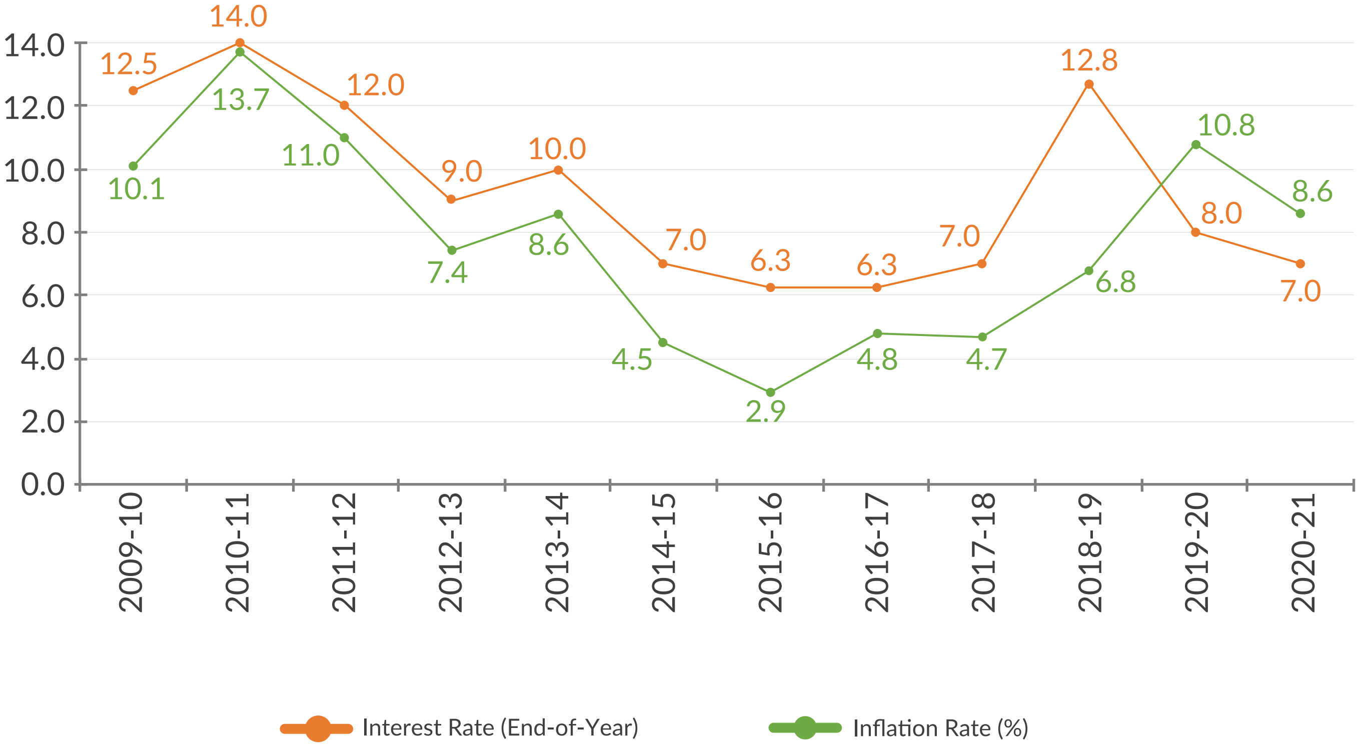
*Ratio of income shares of the top and bottom quintiles.

The Palma ratio is the share of all income received by the 10% people with highest disposable income divided by the share of all income received by the 40% people with the lowest disposable income.

*Source: World Inequality Database | **Source: Pakistan Economic Survey 2020-21 (https://www.finance.gov.pk/survey_2021.html)

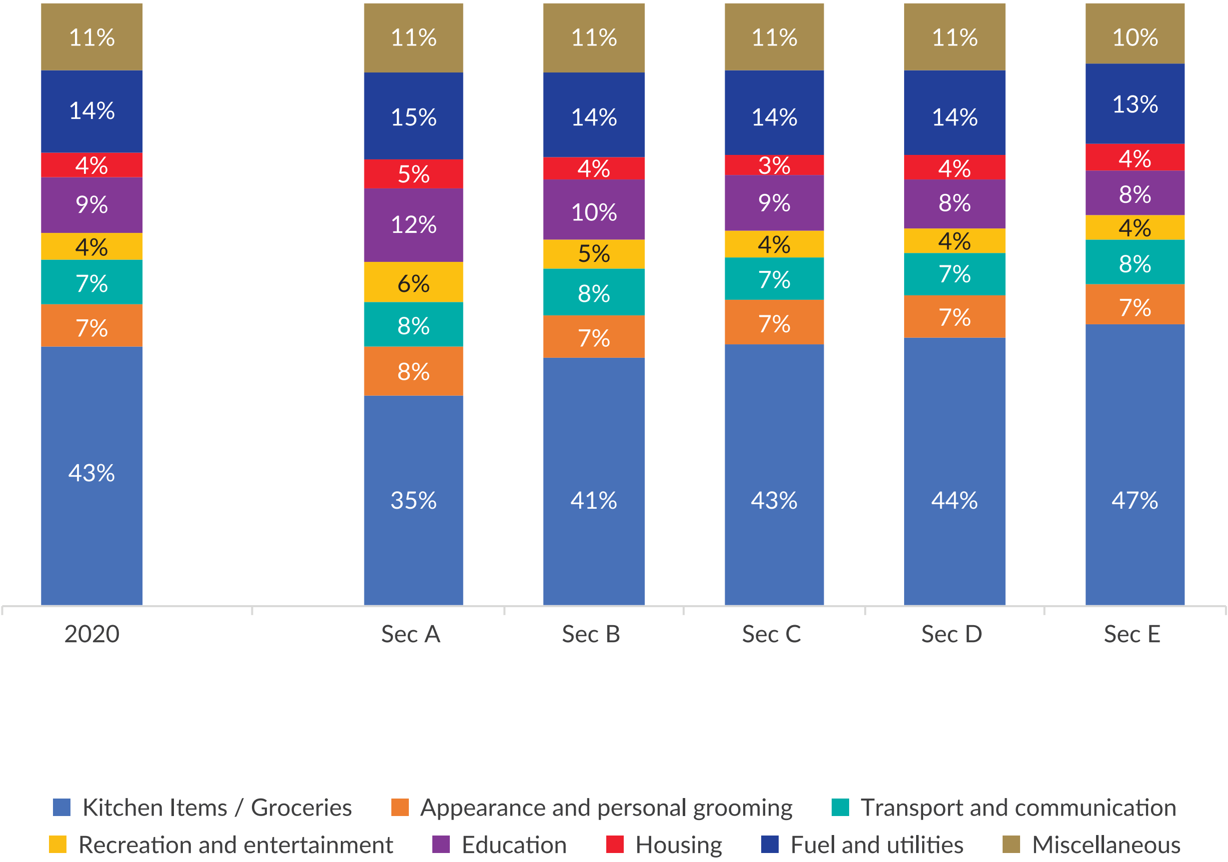
KEY ECONOMIC FACTS

THE HISTORICAL PATH OF THE INTEREST RATE* & THE RATE OF INFLATION*



*Source: Pakistan Economic Survey 2020-21 (https://www.finance.gov.pk/survey_2021.html)

AVERAGE MONTHLY EXPENSES



Source: Consumer Multimedia Index (2010 – 2020)

SOCIO-ECONOMIC CLASSIFICATION (SEC)

URBAN SEC

Occupation of chief wage earner	Education of chief wage earner						
	Illiterate	Less than Primary	School 5-9 years	Matric	Inter-mediate	Graduate	Post Graduate
Unskilled worker	E-2	E-2	E-1	E-1	D	D	C
Petty traders	E-2	E-2	E-1	E-1	D	C	C
Skilled workers	E-2	E-2	E-1	D	D	C	C
Non-executive staff	E-2	E-2	D	D	D	C	C
Supervisory level	D	D	C	C	B	B	B
Small shopkeeper/Businessmen	D	D	C	C	B	B	A-2
Lower/Middle: Executive, Officer	D	C	C	C	B	B	A-2
Self employed/Employed/Professionals	B	B	A-2	A-2	A-2	A-1	A-1
Medium Businessmen	B	A-2	A-2	A-2	A-2	A-1	A-1
Senior Executive/ Officer	B	A-2	A-2	A-2	A-1	A-1	A-1
Large Businessmen/Factory owner	A-2	A-2	A-2	A-1	A-1	A-1	A-1

A1: Well-educated, self-employed/employed professionals, senior level executives/officers in public/private limited organizations, well-educated medium to large-scale businessmen.

A2: Relatively less well educated, medium to large scale businessmen and professionals. Well educated middle level executives, small businessmen and supervisors.

B: Relatively less well educated lower/middle level executives and officers, well-educated small businessmen and supervisors.

C: Predominantly small retailers/businessmen, supervisors and lower-level executives who have 5-10 years of schooling.

D: Relatively well-educated skilled workers; not so well-educated small retailers and non-executive staff members.

E1: Skilled/unskilled workers, petty traders and non-executive staff members who have at least 5-10 year of schooling.

E2: Predominantly, illiterate unskilled/skilled workers and petty traders.

RURAL SEC

Education	Structure of House			
	Kuchha	Semi Pukka	Pukka lower	Pukka Upper
Illiterate	E	D	D	C
Upto Primary	E	D	C	C
School 6-9 years	D	C	C	B
Matric	D	C	B	B
Intermediate	C	C	B	A
Graduate	C	C	A	A
Post Graduate	B	B	A	A

A: This is the most educated class in rural Pakistan where the education of the head of household is at least intermediate and the structure of house is either pukka lower or pukka upper.

B: A high percentage of individuals in this class have acquired education up to matriculation level and the structure of house is any one from all four types.

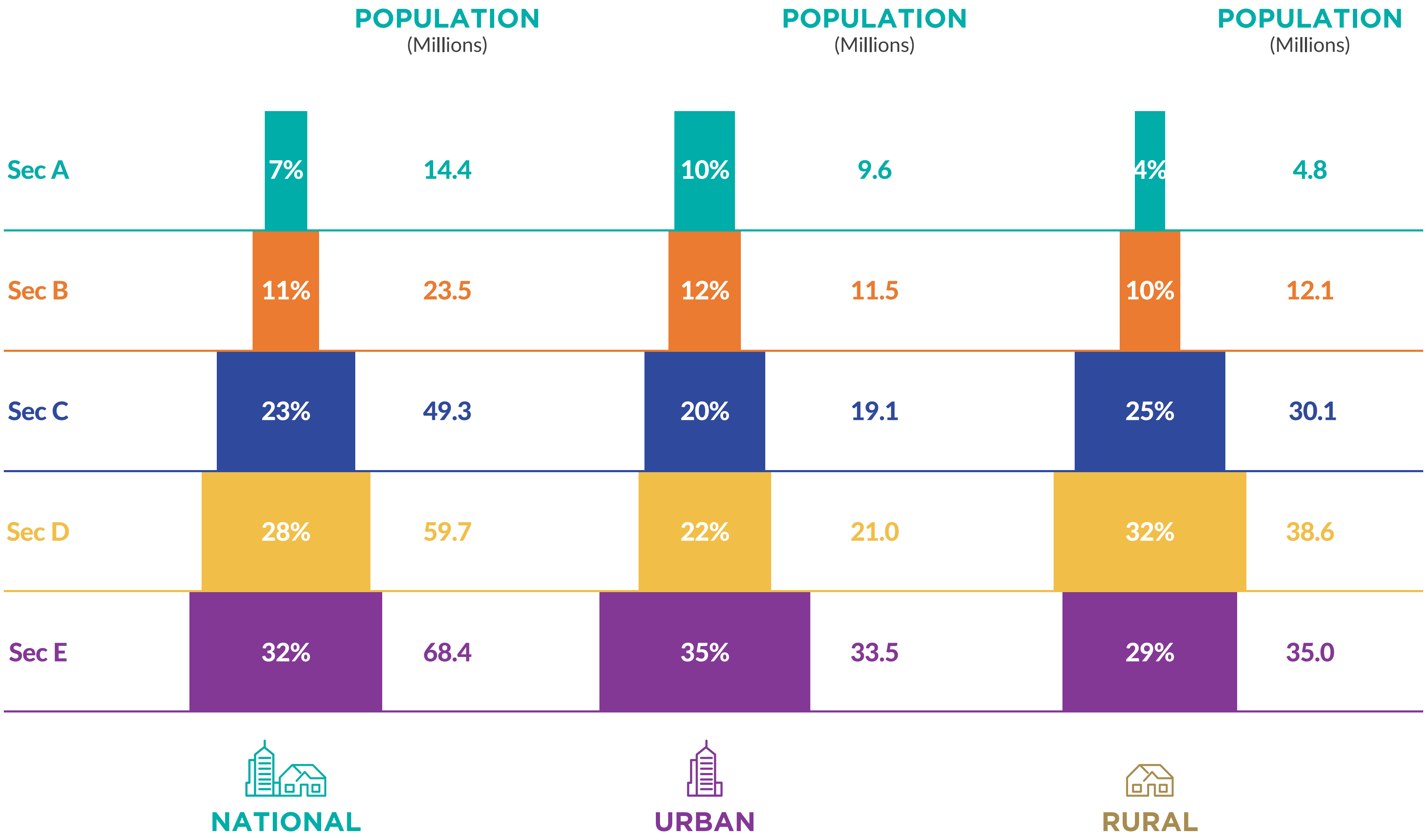
C: This is the middle class of rural Pakistan. Education level of heads of households is much lower than in SECs A and B.

D: This is the largest SEC in terms of number of households. Illiteracy among the heads of households is very common. Structure of house is either semi pukka or pukka lower.

E1: Most of the heads of households in this class have not acquired any formal education. Structure of the house is kuchha.

Source: Establishment Survey 2005 by Pakistan Advertisers' Society

SOCIO-ECONOMIC CLASSIFICATION



		POPULATION (Millions)		POPULATION (Millions)		POPULATION (Millions)
Sec A	7%	14.4	10%	9.6	4%	4.8
Sec B	11%	23.5	12%	11.5	10%	12.1
Sec C	23%	49.3	20%	19.1	25%	30.1
Sec D	28%	59.7	22%	21.0	32%	38.6
Sec E	32%	68.4	35%	33.5	29%	35.0
	NATIONAL		URBAN		RURAL	

All numbers are rounded off for easy understanding | Source: Establishment Survey 2005 by Pakistan Advertisers' Society

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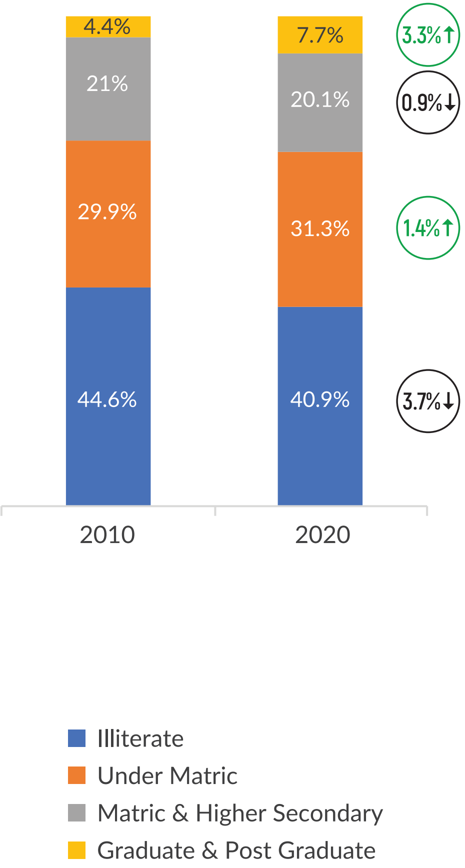
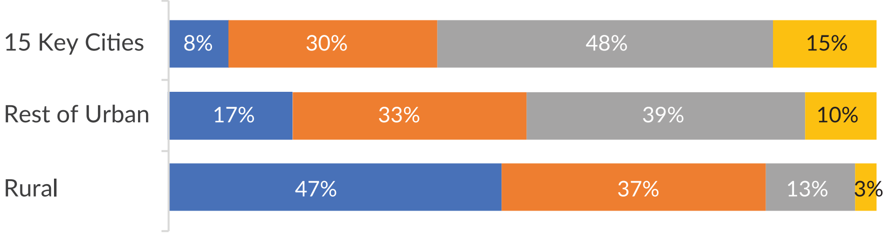
EDUCATION

10 YEAR CHANGE

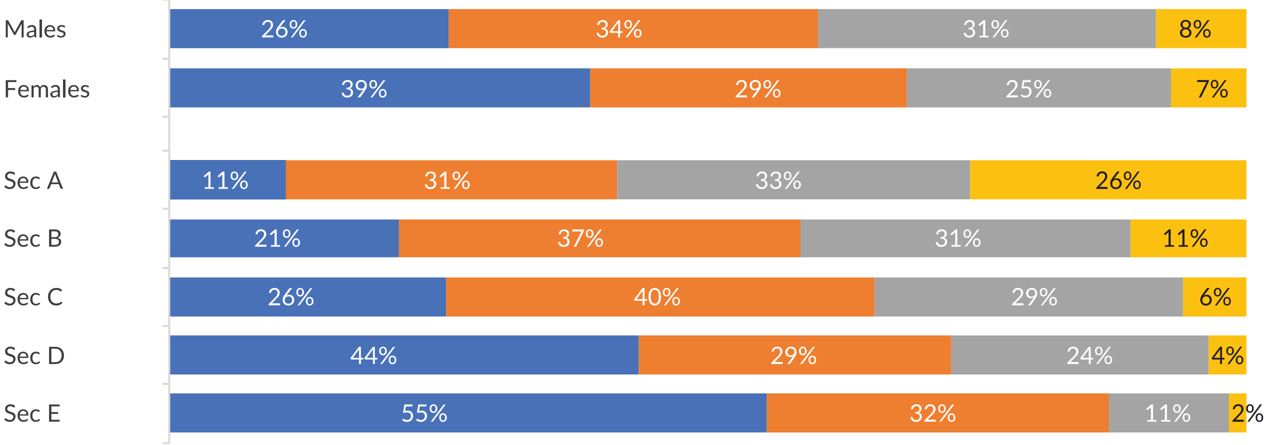


2020 ONLY

EDUCATION BY LOCALITY



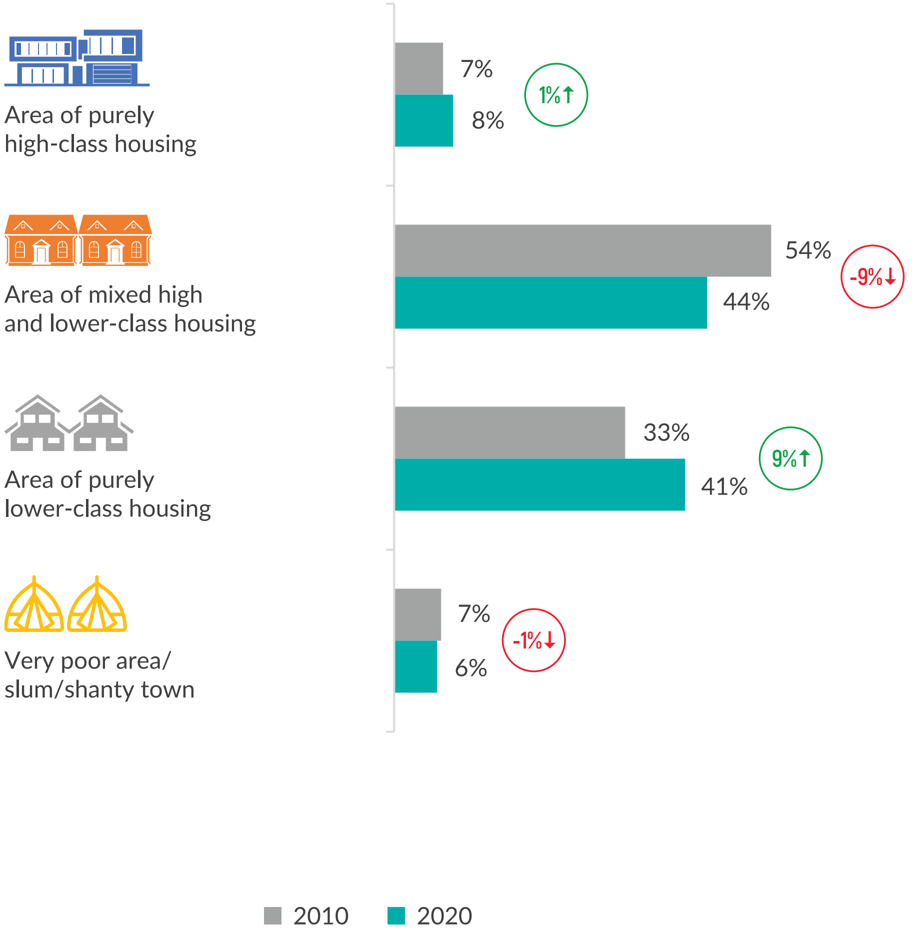
EDUCATION BY GENDER AND SEC

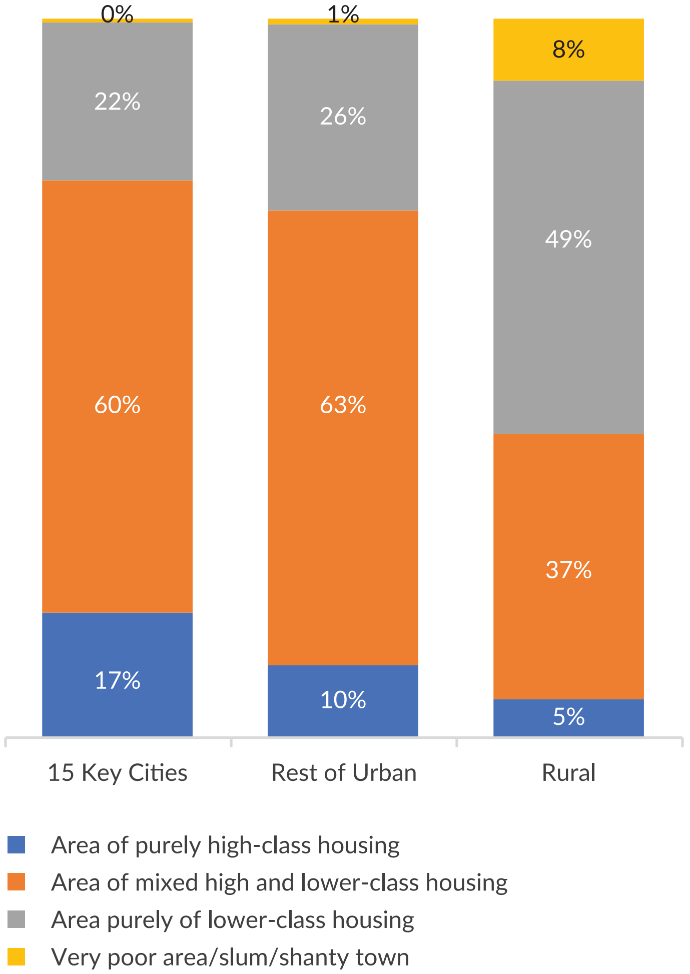


*12+ Literate population only | Source: Consumer Multimedia Index (2010 – 2020)

LIVING STANDARDS

NEIGHBORHOOD TYPE



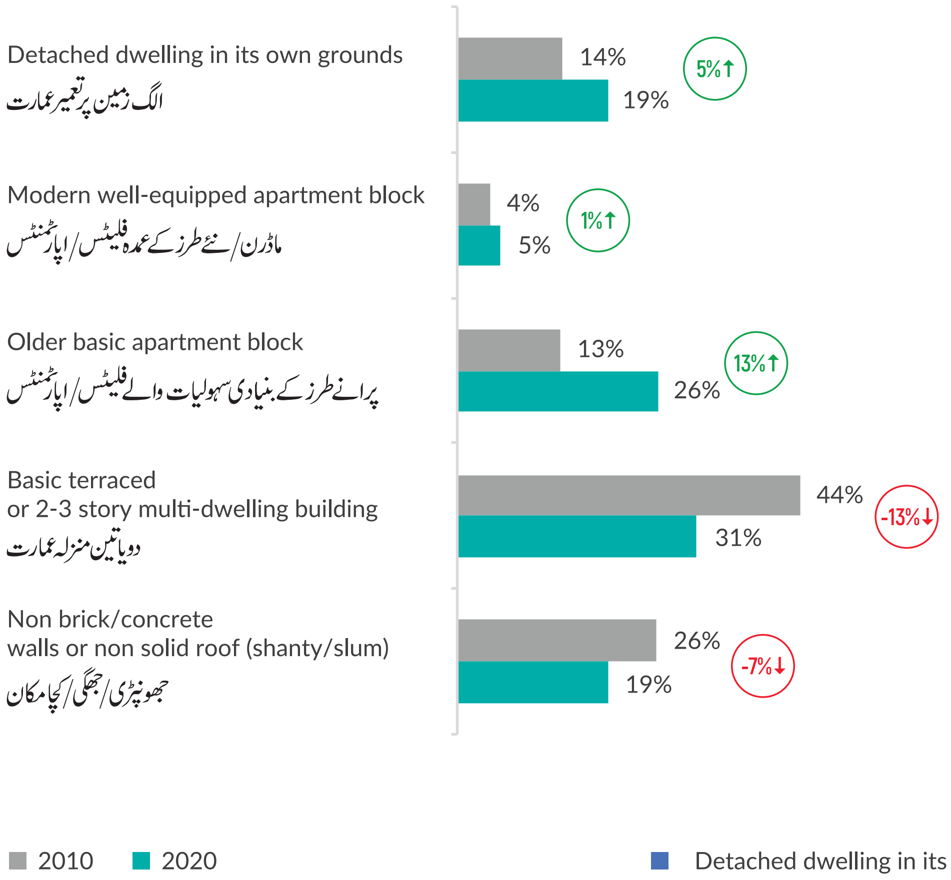


Source: Consumer Multimedia Index (2010 – 2020)

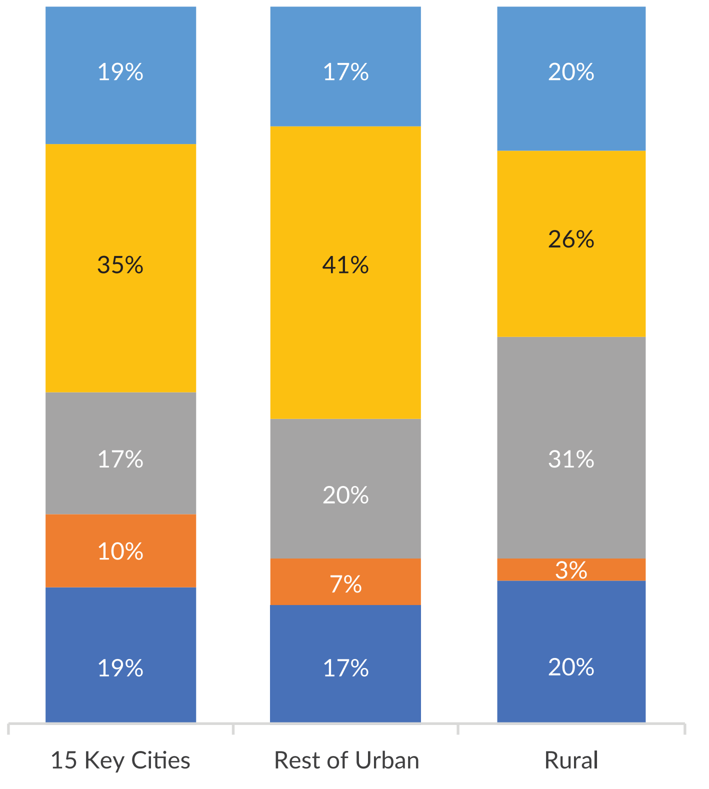
LIVING STANDARDS

HOUSING TYPE

10 YEAR CHANGE



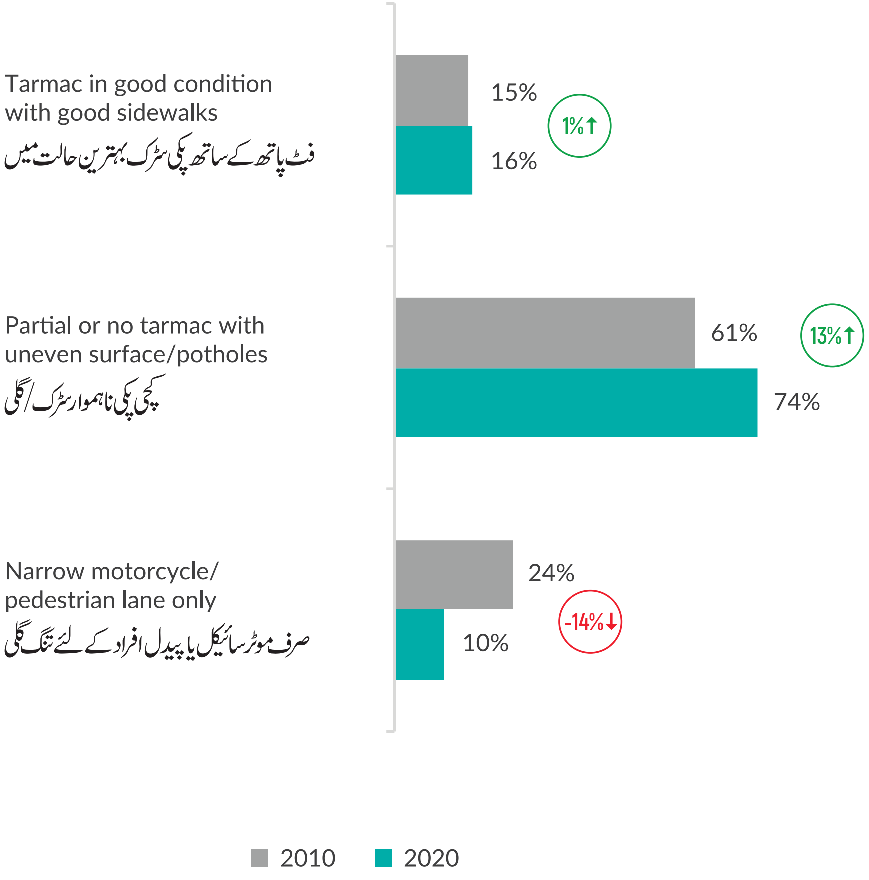
2020 ONLY



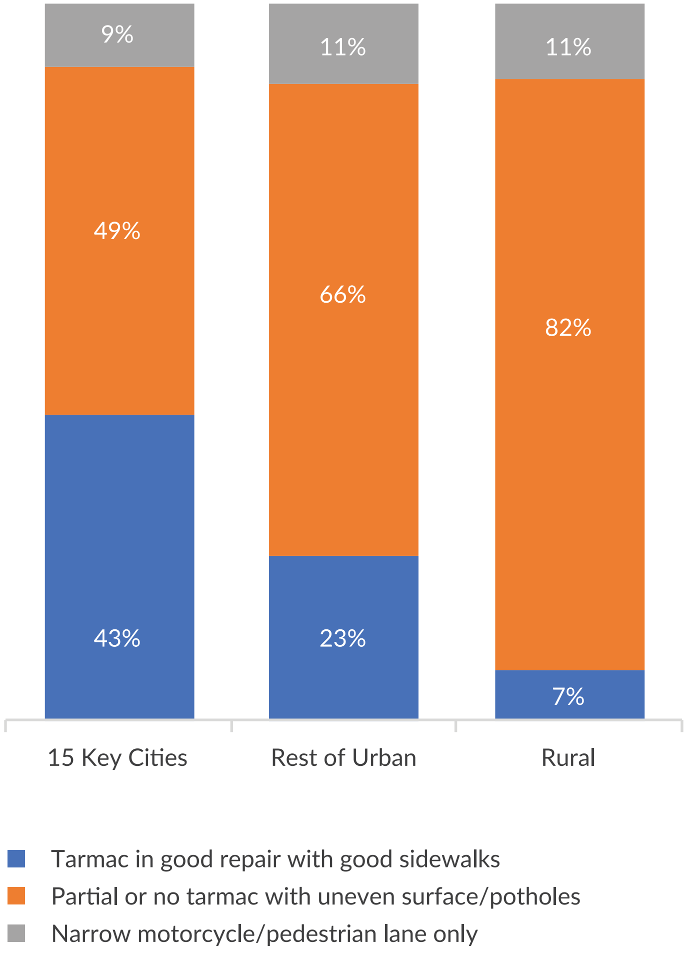
Source: Consumer Multimedia Index (2010 – 2020)

STREET TYPE

10 YEAR CHANGE



2020 ONLY

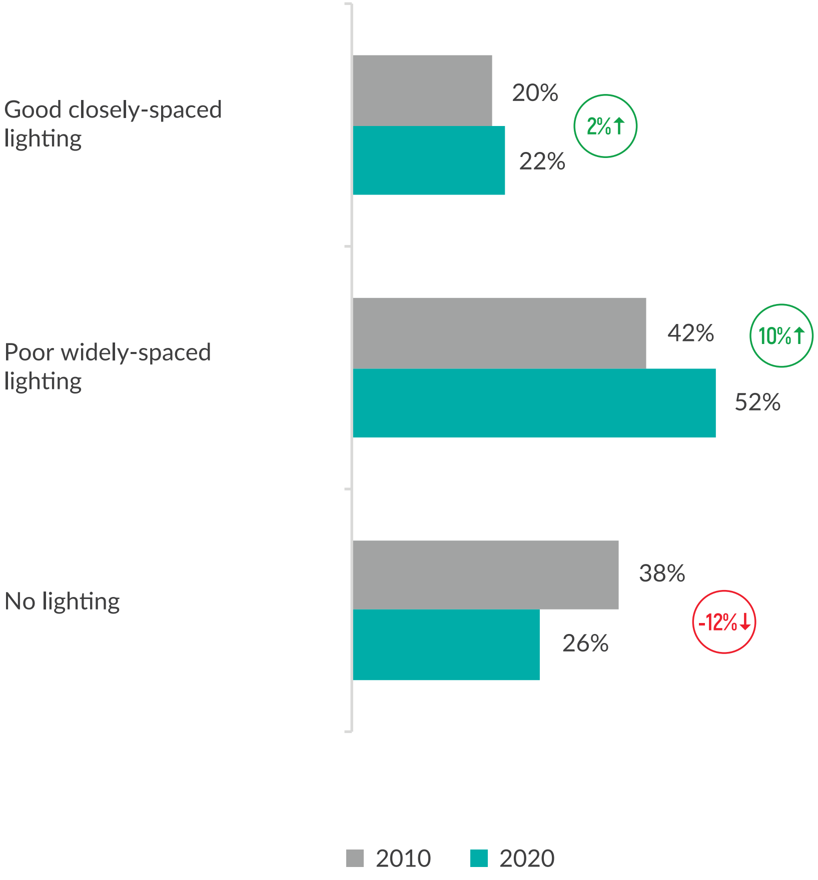


Source: Consumer Multimedia Index (2010 – 2020)

LIVING STANDARDS

STREET LIGHTS

10 YEAR CHANGE



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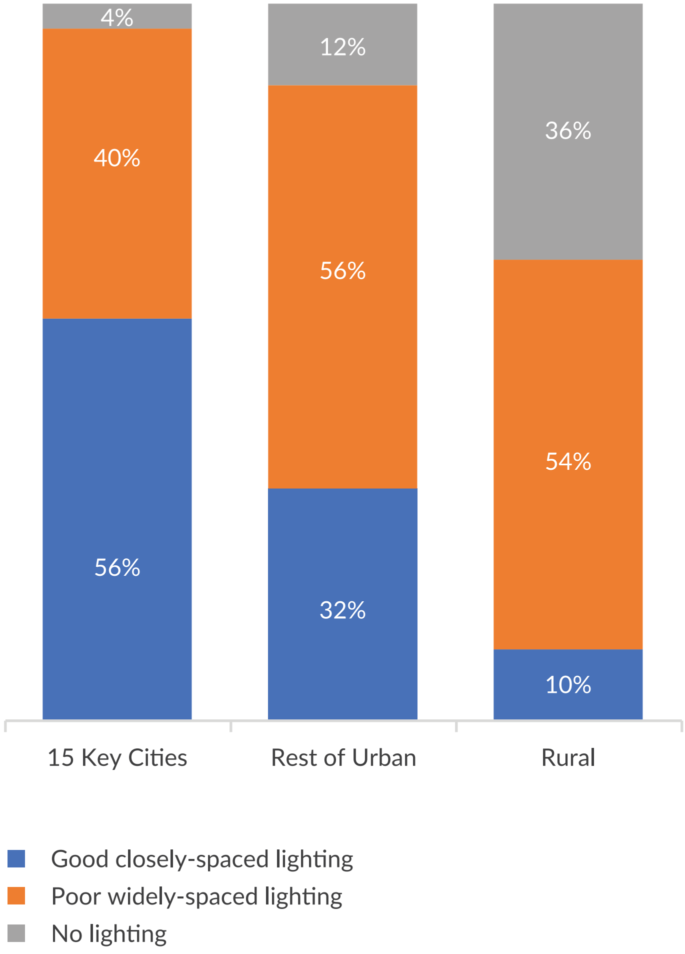
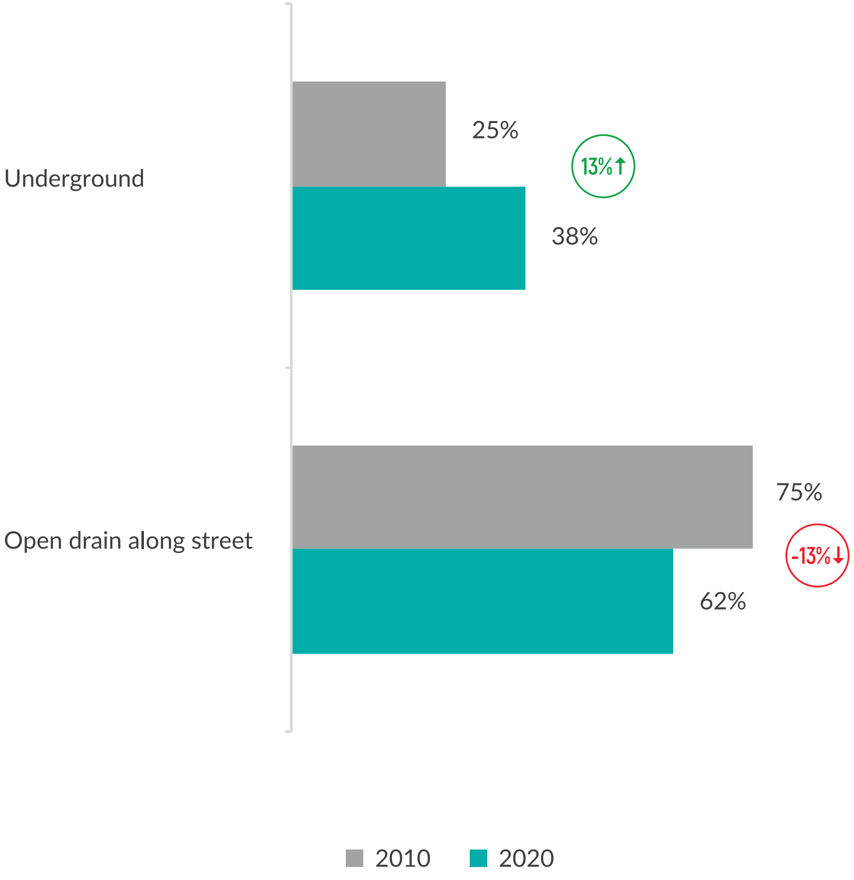


Source: Consumer Multimedia Index (2010 – 2020)

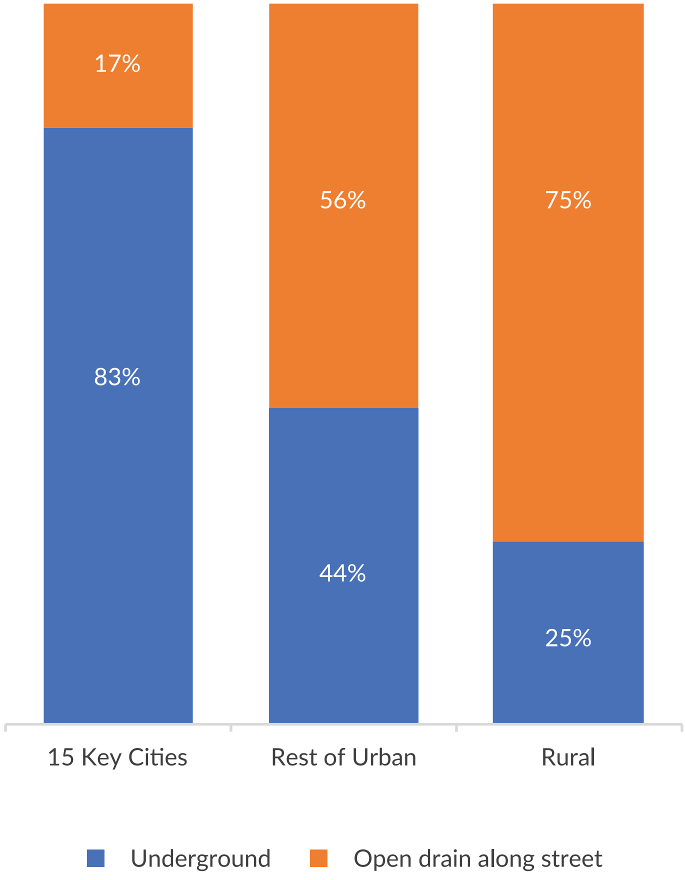

50 سالوں
سے گھروں
اور رشتوں کی
SOLID
بنیاد
50 YEARS SOLID
AMRELI STEELS

SEWERAGE/DRAINAGE

10 YEAR CHANGE



2020 ONLY

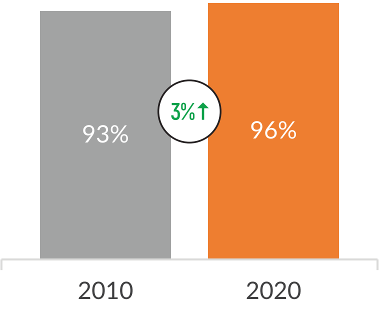


Source: Consumer Multimedia Index (2010 – 2020)

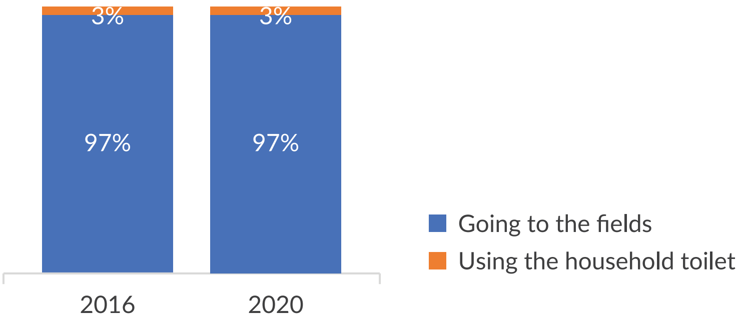
LIVING STANDARDS

TOILET IN THE HOUSE

(% Yes)

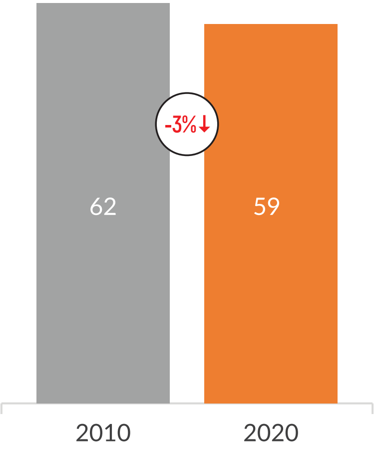


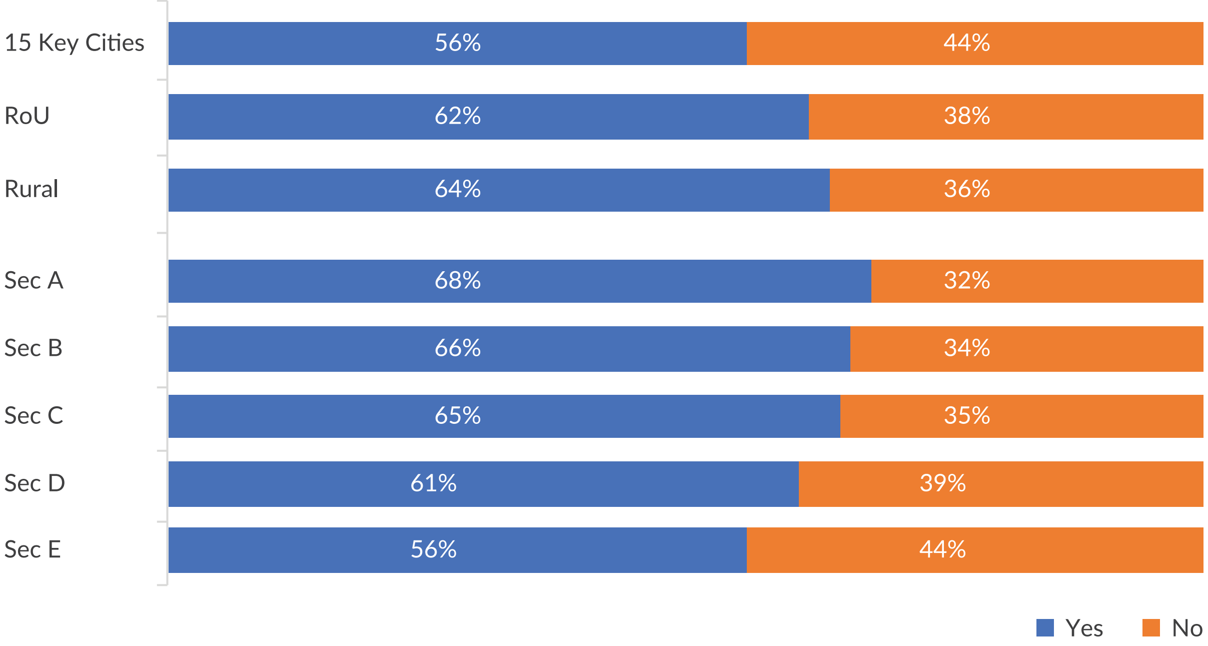
PREFERENCE FOR DEFECATION AMONG THOSE WHO HAVE TOILET AT HOME



RESIDING IN OWN HOUSE

(% Yes)





Source: Consumer Multimedia Index (2010 – 2020)

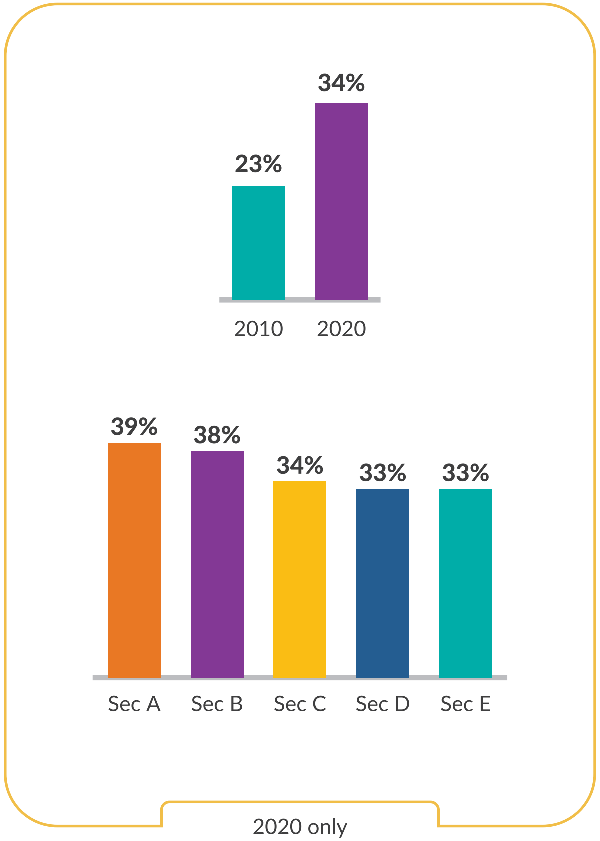
LIVING STANDARDS

HOUSE TYPE

			2020 ONLY				
ROOF MATERIAL	**2010**	**2020**	**SEC A**	**SEC B**	**SEC C**	**SEC D**	**SEC E**
Grass/Leaves	2%	1%	0%	0%	0%	1%	2%
Wood	6%	11%	0%	0%	4%	12%	27%
Mud and Wood	11%	13%	0%	0%	5%	15%	29%
Mud	7%	16%	0%	1%	4%	15%	42%
Mud and stones	2%	3%	1%	3%	6%	3%	0%
Guarder/TR/Brick	25%	30%	38%	44%	43%	34%	0%
Readymade concrete	1%	4%	5%	8%	7%	4%	0%
Iron steels	2%	1%	0%	1%	2%	1%	0%
Iron guarded	26%	10%	11%	15%	15%	10%	0%
Concrete/RCC	18%	11%	44%	28%	14%	5%	0%

ROOF MATERIAL	**2010**	**2020**	**SEC A**	**SEC B**	**SEC C**	**SEC D**	**SEC E**
Grass	1%	2%	0%	0%	1%	1%	4%
Wood	2%	3%	0%	0%	1%	3%	7%
Mud	23%	41%	0%	1%	23%	44%	89%
Concrete	1%	4%	7%	11%	5%	3%	0%
Iron	1%	1%	2%	2%	2%	1%	0%
Wood/mud/stone	7%	4%	1%	5%	8%	6%	0%
Brick/cemented	66%	45%	90%	81%	62%	43%	0%

GAS SUPPLY AT HOME



Source: Consumer Multimedia Index (2010 – 2020)

PAKISTAN'S ONLY SINGLE SOURCE, MOST ROBUST PAN-INDUSTRY, SYNDICATED CONSUMERS' RESEARCH

CMI
Consumer Multimedia Index

MULTIMEDIA EXPOSURE | DEMOGRAPHICS
PSYCHOGRAPHICS | CATEGORIES/BRANDS

- CONSUMERS' SEGMENTATION FOR 70+ PRODUCTS/SERVICES CATEGORIES*
- USERS/NON-USERS', OWN & COMPETITIVE BRANDS PROFILING
- SHOPPING HABITS/A DAY IN CONSUMER LIFE/HOUSING QUALITY INDICATORS

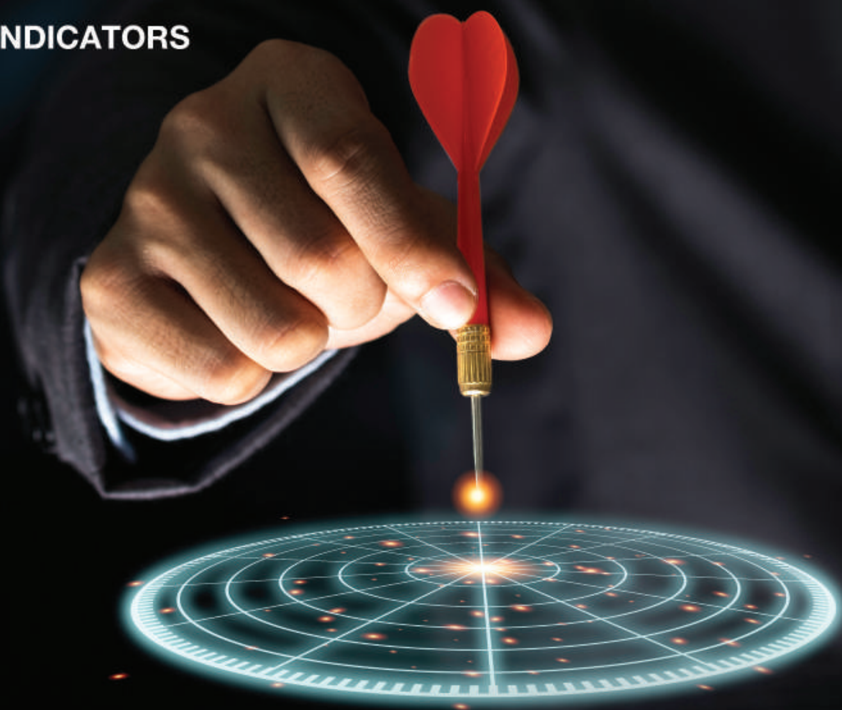
HOW CMI CAN HELP STRATEGIZE COMMUNICATION ?

- Identification of all effective consumer touch points amid increasing clutter of conventional media
- Compatible, comprehensive and single-source reach & frequency (R&F) data of numerous media vehicles
- A shift from hunch-based decisions to more pragmatic bifurcation & utilization of Advertising Budgets
- Cross-media exposure data with solu & duplicated reach to map out integrated Media Plans
- Single-source study of consumption patterns of diverse product categories
- Vividly segmented psychographic/Ethnographic/ Demographic profiling of audience

*CATEGORIES | FOOD, HOUSEHOLD & PERSONAL CARE, SERVICES DURABLES, ELECTRONIC GADGETS & OTHERS

For more information, please contact: **Adil Jamil** | Head of BHT | **0345 8550 515** | Adil.jamil@ipsos.com

GAME CHANGERS Ipsos



A DAY IN CONSUMERS’ LIFE

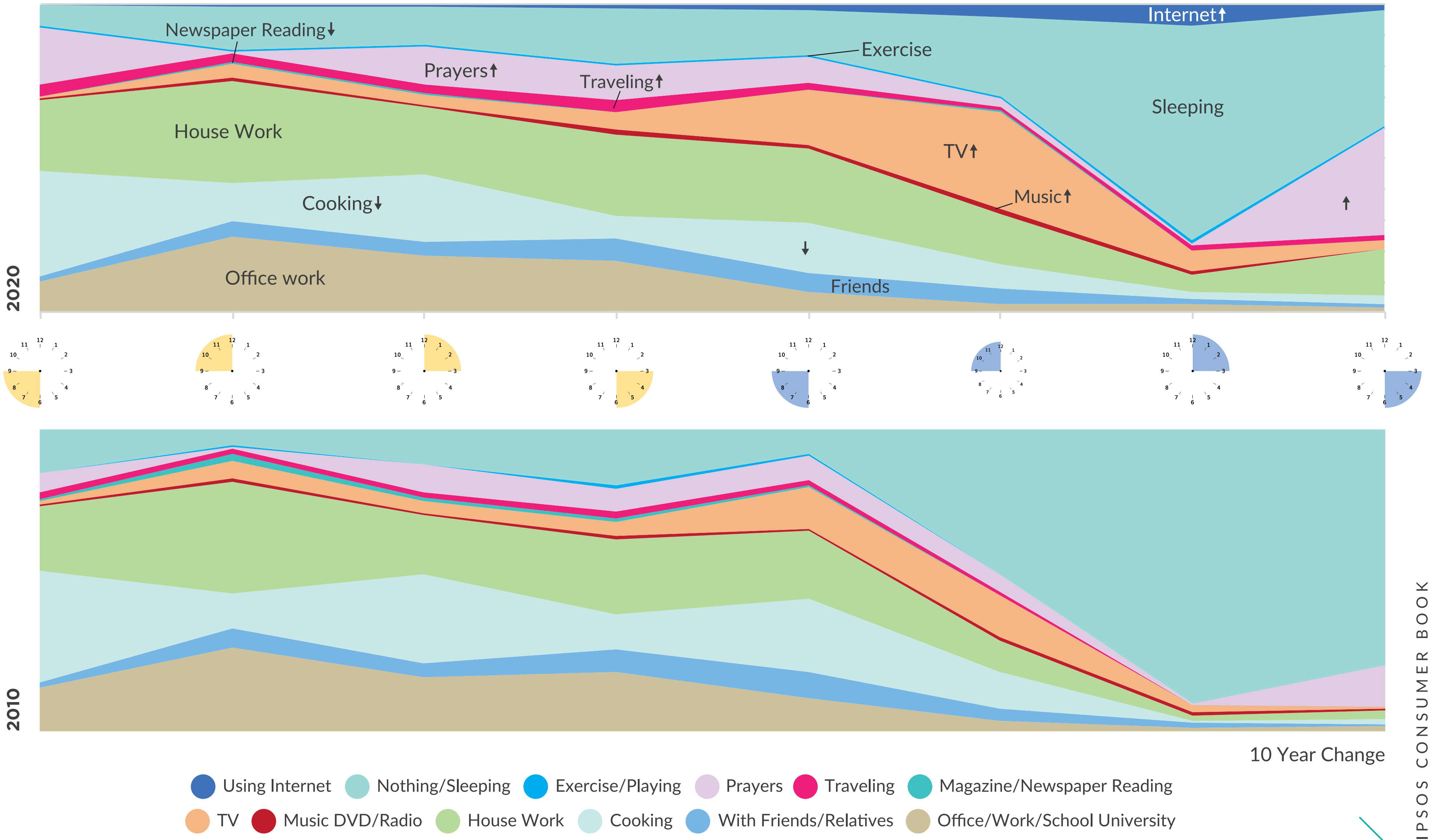
TAPAL

Truly yours

PAKISTAN'S NO. 1 TEA COMPANY*

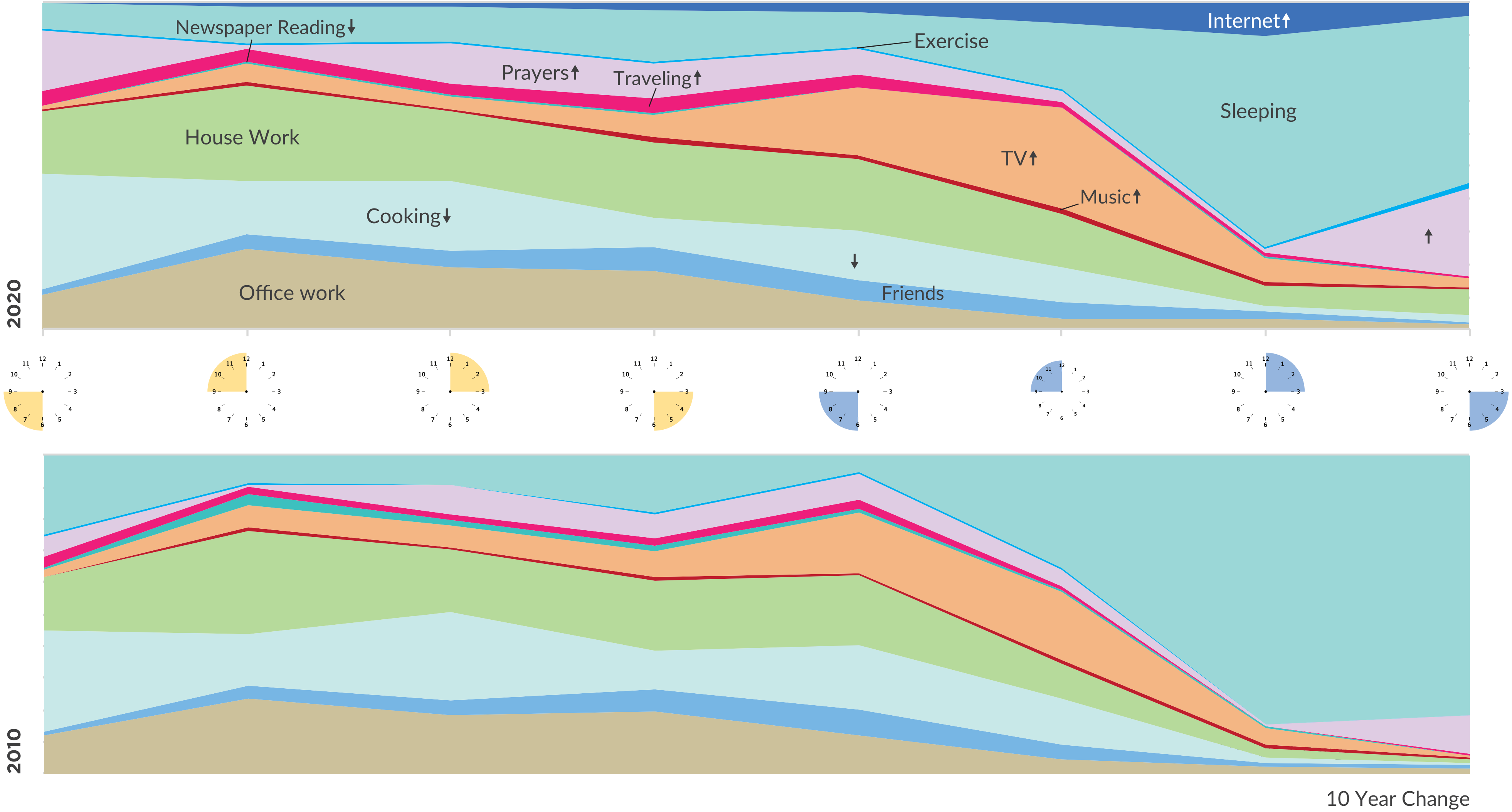
*Household panel data April 2021

A DAY IN CONSUMERS' LIFE - OVERALL NATIONAL



Source: Consumer Multimedia Index (2010 – 2020)

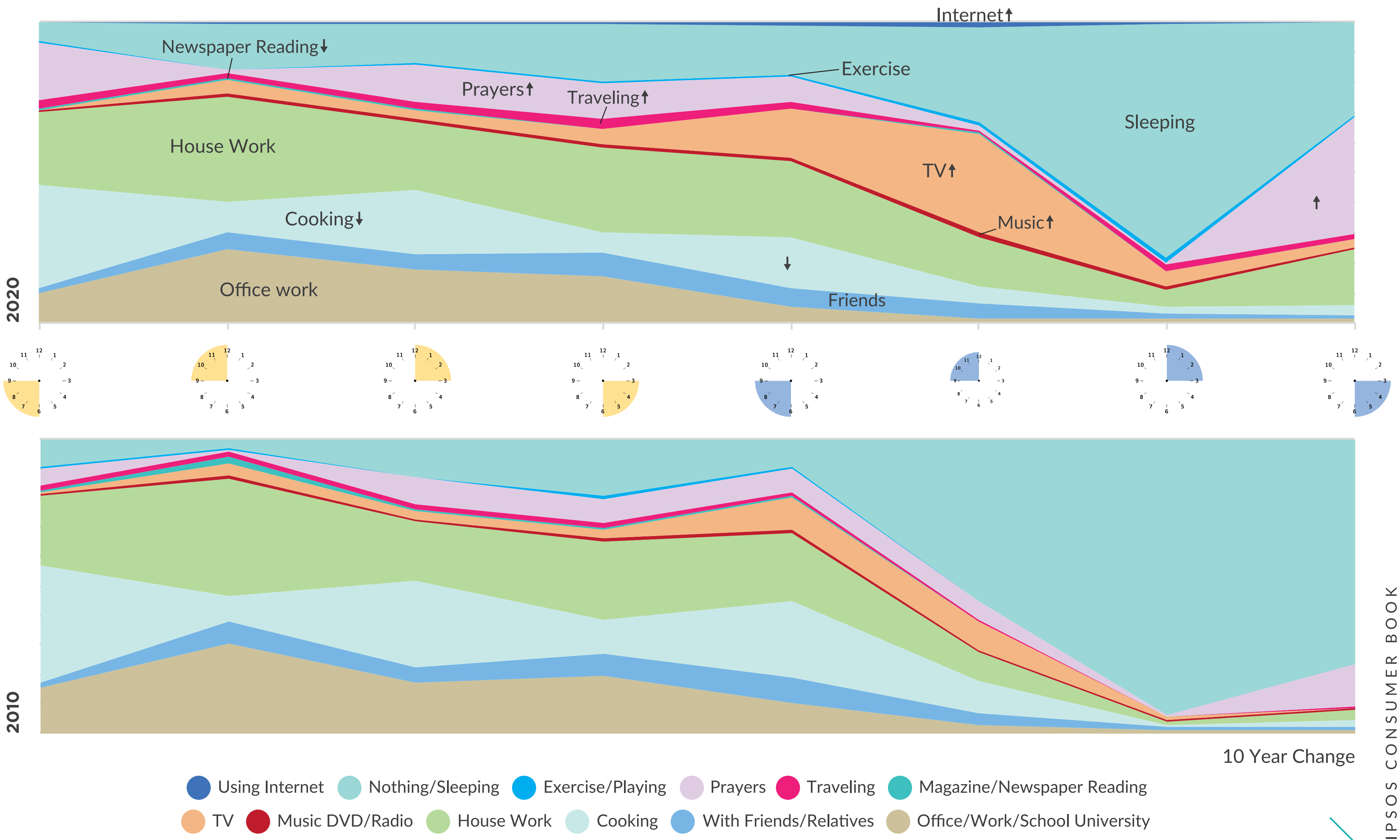
A DAY IN CONSUMERS' LIFE - URBAN



● Using Internet ● Nothing/Sleeping ● Exercise/Playing ● Prayers ● Traveling ● Magazine/Newspaper Reading
● TV ● Music DVD/Radio ● House Work ● Cooking ● With Friends/Relatives ● Office/Work/School University

Source: Consumer Multimedia Index (2010 – 2020)

A DAY IN CONSUMERS' LIFE - RURAL



Source: Consumer Multimedia Index (2010 – 2020)

Nestlé PROFESSIONAL

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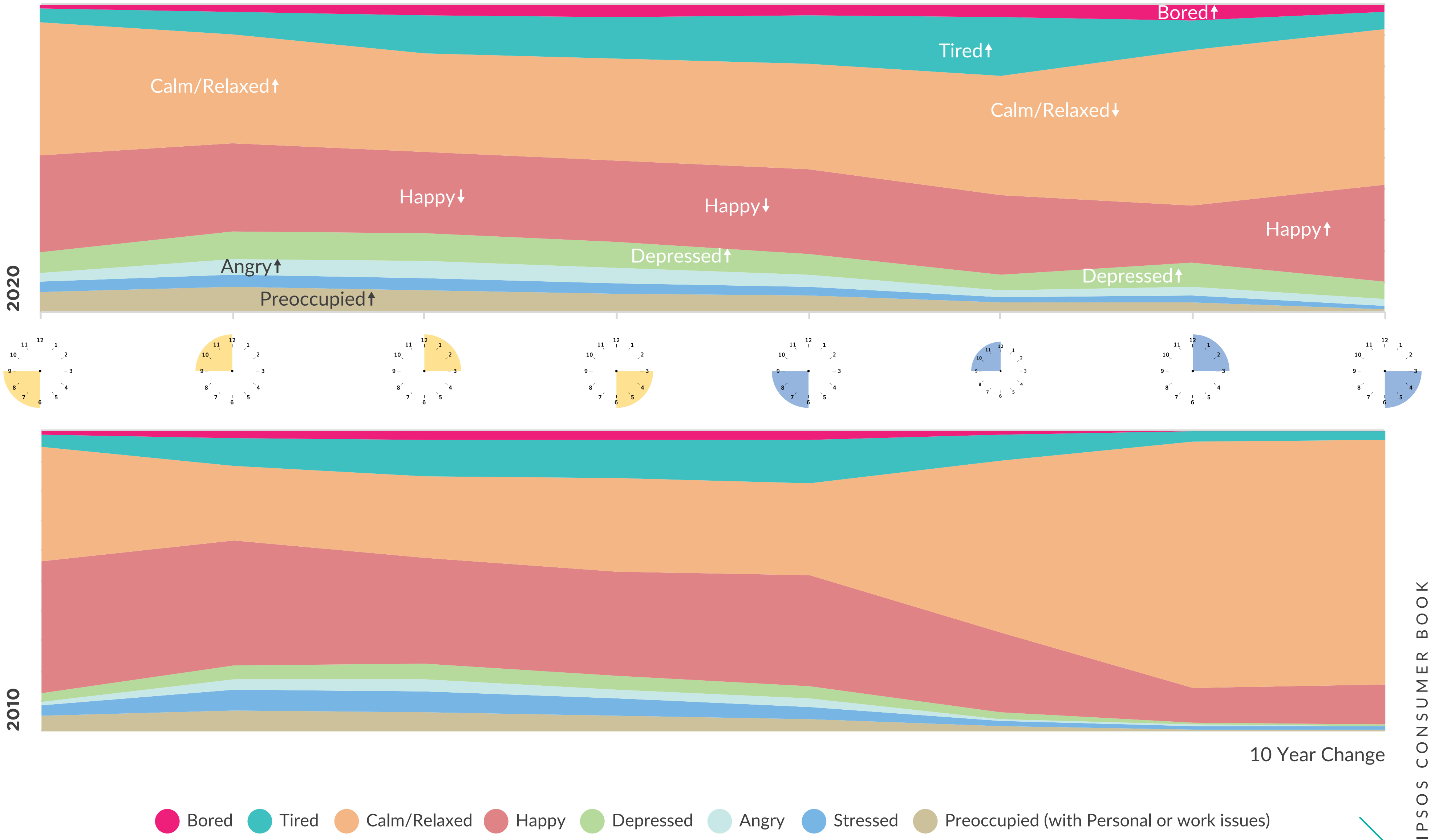
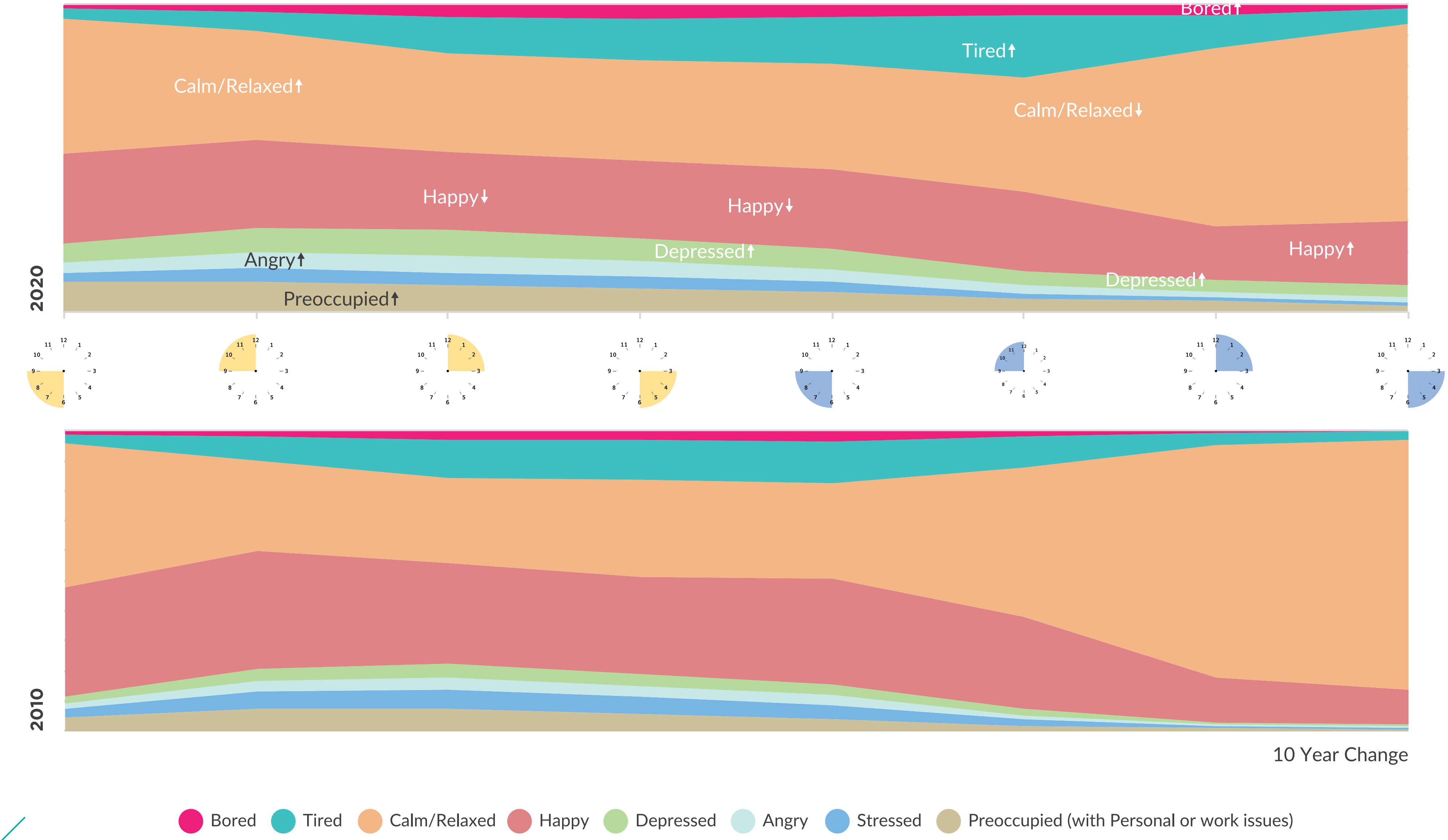
03000-Nestle (03000-637853) NAATA@pk.nestle.com www.nestle.pk

MOOD & FEELING - OVERALL NATIONAL



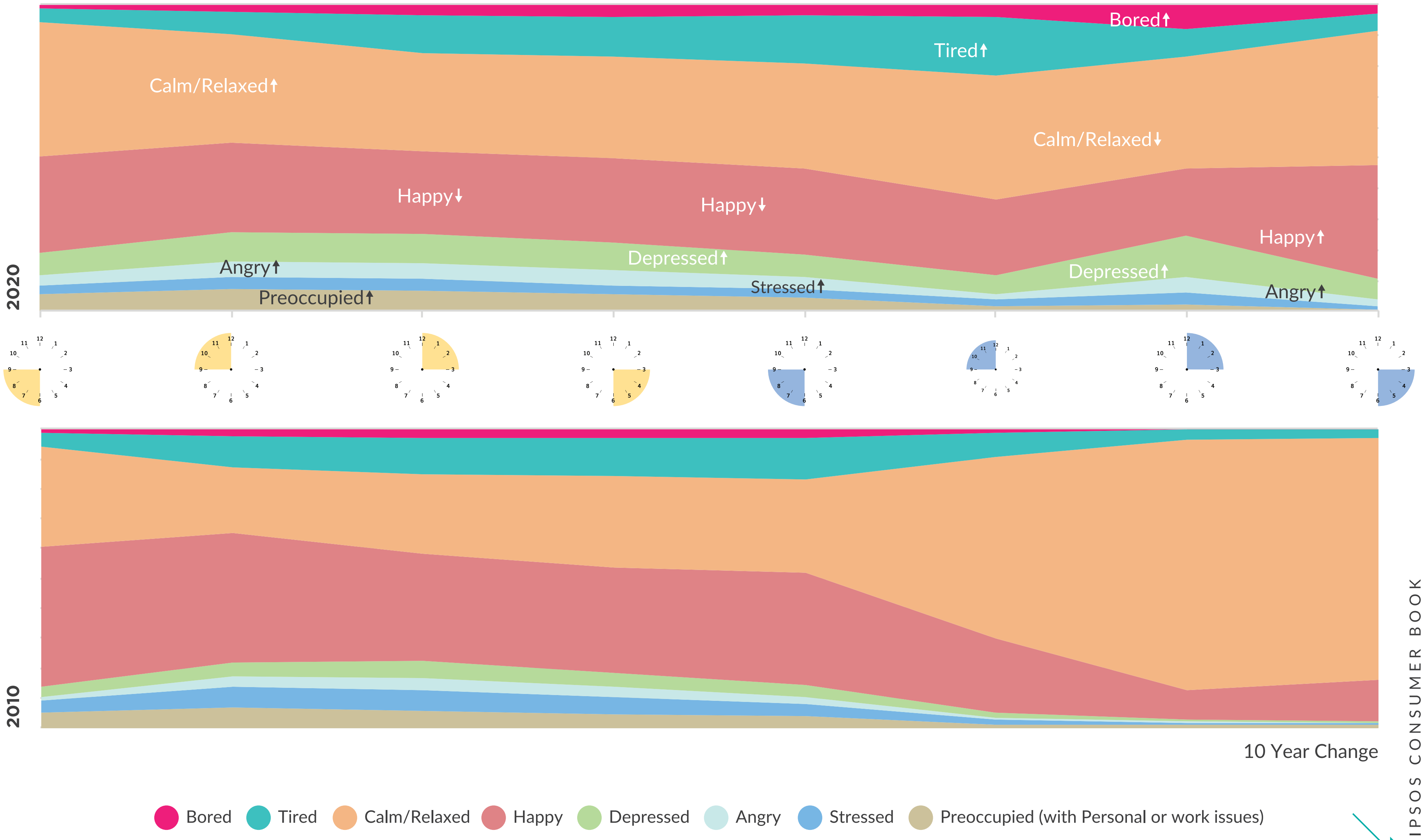
Source: Consumer Multimedia Index (2010 – 2020)

MOOD & FEELING - URBAN



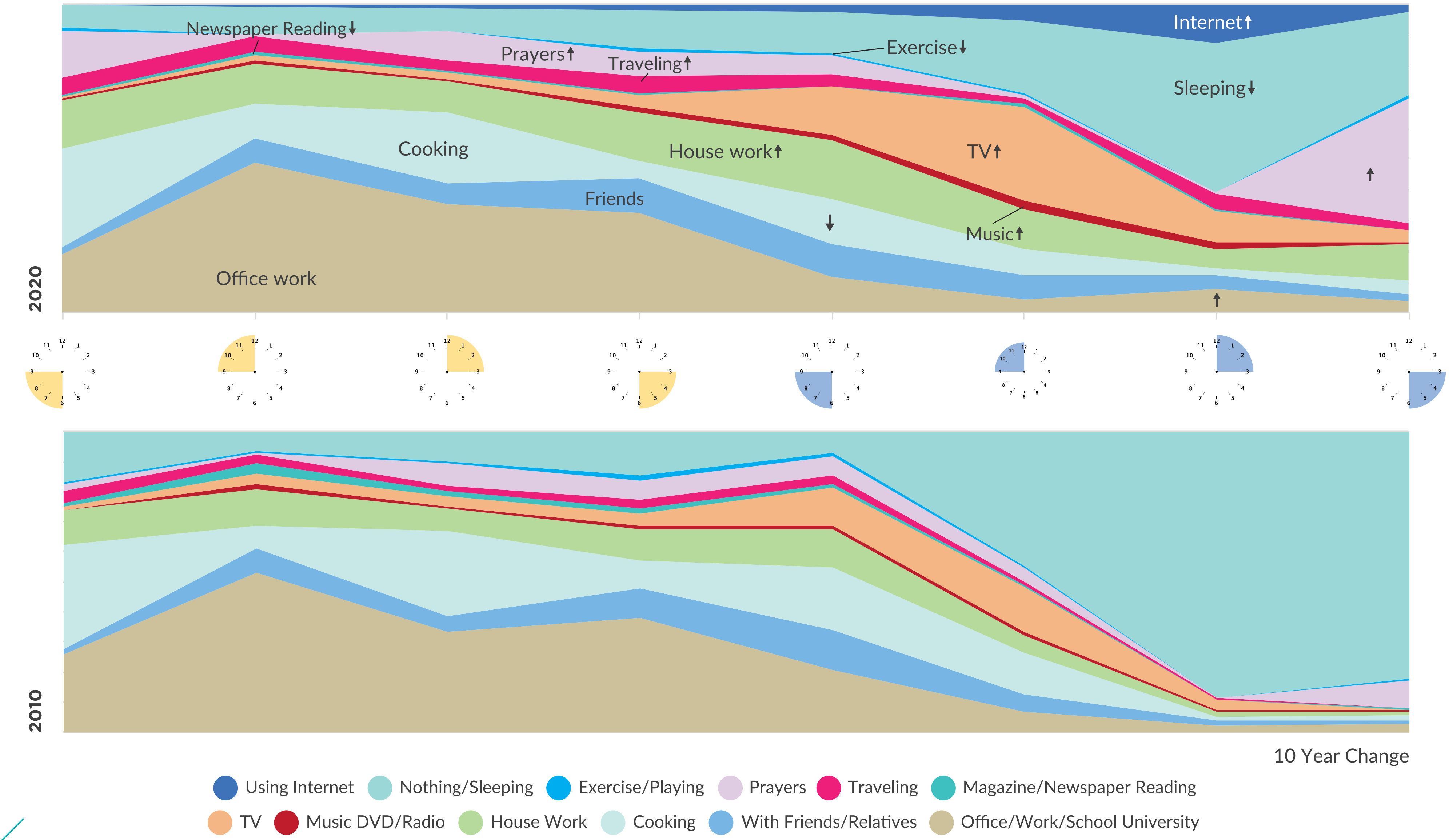
Source: Consumer Multimedia Index (2010 – 2020)

MOOD & FEELING - RURAL



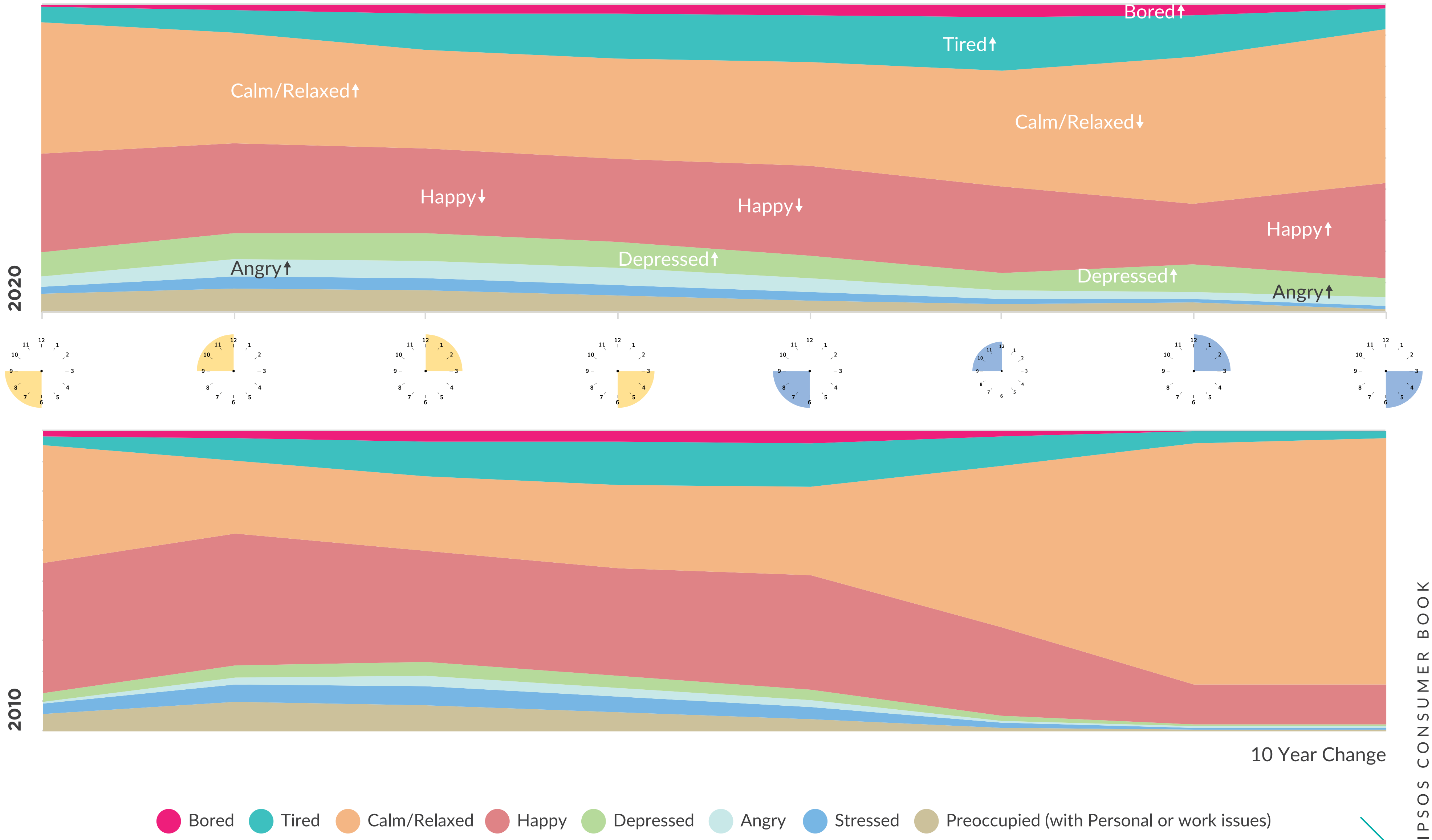
Source: Consumer Multimedia Index (2010 – 2020)

A DAY IN CONSUMERS' LIFE - MALES



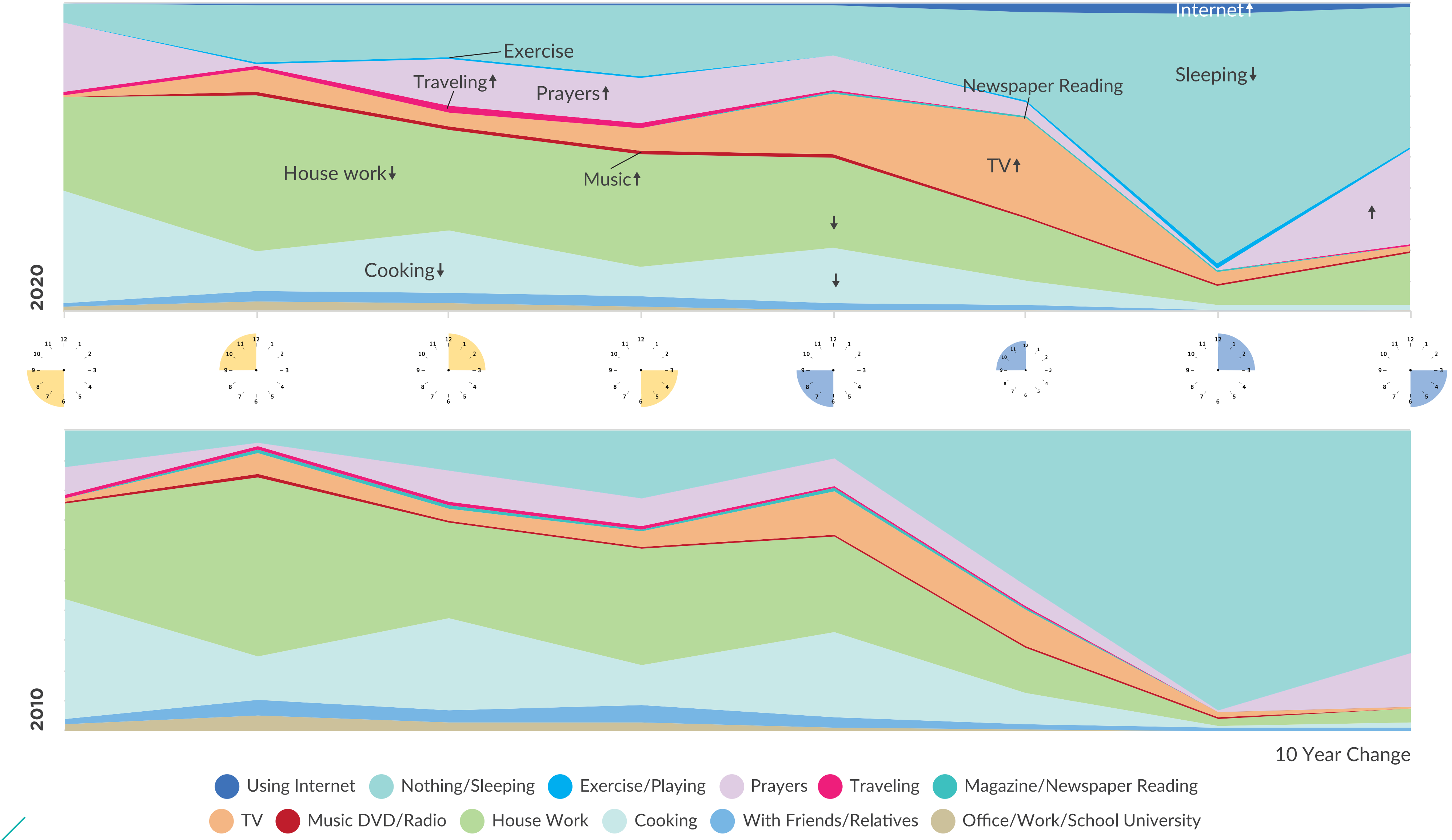
Source: Consumer Multimedia Index (2010 – 2020)

MOOD & FEELING - MALES



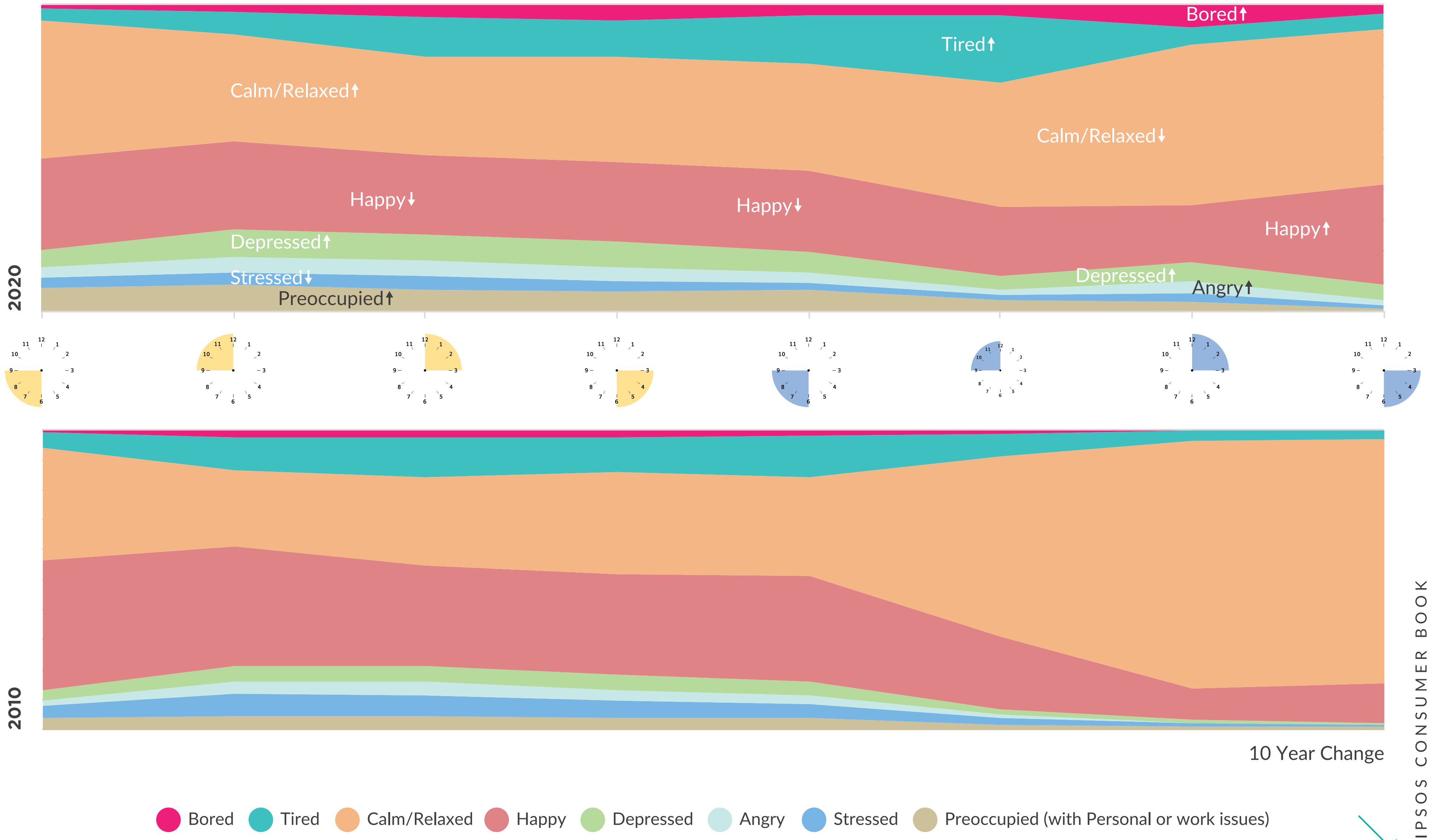
Source: Consumer Multimedia Index (2010 – 2020)

A DAY IN CONSUMERS' LIFE - FEMALES



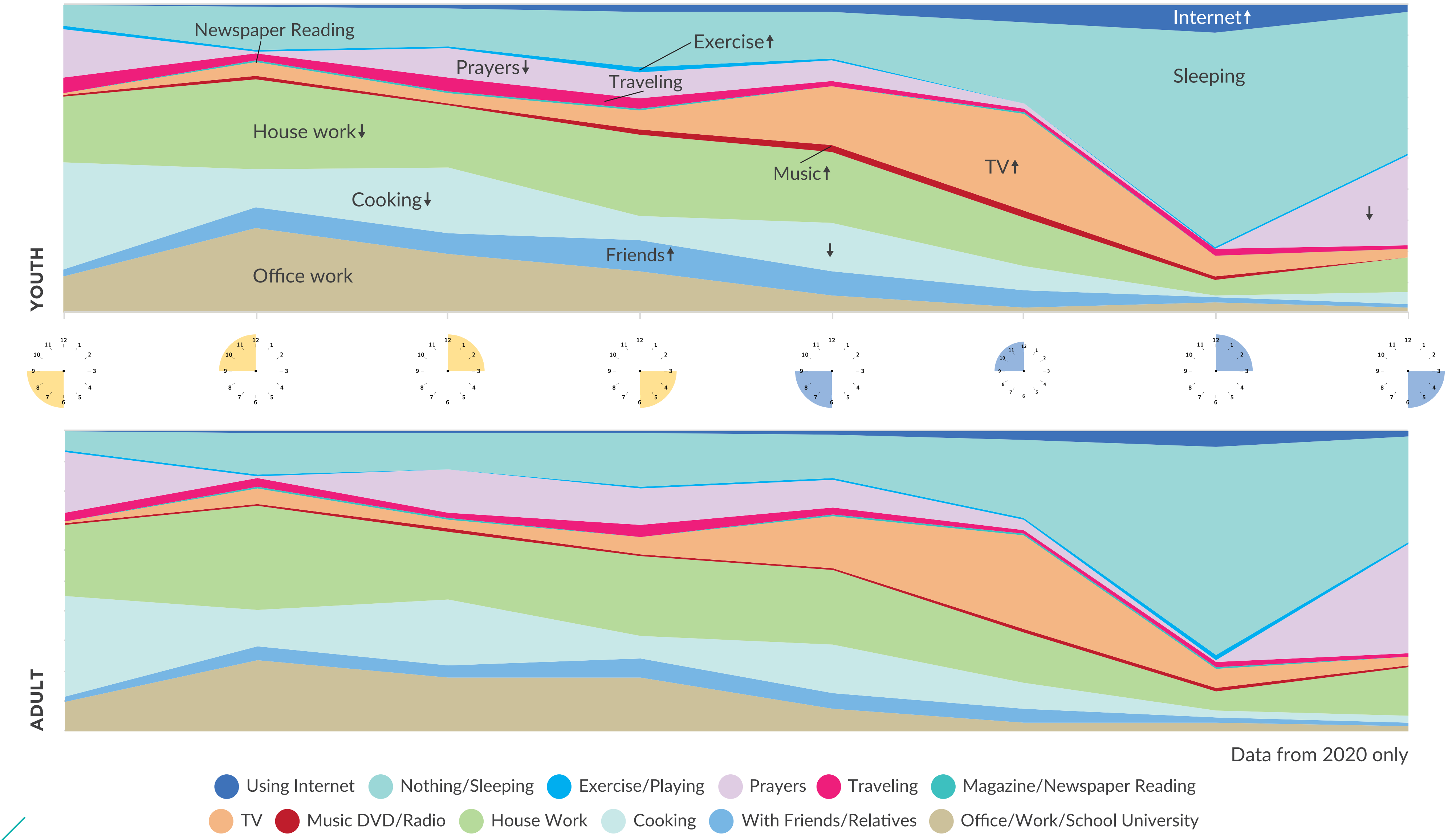
Source: Consumer Multimedia Index (2010 – 2020)

MOOD & FEELING - FEMALES



Source: Consumer Multimedia Index (2010 – 2020)

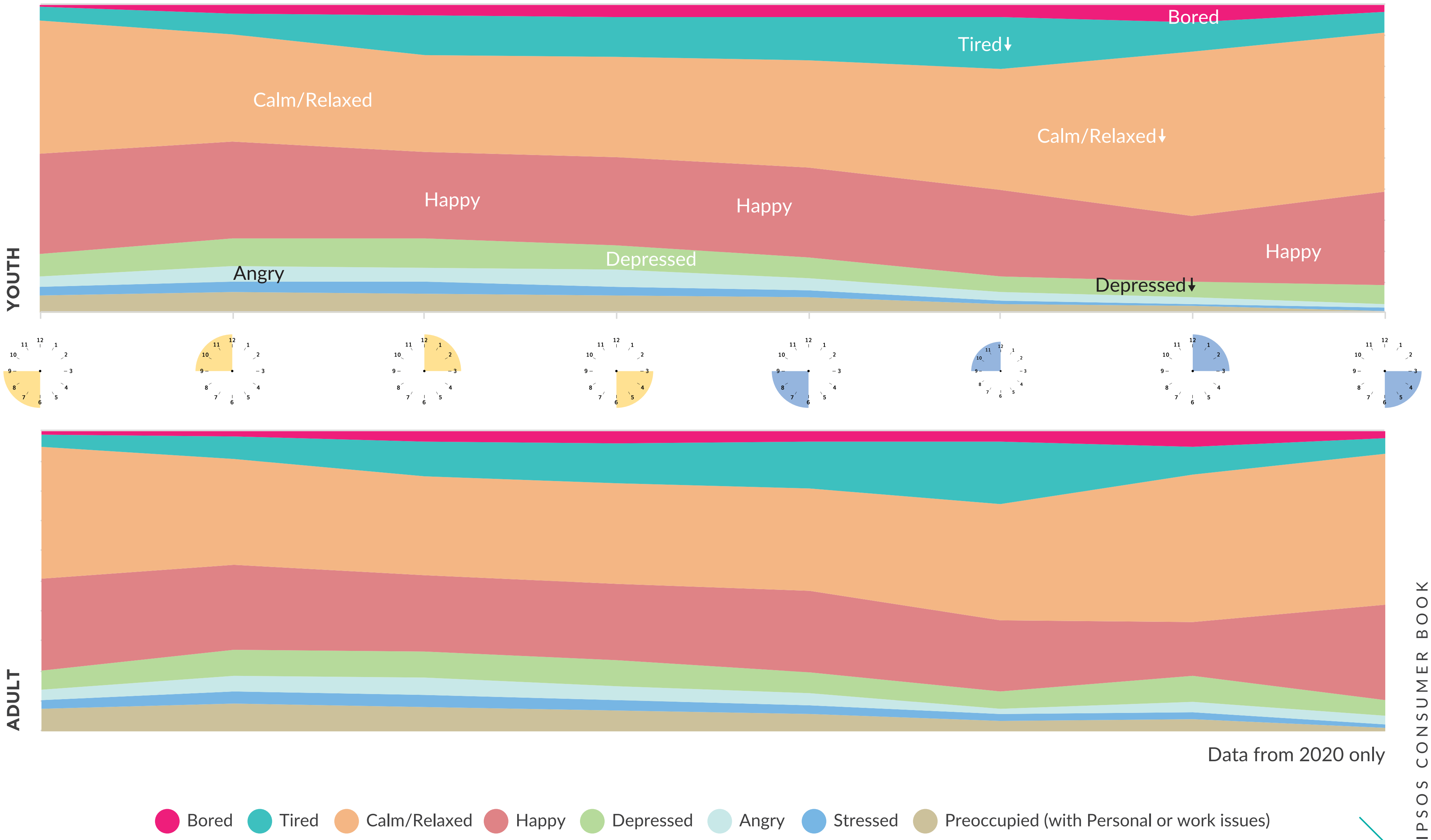
A DAY IN CONSUMERS' LIFE - YOUTH VS ADULT



Data from 2020 only

Youth : 12- 24 yrs Adult: 25+ yrs | Source: Consumer Multimedia Index (2010 – 2020)

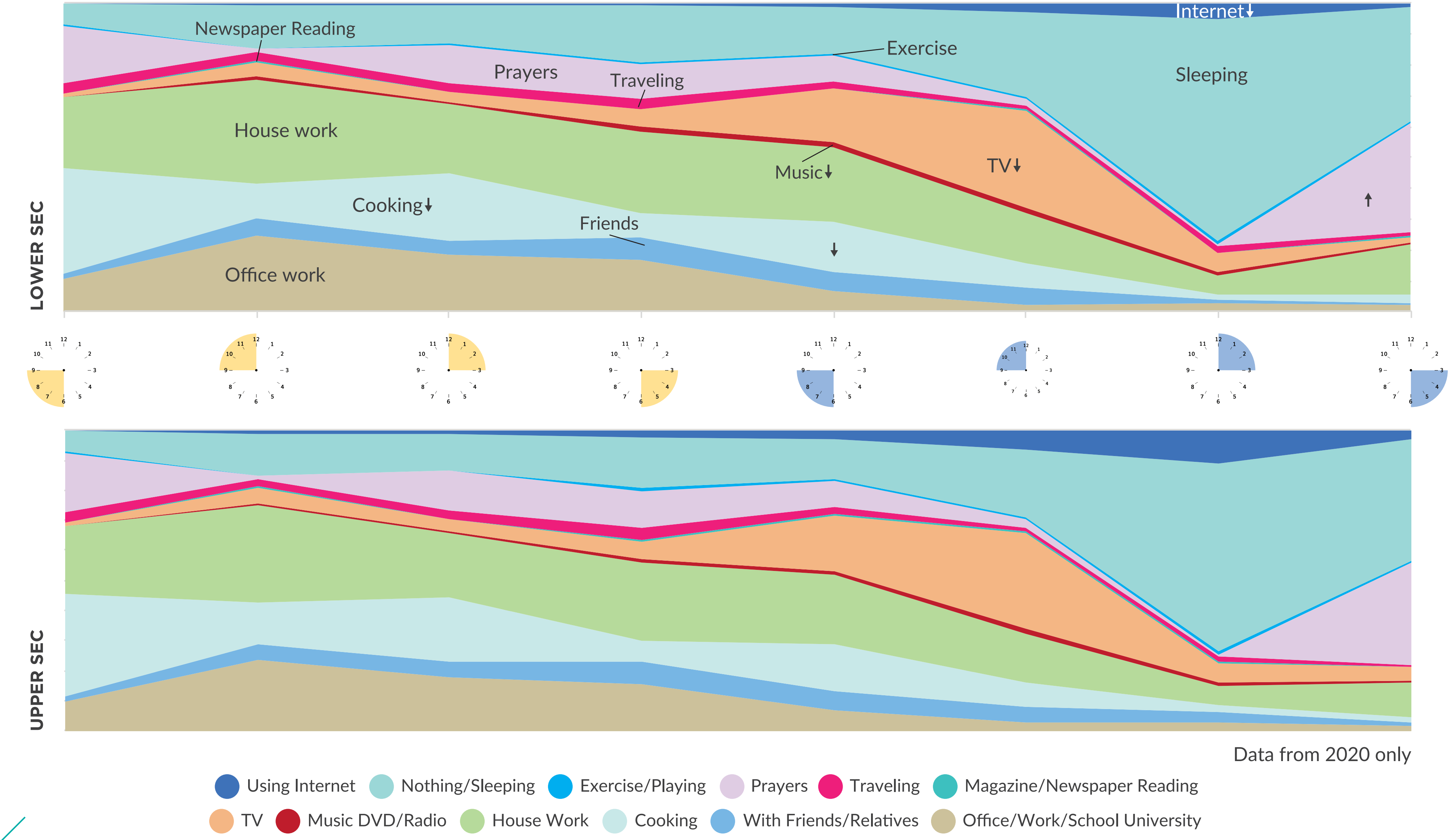
MOOD & FEELING - YOUTH VS ADULT



Data from 2020 only

Youth : 12- 24 yrs Adult: 25+ yrs | Source: Consumer Multimedia Index (2010 – 2020)

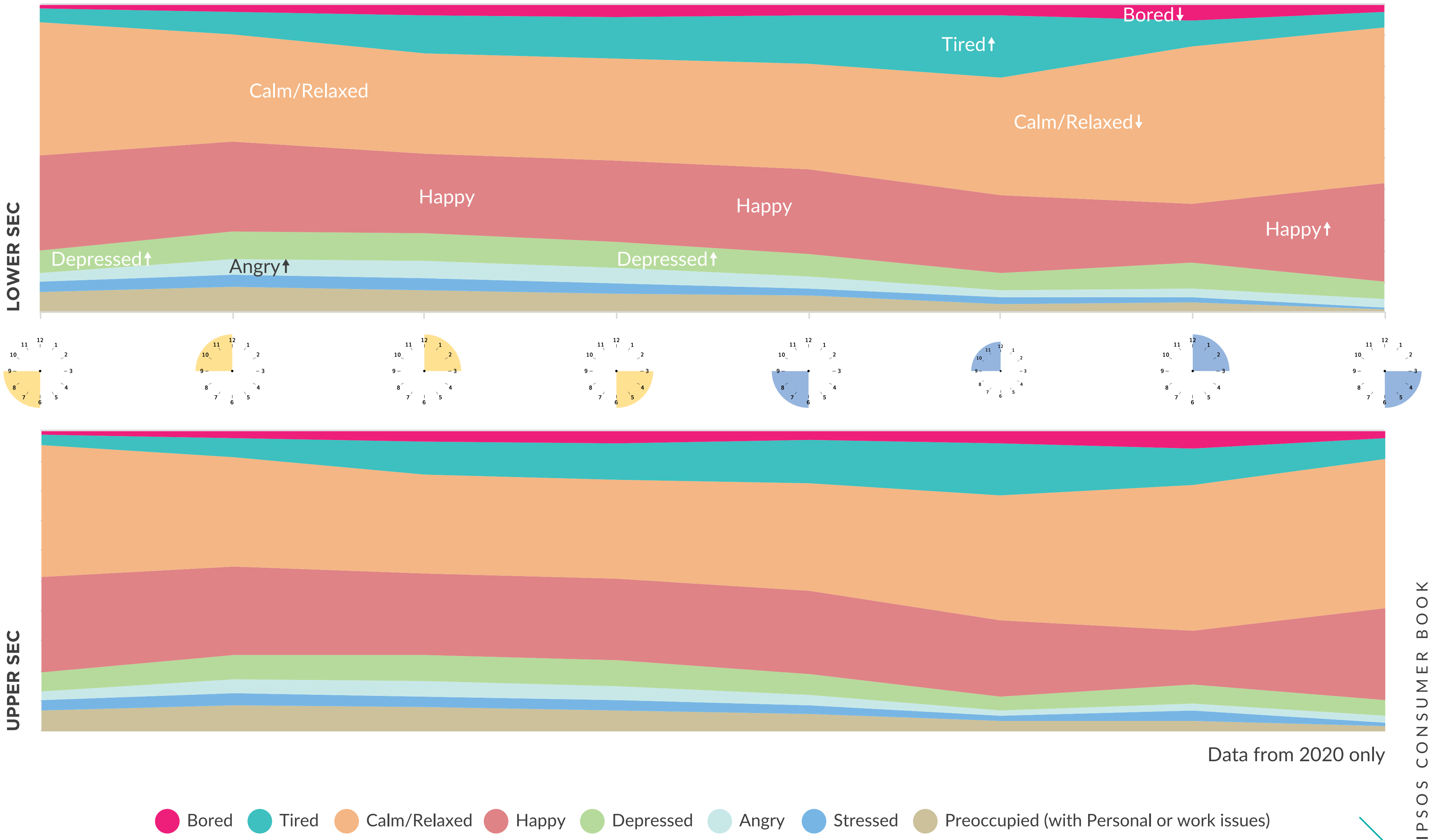
A DAY IN CONSUMERS' LIFE
LOWER SECs VS UPPER SECs



Data from 2020 only

Lower SEC: C, D, E Upper SEC: A & B | Source: Consumer Multimedia Index (2010 – 2020)

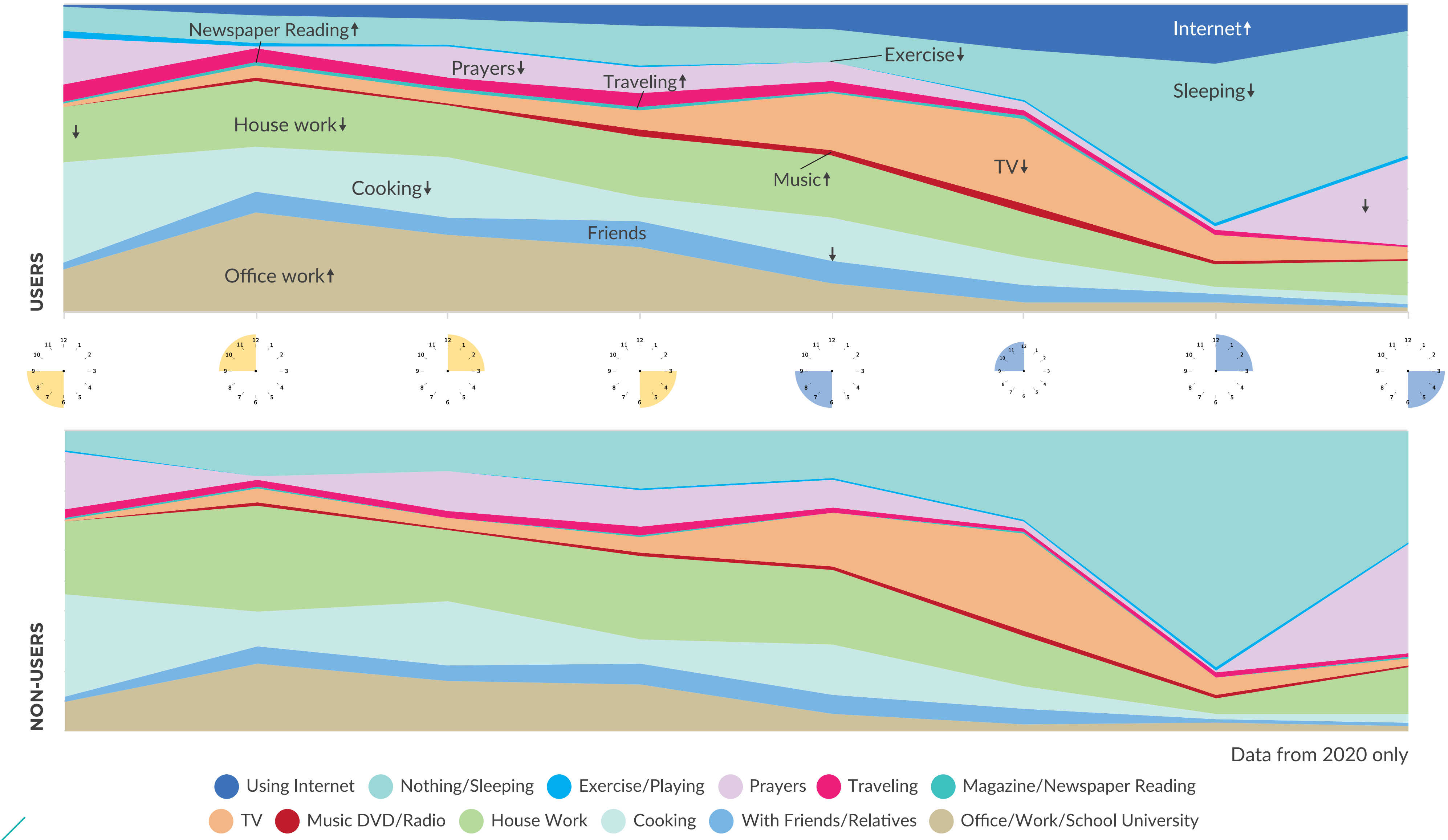
MOODS & FEELINGS
LOWER SECs VS UPPER SECs



Data from 2020 only

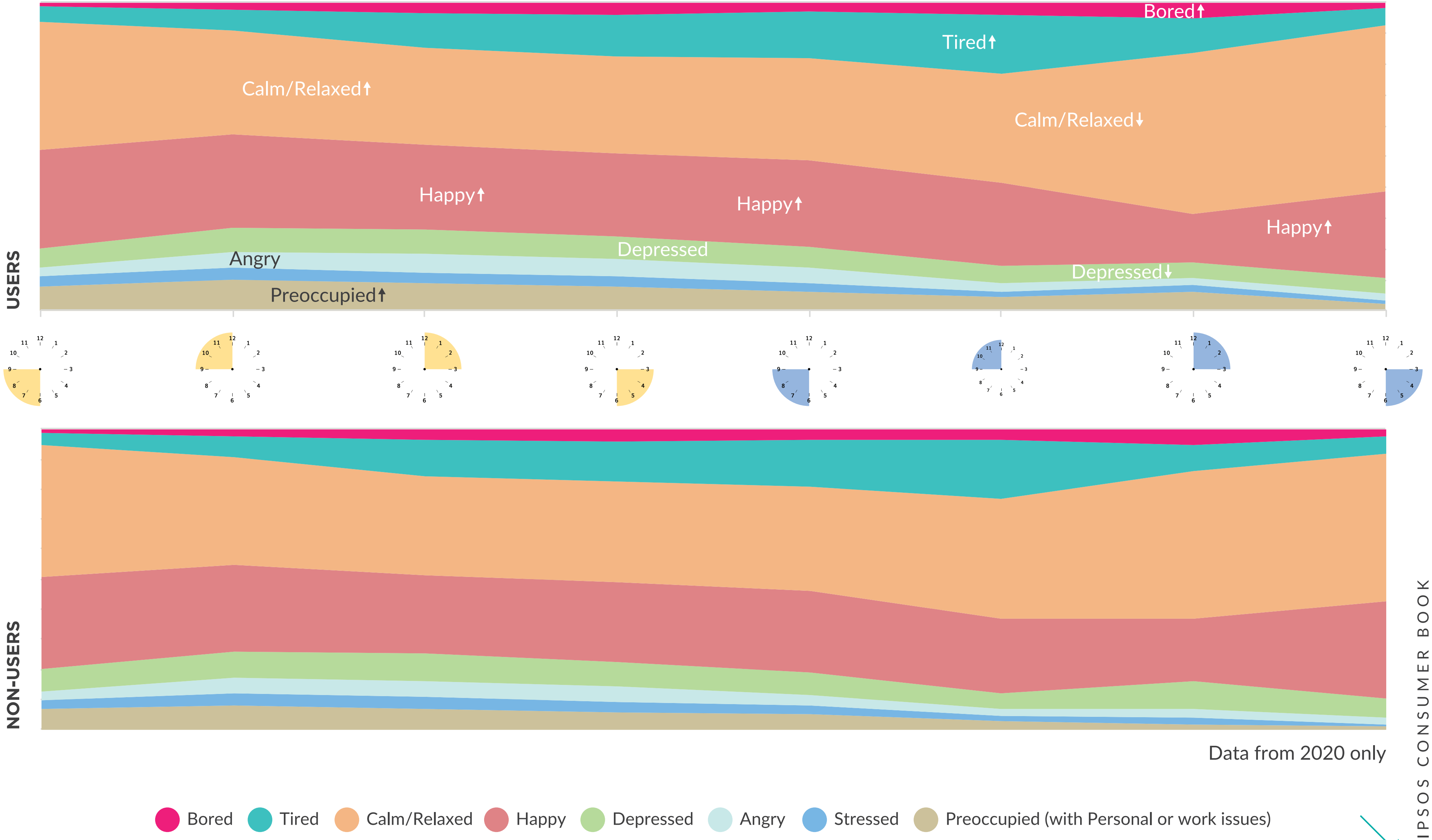
Lower SEC: C, D, E Upper SEC: A & B | Source: Consumer Multimedia Index (2010 – 2020)

A DAY IN CONSUMERS' LIFE
INTERNET USERS VS NON-USERS



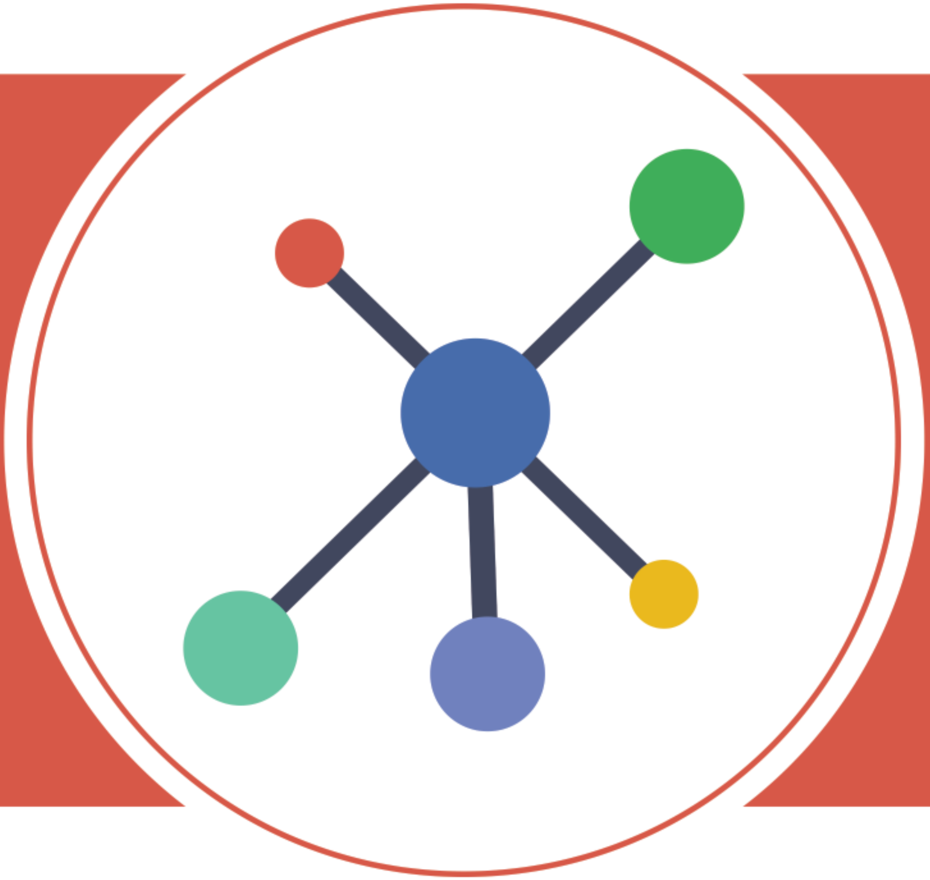
Source: Consumer Multimedia Index (2010 – 2020)

MOOD & FEELING
INTERNET USERS VS NON-USERS



Data from 2020 only

Source: Consumer Multimedia Index (2010 – 2020)



BRAND MENTAL NETWORKS

Brands are made by marketers but live and die by the associations that they make with consumers. Brands exist in peoples' minds as a network.

– a unique memory structure of thoughts, feelings, images, stories, associations, colours, sounds, symbols and memories. Brands with stronger mental networks and high relevance to key choice occasions are chosen more often.

SEE THROUGH YOUR CONSUMERS' EYES

At Ipsos we help you to identify your brand's mental networks as well as your competitors' so that you can INFLUENCE FUTURE BRAND CHOICES. Brand Mental Networks (BMN) provides an understanding of what people truly think about your brand as well as its competitors, in their own words.

Discovering your brand's mental networks means understanding what sticks about your brand with people and, therefore, understanding what you need to reinforce or adjust to take your brand further on its growth journey.

Unlike other perception evaluation methods, BMN reveals an unbiased organic and spontaneously generated image of the brand associations and areas of distinction from competitors.

For more information, please contact: **Adil Jamil** | Head of BHT | **0345 8550 515** | Adil.jamil@ipsos.com

GAME CHANGERS

PSYCHOGRAPHIC ORIENTATION*

*Agreed responses (Top 2 Boxes on a 5-point rating scale) to the following question

WHAT'S THE DEGREE OF YOUR AGREEMENT OR DISAGREEMENT WITH THESE ATTITUDINAL STATEMENTS?

آپ ان جملوں سے کس حد اتفاق یا اختلاف کرتے/کرتی ہیں؟

PAKISTANI YOUTH - CHANGING THE UNCHANGING

Dynamism and change should be a natural and organic feature of a young society, where the median age is among the lowest in the world (twenty-three) and the majority of the population is under the age of thirty. The 2021 Ipsos psychographic data confirms exactly this about Pakistan: a society that is young and changing rapidly.

Among key psychographic indictors, there are major shifts in how people see themselves, how they want to be seen, and how they engage with the rest of society. These findings have potentially profound implications for the economy, for how the state engages with citizens and for how society organizes itself.

The demand for entertainment, fashion and technology shows substantial increases across all income groups, across genders and across the rural-urban divide. Ten years ago, the reported number of people that ate out regularly was 13%, in 2021 this figure nearly tripled to 37%. Similarly, there has been a doubling in those that assert that fashion is an essential part of their lives—in both urban and rural Pakistan.

Men and women both demonstrate a much greater appetite to be alone, as compared to ten years ago, despite continuing support, at least theoretically, for traditional living arrangements like the joint family system and parental consent for marriage. This also indicates the continuing strength of tradition, even as modernity manifests itself. Overall, 74% of all respondents believe that prayers and fasting are a compulsory part of life.

Perhaps one insight to glean from these data points is that the fears that modernity will somehow overrun the cultural identity of Pakistanis are overblown. Young Pakistanis are forging a newer and more modern outlook within the framework of their values. Individualism is clearly on the rise, as Gen Z takes over, not just demographically, but also culturally, with 57% of urban and 52% of rural respondents claiming that they like to stand out in a crowd—both increasing substantially (from 36% in urban and 25% in rural areas).

This trends toward the individual, rather than the collective is manifest across a range of indicators. Nearly six in ten respondents claim they like to speak their minds, even at the cost of upsetting others—with no great variation across incomes, geography, or gender.

Much greater academic research into how gender, demography, and technology are shaping Pakistan is needed on a consistent basis. Ipsos' important psychographic data is yet another reminder of 220 million fascinating stories waiting to be heard, to be told, to be understood and to be served.

SYED MOSHARRAF ALI ZAIDI

Senior Fellow
TABADLAB

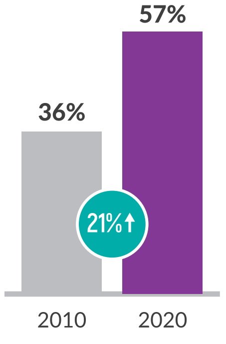
PERSONAL VIEW ON LIFE

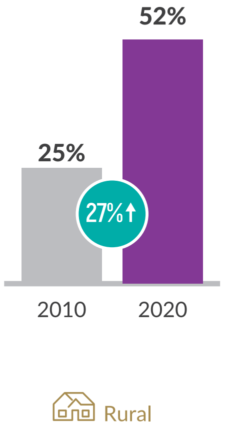
Top 2 box scores are mentioned on 5-point rating scale

I LIKE TO STAND OUT IN A CROWD

مجھے ہجوم میں نمایاں / منفرد نظر آنا اچھا لگتا ہے

2010		2020
29%	25%↑	54%

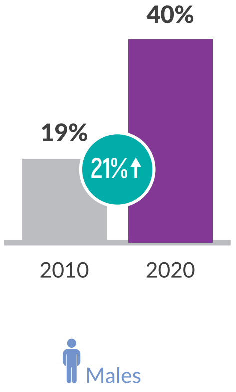


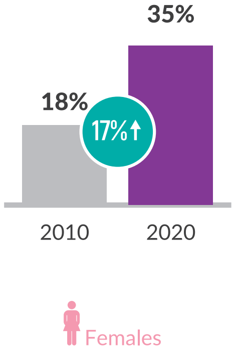


I LIKE TO LIVE ALONE/IN ISOLATION

میں اکیلا / اکیلی رہنا پسند کرتا / کرتی ہوں

2010		2020
19%	18%↑	37%

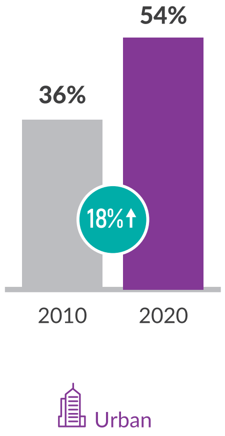


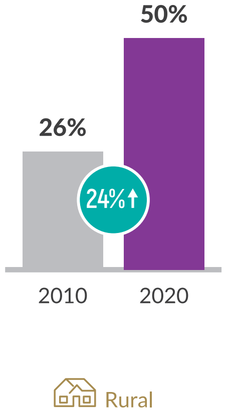


I BELIEVE IN ENJOYING LIFE TODAY AND NOT WORRYING ABOUT FUTURE

میرے خیال میں آج کو انجوائے کرنا چاہیئے اور کل کی فکر نہیں کرنی چاہیئے

2010		2020
29%	22%↑	51%





Source: Consumer Multimedia Index (2010 – 2020)

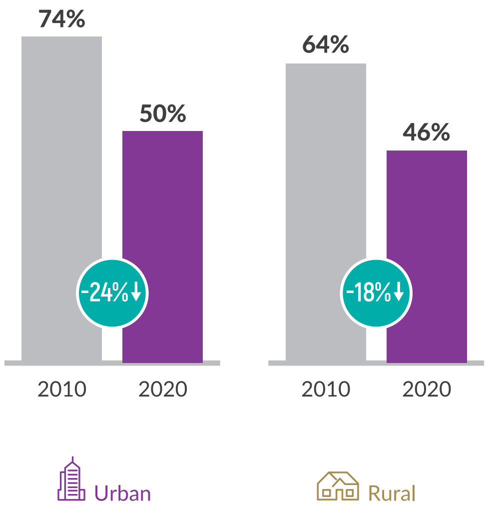
PERSONAL VIEW ON LIFE

I DON'T WANT MUCH CHANGE IN MY LIFE

میں اپنی زندگی میں زیادہ تبدیلی نہیں چاہتا / چاہتی

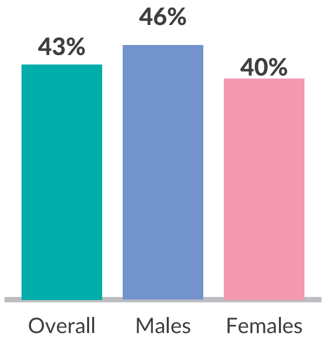
67% -20%↓ 47%

2010 2020



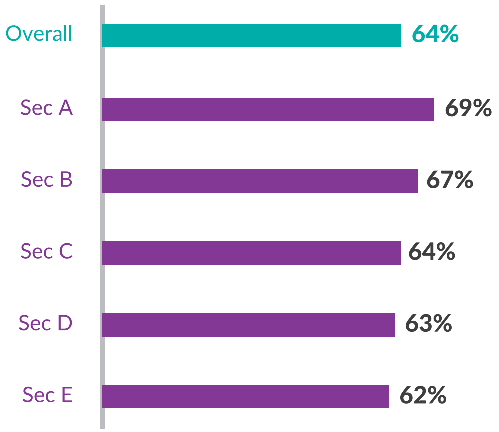
I DON'T HAVE MUCH EXPECTATIONS FROM THE FUTURE

مجھے مستقبل سے زیادہ توقع نہیں ہے



IT IS IMPORTANT FOR ME TO LOOK WELL-DRESSED

میرے لئے اچھے کپڑوں میں نظر آنا ضروری ہے



Top 2 box scores are mentioned on 5-point rating scale

Source: Consumer Multimedia Index (2010 – 2020)

FASHION

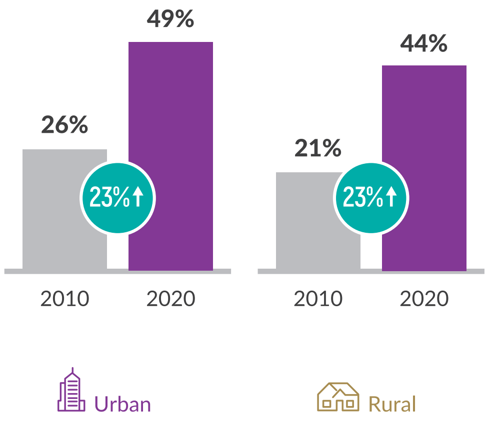
Top 2 box scores are mentioned on 5-point rating scale

FASHION IS AN ESSENTIAL PART OF MY LIFE

فیشن میری زندگی کا لازمی حصہ ہے

23% — 23%↑ — 46%

2010 — 2020

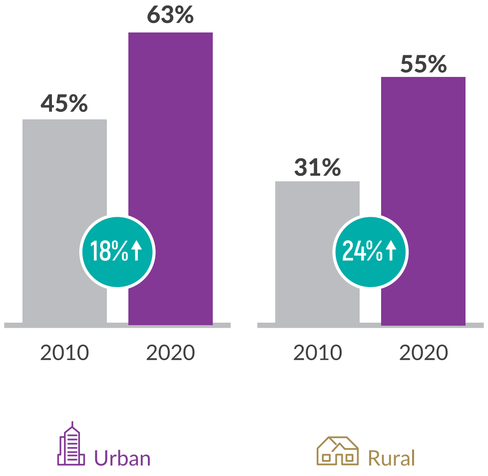


I LIKE THE KIND OF FASHION WHICH IS LIKED/ADMIRED BY EVERYONE

مجھے ایسا فیشن پسند ہے جو سب کو پسند آئے

35% — 22%↑ — 57%

2010 — 2020

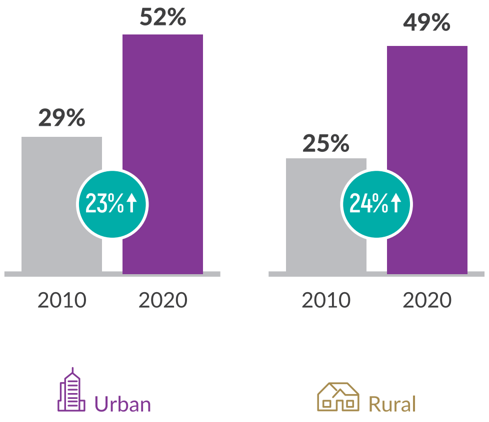


BRANDED PRODUCTS ARE USED JUST TO SHOW OFF AND IMPRESS OTHERS

برانڈڈ چیزیں صرف دکھاوے اور دوسروں پر رعب ڈالنے کے لئے استعمال ہوتی ہیں

26% — 24%↑ — 50%

2010 — 2020



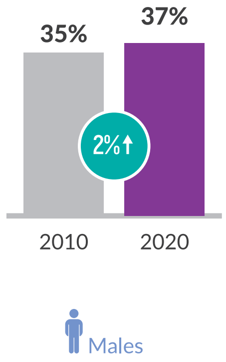
Source: Consumer Multimedia Index (2010 – 2020)

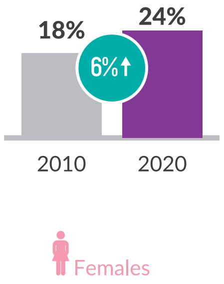
PERSONAL LOOKS

I REGULARLY GO FOR A WALK, JOGGING OR ANY EXERCISE

میں باقاعدگی سے واک , جاگنگ یا کسی بھی طرح کی ورزش
کرتا / کرتی ہوں

26% 5%↑ 31%
2010 2020





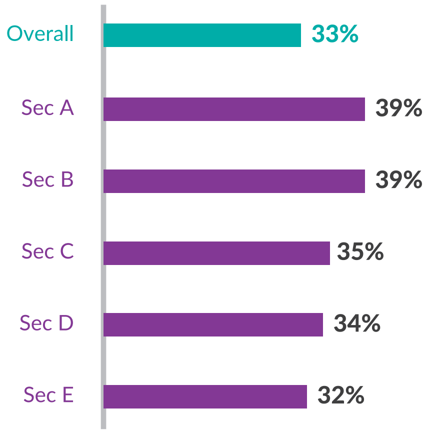
IT`S IMPORTANT TO CONTINUE LOOKING YOUNG

ہمیشہ جوان نظر آنا بہت اہم ہے

43% 21%↑ 64%
2010 2020

MOST OF THE TIME I AM TRYING TO LOSE WEIGHT

میں زیادہ تر وقت وزن کم کرنے کی کوشش کرتا / کرتی ہوں



Top 2 box scores are mentioned on 5-point rating scale

Source: Consumer Multimedia Index (2010 – 2020)

FAMILY

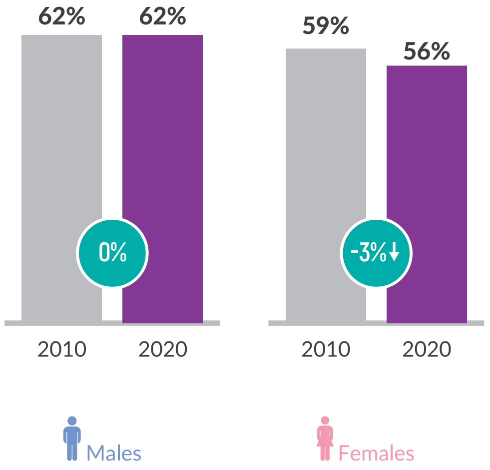
Top 2 box scores are mentioned on 5-point rating scale

I THINK IT IS PEACEFUL IN JOINT FAMILY

میرے خیال میں جوائنٹ فیملی میں سکون ہوتا ہے

61% -2%↓ **59%**

2010 2020

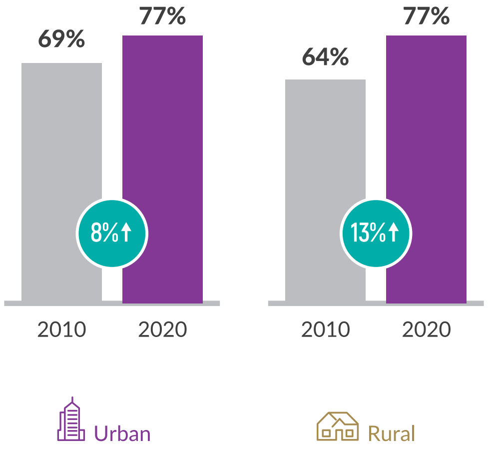


MARRIAGES WITH THE CONSENT/BLESSINGS OF PARENTS CARRY DIVINE ADVANTAGE

جو شادی ماں باپ کی خوشی سے ہوجائے اسی میں برکت ہے

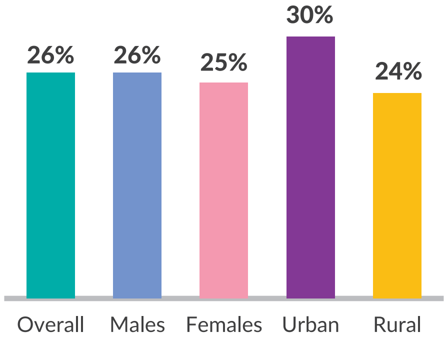
65% 12%↑ **77%**

2010 2020



THERE IS NO HARM FOR YOUNG BOYS AND GIRLS TO BE FRIENDS AND HANG OUT TOGETHER

نوجوان لڑکے لڑکیوں کی دوستی اور ملنے ملانے میں کوئ
حرج نہیں ہے



Source: Consumer Multimedia Index (2010 – 2020)

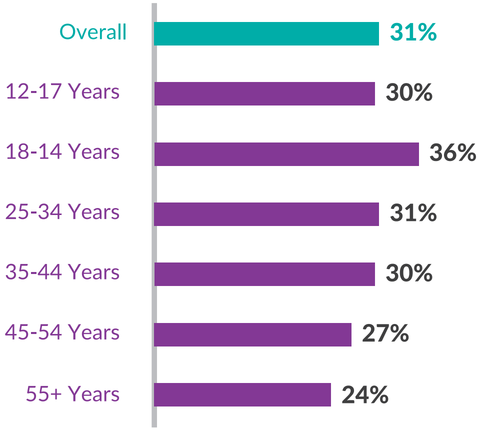
SHOPPING

I WOULD DO ONLINE SHOPPING IF THE PAYMENT METHOD IS SECURE

اگر ادائیگی کا طریقہ کار محفوظ ہو تو میں انٹرنیٹ پر شاپنگ
کرلوں گا / گی

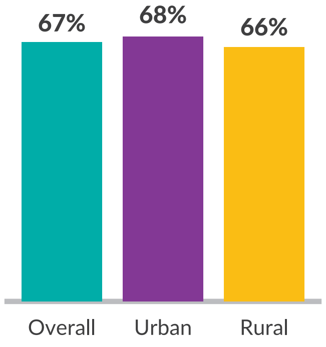
50%
CONNECTED*

27%
NOT CONNECTED



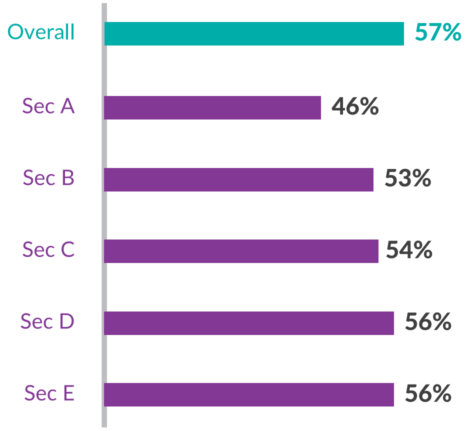
WHENEVER POSSIBLE, I BUY PRODUCTS MADE IN MY OWN COUNTRY

جب بھی ہوسکے میں اپنے ملک کی بنی ہوئی چیزیں خریدتا /
خریدتی ہوں



WHILE SHOPPING, I PREFER/LOOK FOR THE CHEAPEST PRODUCTS AVAILABLE

میں خریداری کے دوران سب سے کم قیمت والی چیز کو
تلاش کرتا / کرتی ہوں

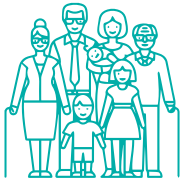


Top 2 box scores are mentioned on 5-point rating scale

*Connected = Who use internet | Source: Consumer Multimedia Index (2010 – 2020)

VALUES

Top 2 box scores are mentioned on 5-point rating scale

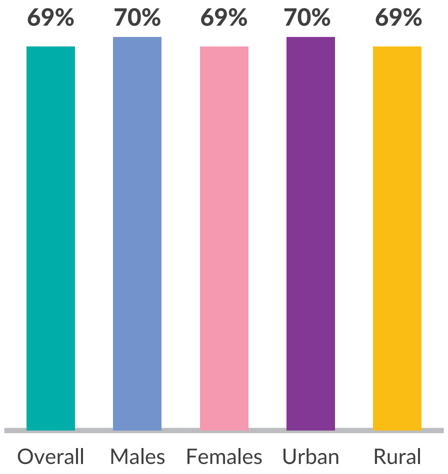


IT IS IMPORTANT TO RESPECT OUR SOCIAL & TRADITIONAL VALUES

یہ بہت ضروری ہے کہ ہم اپنی سماجی اور روائتی قدروں کا
احترام کریں

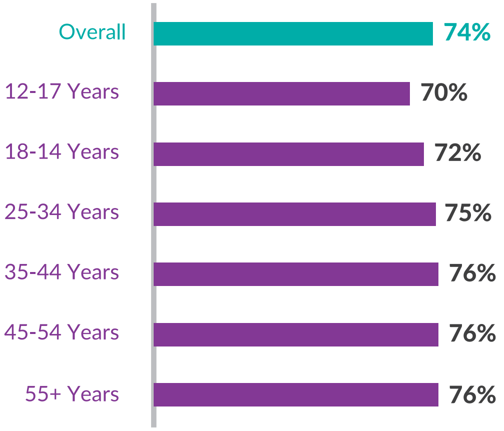
73%
CONNECTED*

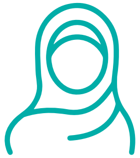
68%
NOT CONNECTED



SAYING PRAYERS AND OBSERVING FAST IS A COMPULSORY PART OF MY DAILY ROUTINE

نمازوں کی باقاعدگی سے ادائیگی اور رمضان کے روزے رکھنا
میرے معمول کا لازمی حصہ ہے

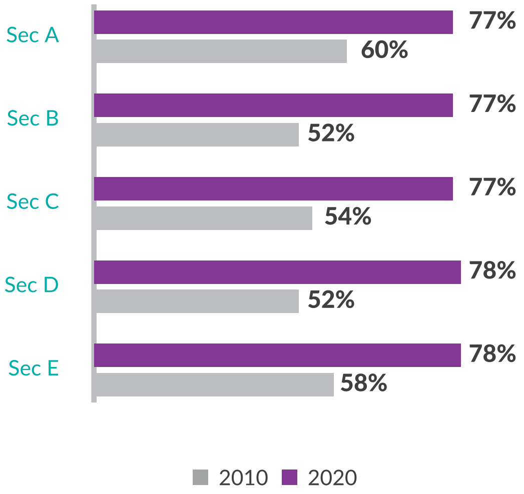




WOMEN, ESPECIALLY YOUNG LADIES SHOULD WEAR CLOAKS/VEILS WHEN THEY GO OUT

خواتین بالخصوص نوجوان لڑکیوں کے لئے اپنے گھروں سے باہر نکلتے
وقت پردہ کرنا یا سر پر چادر / اسکارف پہننا بہت ضروری ہے

54% 23%↑ **77%**
2010 2020



*Connected = Who use internet | Source: Consumer Multimedia Index (2010 – 2020)

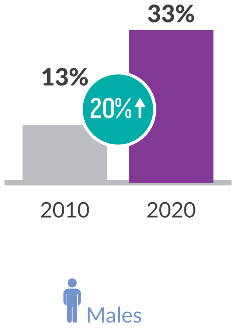
ATTITUDE

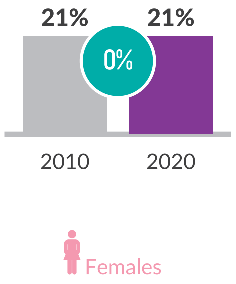
I LIKE TO DRIVE MY CAR/MOTORCYLE FAST

مجھے موٹر سائیکل یا گاڑی تیز رفتار میں چلانا بہت پسند ہے

17% 10%↑ 27%

2010 2020



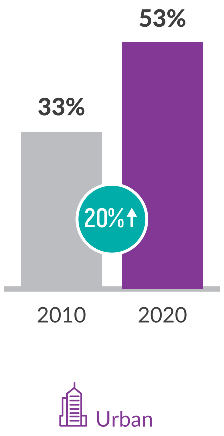


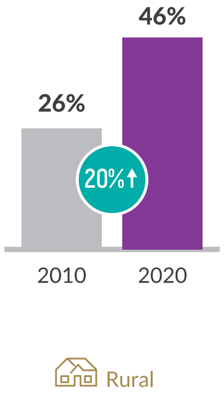
I LIKE CHALLENGES IN LIFE

مجھے زندگی میں چیلنجز پسند ہیں

28% 20%↑ 48%

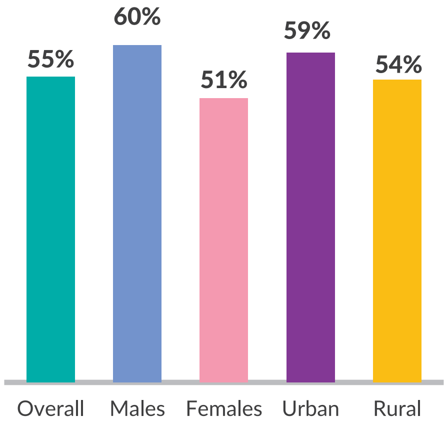
2010 2020





I USUALLY SPEAK UP MY MIND, EVEN IF IT UPSETS/OFFENDS PEOPLE

میں عام طور پر وہی بولتا / بولتی ہوں جو میرے دماغ میں
ہوتا ہے بے شک لوگ اس سے ناراض ہوجائیں



Top 2 box scores are mentioned on 5-point rating scale

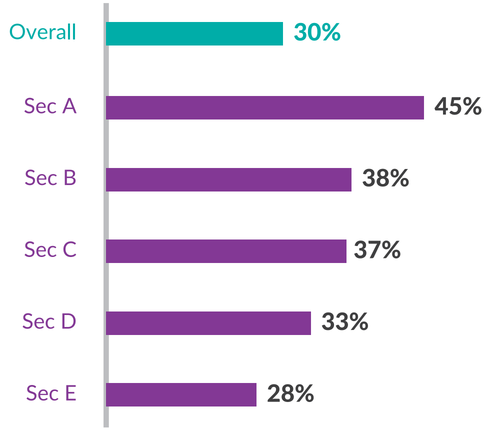
Source: Consumer Multimedia Index (2010 – 2020)

MEDIA

Top 2 box scores are mentioned on 5-point rating scale

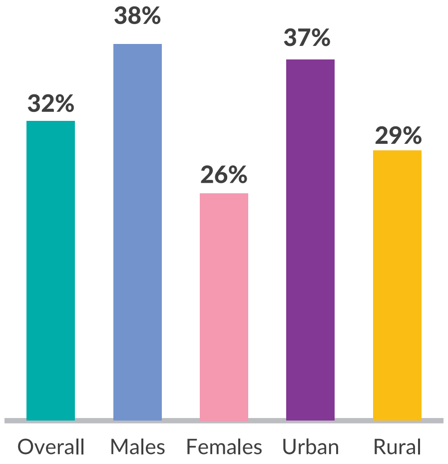
I FEEL SOCIAL NETWORKING SITES ARE A PART OF MY EVERYDAY LIFE

میں سوشل نیٹ ورک ویب سائٹس کو اپنی روزمرہ زندگی
کا حصہ سمجھتا/ سمجھتی ہوں



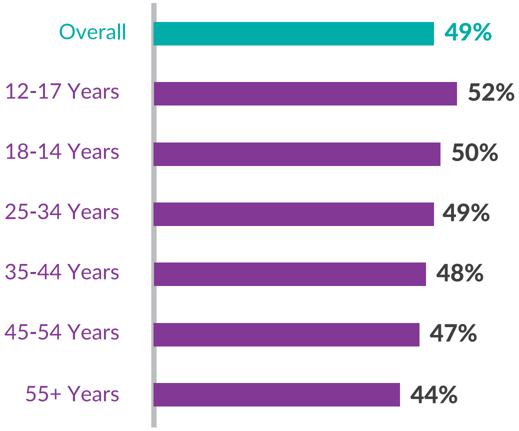
INTERNET IS MY FIRST SOURCE OF INFORMATION

جب مجھے سب سے پہلے معلومات دیکھنی ہو تو، میں انٹرنیٹ
دیکھتا/ دیکھتی ہوں



I RELY ON TV TO GATHER INFORMATION

میں معلومات حاصل کرنے کے لئے ٹی وی پر انحصار کرتا/
کرتی ہوں

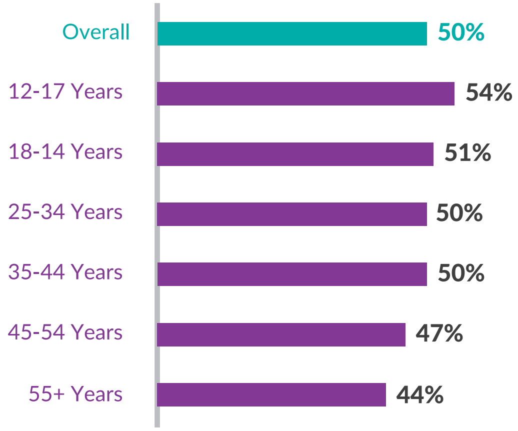


Source: Consumer Multimedia Index (2010 – 2020)

MEDIA

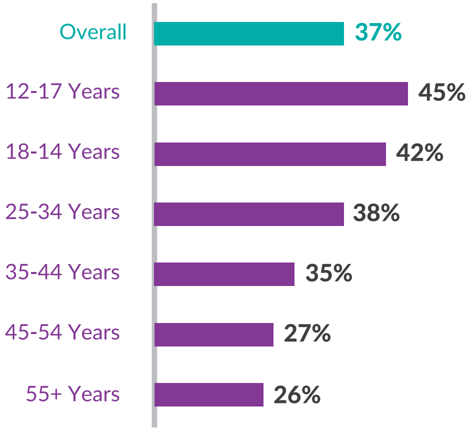
I THINK PEOPLE RELY TOO MUCH ON TV FOR RELAXATION

میرے خیال میں لوگ آرام و سکون کے لئے ٹی وی پر
بہت زیادہ انحصار کرتے ہیں



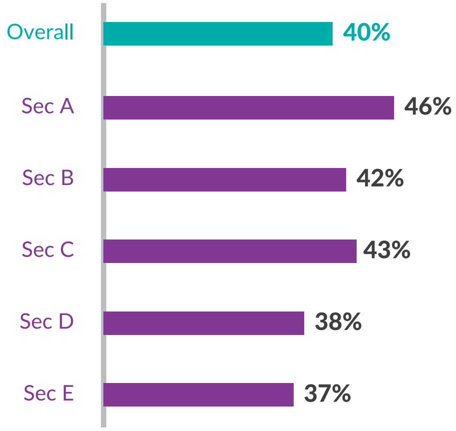
HOME OR OUTSIDE, I LIKE LISTENING TO MUSIC EVERYWHERE

گھر یا باہر ہر جگہ پر میوزک سننا مجھے پسند ہے



THERE ARE TIMES WHEN IT IS OKAY TO BREAK THE RULES

بعض مواقع ایسے ہوتے ہیں جب قانون کو توڑنے میں کوئی
برائی نہیں ہوتی



Top 2 box scores are mentioned on 5-point rating scale

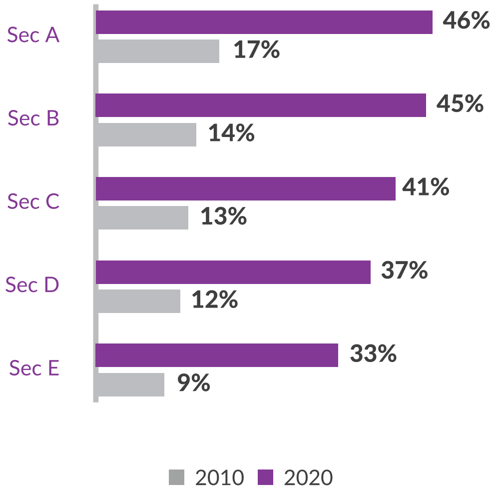
Source: Consumer Multimedia Index (2010 – 2020)

SOCIALISATION

Top 2 box scores are mentioned on 5-point rating scale

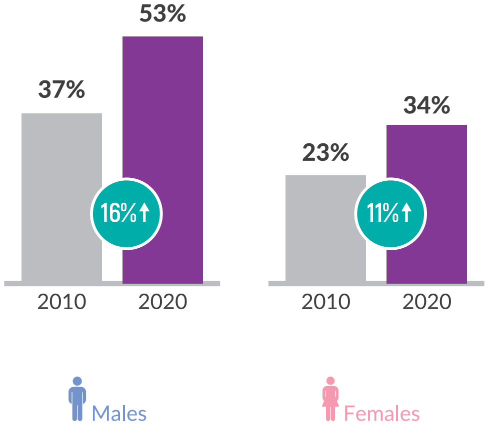
I OFTEN EAT OUT WITH MY FRIENDS & FAMILY

میں اکثر دوستوں اور گھر والوں کے ساتھ باہر کھانا کھاتا/
کھاتی ہوں



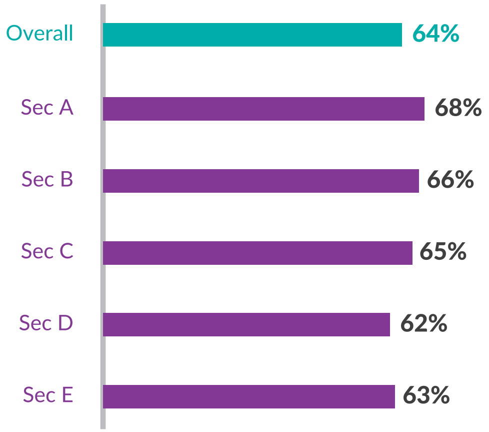
I PREFER SPENDING MOST OF MY TIME WITH FRIENDS

میں زیادہ تر وقت دوستوں کے ساتھ گزارنا چاہتا/ چاہتی ہوں



WE SHOULD BE OPEN MINDED TOWARDS OTHER CULTURES

ہمیں دوسری ثقافتوں کے لئے اپنا ذہن کھلا رکھنا چاہئے

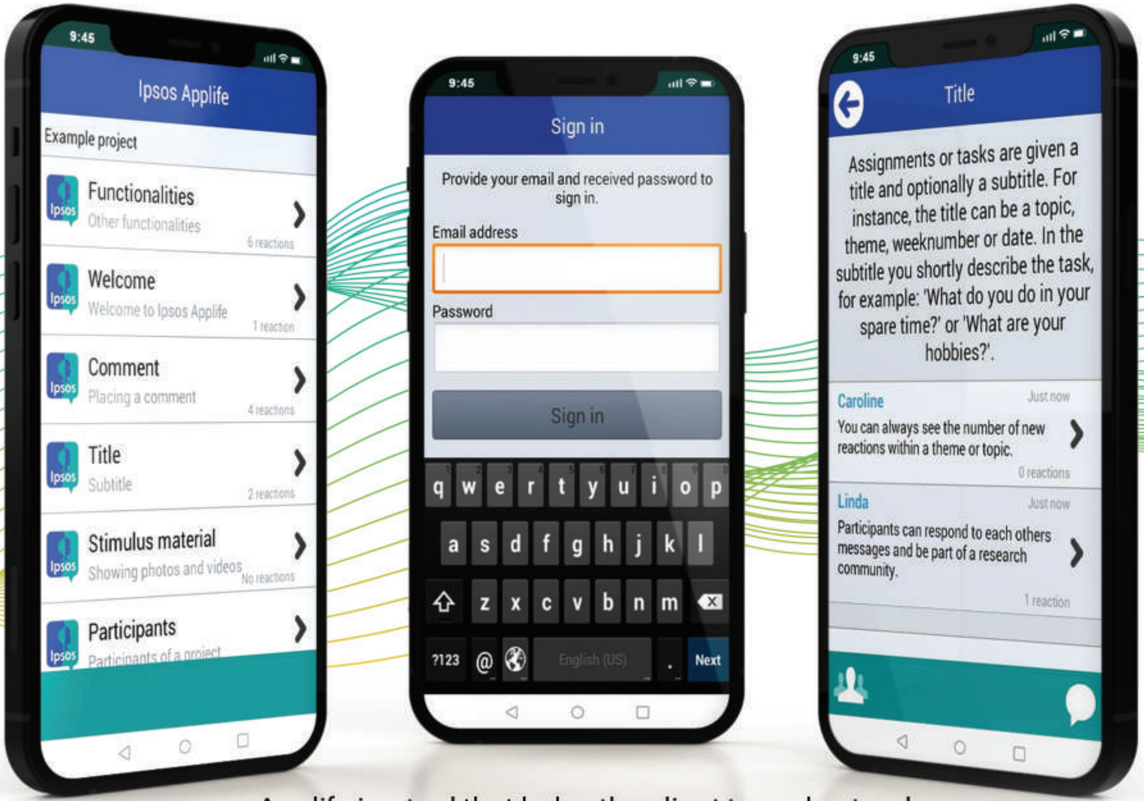


Source: Consumer Multimedia Index (2010 – 2020)

APPLIFE

WINNING TOOL FOR CONTEXTUAL RESEARCH

Ipsos Applife



Provide your email and received password to sign in.

Assignments or tasks are given a title and optionally a subtitle. For instance, the title can be a topic, theme, weeknumber or date. In the subtitle you shortly describe the task, for example: 'What do you do in your spare time?' or 'What are your hobbies?'.

You can always see the number of new reactions within a theme or topic.

Participants can respond to each others messages and be part of a research community.

Applife is a tool that helps the client to understand more deeply the context in which the behavior takes place. The context around a person influences how they make choices, decisions and how they behave.

IN THE MOMENT | **REAL CONTEXT** | **ON THE GO** | **QUICK RESPONSE**

- ✓ **IN THE MOMENT-**Thoughts and opinions of respondents are formed at the very moment no recall required
- ✓ **REAL CONTEXT-**Responses are in an actual situation & in natural environment
- ✓ **ON THE GO-**Respondents can respond any time anywhere through their phones
- ✓ **QUICK RESPONSE-**Respondents can be asked to respond quickly after launching questions since it is a mobile app

For more information, please contact:
M. Haris Rasheed | Head of MSU/IUU | **0345 8227 131** | haris.rasheed@ipsos.com

GAME CHANGERS Ipsos

CONSUMER LIFESTYLE

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DESKS | WORKSTATIONS | SEATING | STORAGE

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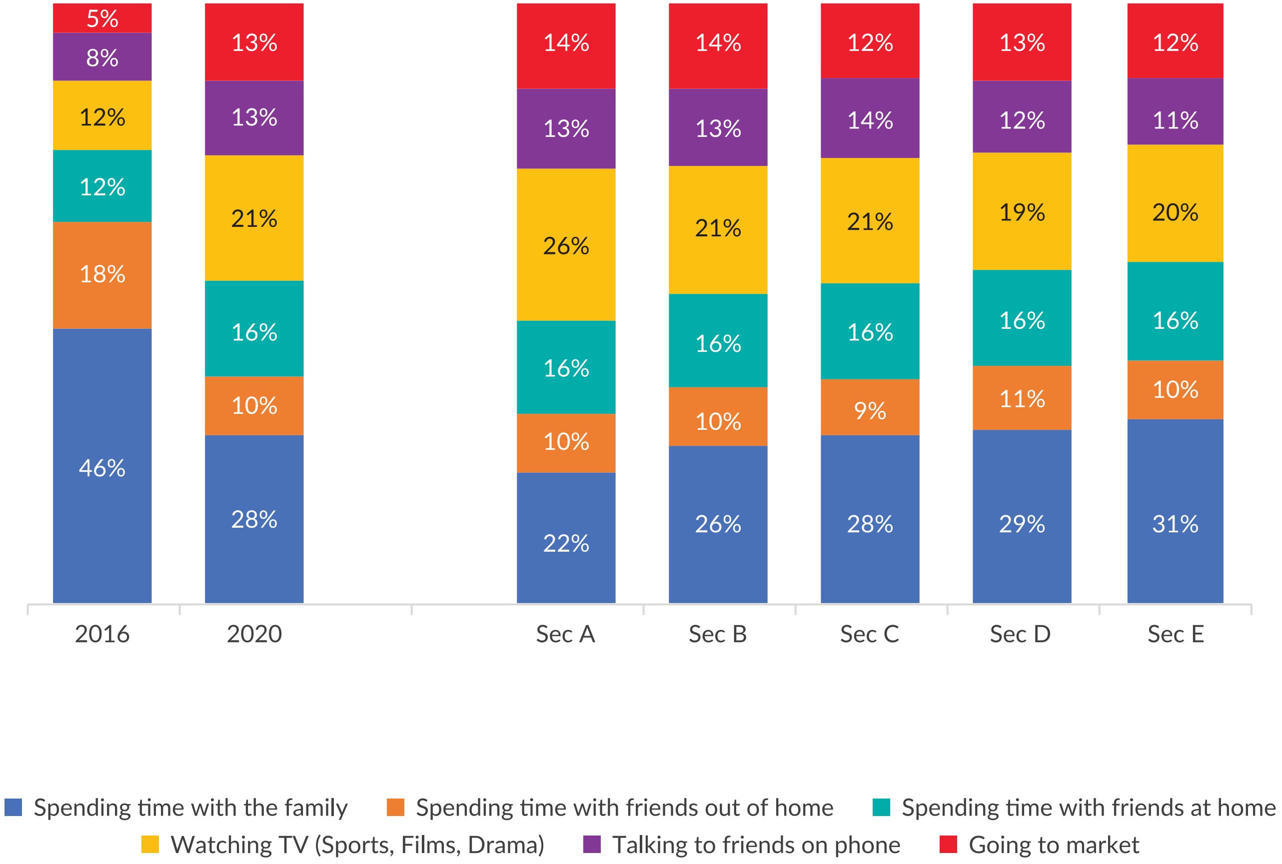
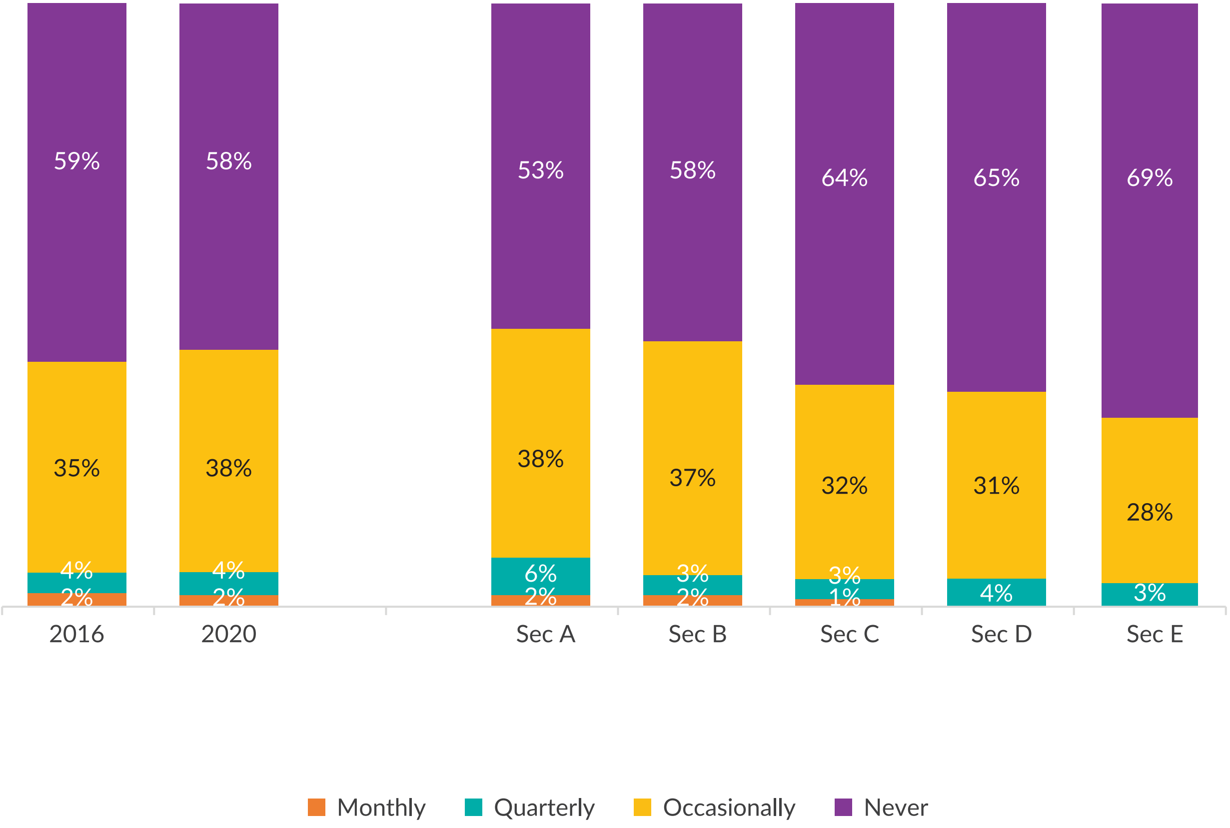


Source: Consumer Multimedia Index (2010 – 2020)

LEISURE ACTIVITIES WITH FAMILY

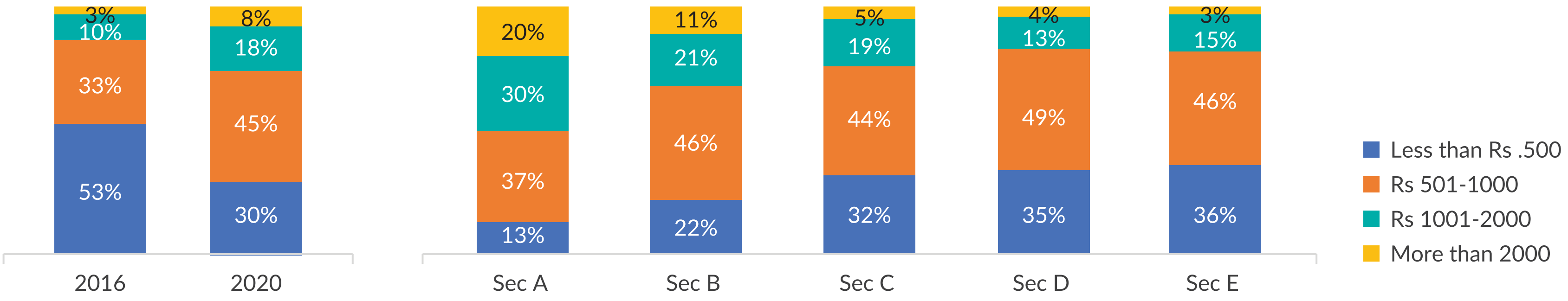


Source: Consumer Multimedia Index (2010 – 2020) | 10 year change not available

VISITING BEAUTY PARLORS AND AVERAGE AMOUNT SPENT/VISIT

VISITING PARLORS

AVERAGE AMOUNT SPENT/ VISIT



Source: Consumer Multimedia Index (2010 – 2020)

ONLINE COMMUNITITES

Single Solution for Multiple Business Needs

Ipsos communities enable collaborative environments for brands to interact with consumers in real-time. It will help the client to build insights, drive innovation and gain influence by accessing on-tap audience eager to provide input that will have an impact. Ipsos Communities leverage the very latest in online technology to turn static, linear research into an interactive and immersive experience. Featuring a robust suite of qualitative research tools, which can be scoped to meet your specific research objectives, from overnight testing to longer term, iterative learning.

Ipsos Community direct

WHAT ACTIVITIES WILL BE COVERED?

- BLOGS AND VIDEO DIARIES
- LIVE CHATS & VIDEO FOCUS GROUP
- CO-CREATION & VOTING
- MARKER BOARD
- DISCUSSION

WHAT WILL CLIENT GET FROM THIS?

- RESEARCH EXPERTISE
- ENGAGEMENT AND APPROACH
- INNOVATIVE PLATFORM
- FLEXIBLE SOLUTION
- SPEED AND SIMPLICITY

For more information, please contact:
M. Haris Rasheed | Head of MSU/IUU | **0345 8227 131** | haris.rasheed@ipsos.com

GAME CHANGERS Ipsos

SERVANTS, SPORTS EQUIPMENT, CLUB MEMBERSHIP & STUDY ABROAD

2020 ONLY

SERVANTS

Maid	1.2%
Driver	0.2%
Cook	0.1%
Babysitter	0.4%
Guard	0.1%

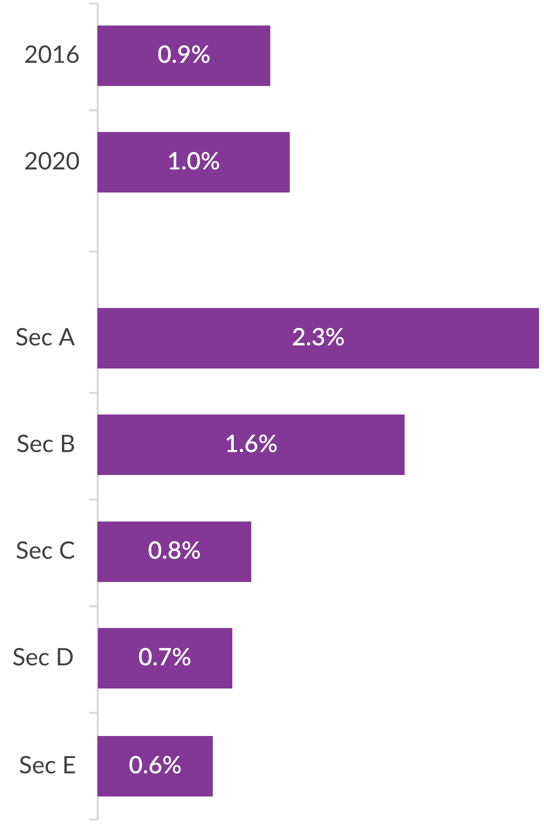
SPORTS EQUIPMENT

Golf equipment	0.2%
Scuba diving/surfing	0.2%
Skiing	0.1%
Glider	0.1%
Treadmill	0.1%
Motorboat	0.1%
Swimming pool	0.04%
Musical instrument	0.1%
Hot tub / Jacuzzi/ Sauna	0.1%

CLUB MEMBERSHIP

Club Member ship	0.4%

WENT ABROAD FOR STUDIES



Base : All Respondents | Source: Consumer Multimedia Index (2010 – 2020)


Fast
CABLES
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ایک بار لگے
نسلوں چلے!
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MULTIMEDIA OUTLOOK

"CONTENT" IS THE KING IN MODERN MULTIMEDIA WORLD

Last decade has led us to a 'Multi-screen' world where traditional television programming is viewed on computers, newspapers are read on mobile phones, movies are watched on tablets and so on. Direct To Home (DTH) transmission is becoming obsolete past. Social and digital media as whole has already surpassed electronic and print media combined, in many markets, in terms of reach, frequency, revenues, variety and engagement. "Content" has emerged as the only "King" driving general consumers to choose the right screens at their preferred timing. Media outlets need to focus on producing relevant, unique, and rich quality content across all genres to stay viable in the coming decades.

Unearthing core human insights are increasingly becoming more critical for the marketers, to identify sustainable communication platforms which can be equally and optimally leveraged for advertising on traditional as well as on digital media, to win more consumers and customers. The challenge observed is that many large MNCs and local organisations have internal protocols, best practices and norms suitable for TV commercials. Once TVCs are finalized, generally its adaptations are utilized for digital, social, outdoor, POS and print. The dire need is to develop similar SOPs for all types of media to match their specific requirements and technical aspects. Another objection raised against Pakistani advertising industry is lack of creativity and originality while producing domestic campaigns. I believe that various social taboos evolved significantly during last few decades have unfortunately curbed creative thinking in Pakistan. Well thought strategic planning and legislative and administrative measures along with strong political will, are required to unleash and flourish native creativity, folk wisdom and great communication.

Fake News has become an issue with the emergence of many social media platforms. This is likely to become even more serious threat to undermine genuine news' credibility. Again, relevant stakeholders need to craft and institutionalize necessary mechanism to filter fake news across the board.

TAHER A. KHAN

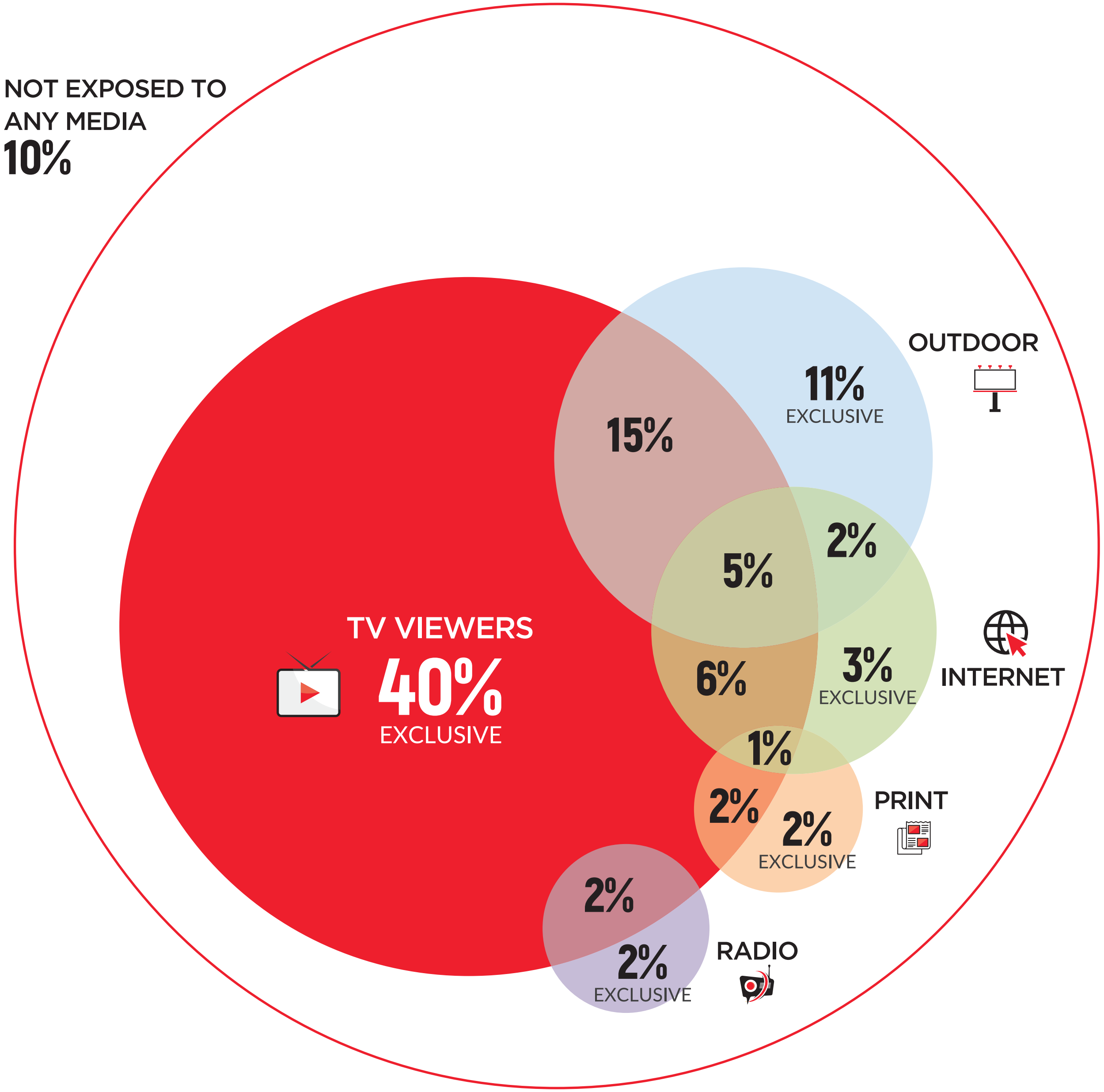
Chief Patron
PAKISTAN BROADCASTERS ASSOCIATION

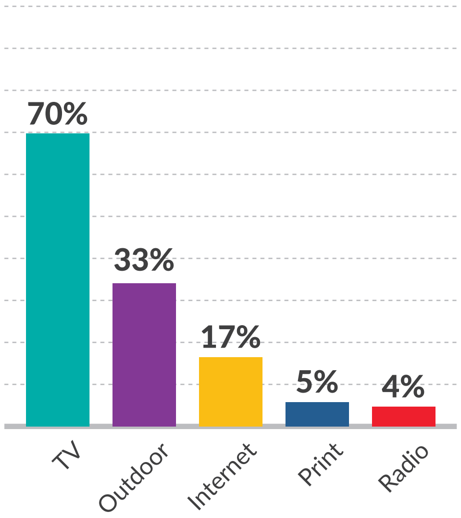
Chairman
PRESIDENTIAL INITIATIVE ON
POPULATION OWNERSHIP

President - CANCER SOCIETY

Trustee - FATIMID FOUNDATION

Chairman - INTERFLOW GROUP





OVERALL REACH

Source: Consumer Multimedia Index (2010 – 2020)

DEFINITIONS & ABBREVIATIONS

Reach

- Daily Reach refers to the estimated total number of people exposed to a medium at least once a day.
- Weekly Reach refers to the total number of people exposed, at least once in a week.
- Monthly or Long Ago Reach refers to the total number of people exposed, at least once in a month.

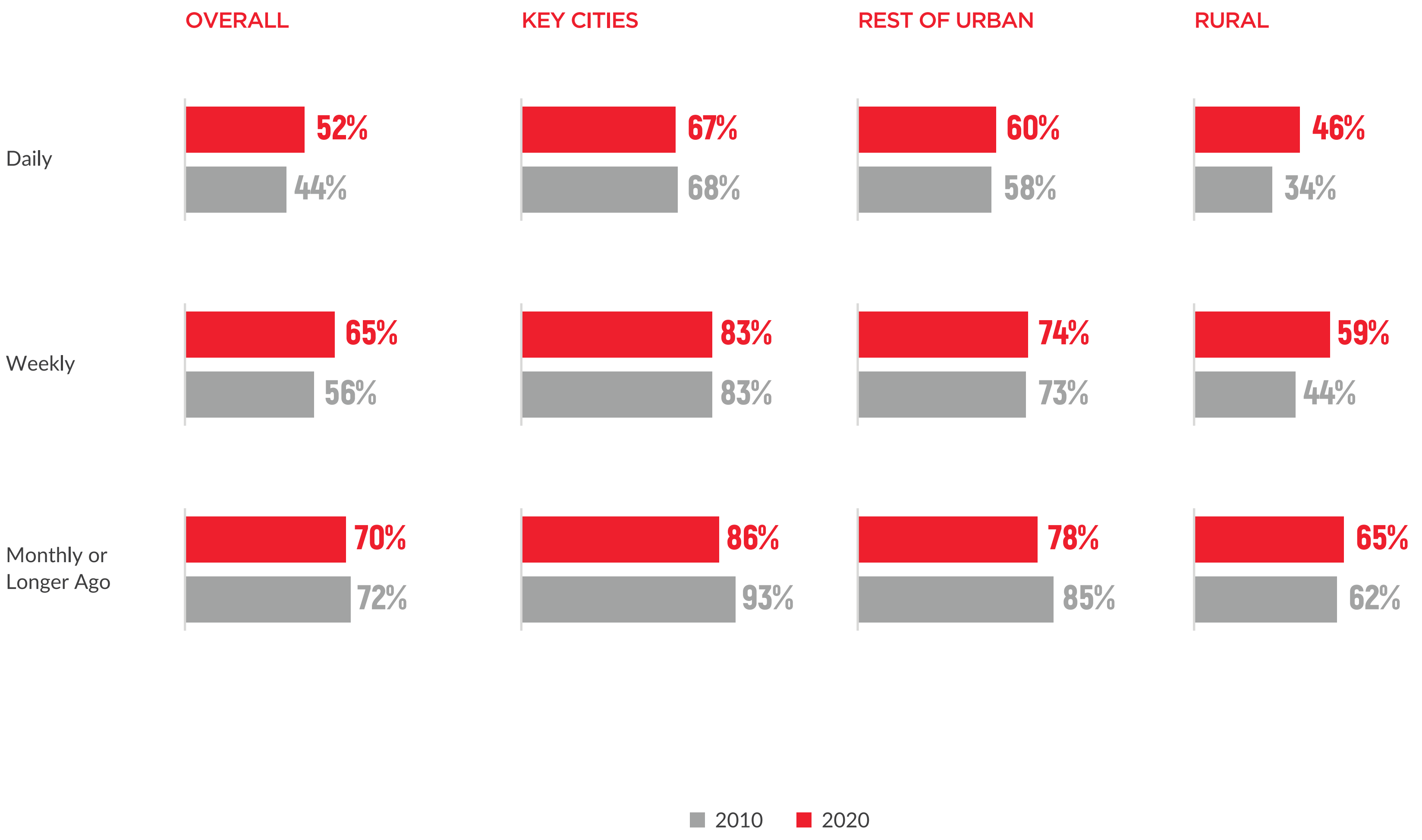
Geography

- ***Metros*** are metropolitan cities of Pakistan i.e. Karachi, Lahore, and Islamabad/Rawalpindi.
- ***15 Key Cities*** comprising 22% population representing major urban segments of the country that includes Karachi, Lahore, Faisalabad, Gujranwala, Hyderabad, Rawalpindi/Islamabad, Peshawar, Multan, Quetta, Mardan, Sargodha, Sukkur, Bahawalpur, Sialkot & Sahiwal.
- ***Rest of Urban (RoU)*** comprises 22% of the population in 35 cities other than the key cities of Pakistan which constitutes a panel to represent the Rest of Urban Pakistan.
- ***Rural*** comprises 56% population representing the villages of Pakistan. In this study 500 villages were selected to give robust representativeness of the rural segment.

Media Vehicles

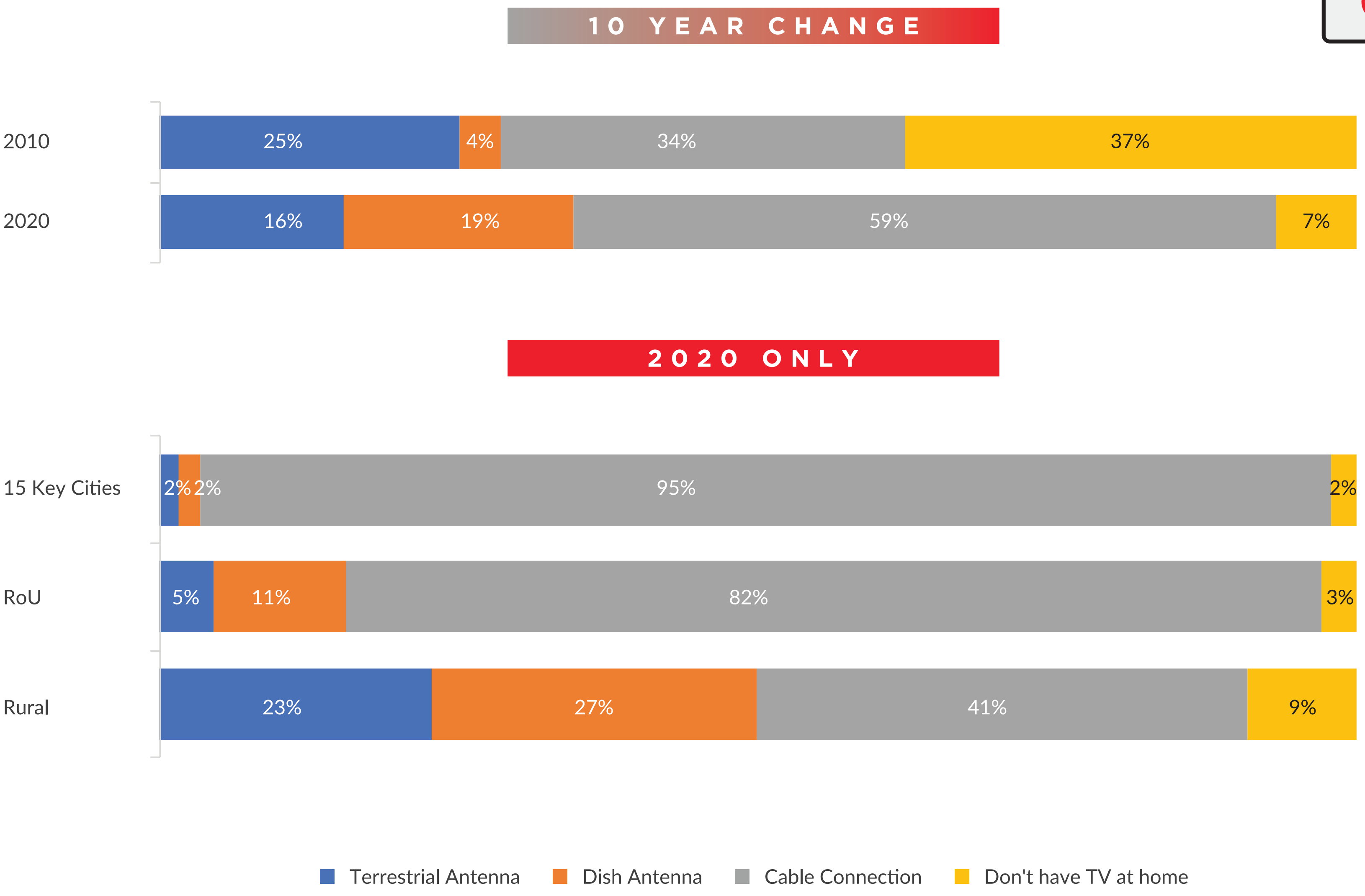
- Print media refers to Newspapers & Magazines.
- Out of Home (OOH) Media is an advertising medium that is used to reach consumers on the go e.g. Billboards.
- Promotional SMS is a message delivered to consumers via mobile phones.

TV REACH



Source: Consumer Multimedia Index (2010 – 2020)

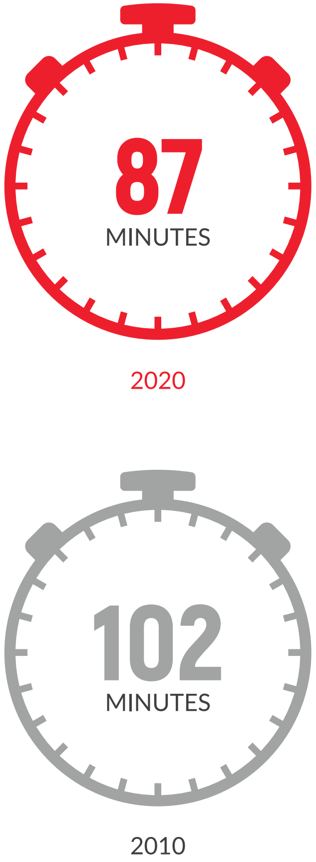
SOURCE OF TV RECEPTION



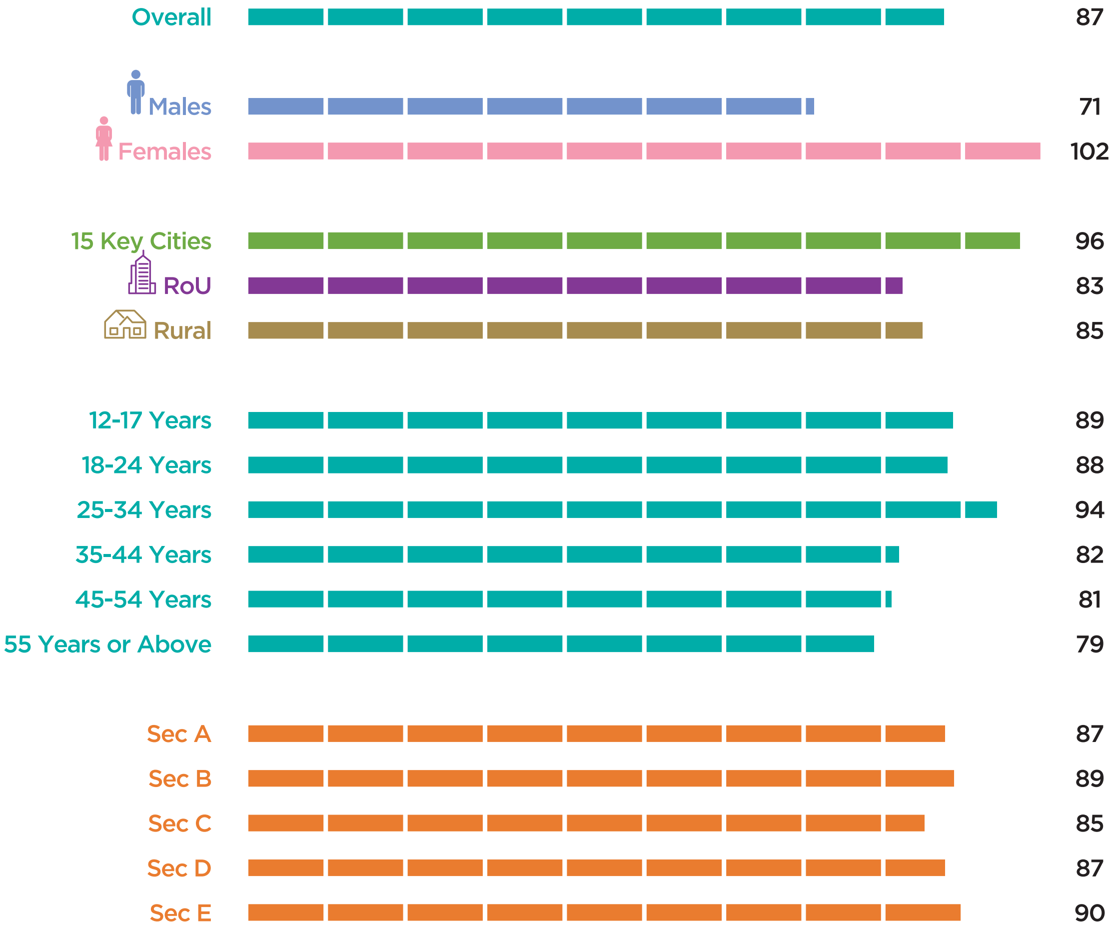
Source: Consumer Multimedia Index (2010 – 2020)

AVERAGE TIME SPENT ON TV (MINUTES)

10 YEAR CHANGE



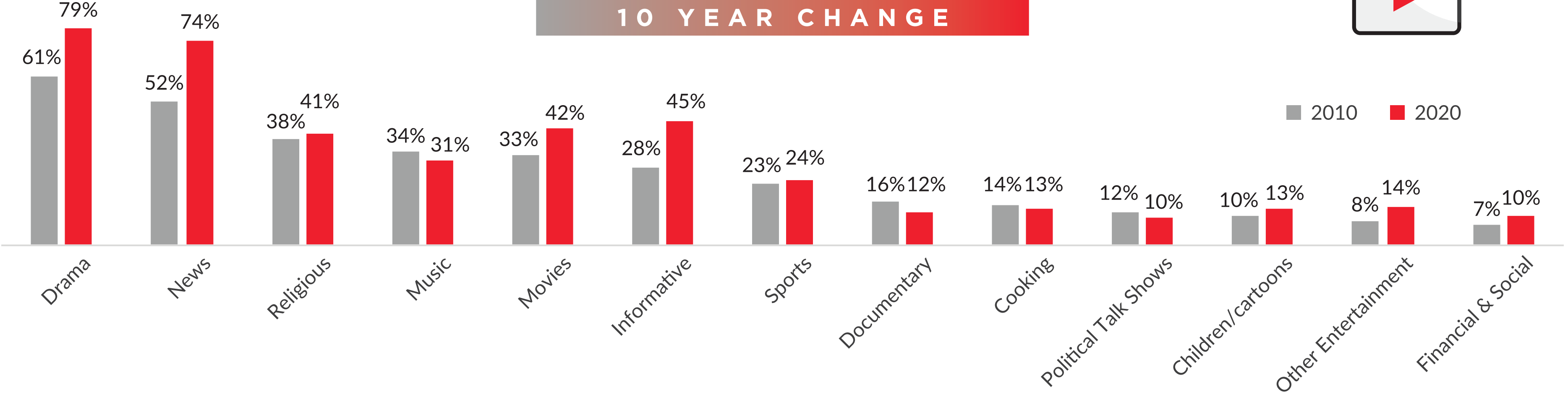
2020 ONLY



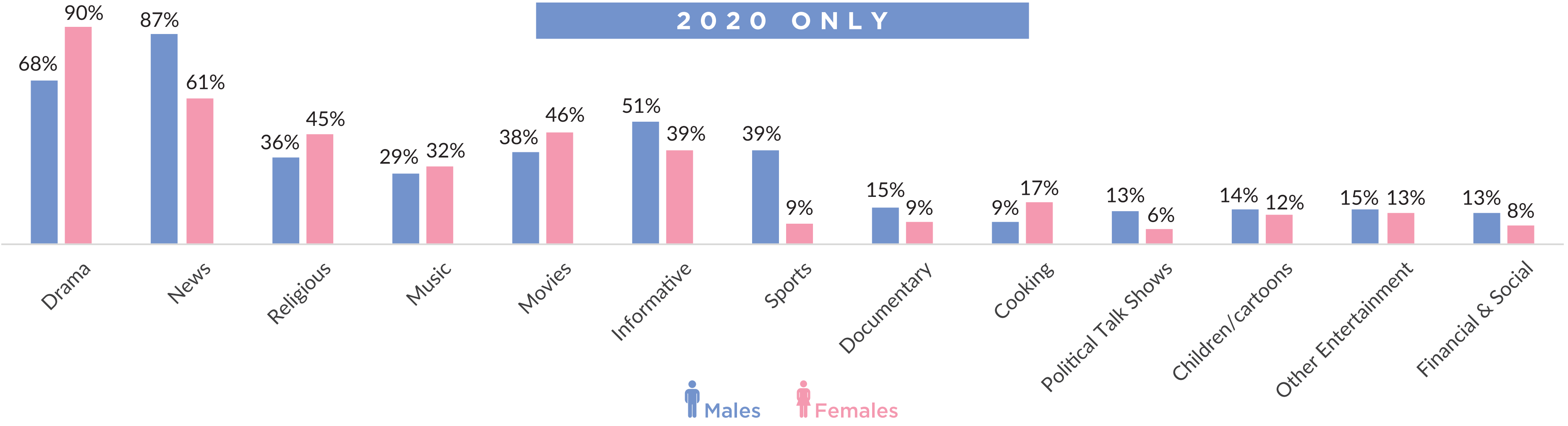
Source: Consumer Multimedia Index (2010 – 2020)

FAVORITE PROGRAMS ON TV

10 YEAR CHANGE



2020 ONLY



Source: Consumer Multimedia Index (2010 – 2020) | Answers based on multiple responses

MOST WATCHED CHANNELS

ENTERTAINMENT

A plus

ARY DIGITAL

ARY ZINDAGI

ULTRA HD بول ENTERTAINMENT

Atv

express entertainment

GEO ENTERTAINMENT

کہانی

HUM ہم

PTV home

TV ONE

Kashish

urdu 1

Only those channels logos are placed which constitute 90% of the overall share.
They are in alphabetical order and from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

MOST WATCHED CHANNELS

NEWS

Only those channels logos are placed which constitute 90% of the overall share.
They are in alphabetical order and from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

MOST WATCHED CHANNELS

REGIONAL

AVT خیبر
جاگ
کے ٹو KAY2
خیبر
کوہ نور TELEVISION

KTN
HD لاہور NEWS
مشرق MASHRIQ
مہران MEHRAN TV
PASHTO 1
PTV bolan
Waseb وسیب

PTV global
Sindh TV
سوہنی دھرتی
PUNJAB TV
RAAVi
ROHI روہی

Only those channels logos are placed which constitute 90% of the overall share.
They are in alphabetical order and from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

MOST WATCHED CHANNELS

SPORTS

PTV sports

SUPER

TEN SPORTS

RELIGIOUS

السنة النبوية

القرآن الكريم

ARY Qtv

MOVIES

film WORLD

FILMAZIA

HBO

STAR MOVIES

MUSIC

8XM HD

JALWA

Oxygene

ARY Musik

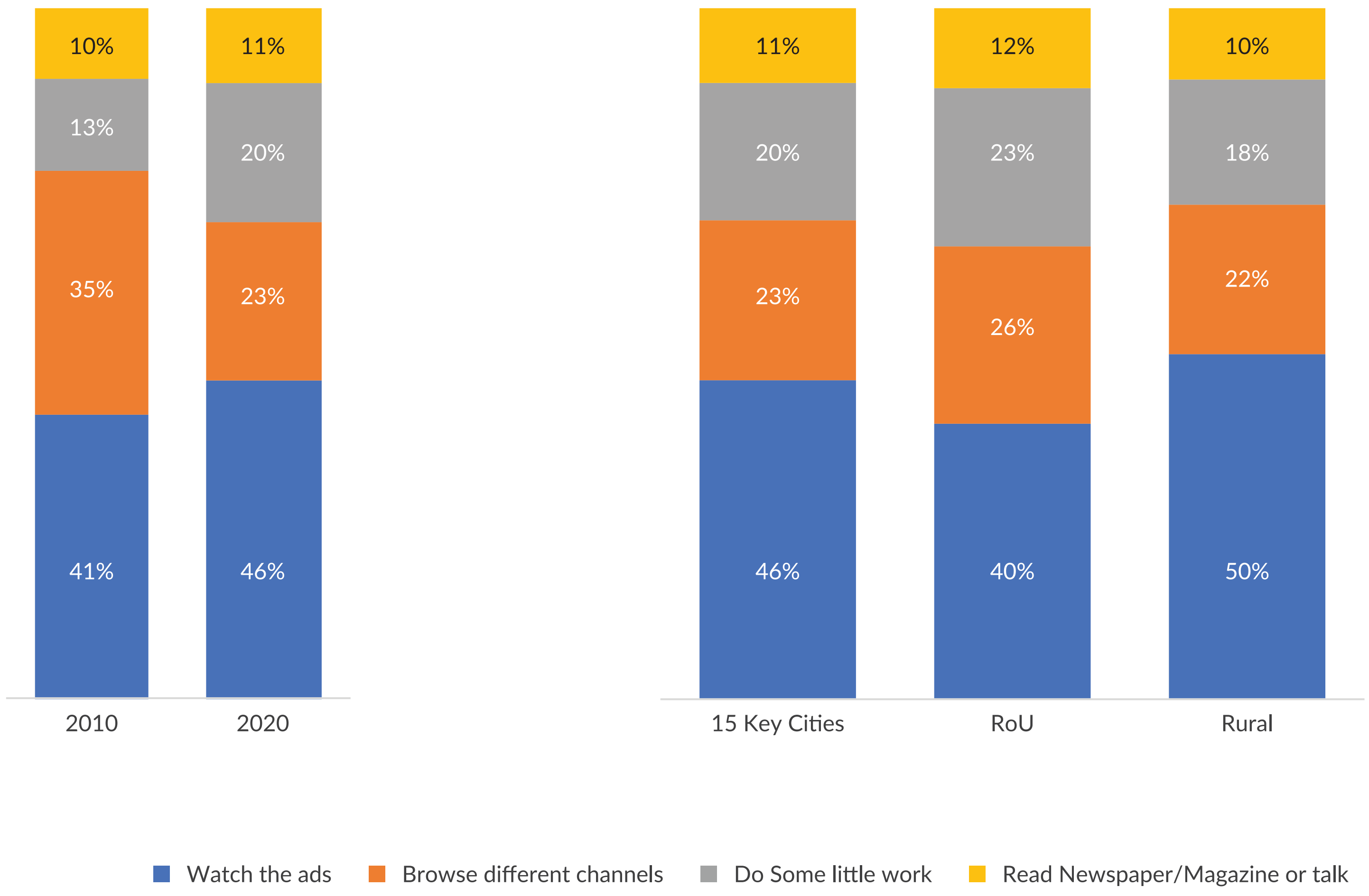
Only those channels logos are placed which constitute 90% of the overall share.
They are in alphabetical order and from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

USUAL REACTION TO COMMERCIAL BREAK

10 YEAR CHANGE

2020 ONLY



Base: TV Viewers | Source: Consumer Multimedia Index (2010 – 2020)

Leopards
There for ***You***

INTERNATIONAL DELIVERY

WAREHOUSING & DISTRIBUTION

OVERNIGHT EXPRESS

STUDENT EXPRESS

FLYERS EXPRESS

GIFTWIFTS

LEOPARDS BOX

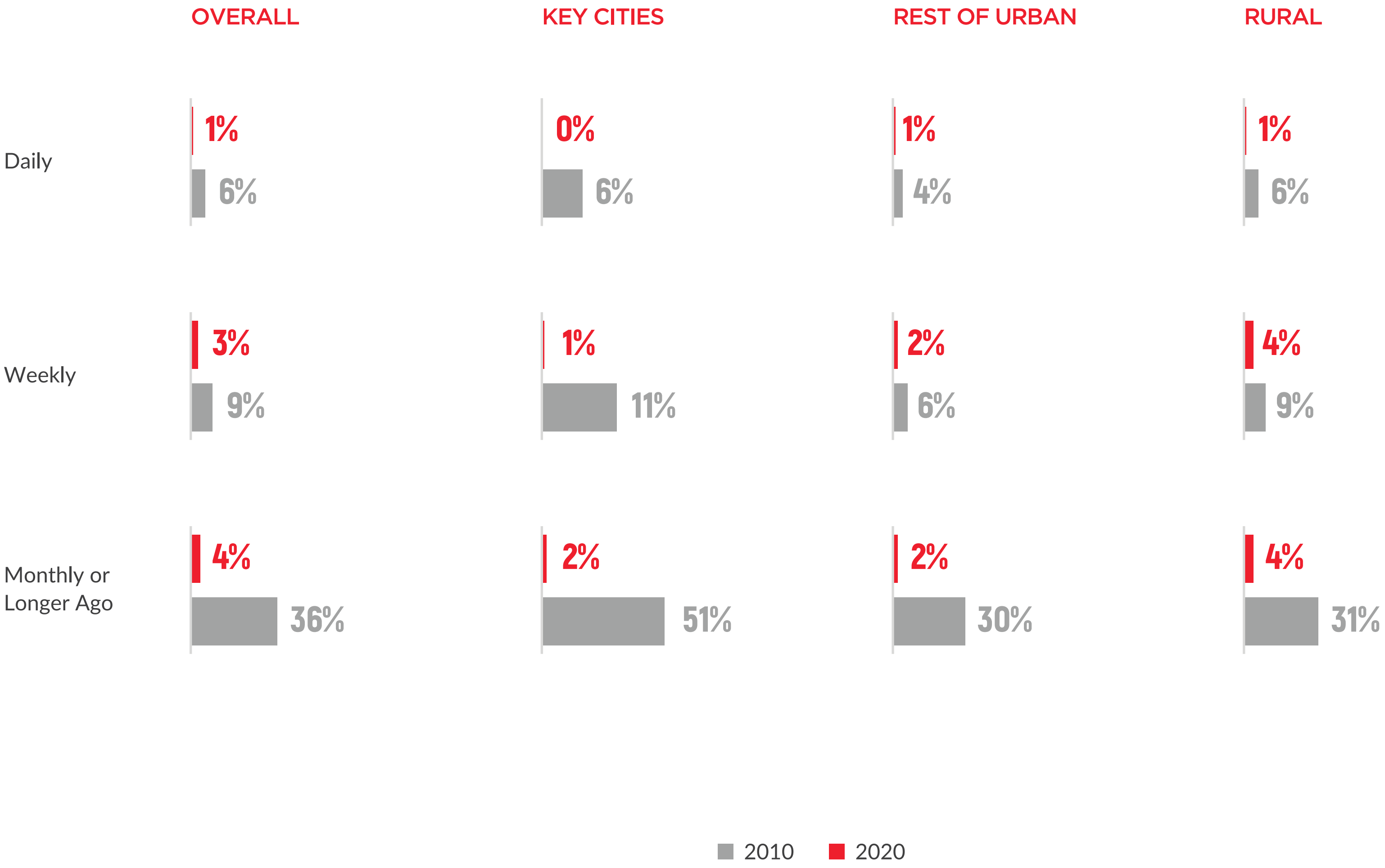
CASH ON DELIVERY

CORPORATE GIFTING SERVICES

ATTESTATION SERVICES

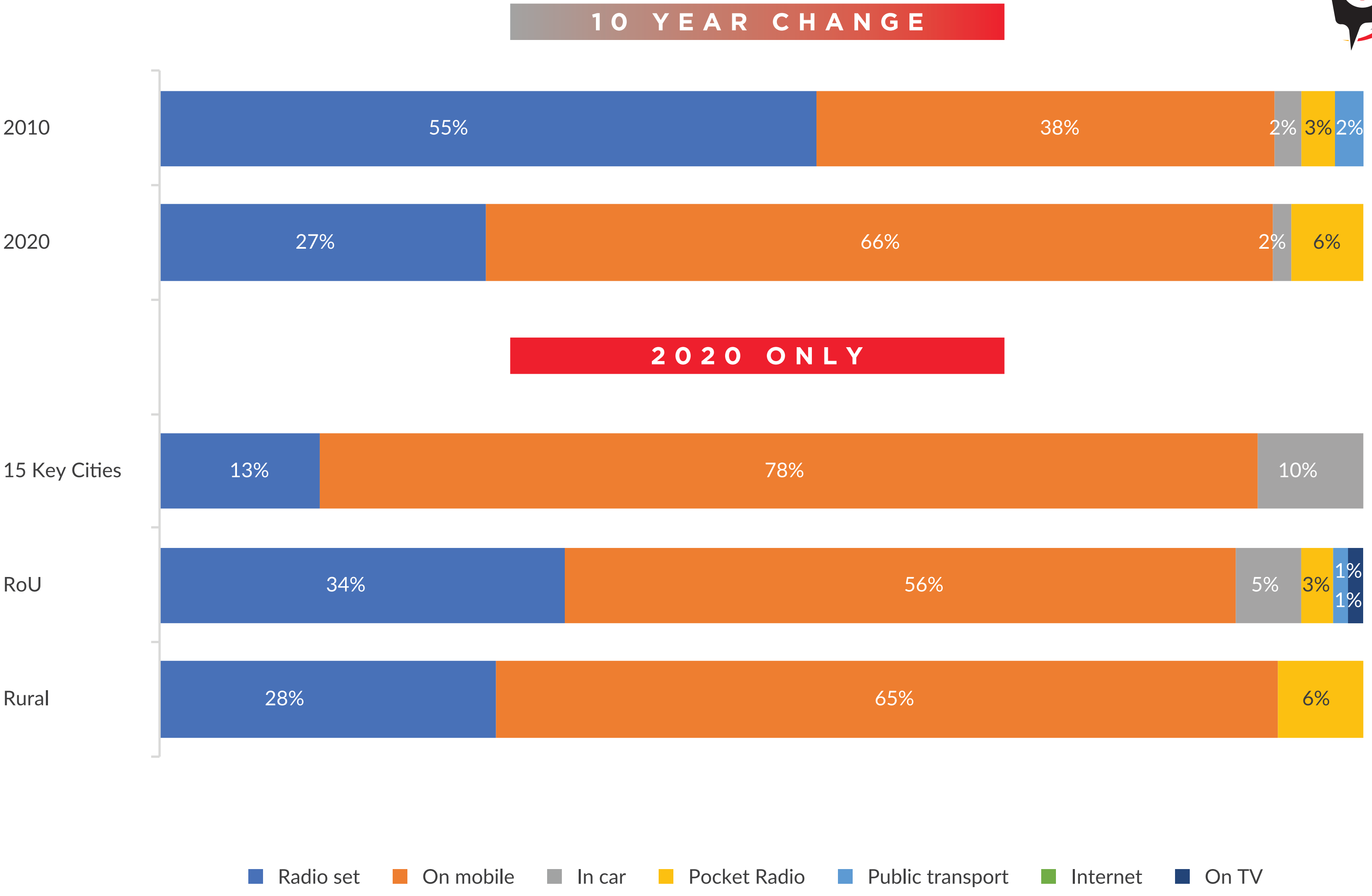
☎ 111-300-786 www.leopardscourier.com 0345-5367273

RADIO REACH



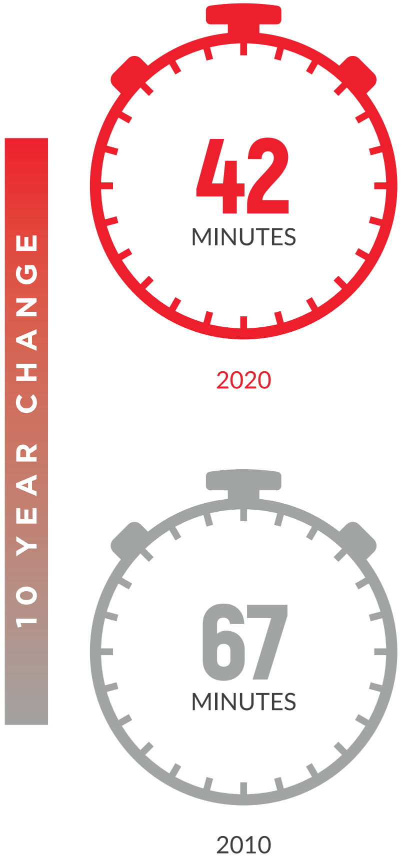
Source: Consumer Multimedia Index (2010 – 2020)

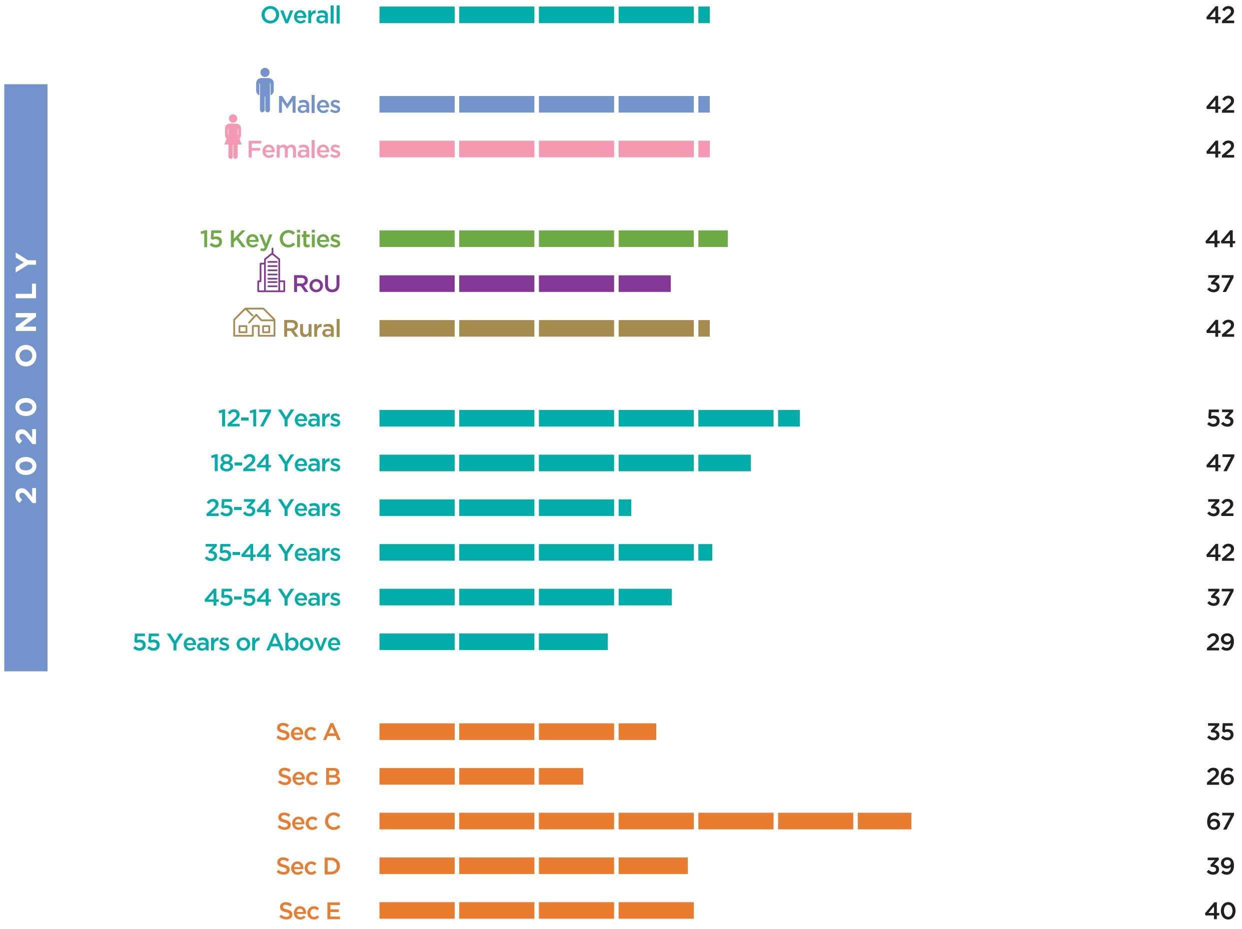
SOURCE OF RADIO RECEPTION



Base: Radio Listeners | Source: Consumer Multimedia Index (2010 – 2020)

AVERAGE TIME SPENT ON RADIO (MINUTES)





Base: Radio Listeners | Source: Consumer Multimedia Index (2010 – 2020)

MOST LISTENED TO RADIO CHANNELS

Radio Buraq براق

AajFm The Voice Of Todays Youth

apna karachi FM 107

Radio awaz The Largest Group of FM Radios in Pakistan

RADIO AWAZ 105 FM

awaz 107.2 fm www.awazfm.co.uk

BBC اردو

CITY FM89

Beta DhakDhak Radio Playing what you want..

DHAMAAL FM 94

FM98 DOSTI CHANNEL

99 FM FLARE

TUNE IN TO THE ONE ABOVE FM 101 Pakistan

SUNO 1024 FM

RADIO 1 FM91

FM 93 MIRPUR

hotfm 105 Larkana

HUM 106.2 PURE MUSIC

ASSALAM-O-ALAIKUM PAKISTAN FM 100 PAKISTAN 24 HOURS RADIO STATION

Mast FM 103

94 PLANET

POWER 99 FM

96 FM radioactive

SAMAA FM 107.4

Only those channels logos are placed which constitute 90% of the overall share.
They are in alphabetical order and from left to right.

Base: Radio Listeners 2020 | Source: Consumer Multimedia Index (2010 – 2020)

RESEARCH IS THE REAL HERO

In today's age and time, data is the king. Business decisions are made not on assumptions anymore but on tested and proven data. Business and marketing strategies are created from data and not just statements alone. Ipsos Consumer Book provides us this very pertinent information that we need to chart our way forward in the sea of uncertainty that has engulfed us.

I would like to express my appreciation to Ipsos for taking up this painstaking job and coming out with an extensively detailed and well researched second edition of the consumer book. This book is extremely crucial for businesses, marketers, and advertisers as it helps us make better, well informed and practical decisions.

With the help of research, a brand can position itself more effectively by developing and creating campaigns that appeal directly to the consumers. So, this book saves us the time and effort, and gives us a prepared document to analyse where we stand in the market today and develop our strategies for the future.

As President of the All Pakistan Newspapers Society (APNS), I appreciate the efforts made by Ipsos in gathering and compiling the data that will help advertisers in determination of their marketing and media budgets effectively in an overcrowded media market place.

Together, let's work towards making media and advertising industry thrive and flourish. I hope Ipsos continues to play its part by providing us relevant and pertinent data in the future as well.

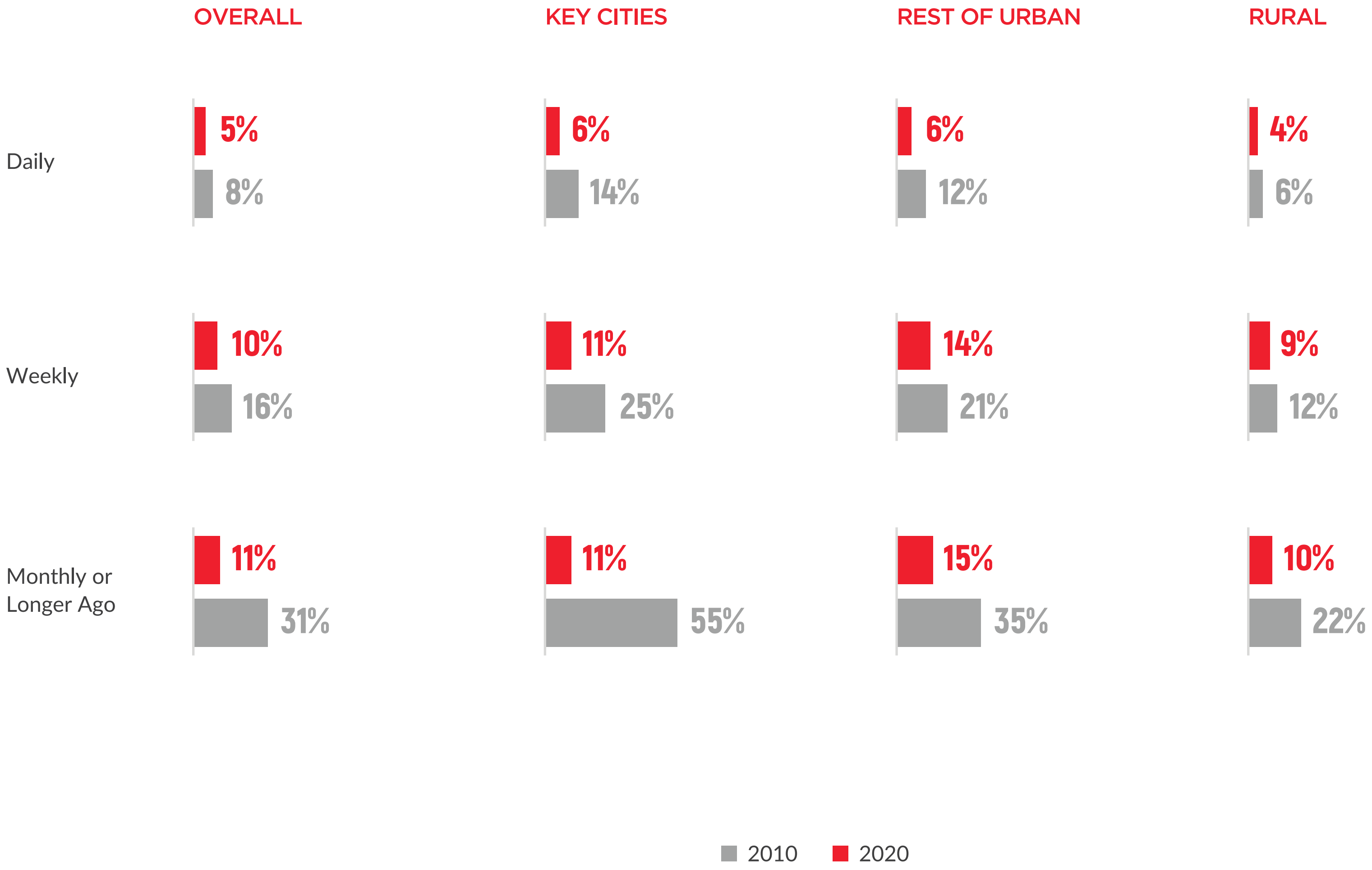
SARMAD ALI

President, ALL PAKISTAN
NEWSPAPERS SOCIETY (APNS)

President, INTERNATIONAL ADVERTISING
ASSOCIATION (IAA) PAKISTAN CHAPTER

Director, ASIAN FEDERATION
OF ADVERTISING ASSOCIATIONS (AFAA)

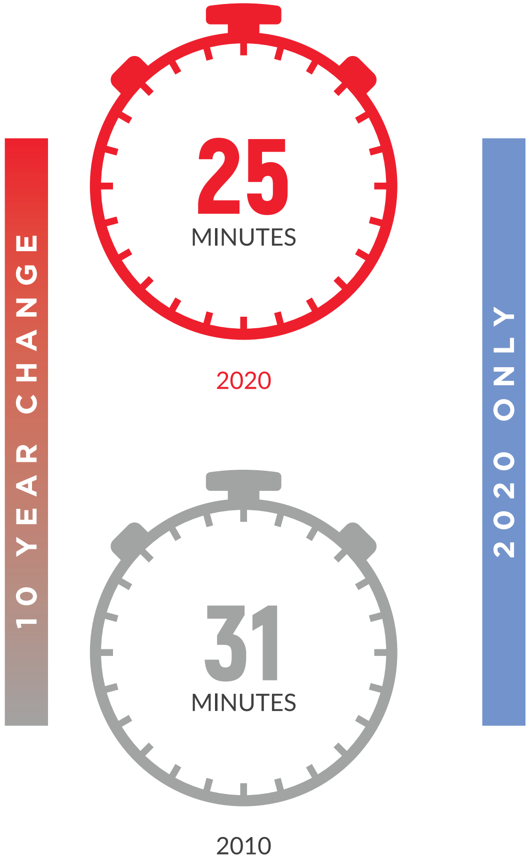
PRINT MEDIA REACH

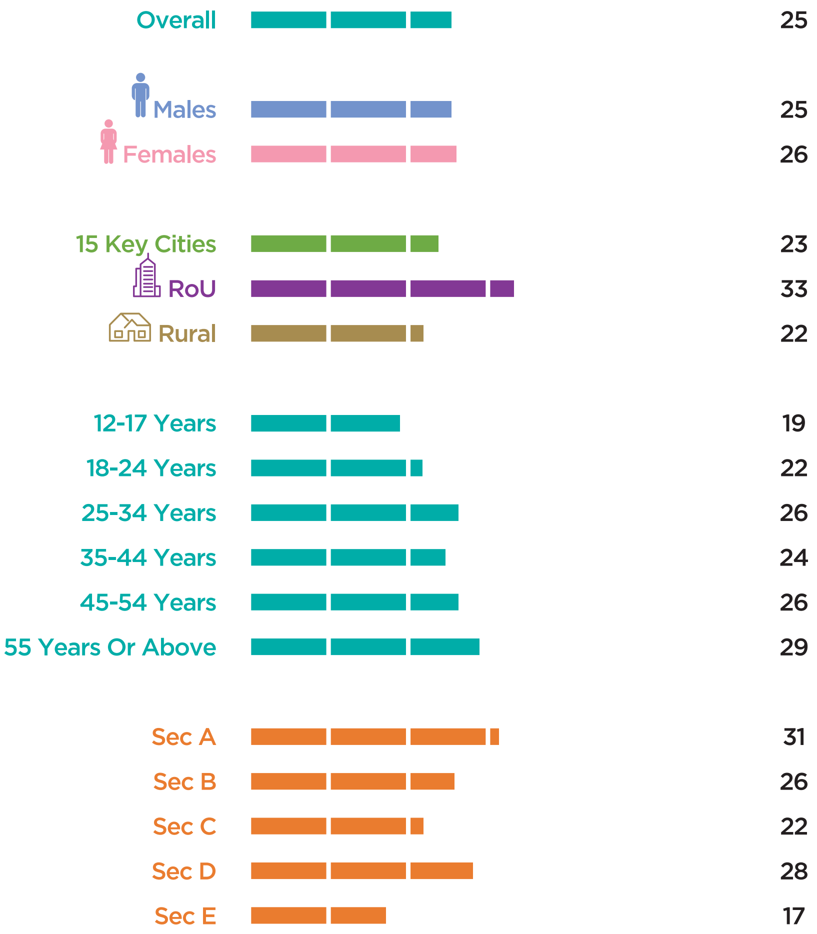


BASE: Educated adult males belonging to Upper middle class

Source: Consumer Multimedia Index (2010 – 2020)

AVERAGE TIME READING NEWSPAPER (MINUTES)

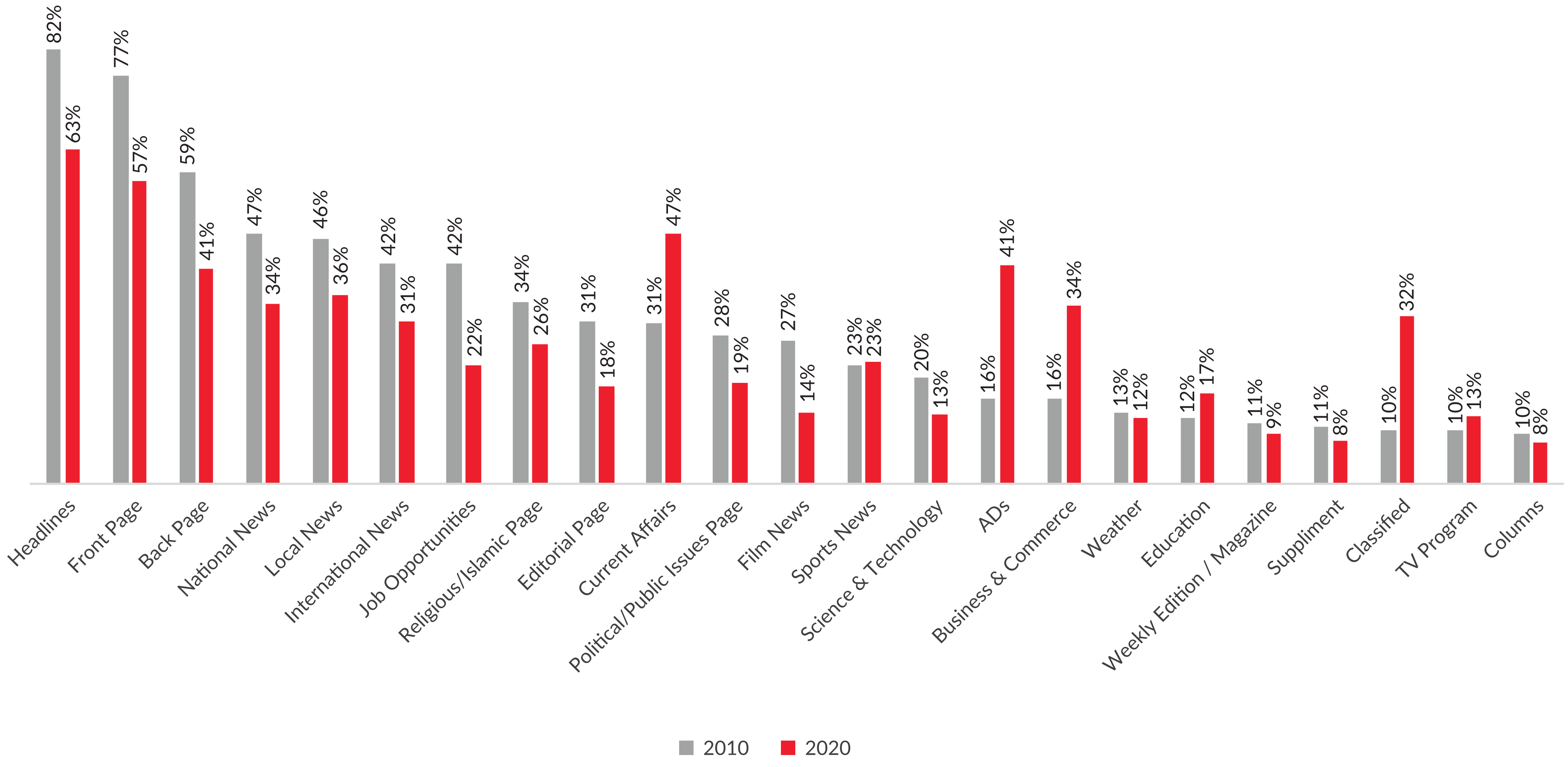




Overall	25
Males	25
Females	26
15 Key Cities	23
RoU	33
Rural	22
12-17 Years	19
18-24 Years	22
25-34 Years	26
35-44 Years	24
45-54 Years	26
55 Years Or Above	29
Sec A	31
Sec B	26
Sec C	22
Sec D	28
Sec E	17

Base: Newspaper Readers | Source: Consumer Multimedia Index (2010 – 2020)

FAVORITE SECTIONS IN NEWSPAPER



Base: Newspaper Readers 2020 | Source: Consumer Multimedia Index (2010 – 2020)

MOST READ NEWSPAPERS

Only those channels logos are placed which constitute 90% of the overall share.
They are in alphabetical order and from left to right.

URDU NEWSPAPERS

روزنامہ آج

روزنامہ اخبار

Daily AWAZ LAHORE آواز

THE DAILY DUNYA QUETTA دنیا

DAILY EXPRESS روزنامہ ایکسپریس

روزنامہ انصاف لاہور

روزنامہ جنگ

Daily KHABRAIN روزنامہ خبریں

روزنامہ مشرق پشاور INTERNET EDITION

DAILY NAWA-I-WAQT روزنامہ نوائے وقت

نیا اخبار کراچی

DAILY PAKISTAN پاکستان

قومی اخبار کراچی

روزنامہ اوصاف

Daily Shaam Hyderabad روزانی شام حیدرآباد

REGIONAL NEWSPAPERS

DAILY KAWISH روزانی کاوش

Daily KOSHISH Hyderabad روزانی کوشش حیدرآباد

روزانی سندھ

MEHRAN مہران

Daily Shaam Hyderabad روزانی شام حیدرآباد

Daily AWAMI AWAZ روزانی عوامي آواز

ENGLISH NEWSPAPERS

DAWN

THE NEWS INTERNATIONAL

THE EXPRESS TRIBUNE

Base: Newspaper Readers 2020 | Source: Consumer Multimedia Index (2010 – 2020)

FAVORITE TYPE OF MAGAZINE

	2014
Education/Ethics	40%
Fashion	32%
Political/Current Affairs	26%
Suspense	22%
Sports	21%
Cooking	20%
Literature/Performing Art	19%
Showbiz	19%
Stories	8%
Marketing/Advertising	6%
Science	5%
Religious	5%

	2020
Women	64%
Entertainment	20%
Religious	20%
Family	19%
Political	8%
Health	8%
Youth	7%
Business and Economy	6%
Social	5%

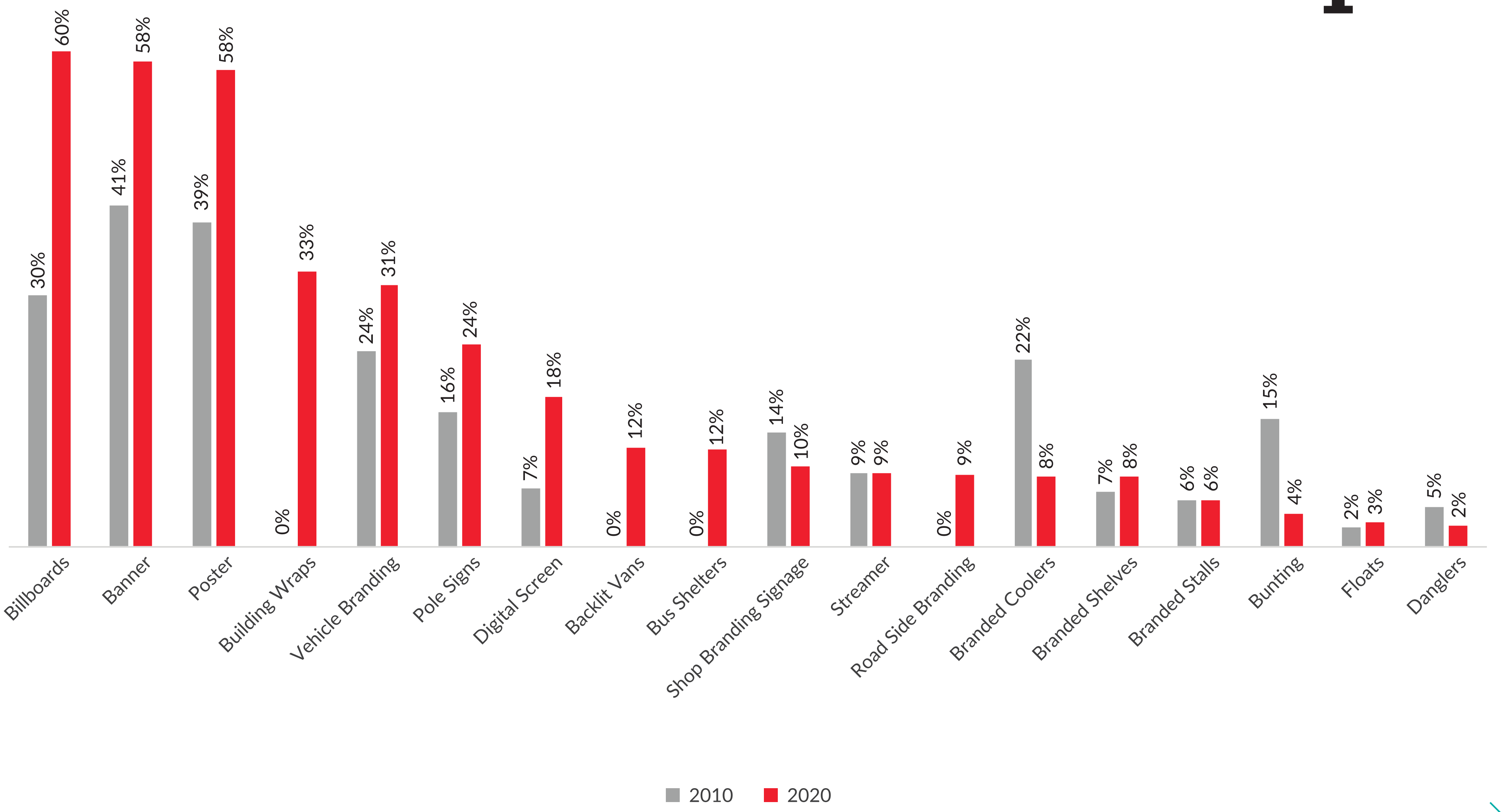
MOST READ MAGAZINES

Only those magazines logos are placed which constitute 80% of the overall share.
They are in alphabetical order and from left to right.

Base: Magazine Readers 2020 | Source: Consumer Multimedia Index (2010 – 2020)

OUTDOOR ADVERTISEMENT (MONTHLY REACH)

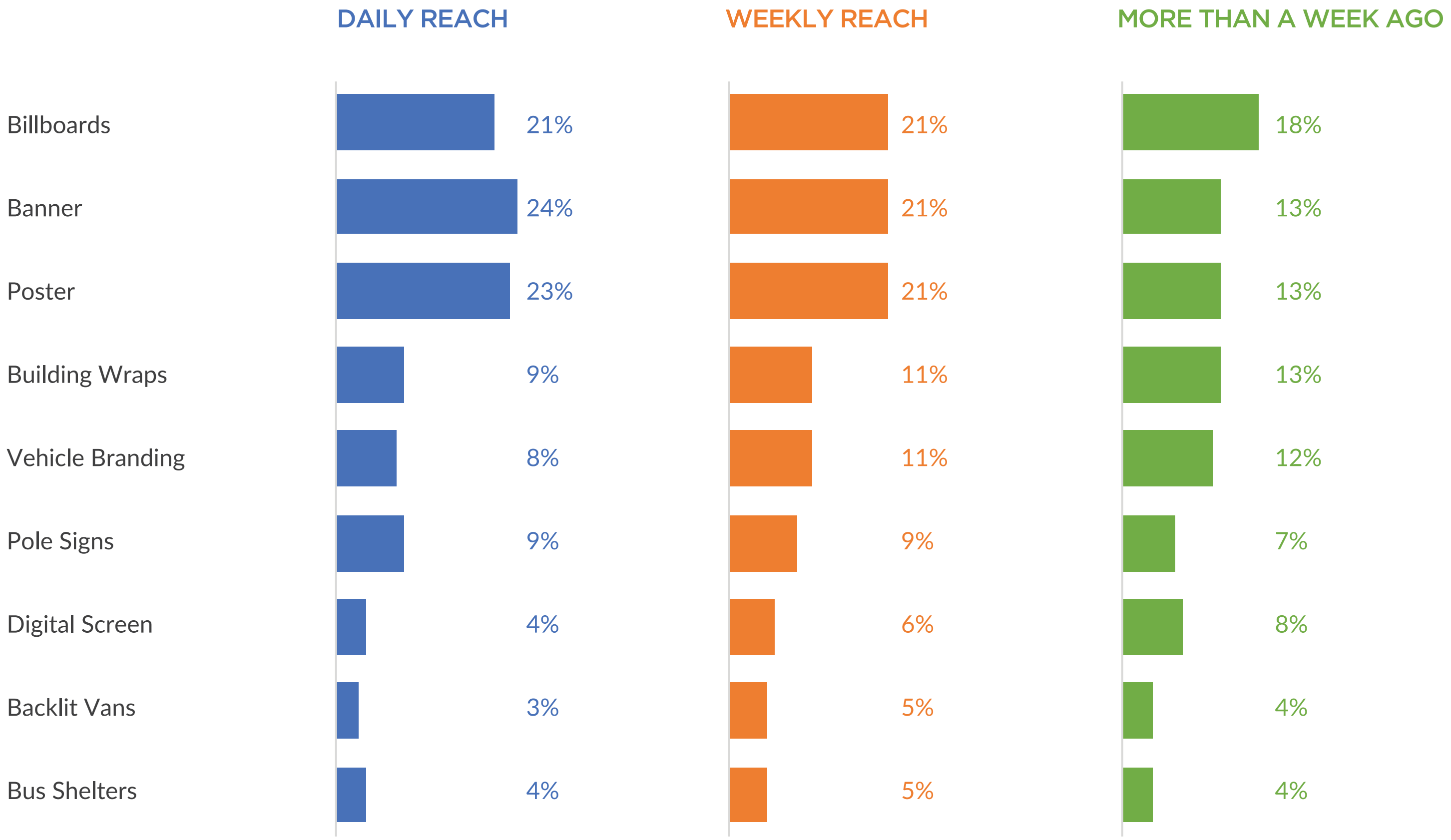
Question: Which of these types of outdoor advertisement have you seen or looked at for at least one or two seconds in the last 1 month?



Source: Consumer Multimedia Index (2010 – 2020)

OUTDOOR REACH (2020)

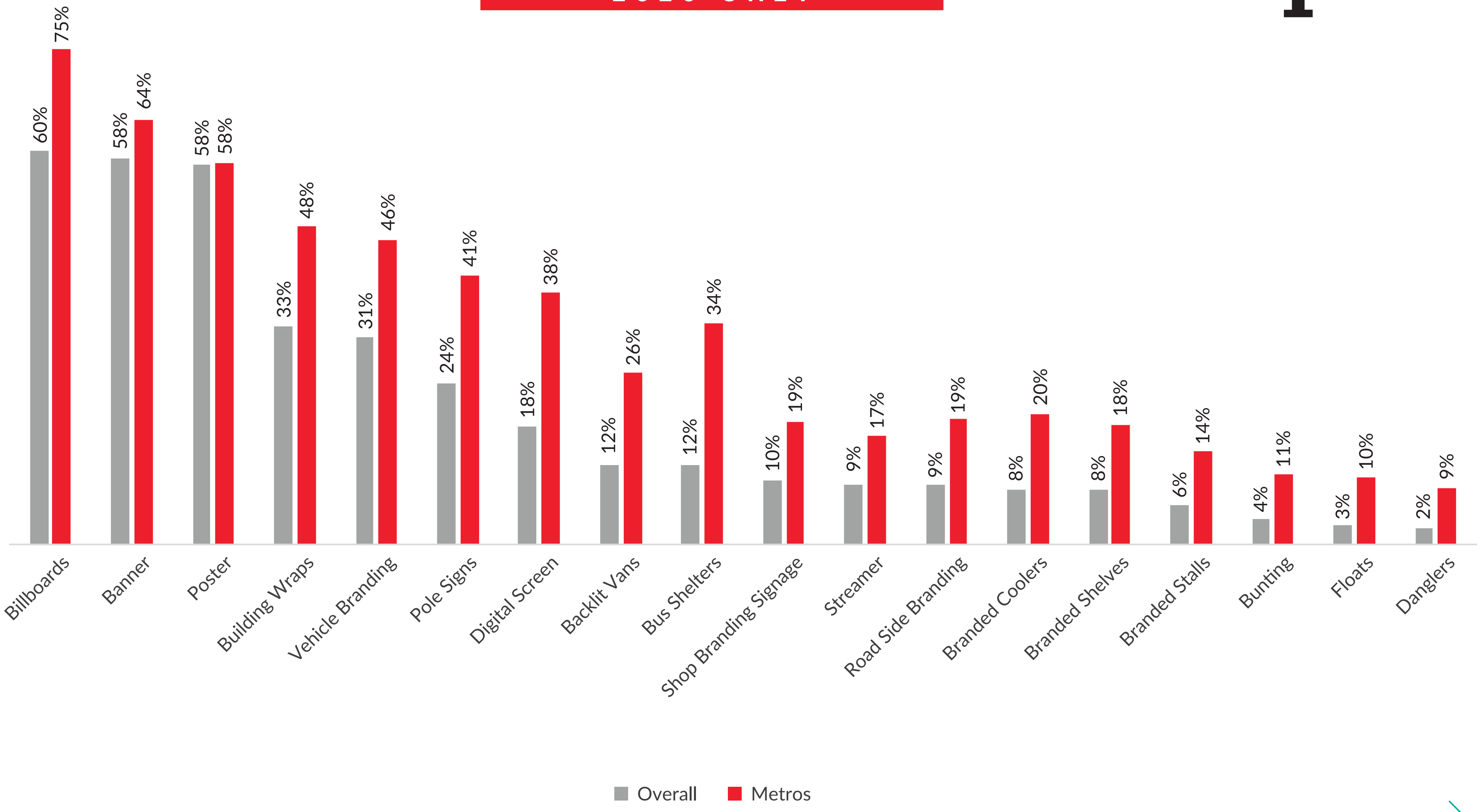
Question: Which of these types of outdoor advertisement have you seen or looked at for at least one or two seconds in the last 1 month?



Source: Consumer Multimedia Index (2010 – 2020)

OUTDOOR ADVERTISEMENT MONTHLY REACH

2020 ONLY



Source: Consumer Multimedia Index (2010 – 2020)

HARNESS THE POWER OF CONSUMER DRIVEN CONVERSATIONS

synthesio
AN IPSOS COMPANY

Our Social Intelligence Analytics (SIA) solution enables the discovery of real-time consumer-driven social insights. Through a combination of Synthesio's world-class platform and Ipsos' global research expertise, we enable the transformation of unstructured data into strategic and actionable business insights.

TECHNOLOGY PLATFORM

Market-leading social media intelligence suite with the world's widest data coverage including 600+ million sources, 80 languages, 190+ countries.

INSIGHT SERVICES

Teams around the world providing in-depth global expertise across categories, local context, and cultural nuance.

ADVANCED ANALYTICS

Dedicated data science team leveraging cutting-edge AI-powered data-mining algorithms and advanced analytical frameworks.

ADDRESSING KEY BUSINESS QUESTIONS:

MARKET EXPLORER

A comprehensive landscape mapping of motivations, attitudes, needs and habits that drive consumer behaviors, preferences and decisions in your category.

INNOVATION SPACES

Uncover new innovation spaces and unlock future growth territories from emerging unmet consumer needs and lead user innovations.

TREND RADAR

A consumer-led trend approach designed to deliver critical insights on change drivers and foresight the future impact of macro and micro trends in your category.

BRAND SONAR

Authentic and context rich brand and campaign performance insights designed to surface critical emotions, brand experiences and distinctive brand associations.

PRODUCT INTELLIGENCE

Unlock your full potential with in-context product performance insights and the critical satisfaction driving product features from unfiltered consumer reviews.

DIGITAL PERSONAS

A new era of audience insights on lifestyle patterns, interests, digital touchpoints or media habits through a unique behavioral and conversational data ecosystem.

For more information, please contact:
Abdullah Umar Khalid | Head of PA/SIA | **0345 8227 212** | abdullah.khalid@ipsos.com

GAME CHANGERS Ipsos

DIGITAL LANDSCAPE

HARNESSING THE POWER OF DATA

Research plays a critical role in understanding customer mindset, finding solutions to problems and most importantly, identifying new opportunities for businesses. It is impractical to achieve substantial success without relying on profound research. Modern companies need objectivity and validity of any research, a high degree of reliability of the results otherwise their progress is disorganized and disintegrated.

Being a 'Customer Obsessed' organization, Jazz gives immense importance to consumer insights in driving initiatives, developing strategies and business planning by analyzing consumer data. We rely greatly on quality data, authentic research and welcome innovative and unique approaches towards challenges that help us in carving out solutions to make effective decisions.

On behalf of Jazz and my team, I appreciate all the initiatives Ipsos is taking to contribute to the research industry and all the value it has added for Jazz to help understand our customers better.

KAZIM MUJTABA

Chief Data & Strategy Officer,
JAZZ

KEY FACTS ABOUT CONNECTIVITY IN PAKISTAN

175
Million
Mobile SIMS

Source: PTA Report – 2020

105
Million
Mobile Phone Users
(48% of Population)

Because Average
1.7
SIMS Per Person

Source: Consumer Multimedia Index 2020

90
Million
3G/4G SIMS

Source: PTA Report – 2020

38
Million
Active Internet Users
(17% of Population)

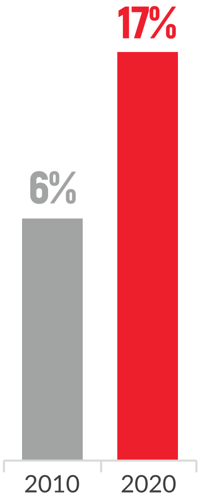
Remaining
3G/4G Users are
NOT ACTIVE
Internet Users

Source: Consumer Multimedia Index 2020

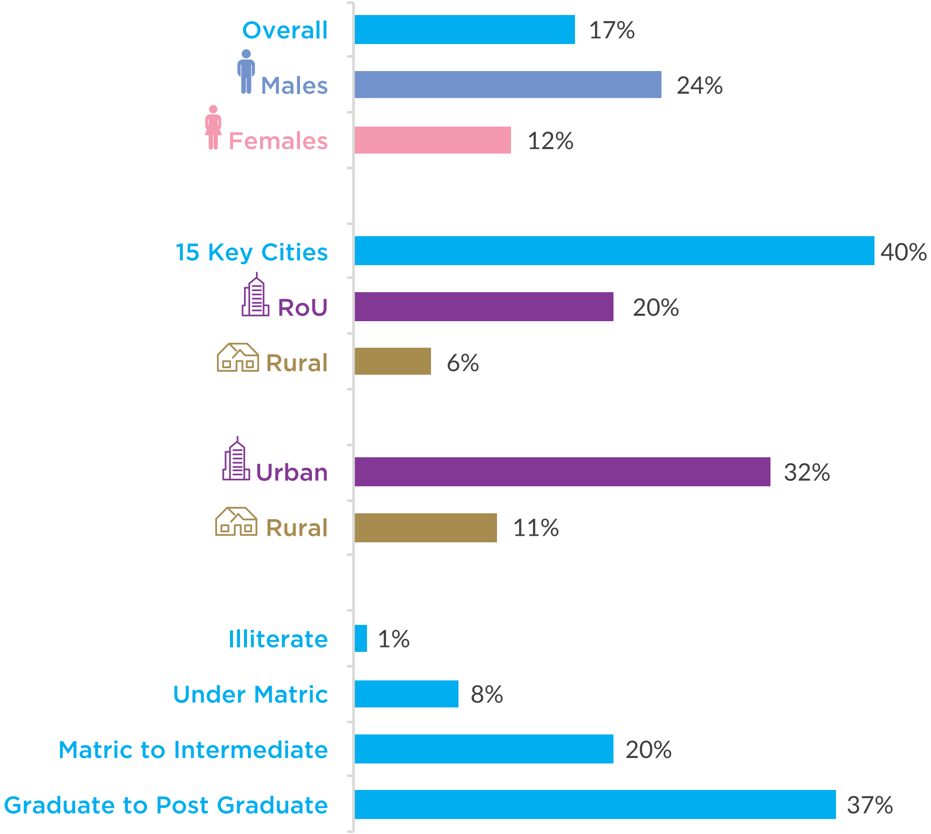
DIGITAL MEDIA USERSHIP

Question: Did you use internet or any digital media platform during past 12 months?

10 YEAR CHANGE



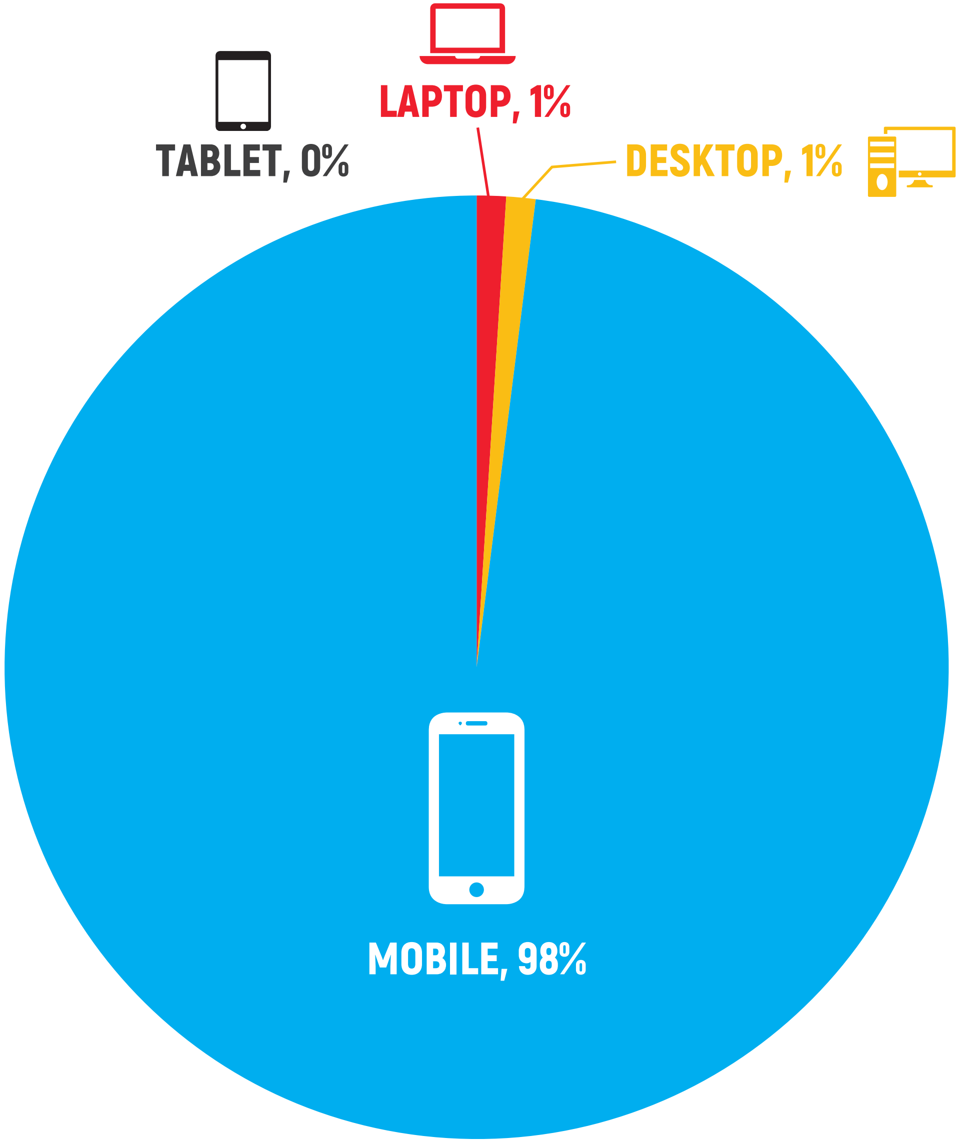
2020 ONLY



Source: Consumer Multimedia Index (2010 – 2020)

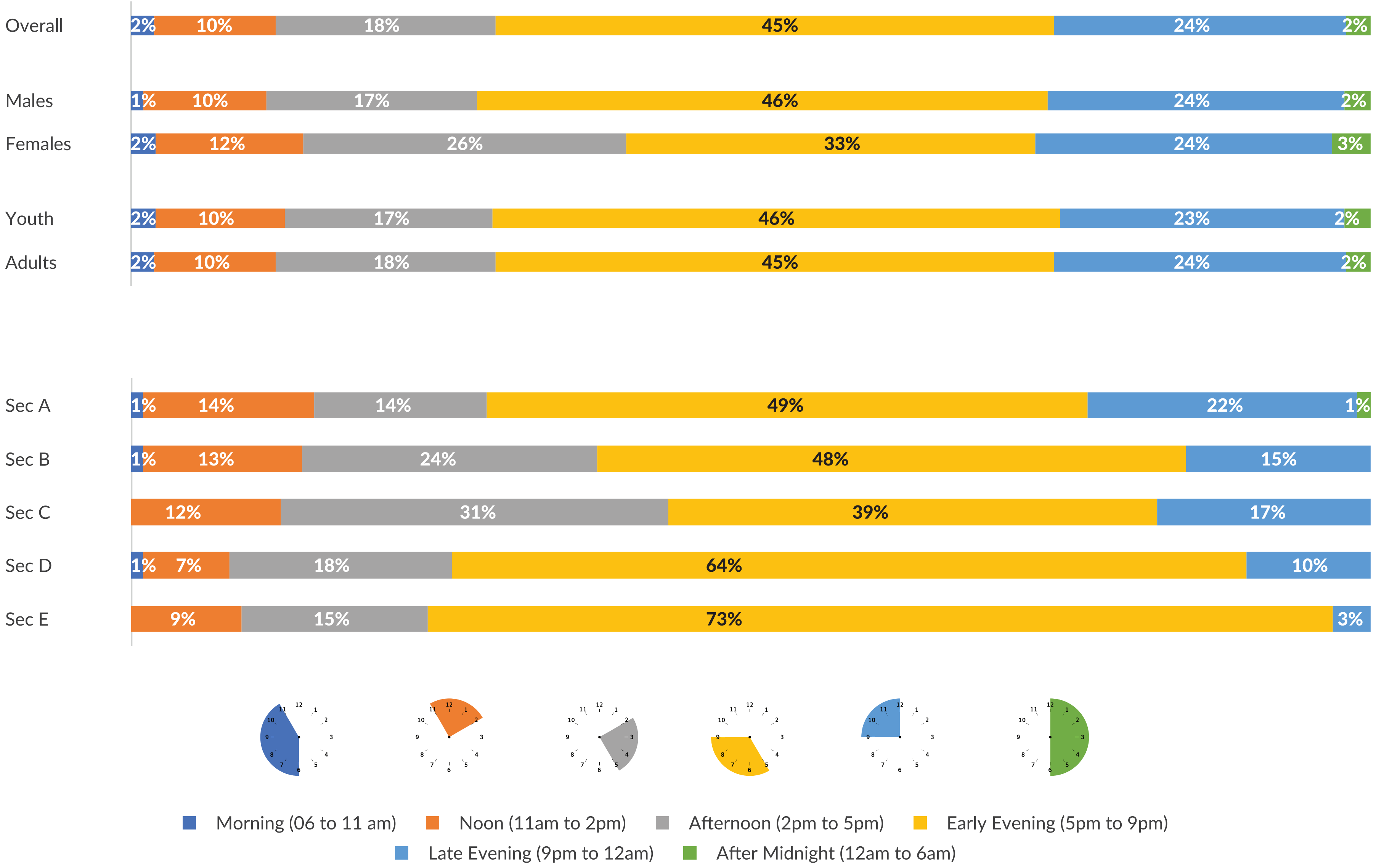
DEVICES USED FOR INTERNET CONNECTION

Question: Which devices do you use to connect to internet?



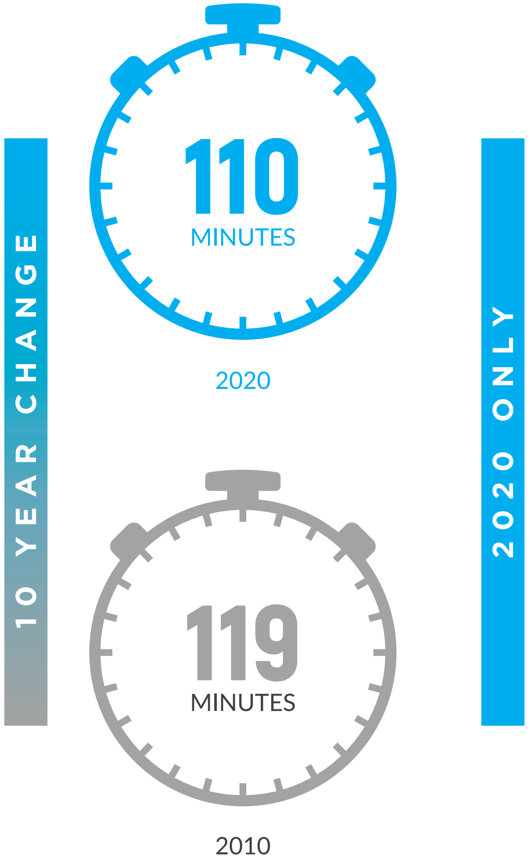
Base: Internet Users | Source: Consumer Multimedia Index (2010 – 2020)

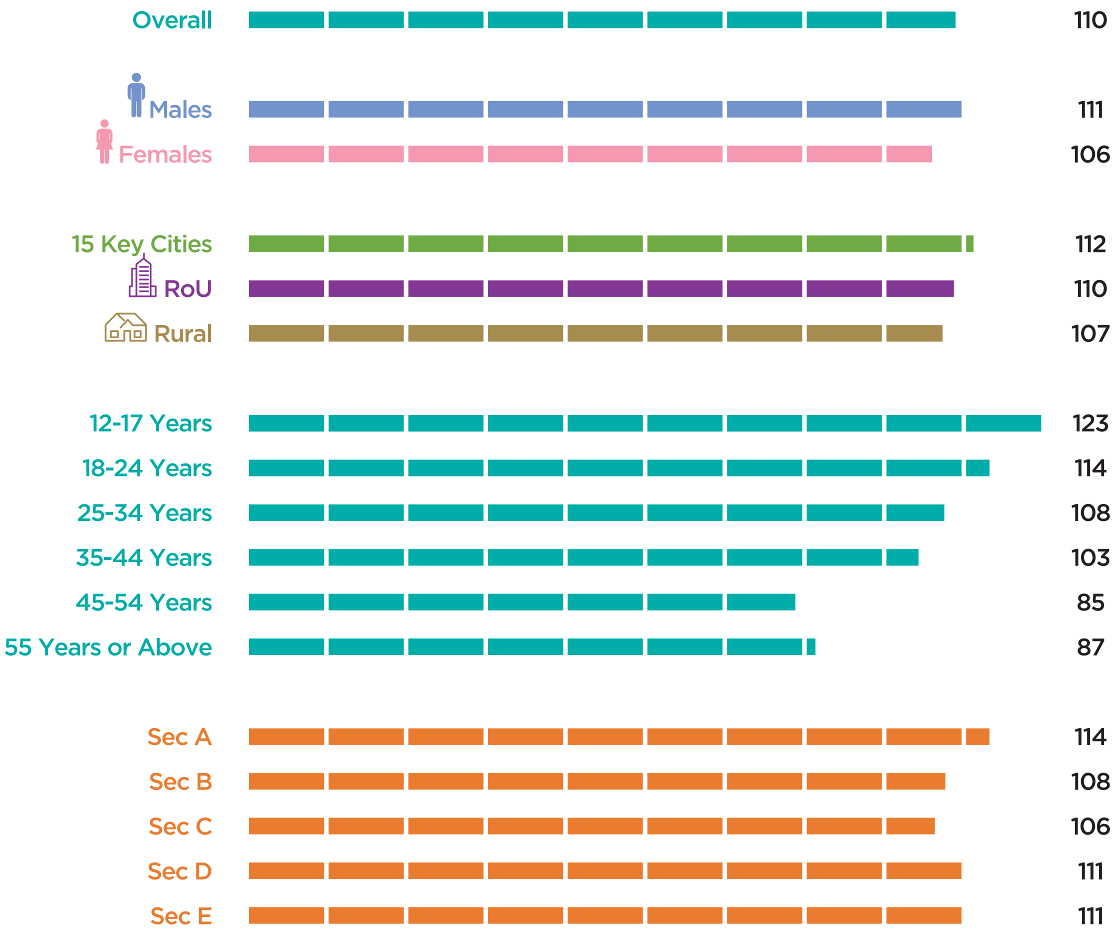
TIMING OF INTERNET USAGE



Base: Internet Users | Source: Consumer Multimedia Index (2010 – 2020)

AVERAGE TIME SPENT ON INTERNET (MINUTES)





Overall	110
Males	111
Females	106
15 Key Cities	112
RoU	110
Rural	107
12-17 Years	123
18-24 Years	114
25-34 Years	108
35-44 Years	103
45-54 Years	85
55 Years or Above	87
Sec A	114
Sec B	108
Sec C	106
Sec D	111
Sec E	111

Source: Consumer Multimedia Index (2010 – 2020)

HI-SPEED, RELIABLE CONNECTIVITY TO BOOST START-UPS

Despite many odds, Pakistan has moved towards connectivity and digitalization of economy at fast pace in the last decade. The pandemic has served as catalyst towards digitalization, being a blessing in disguise. Consumers addicted to paper currency and physical shopping had no option but to pay and buy online. The pandemic also forced people to shift to work from home and online education became a norm rather than exception. Internet usage surged and consumers' expectations in terms of quality and speed grew tremendously. With every family member working or schooling from home at the same time, high speed, and reliable Internet, previously considered a kind of luxury, became a necessity just like water and electricity supply.

Social media usage in last decade grew at fast pace. Leading brands established solid social media presence and those lagging are trying to catch up fast as many consumers have shifted from traditional mass media to social media. Service providers are compelled to integrate their customer care systems with social media on 24x7 basis as many customers have stopped calling service providers contact centres. They simply post their complaints on social media where posts can easily go viral causing severe reputation loss to the brands. Managing customer perceptions on social media is becoming a big challenge as well as opportunity for businesses and marketing teams.

Next decade offers huge world of opportunities for the businesses. Many young graduates now want to open their start-ups instead of entering job market, to become job creators instead of job seekers. The entrepreneurial ecosystem has taken roots with incubators, accelerators, venture capital funds, start-up clubs, etc., expanding at fast pace in Pakistan's ecommerce, fintech, and tech sector. In next 10 years, Pakistan's economy badly needs market creating innovations, an area where traditional businesses have been slow to make a headway. With more and more young professionals moving fast into innovative ventures, Pakistan offers a great potential for various platform and service delivering technologies. While many look towards government for reforms, I strongly believe that the businesses must move towards competitiveness and innovations at fast track so that Pakistan can attain high growth rate besides creating meaningful job opportunities for the educated youth.

WAHAJ US SIRAJ

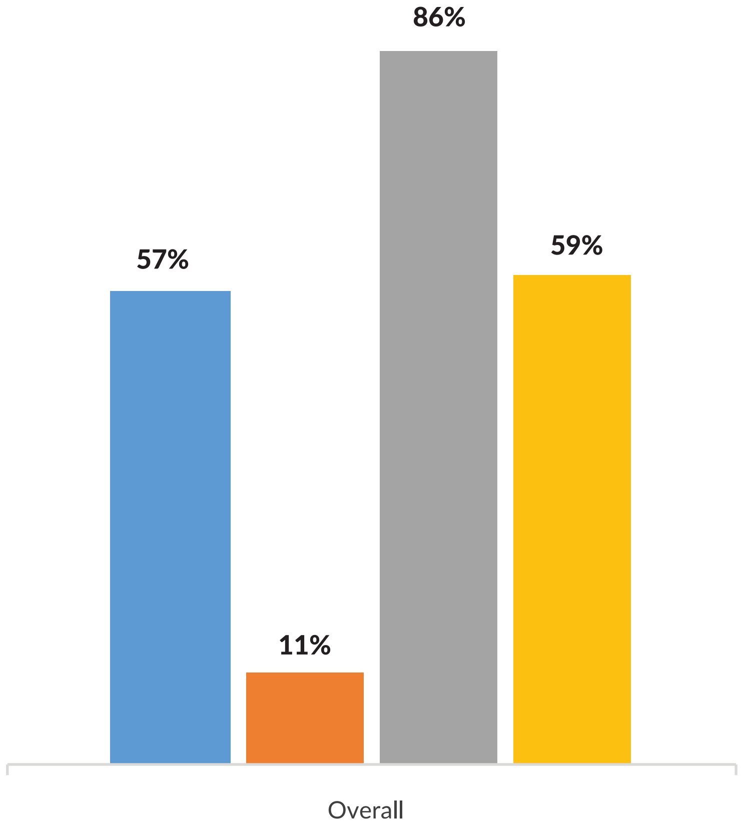
CEO & Cofounder - NAYATEL

Member BoG/Senate
COMSATS, HITEC UNIVERSITY,
TAXILA AND CAPITAL UNIVERSITY OF
SCIENCE & TECHNOLOGY (CUST)

Member/Director
RAVI URBAN DEVELOPMENT AUTHORITY,
LAHORE, POWER IT COMPANY, LAHORE
AND KHYBER PAKHTUNKHWA IT BOARD.

Member
PRIME MINISTER'S TASK FORCE
ON IT & TELECOM.

ACTIVITIES PERFORMED ON INTERNET



INTERACTION

Includes communication online through digital media e.g., Sending/Receiving of messages, emails, videos & pictures etc.

INFOTAINMENT

Includes gathering of data or information through an online platform e.g., Google, Wikipedia, News etc.

ENTERTAINMENT

Includes watching, uploading, downloading any content online from a digital platform i.e., videos, music e.g., YouTube, TikTok etc.

SERVICES

Includes any action that happens online on any digital platform e.g., product or service sale or purchase, subscription to internet package, kindle, websites and other services.

🟦 Interaction 🟧 Infotainment ⬜ Entertainment 🟨 Services

Base: Internet Users | Source: Consumer Multimedia Index (2010 – 2020)

PORTALS/WEBSITES/ APPLICATIONS USED

INTERACTION

ENTERTAINMENT

INFOTAINMENT

Google

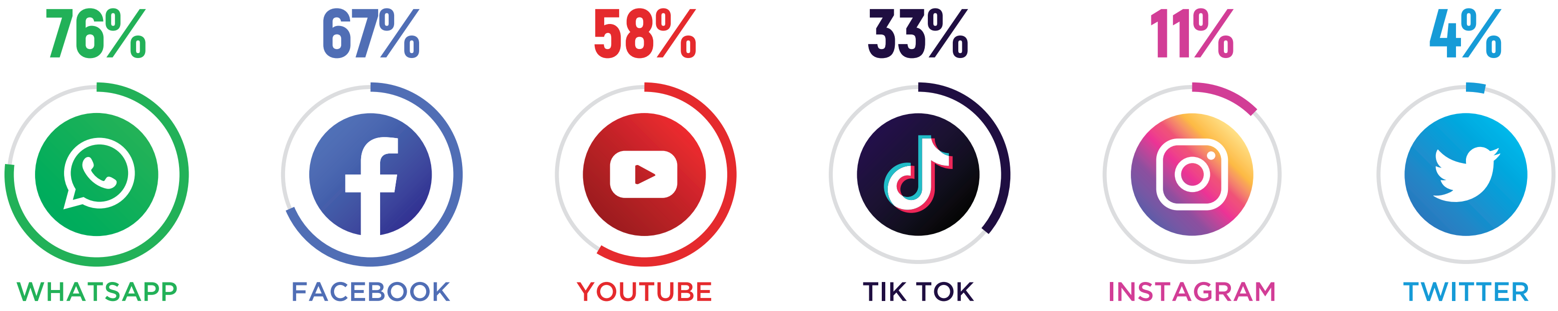
WIKIPEDIA

جنگ

Only those brands' logos are placed which constitute 90% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

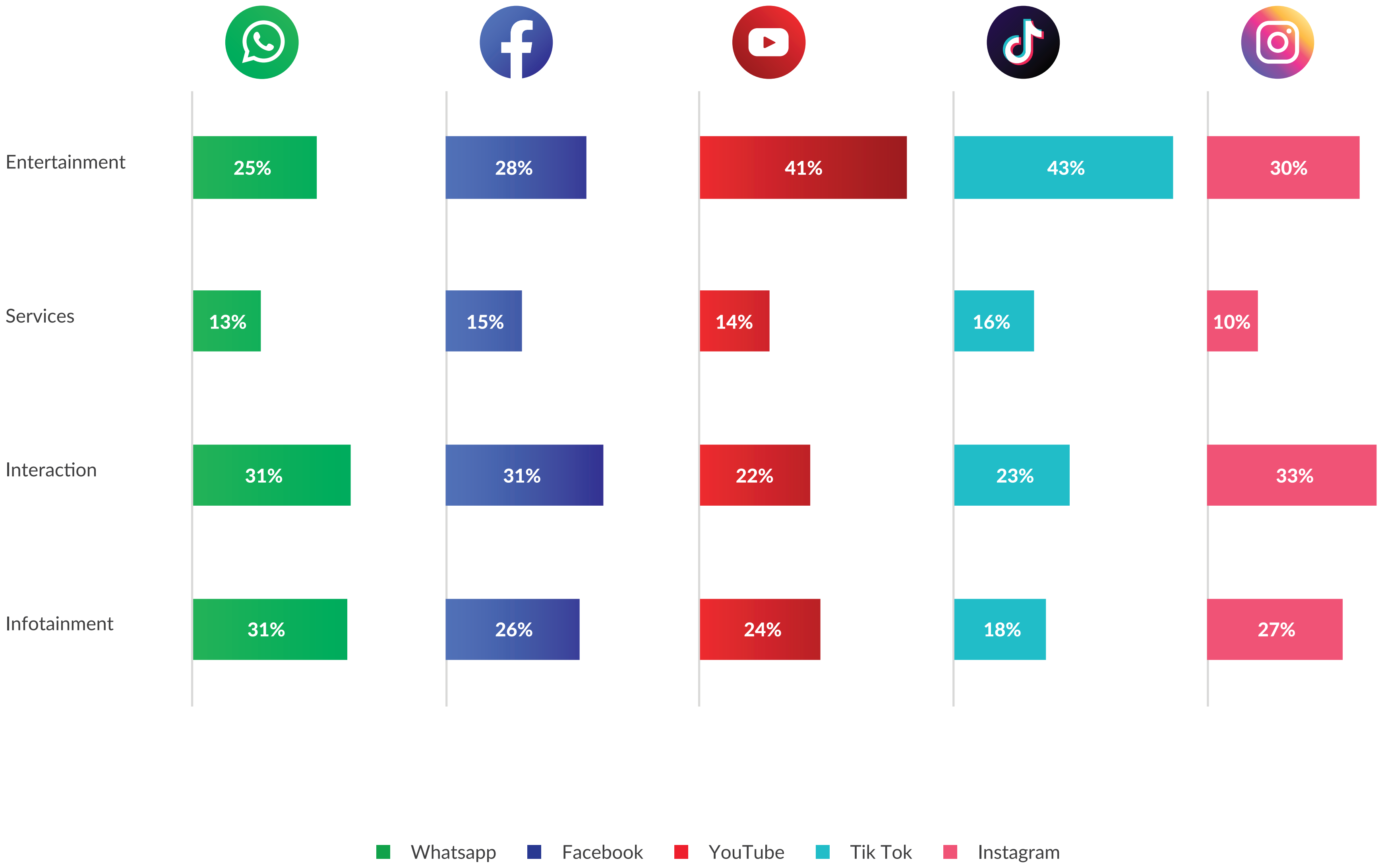
SOCIAL MEDIA PENETRATION

Question. Which websites/portals did you browse in the last 1 month?



Base: Internet Users | Source: Consumer Multimedia Index (2010 – 2020)

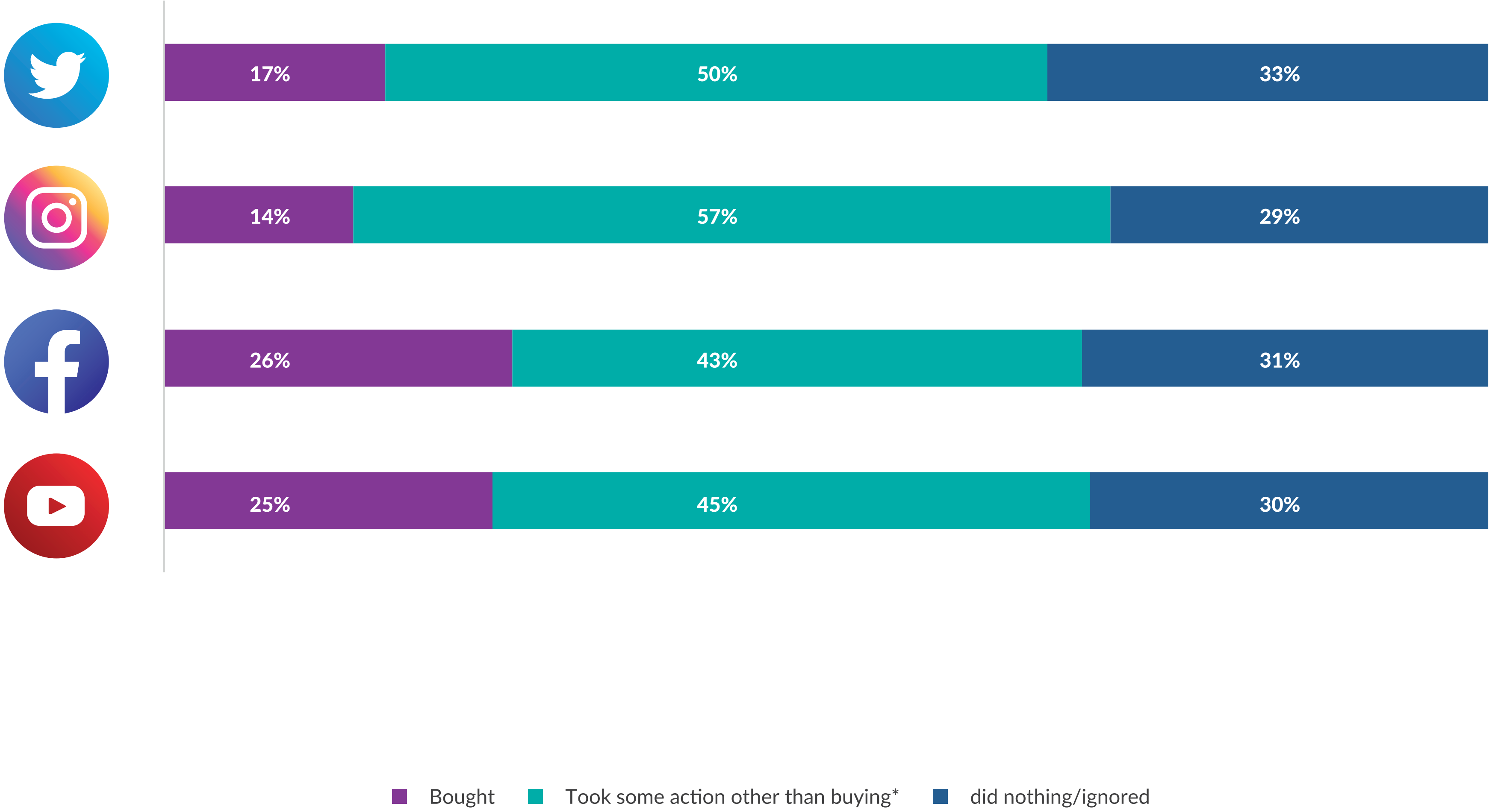
PURPOSE OF USING SOCIAL MEDIA



Base: Internet Users | Source: Consumer Multimedia Index (2010 – 2020)

REACTION TO ADVERTISEMENTS ON SOCIAL MEDIA

Question: What have you ever done after seeing advertisement on the following sources?



* Actions include Clicked the Ad, Research the product on other websites, search the information, etc.
Base: Internet Users | Source: Consumer Multimedia Index (2010 – 2020)

PENETRATION* OF CATEGORIES

*Question asked for gauging penetration:

DO YOU USE/CONSUME THESE PRODUCTS/CATEGORIES FOR YOURSELF OR AT YOUR HOME?

کیا آپ ان اشیاء کو خود استعمال کرتے / کرتی ہیں یا آپ کے گھرانے میں استعمال ہوتی ہیں؟

TRENDS THAT WILL SHAPE THE FUTURE

While technology has played a most pivotal role in the evolution of the Pakistani consumer in the last few years it is set to be truly disruptive in the coming decade. When strategizing to win in this new digital world, companies will have to fundamentally repivot to figure out ways to build a successful business through online retail channels, build brands and categories in a socially networked world to make the consumer an active part of the growth journey, and carefully chart out the plan to exploit technology-driven opportunities to understand consumers more deeply and connect with them more often.

Consumer comfort with shopping online and their desire, especially from millennials and now Generation Z, to be able to shop anywhere at any time, has fueled increasing shifts in how and where consumers shop. We will increasingly see an evolution of shopping from a transactional purchase to multi-sensory and engaging shopper journeys in-store and/or online (phygital reality), across platforms and touchpoints, where the customer is center-stage and in control. Marketers will have to re-cast their perception of consumers from being ‘targets’ to being active participants, who expect, and even sometimes demand, a role in marketing activities. However, as companies seek personal information to better tailor products and experiences and target consumers, they must be mindful of the criticality of keeping that information secure. Businesses can build a system of privileged insights, but only if the value they offer in exchange resonates with consumers, and consumers trust them to make good use of their data.

Protecting the health and interest of society and the planet is now an even more pronounced consumer expectation, following Covid-19. Companies are expected to reshape the world in a more sustainable way, leading a shift from a volume to a value driven economy and turning the tide on social inequity and environmental damage. The corporate purpose though needs to be more credibly backed through behaviour and action than through just statements of values.

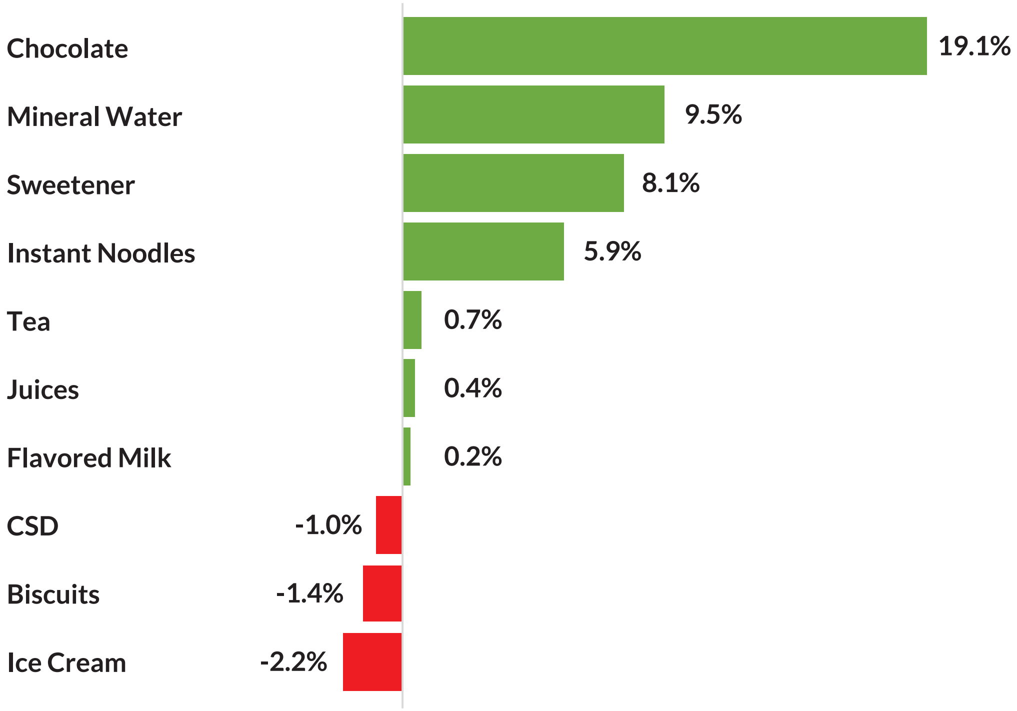
We have weathered the storm of the pandemic much better than most nations in the world and with a young, rising middle income consumer the country is well poised to be a potential velocity market in the global arena.

AMIR PARACHA

Chairman and Chief Executive Officer
UNILEVER PAKISTAN LIMITED

PERSONAL FOOD ITEMS

AVERAGE ANNUAL GROWTH RATE



	CATEGORY PENETRATION (2020)	CONSUMPTION FREQUENCY* (IN A WEEK)	NO. OF BRANDS THAT CONSTITUTE 80% CONSUMERS' SHARE	
			2010	2020
Chocolate	21%	2.4	5	12
Mineral Water	18%	2	3	4
Sweetener	3%	5.2	2	6
Instant Noodles	13%	1.1	4	2
Tea	94%	13.8	8	11
Juices	49%	1.8	9	9
Flavored Milk	5%	1	5	4
CSD	75%	1.9	5	5
Biscuits	70%	3.7	10	15
Ice Cream	28%	1.2	6	19

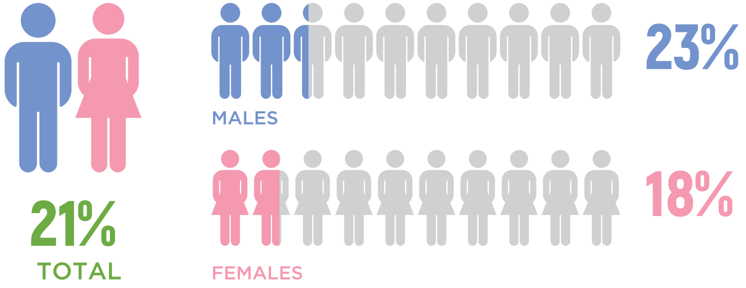
Avg. Annual growth rate = ((P2-Pn)/Pn)*100)/N

where P2 = Penetration in 2020
Pn = Penetration in earlier year (2010, 2012 etc.)
N = Number of years

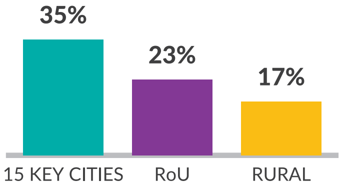
Source: Consumer Multimedia Index (2010 – 2020) | *Number of times respective category is consumed/used in a week

CHOCOLATE

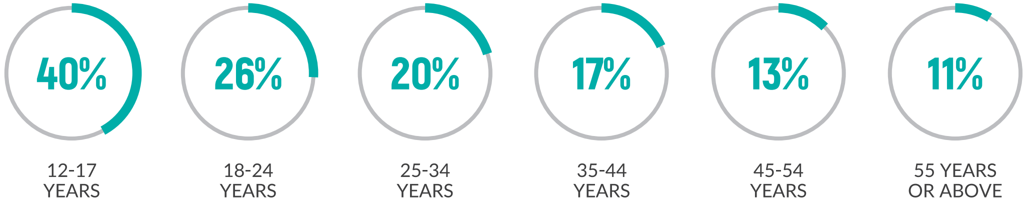
2012: 7% → 2020: 21% 14%↑



PUNJAB	20%
SINDH	30%
KPK	8%
BALOCHISTAN	35%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	35%	34%	30%	29%	28%
RURAL	20%	17%	17%	18%	14%

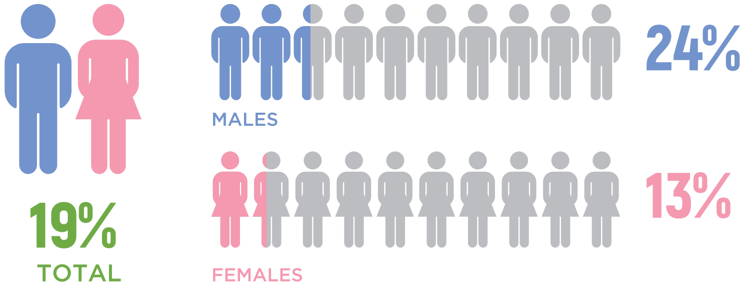


Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

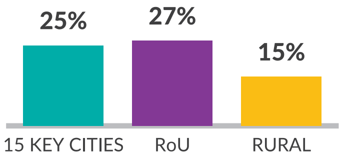
10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

MINERAL WATER

2010: 10% → 2020: 19% 9%↑



PUNJAB	26%
SINDH	17%
KPK	2%
BALOCHISTAN	9%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	41%	32%	24%	23%	20%
RURAL	21%	18%	16%	15%	12%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

SWEETENER

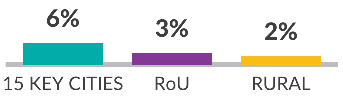
2016: 2% → 2020: 3% 1%↑

3% TOTAL

MALES **2%**

FEMALES **4%**

PUNJAB	4%
SINDH	3%
KPK	1%
BALOCHISTAN	2%



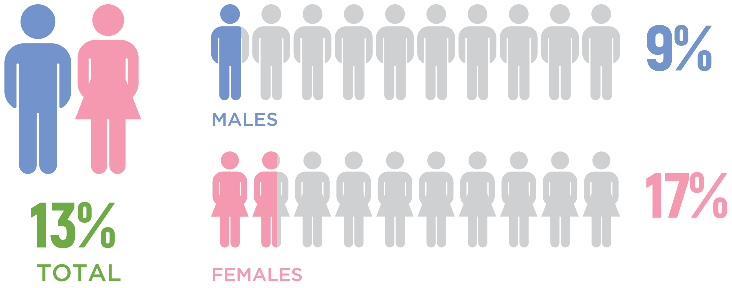
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	8%	5%	4%	4%	4%
RURAL	3%	3%	2%	3%	2%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

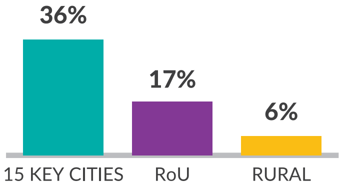
Source: Consumer Multimedia Index (2010 – 2020)

INSTANT NOODLES

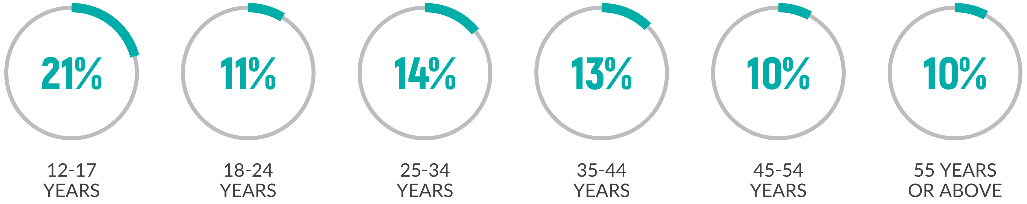
2010: 8% → 2020: 13% 5%↑



PUNJAB	14%
SINDH	20%
KPK	3%
BALOCHISTAN	13%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	35%	32%	26%	27%	5%
RURAL	11%	8%	7%	5%	5%



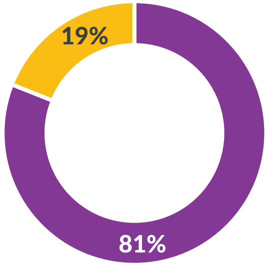
Knorr MAGGI

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

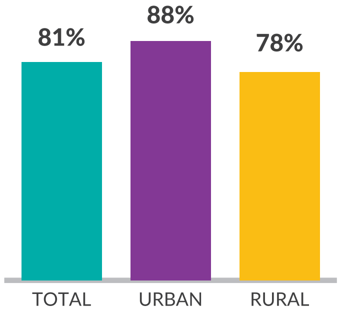
Source: Consumer Multimedia Index (2010 – 2020)

TEA

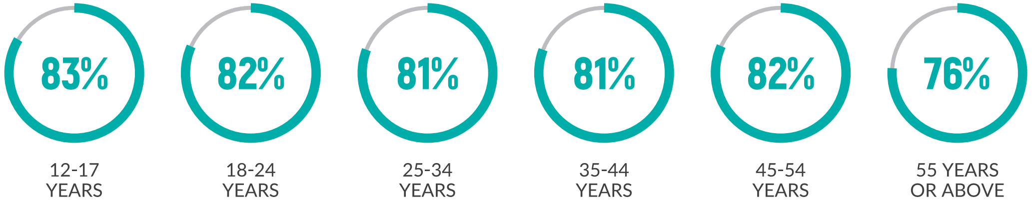
2010: 88% → 2020: 94% 6%↑



PUNJAB	94%
SINDH	88%
KPK	45%
BALOCHISTAN	56%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	92%	89%	88%	87%	86%
RURAL	81%	81%	79%	79%	75%

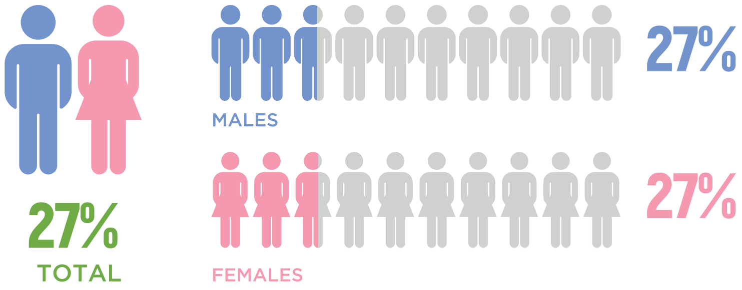


Penetration based on exclusively branded products' usership | Source: Consumer Multimedia Index (2010 – 2020)

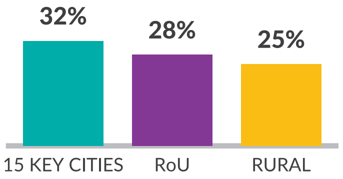
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

TEA WHITENER

2014: 30% → 2020: 27% -3%↓



PUNJAB	26%
SINDH	26%
KPK	27%
BALOCHISTAN	26%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	35%	30%	30%	31%	29%
RURAL	23%	23%	24%	25%	26%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

INNOVATION

Building the future faster, smarter and bolder

As Innovation experts, we are passionate about helping clients identify, qualify, optimize and forecast the business potential of innovations in consumer goods, services and durables, products, packaging and new business models. Our rapid and validated end-to-end solutions, combine optimization with qualification, to enable clients to be faster in seizing opportunities and be more agile and confident in bringing their products to market.

Innovation Advisory

Innovation Screening

Product Testing

Pack Evaluation

Forecasting & Validation

For more information, please contact:
M. Haris Rasheed | Head of MSU | **0345 8227 131** | haris.rasheed@ipsos.com

GAME CHANGERS

JUICES*

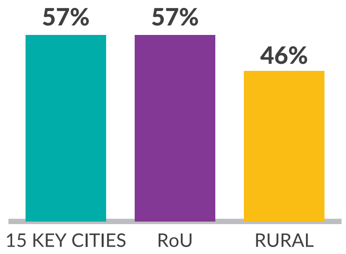
2010: 47% → 2020: 49% 2%↑

49% TOTAL

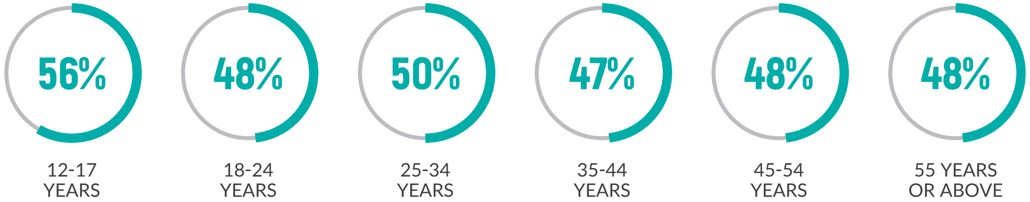
MALES 52%

FEMALES 47%

PUNJAB	52%
SINDH	54%
KPK	31%
BALOCHISTAN	60%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	65%	59%	53%	55%	56%
RURAL	53%	49%	44%	44%	47%



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Murree Brewery's BiGG Apple · Nestlé FRUITA VITALS · MAZA · Nestlé Nesfruta · POLLY Sip of Zindagi! · Shezan · Slice

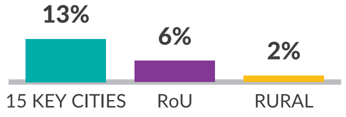
*During C-19, Packaged Juices Penetration was decreased by 21% (owing to lock-downs and high health consciousness)
Source: Consumer Multimedia Index (2010 – 2020)

FLAVORED MILK

2010: 5% → 2020: 5% 0%

	Total	Males	Females
	5%	5%	5%

PUNJAB	3%
SINDH	10%
KPK	1%
BALOCHISTAN	7%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	15%	11%	9%	9%	8%
RURAL	4%	4%	2%	2%	2%

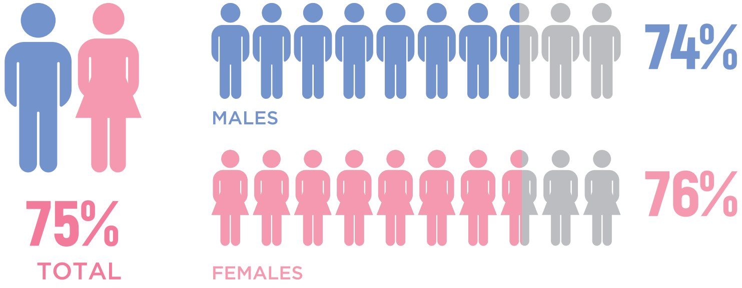
12-17 YEARS	18-24 YEARS	25-34 YEARS	35-44 YEARS	45-54 YEARS	55 YEARS OR ABOVE
7%	5%	4%	4%	5%	4%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

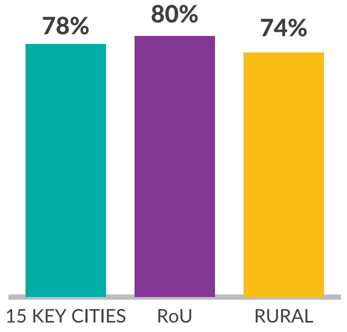
Source: Consumer Multimedia Index (2010 – 2020)

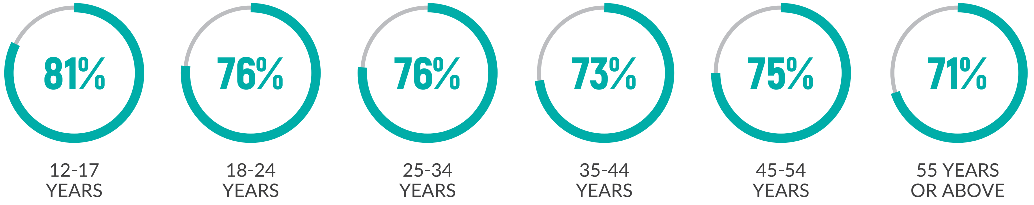
CARBONATED SOFT DRINK*

2010: 84% → 2020: 75% -9%↓



PUNJAB	83%
SINDH	77%
KPK	51%
BALOCHISTAN	75%





Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

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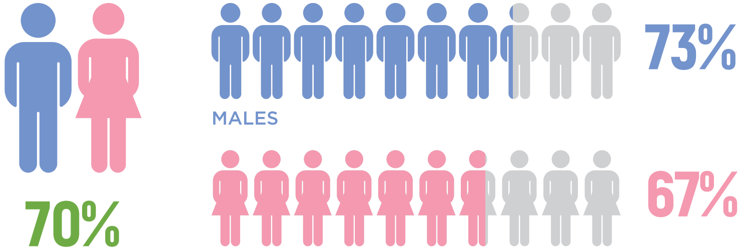
*During C-19, CSD Penetration was decreased by 28% (owing to lock-downs and high health consciousness)
Source: Consumer Multimedia Index (2010 – 2020)

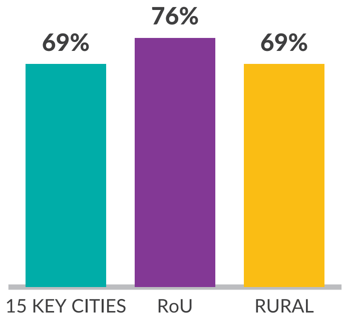
BISCUIT

2010: 82% → 2020: 70% -12%↓

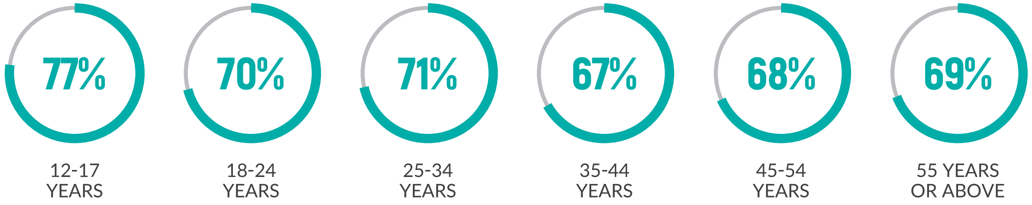


70%
TOTAL

PUNJAB	72%
SINDH	82%
KPK	45%
BALOCHISTAN	75%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	75%	74%	70%	70%	74%
RURAL	73%	71%	67%	68%	70%



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

BAKERI BISCUITS
Bravo!
Butter Puff
Café
Candi ORIGINAL
Chocolatto
Chocolate Chip cookies
Gala
Gluco
Party
Peanut Pik
Peanut Pista
PRINCE
RIO
SOOPER
TIGER
TUC

Source: Consumer Multimedia Index (2010 – 2020)

ICE CREAM

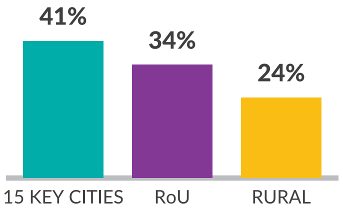
2010: 36% → 2020: 28% -8%↓

28%
TOTAL

MALES 29%

FEMALES 28%

PUNJAB	35%
SINDH	29%
KPK	8%
BALOCHISTAN	23%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	45%	41%	38%	36%	36%
RURAL	30%	26%	23%	23%	22%

12-17 YEARS	18-24 YEARS	25-34 YEARS	35-44 YEARS	45-54 YEARS	55 YEARS OR ABOVE
40%	32%	28%	25%	25%	19%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

CHAMAN gourmet IGLOO omoré WALL'S

Source: Consumer Multimedia Index (2010 – 2020)

MILK MODIFIER

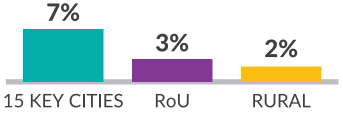
2012: 3% → 2020: 3% 0%

3%
TOTAL

MALES 4%

FEMALES 3%

PUNJAB	3%
SINDH	4%
KPK	1%
BALOCHISTAN	7%



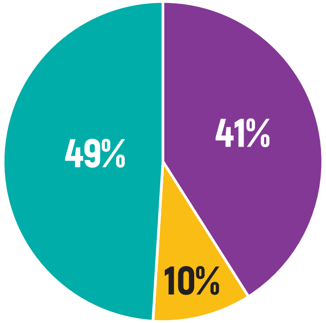
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	9%	6%	5%	4%	5%
RURAL	3%	3%	1%	2%	2%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

SALTY SNACKS

2010: 46% → 2020: 53% 7%↑



- 🟪 Exclusively branded products' usership
- 🟨 Exclusively unbranded products' usership
- 🟩 Both branded & unbranded products' usership

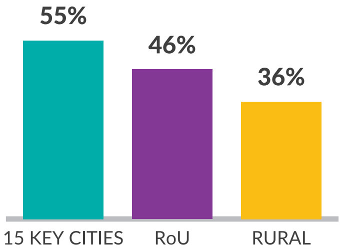
PUNJAB	45%
SINDH	46%
KPK	20%
BALOCHISTAN	50%

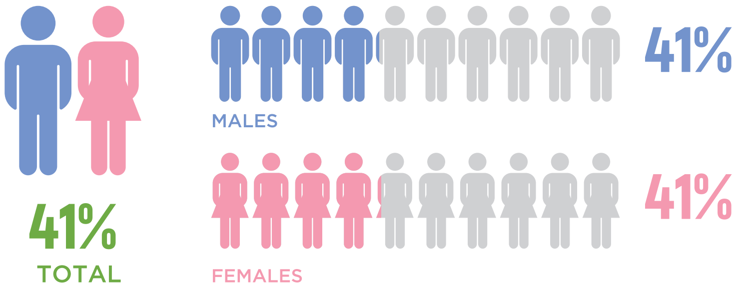
URBAN

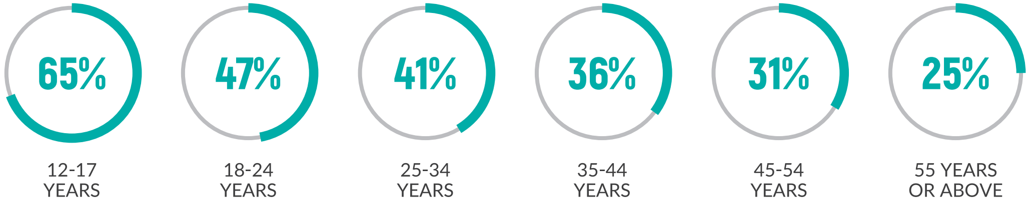
SEC A	SEC B	SEC C	SEC D	SEC E
54%	53%	51%	52%	51%

RURAL

SEC A	SEC B	SEC C	SEC D	SEC E
43%	38%	35%	36%	34%



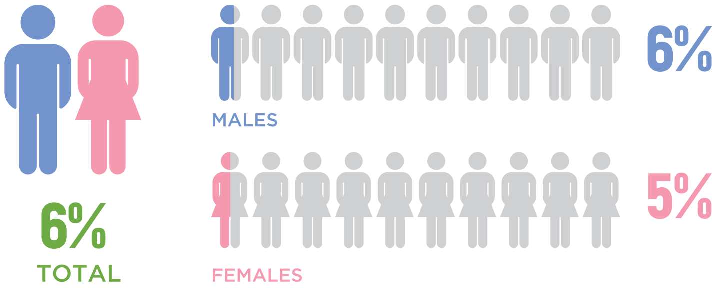




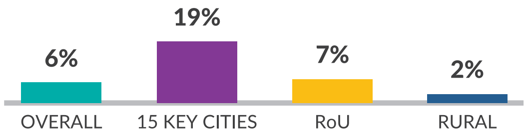
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

COFFEE



PUNJAB	5%
SINDH	11%
KPK	1%
BALOCHISTAN	2%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	26%	21%	13%	9%	8%
RURAL	4%	2%	2%	2%	1%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

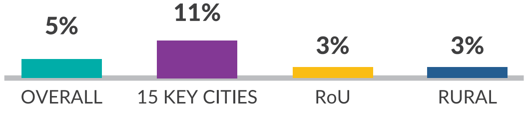
NESCAFÉ

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

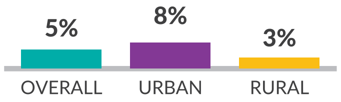
INFANT MILK

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

PUNJAB	4%
SINDH	8%
KPK	3%
BALOCHISTAN	3%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	10%	10%	8%	9%	4%
RURAL	4%	3%	2%	4%	3%



Baby's Only Blemil Cow & Gate Enfamil Gerber Lactéus morinaga meiji FM-T INFANT FORMULA Nestlé NAN

Base: Females with Children 2-3 years | 10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

INFANT FOOD

2%
TOTAL

MALES 2%

FEMALES 2%

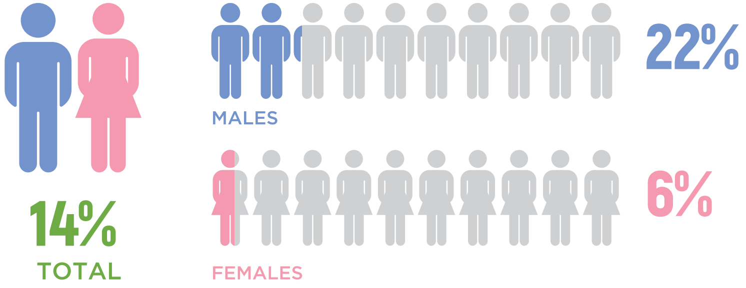
PUNJAB	3%
SINDH	6%
KPK	1%
BALOCHISTAN	6%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	13%	10%	5%	4%	3%
RURAL	4%	3%	2%	2%	2%

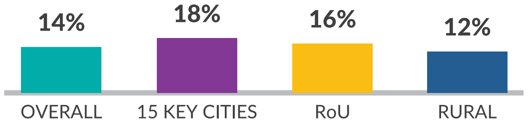
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

ENERGY DRINK



PUNJAB	14%
SINDH	19%
KPK	10%
BALOCHISTAN	10%

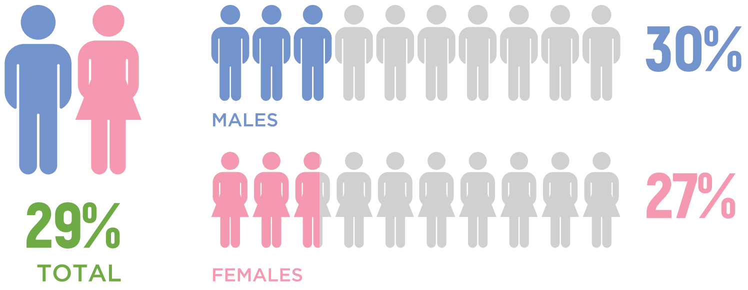


	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	23%	20%	15%	16%	17%
RURAL	14%	15%	12%	13%	10%

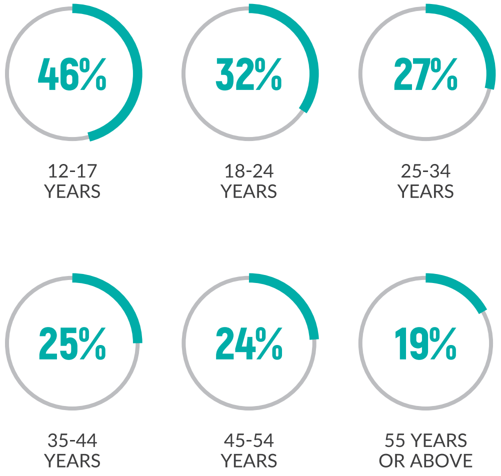
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

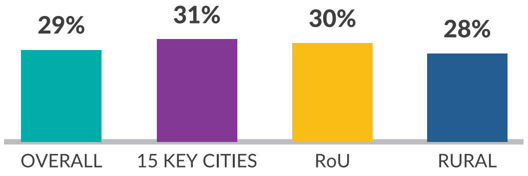
10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

TOFFEE / CANDY



PUNJAB	27%
SINDH	40%
KPK	13%
BALOCHISTAN	42%





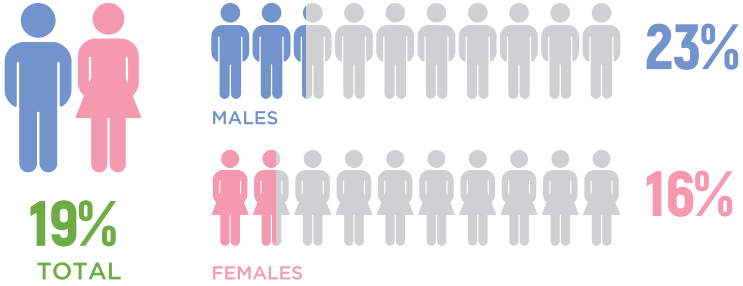
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	30%	32%	30%	31%	31%
RURAL	26%	29%	27%	27%	29%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

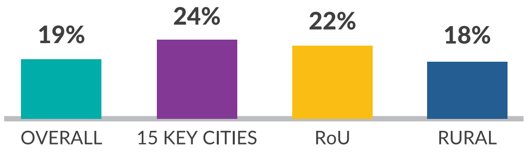
Source: Consumer Multimedia Index (2010 – 2020)

CHEWING GUM

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.



PUNJAB	16%
SINDH	26%
KPK	14%
BALOCHISTAN	38%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	26%	23%	23%	22%	21%
RURAL	21%	18%	18%	15%	19%

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

ACTIVATION
IMPACT
MODELING

AIM - BRAND HEALTH TRACKING

Discover how your brand activations are impacting consumers' relationships with your brand

Brand activations need to capture attention and ultimately deliver impact on the brand, at different stages of the brand relationship.

GRAB **ATTENTION**

ENHANCE **BRAND RELATIONSHIPS**

STRENGTHEN **BRAND PERCEPTIONS**

RAISE **BRAND AWARENESS**

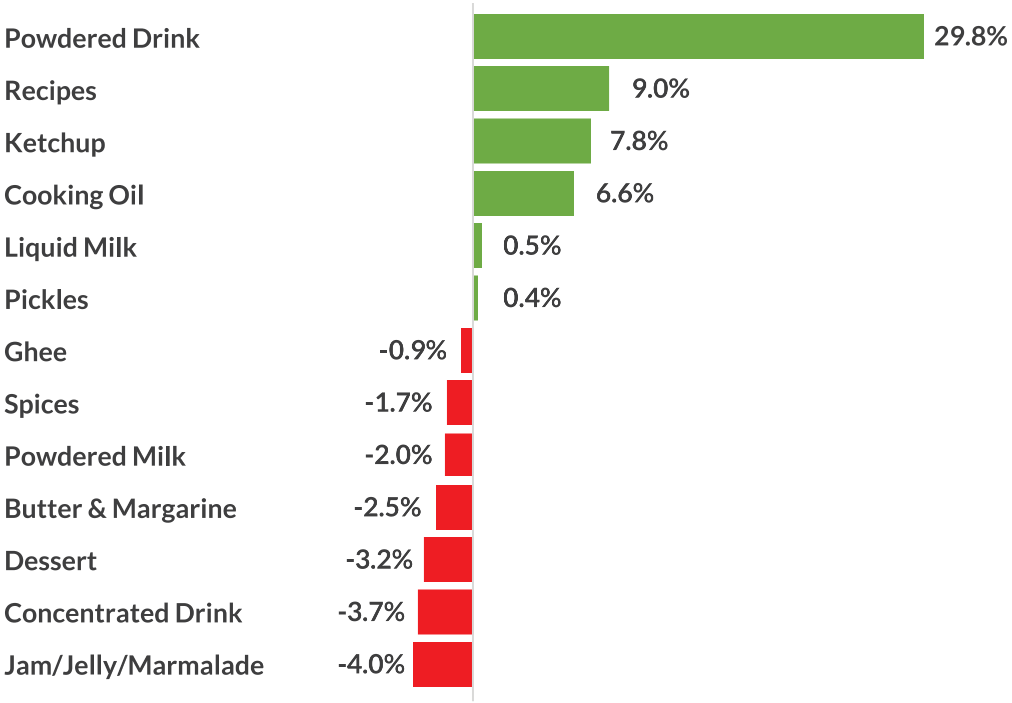
Measure the ability of activations to **gain attention** for the brand

Observe and **drive** impact on key stages of brand relationship, aligned to the objectives of the advertising, in a way that accounts for unconscious response

For more information, please contact: **Adil Jamil** | Head of BHT | **0345 8550 515** | Adil.jamil@ipsos.com

GAME CHANGERS Ipsos

HOUSEHOLD FOOD ITEMS



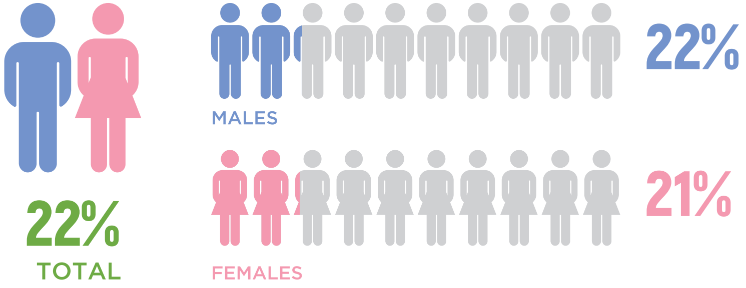
	AVERAGE ANNUAL GROWTH RATE	CATEGORY PENETRATION (2020)	CONSUMPTION FREQUENCY* (IN A WEEK)	NO. OF BRANDS THAT CONSTITUTE 80% CONSUMERS' SHARE	
				2010	2020
Powdered Drink	29.8%	22%	1.9	3	3
Recipes	9.0%	64%	2.9	2	3
Ketchup	7.8%	31%	2.2	5	3
Cooking Oil	6.6%	52%	11.4	13	27
Liquid Milk	0.5%	36%	12.9	2	7
Pickles	0.4%	62%	2.9	2	4
Ghee	-0.9%	79%	13	19	28
Spices	-1.7%	76%	5.4	2	6
Powdered Milk	-2.0%	6%	4.9	2	5
Butter & Margarine	-2.5%	23%	3.7	1	2
Dessert	-3.2%	15%	0.8	3	3
Concentrated Drink	-3.7%	40%	1	2	2
Jam/Jelly/Marmalade	-4.0%	8%	1.5	3	4

Avg. Annual growth rate = ((P2-Pn)/Pn)*100)/N
where P2 = Penetration in 2020
Pn = Penetration in earlier year (2010, 2012 etc.)
N = Number of years

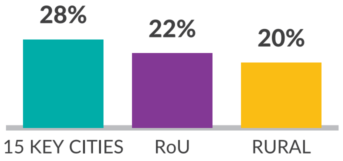
Source: Consumer Multimedia Index (2010 – 2020) | *Number of times respective category is consumed/used in a week

POWDERED DRINK

2010: 6% → 2020: 22% 16%↑



PUNJAB	21%
SINDH	31%
KPK	11%
BALOCHISTAN	25%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	28%	26%	26%	23%	25%
RURAL	22%	21%	20%	19%	22%

Sun Sip LIMOPANI™

Energile

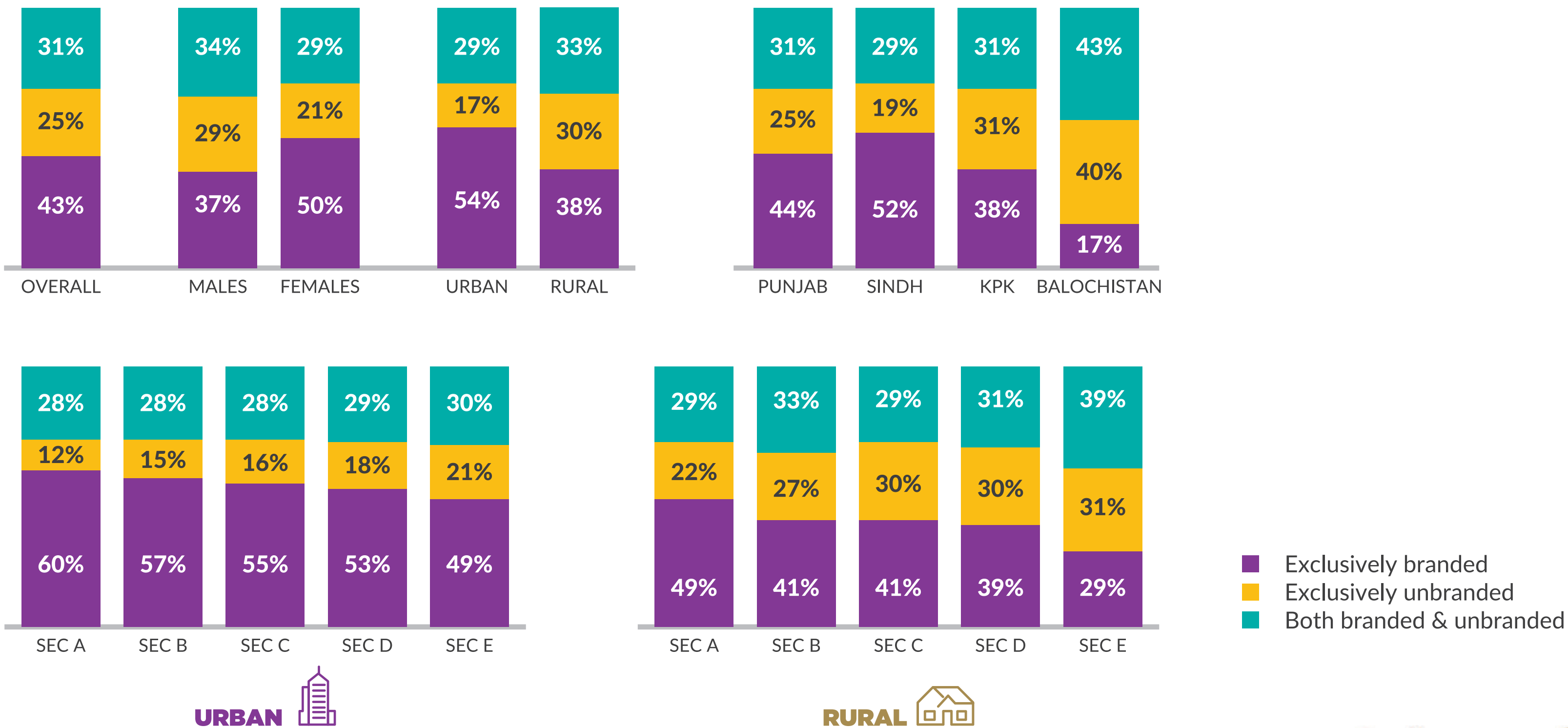
TANG

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

RECIPE MIX

2010: **34%** → 2020: **64%** 30%↑

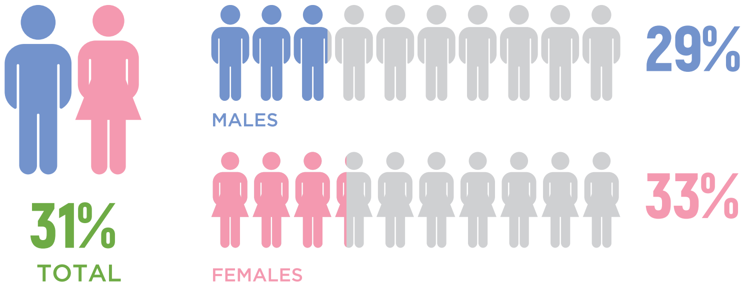


Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

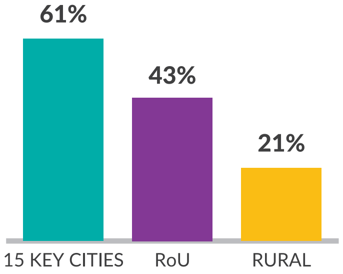
Source: Consumer Multimedia Index (2010 – 2020)

KETCHUP

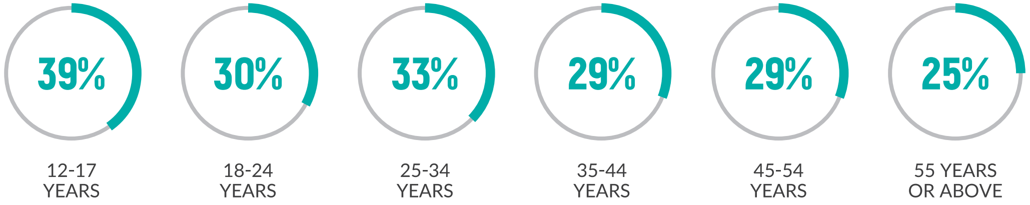
2010: 18% → 2020: 31% 13%↑



PUNJAB	35%
SINDH	38%
KPK	14%
BALOCHISTAN	17%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	64%	59%	53%	51%	45%
RURAL	37%	26%	20%	19%	19%



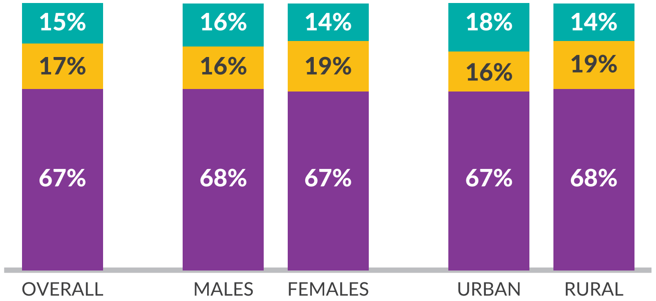
National Shangrila Shezan

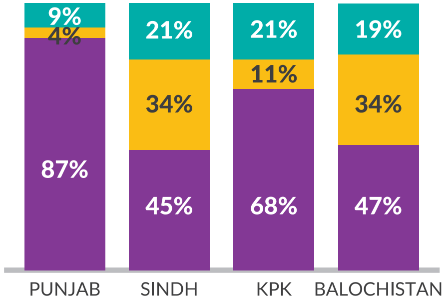
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

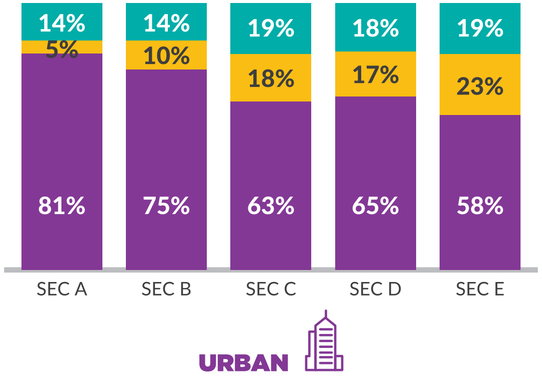
Source: Consumer Multimedia Index (2010 – 2020)

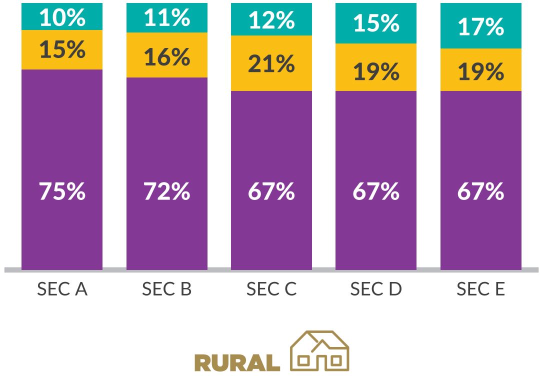
COOKING OIL

2010: 31% → 2020: 52% 21%↑









- 🟪 Exclusively branded
- 🟨 Exclusively unbranded
- 🟦 Both branded & unbranded

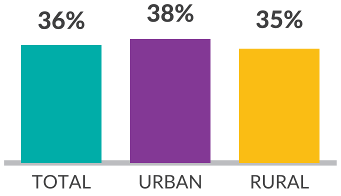
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

PACKAGED LIQUID MILK*

2010: 34% → 2020: 36% 2%↑

PUNJAB	35%
SINDH	36%
KPK	24%
BALOCHISTAN	71%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	40%	39%	38%	39%	35%
RURAL	36%	35%	33%	35%	36%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

*During C-19, Liquid Milk Penetration was increased by 27% (owing to high health consciousness)
*Source: Ipsos Handbook on post Covid-19 Consumer Behavior in Pakistan | Source: Consumer Multimedia Index (2010 – 2020)

PICKLE

2010: 60% → 2020: 62% 2%↑

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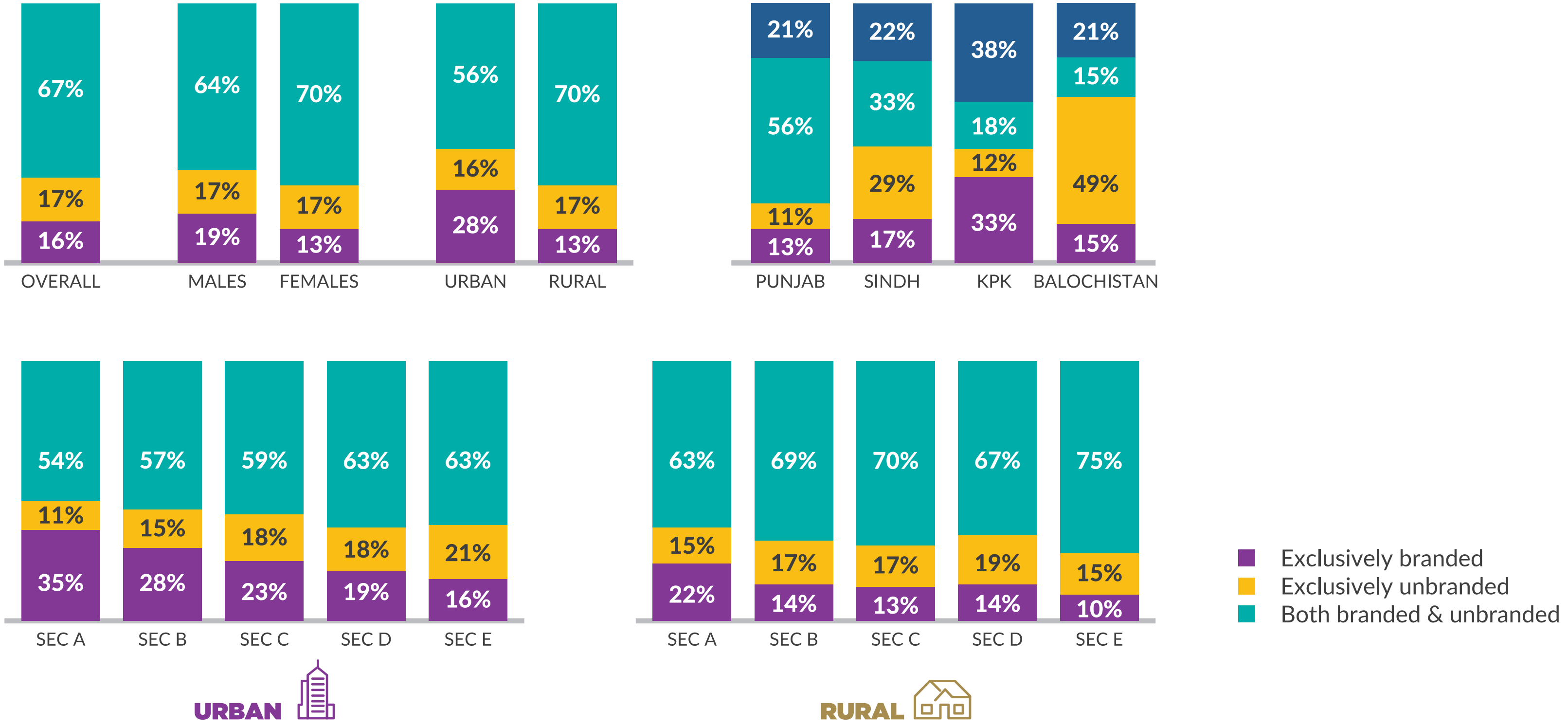
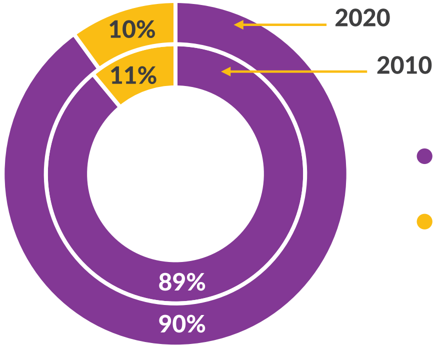


National Shangrila Shan Shezan

Source: Consumer Multimedia Index (2010 – 2020)

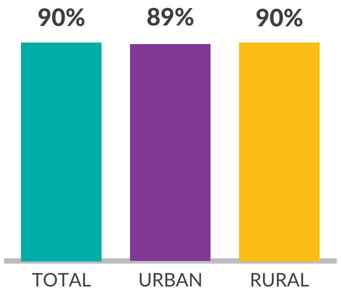
GHEE/VANASPATI

2010: 87% → 2020: 79% -8%↓



● Exclusively branded products' usership

● Exclusively unbranded products' usership



EXCLUSIVELY BRANDED PRODUCTS' USERSHIP

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	93%	91%	91%	91%	88%
RURAL	91%	90%	90%	91%	90%

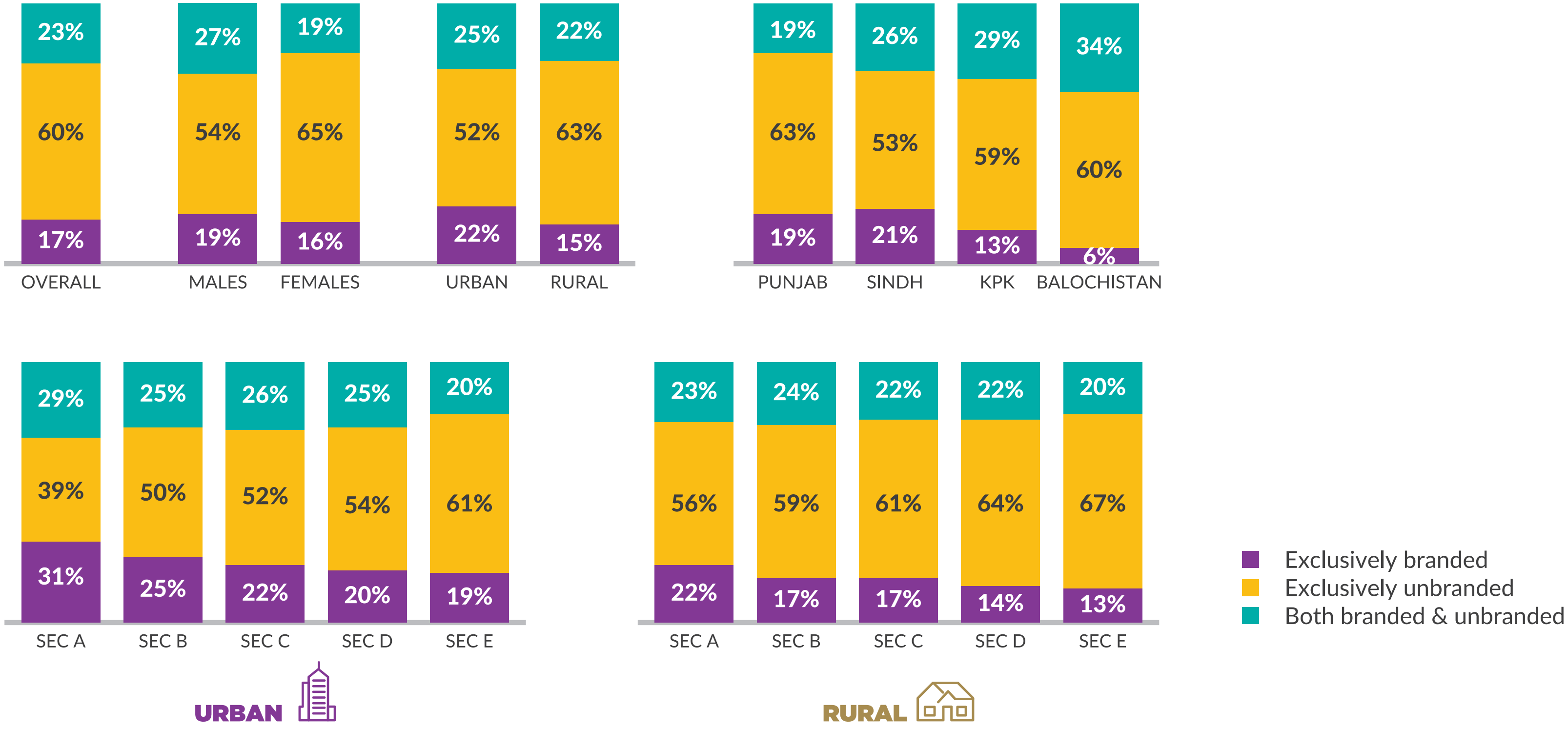
PUNJAB	96%
SINDH	72%
KPK	95%
BALOCHISTAN	77%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

BRANDED PLAIN SPICE

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

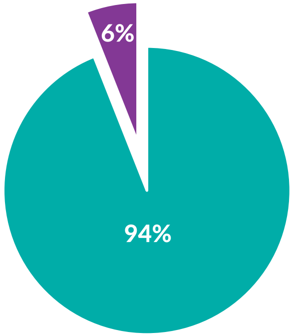


HABIB MAA Spices MEZAN Mehran National Shan

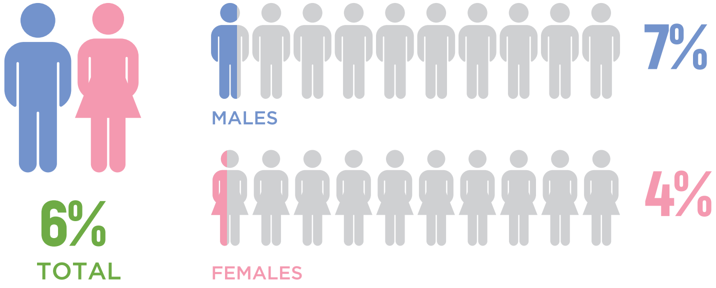
10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

POWDERED MILK

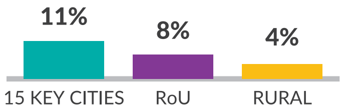
2010: 7% → 2020: 6% -1%↓



Overwhelming majority i.e. 94% of respondents who said they consume powdered milk at home, were those who have kids.



URBAN	SEC A 12%	SEC B 11%	SEC C 10%	SEC D 9%	SEC E 9%
RURAL	SEC A 6%	SEC B 4%	SEC C 4%	SEC D 4%	SEC E 4%



PUNJAB	7%
SINDH	8%
KPK	1%
BALOCHISTAN	5%

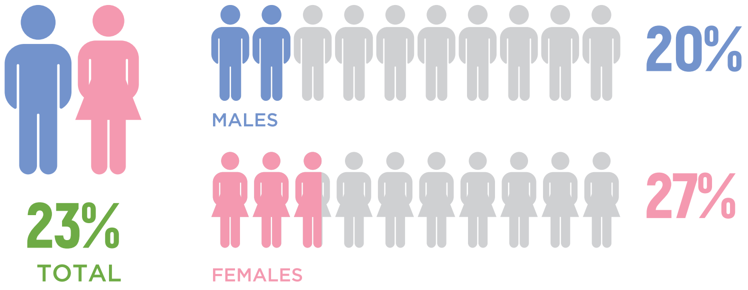
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Ensure MARVEL MillacFoods NIDO Super

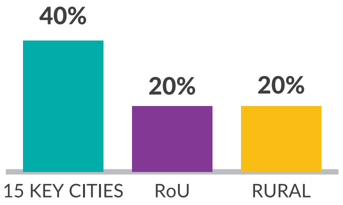
Source: Consumer Multimedia Index (2010 – 2020)

BUTTER & MARGARINE

2014: **28%** → 2020: **23%** -5%↓



PUNJAB	22%
SINDH	34%
KPK	8%
BALOCHISTAN	45%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	44%	36%	32%	29%	27%
RURAL	26%	23%	19%	17%	20%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

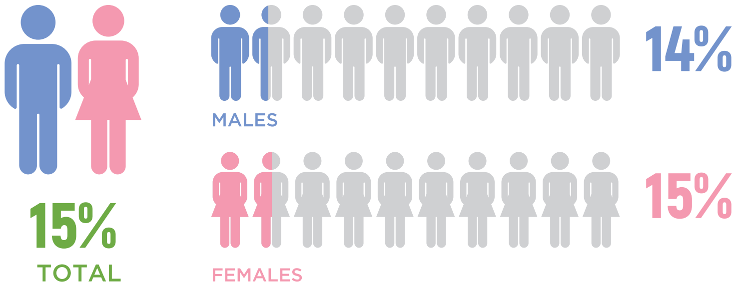
Blue Band

HALEEB FOODS

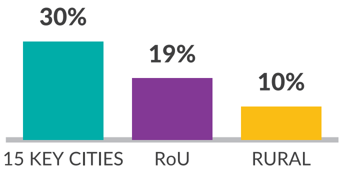
Source: Consumer Multimedia Index (2010 – 2020)

BRANDED DESSERT

2010: 22% → 2020: 15% -7%↓



PUNJAB	17%
SINDH	19%
KPK	4%
BALOCHISTAN	9%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	34%	28%	24%	24%	23%
RURAL	15%	11%	9%	8%	11%

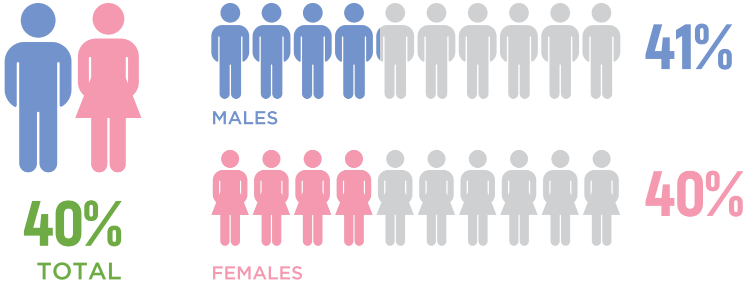
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Laziza INTERNATIONAL National Rafhan

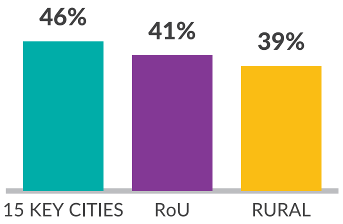
Source: Consumer Multimedia Index (2010 – 2020)

CONCENTRATED DRINK

2010: 64% → 2020: 40% -24%↓



PUNJAB	39%
SINDH	52%
KPK	30%
BALOCHISTAN	40%



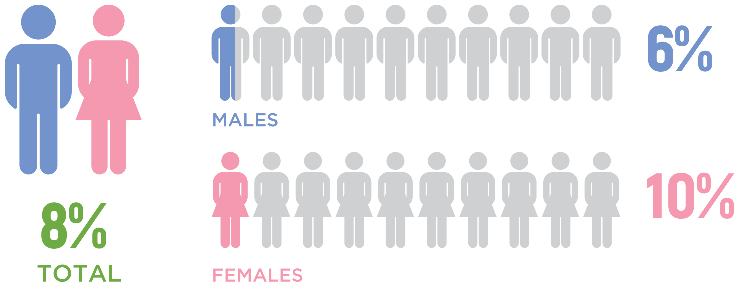
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	48%	42%	44%	42%	46%
RURAL	38%	41%	37%	39%	37%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

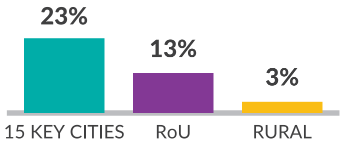
Source: Consumer Multimedia Index (2010 – 2020)

JAM/JELLY/MARMALADE

2010: 13% → 2020: 8% -5%↓



PUNJAB	8%
SINDH	12%
KPK	3%
BALOCHISTAN	3%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	32%	24%	19%	15%	11%
RURAL	9%	5%	2%	2%	3%

AHMED FOODS
MITCHELL'S
National
Shezan

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

BOUILLON CUBE

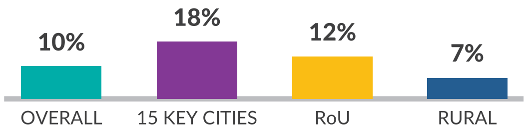
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

10% TOTAL

MALES **10%**

FEMALES **9%**

PUNJAB	13%
SINDH	9%
KPK	2%
BALOCHISTAN	1%

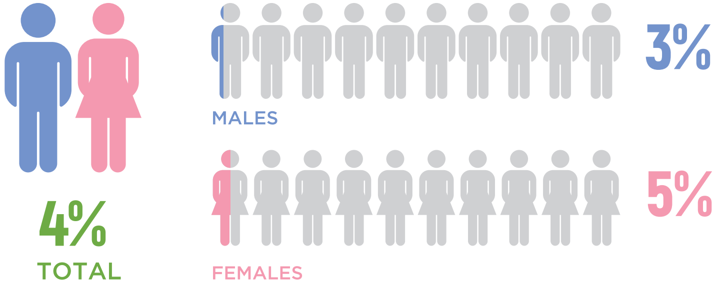


	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	22%	18%	14%	16%	12%
RURAL	8%	7%	6%	6%	8%

FATTORIA ITALIA K&N's Knorr MAGGI

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

READY TO COOK FROZEN MEAT



PUNJAB	4%
SINDH	5%
KPK	2%
BALOCHISTAN	2%

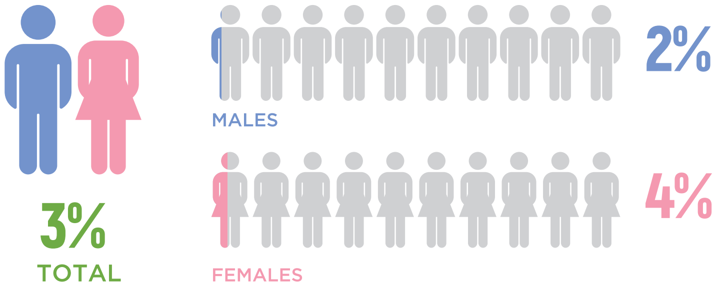
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	10%	7%	6%	6%	4%
RURAL	4%	3%	2%	2%	2%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

BIG BIRD Eat Well. Live Well
DAWN Foods
FAUJI Fresh'n Freeze
Fine Life
K&N's
PRIME Mazedar
Freshmate
Mon Salwa BRING TASTE To LIFE
PK
SABROSO
SHAHI
simply SUFI
Zenith

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

READY TO EAT FROZEN FOOD



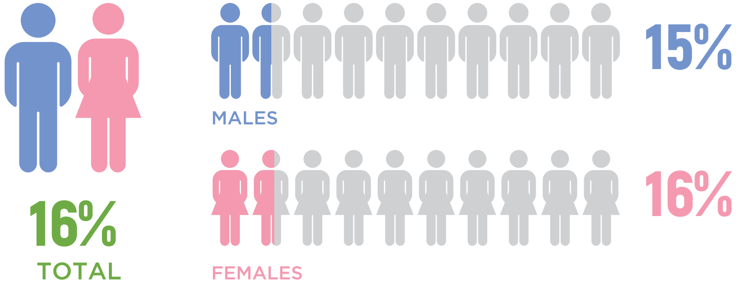
PUNJAB	4%
SINDH	4%
KPK	1%
BALOCHISTAN	1%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	12%	7%	5%	5%	4%
RURAL	3%	2%	2%	1%	2%

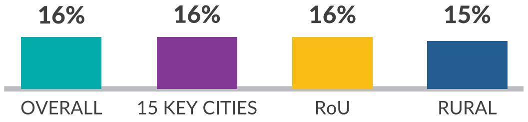
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

BRANDED HONEY



PUNJAB	19%
SINDH	17%
KPK	5%
BALOCHISTAN	11%



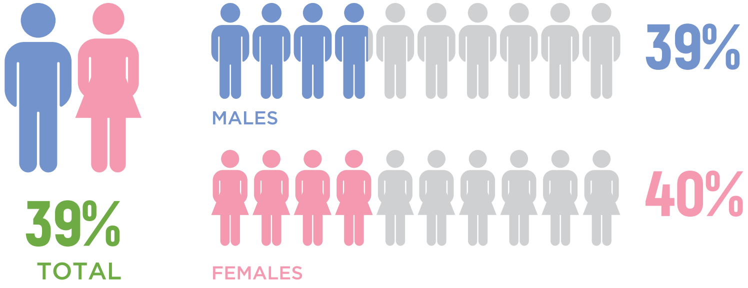
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	24%	19%	15%	14%	12%
RURAL	20%	19%	15%	14%	15%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

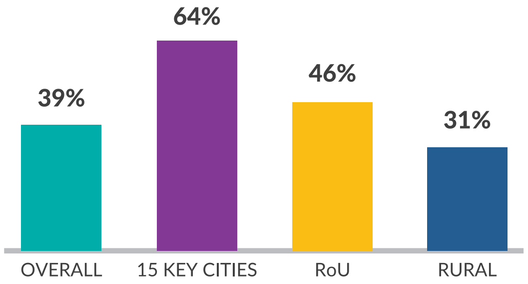
10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

BRANDED BREAD

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.



PUNJAB	49%
SINDH	35%
KPK	16%
BALOCHISTAN	37%

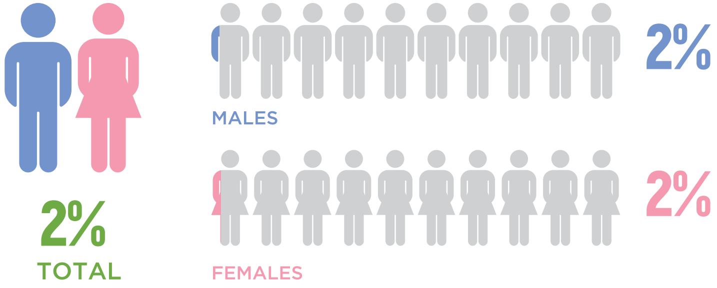


	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	65%	59%	56%	54%	57%
RURAL	40%	34%	30%	29%	32%

B.P BAKERY · BAKE PARLOR · DAWN BREAD · WONDER · SONA FOODS · Sun Rise BREAD · Sunny Gold

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

BREAKFAST CEREAL



PUNJAB	2%
SINDH	3%
KPK	1%
BALOCHISTAN	4%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	7%	5%	4%	3%	2%
RURAL	1%	1%	1%	1%	1%

Alpen
familia
Fauji Cereals
FIBER One
Heinz
Jenan
NATURE VALLEY
NesPlus
Nestlé

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

SALTY SPREAD

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

3%
TOTAL

MALES	3%
FEMALES	3%

PUNJAB	3%
SINDH	4%
KPK	0%
BALOCHISTAN	3%

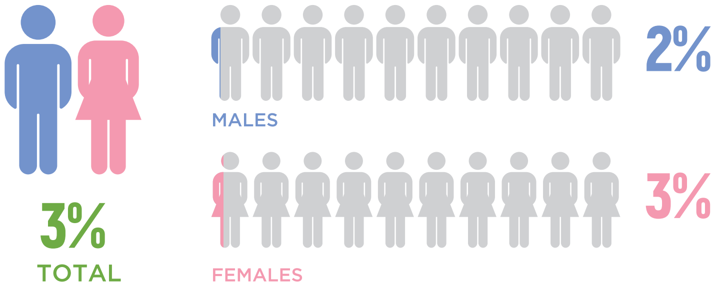
OVERALL	15 KEY CITIES	RoU	RURAL
3%	8%	3%	1%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	8%	7%	6%	5%	4%
RURAL	1%	1%	1%	2%	1%

KISSAN BRAND · Knorr · National · Shezan · Young's

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

SWEET SPREAD



PUNJAB	3%
SINDH	3%
KPK	1%
BALOCHISTAN	2%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	9%	6%	5%	4%	4%
RURAL	2%	1%	1%	1%	1%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

CHEESE

1%
TOTAL

MALES 1%

FEMALES 2%

PUNJAB	1%
SINDH	3%
KPK	1%
BALOCHISTAN	2%

OVERALL	15 KEY CITIES	RoU	RURAL
1%	4%	1%	1%

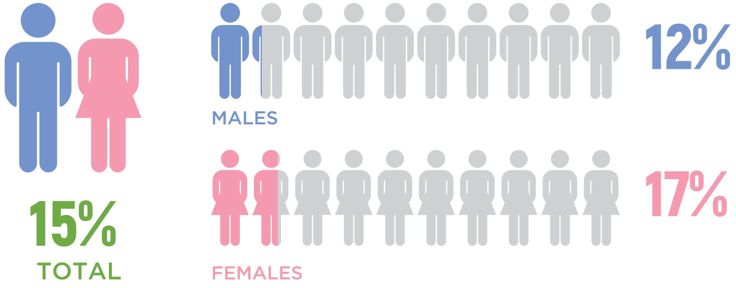
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	6%	4%	3%	2%	2%
RURAL	1%	1%	1%	1%	1%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

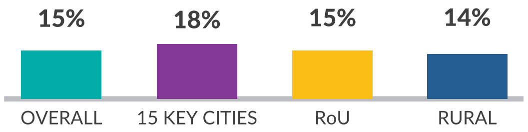
Adam's
الروابي AL RAWABI
المراعي Almarai
Arla
Deen's
EL SABOR
EMBORG
FIELD ROAST
HAPPY COW CHEESE
Kraft
La Belle Vache
PRÉSIDENT
Puck

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

BRANDED DAIRY CREAM



PUNJAB	16%
SINDH	10%
KPK	11%
BALOCHISTAN	32%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	24%	19%	17%	15%	12%
RURAL	19%	15%	13%	13%	14%

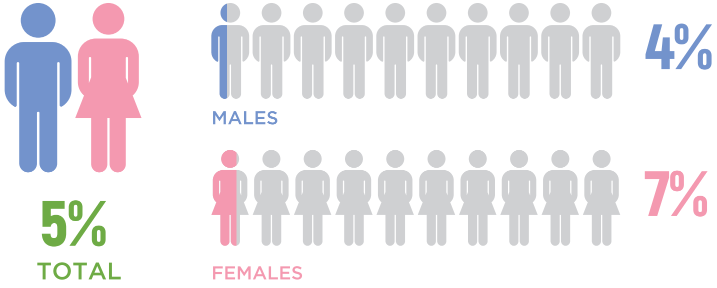
HALEEB
Nestlé Milk Pak
OLPER'S
nurpur
Whipy Whip

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

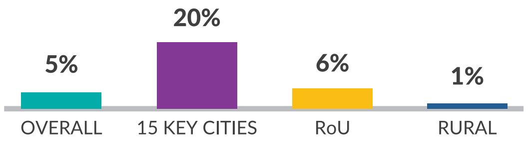
10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

MAYONNAISE

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.



PUNJAB	6%
SINDH	9%
KPK	0%
BALOCHISTAN	1%

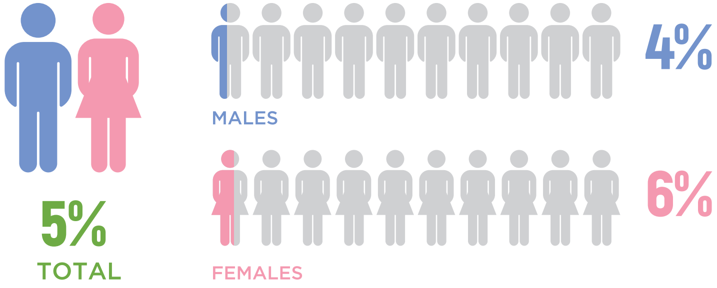


	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	27%	19%	14%	11%	9%
RURAL	3%	2%	1%	1%	1%

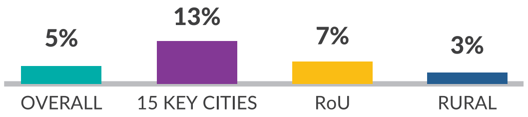
MaMa's
National
Knorr
MITCHELL'S
Smart
Sun Dip
HEINZ EST? 1869

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

PASTA



PUNJAB	3%
SINDH	14%
KPK	0%
BALOCHISTAN	2%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	20%	14%	10%	8%	6%
RURAL	4%	3%	3%	2%	3%

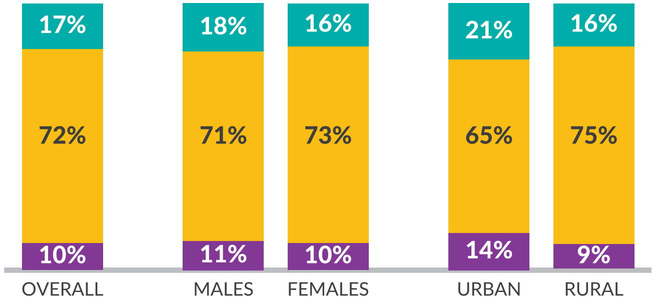
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

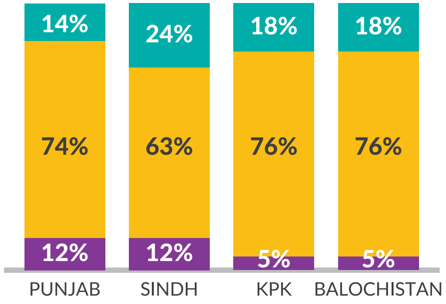
BAKE PARLOR
BORGES
Crispo
KOLSON
Mario's PASTA
Fauji

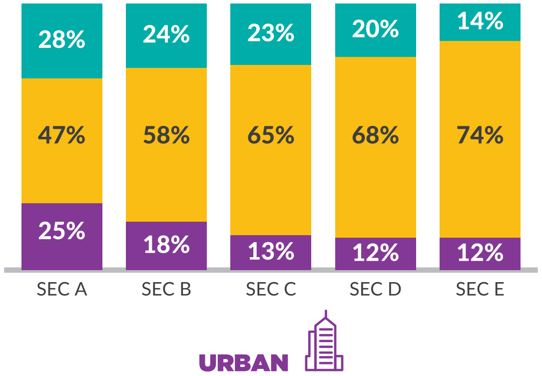
10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

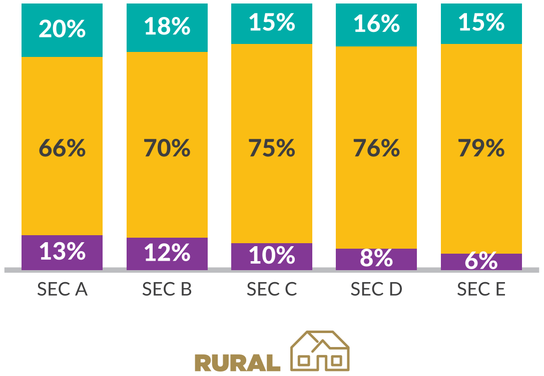
BRANDED RICE

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.







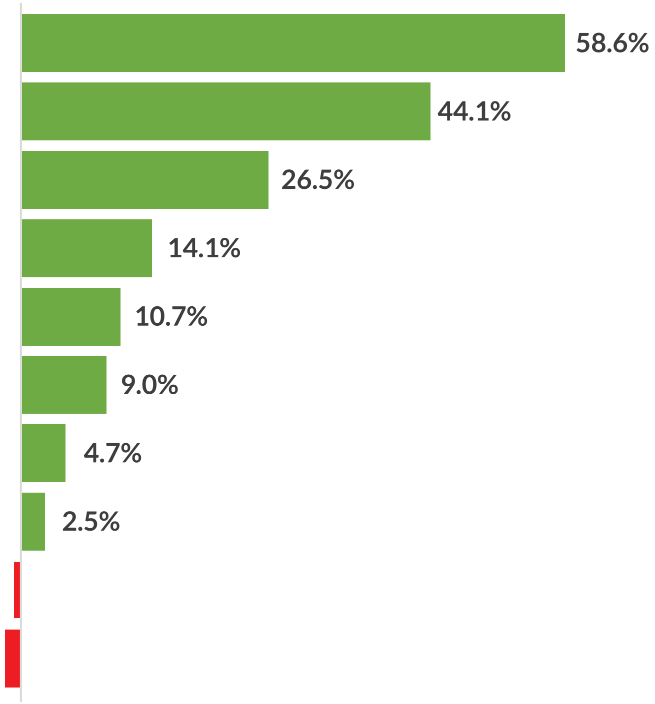


🟪 Exclusively branded
🟨 Exclusively unbranded
🟩 Both branded & unbranded

Anar Dana
Bakamal
BARKAT
DAAWAT THE FINEST BASMATI
Mughal
SULTAN
DUNAR
FALAK
GUARD BASMATI RICE

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

PERSONAL NON-FOOD ITEMS



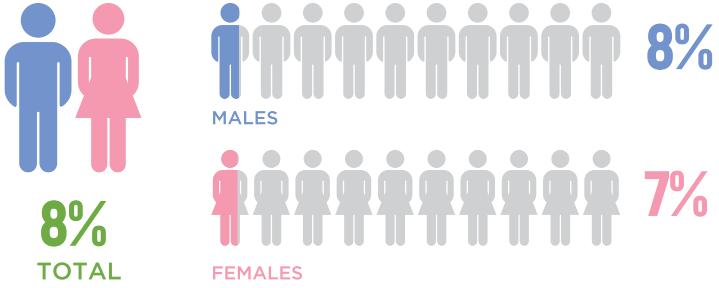
	AVERAGE ANNUAL GROWTH RATE	CATEGORY PENETRATION (2020)	CONSUMPTION FREQUENCY* (IN A WEEK)	NO. OF BRANDS THAT CONSTITUTE 80% CONSUMERS' SHARE	
				2010	2020
Handwash	58.6%	8%	9.6	4	5
Deodorant	44.1%	16%	3.3	20	12
Facewash	26.5%	12%	8.9	11	7
Hair Color	14.1%	18%	0.5	6	10
Napkins	10.7%	35%	6.5	3	2
Cream/ Lotion	9.0%	57%	10.7	5	9
Shampoo	4.7%	87%	2.8	4	5
Toothpaste	2.5%	83%	8	5	5
Personal Soap	-0.7%	92%	14.1	5	6
Hair Removing Cream	-1.7%	70%	0.5	8	3

Avg. Annual growth rate = ((P2-Pn)/Pn)*100)/N
where P2 = Penetration in 2020
Pn = Penetration in earlier year (2010, 2012 etc.)
N = Number of years

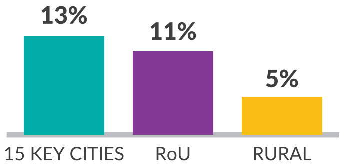
Source: Consumer Multimedia Index (2010 – 2020) | *Number of times respective category is consumed/used in a week

LIQUID HANDWASH

2010: 1% → 2020: 8% 7%↑



PUNJAB	10%
SINDH	9%
KPK	1%
BALOCHISTAN	3%



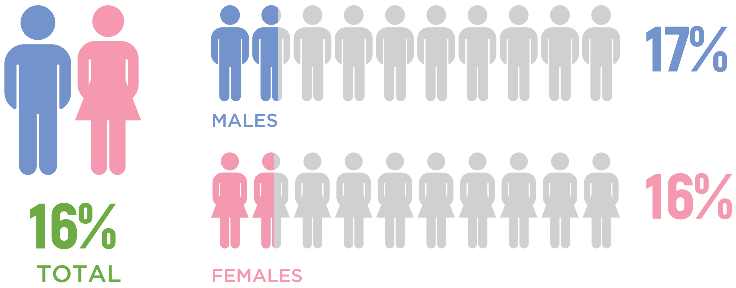
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	26%	18%	10%	10%	6%
RURAL	9%	5%	5%	5%	5%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

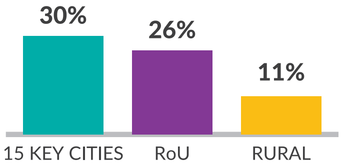
*During C-19, Liquid Handwash Penetration was increased to 19% (owing to high health consciousness)
*Source: Ipsos Handbook on post Covid-19 Consumer Behavior in Pakistan | Source: Consumer Multimedia Index (2010 – 2020)

DEODORANT

2014: 5% → 2020: 16% 11%↑



PUNJAB	18%
SINDH	23%
KPK	5%
BALOCHISTAN	17%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	43%	36%	27%	25%	20%
RURAL	19%	14%	11%	10%	9%

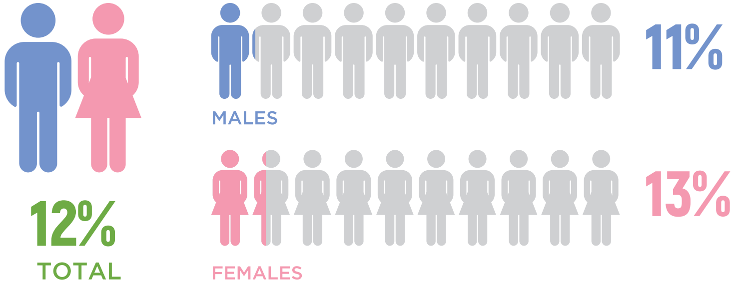
adidas
AXE
Blue Lady
BOLD MEN CARE
BOSS HUGO BOSS
Charlie
COBRA
DO IT!
Fa
FOGG
She
TEA ROSE

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

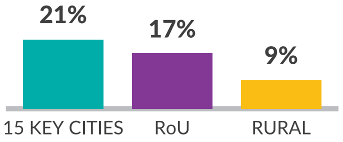
Source: Consumer Multimedia Index (2010 – 2020)

FACEWASH

2010: 3% → 2020: 12% 9%↑



PUNJAB	14%
SINDH	18%
KPK	3%
BALOCHISTAN	6%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	31%	28%	19%	15%	12%
RURAL	15%	12%	8%	8%	7%

Clean & Clear Dove Golden Pearl Fair & Lovely

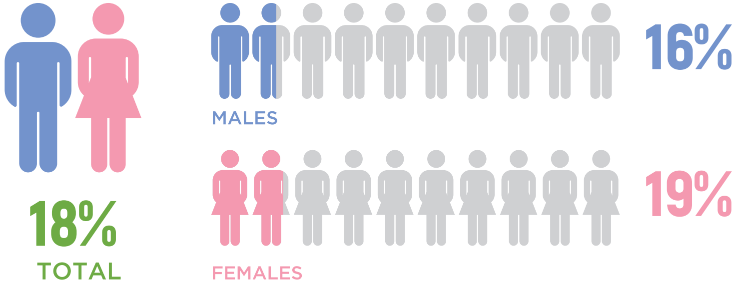
Himalaya SINCE 1930 FACE FRESH Natural. Beautiful & You POND'S

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

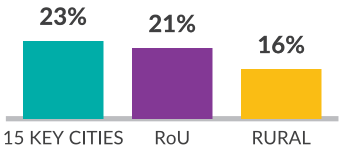
Source: Consumer Multimedia Index (2010 – 2020)

HAIR DYE

2010: 7% → 2020: 18% 11%↑



PUNJAB	18%
SINDH	23%
KPK	7%
BALOCHISTAN	21%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	26%	23%	21%	21%	21%
RURAL	17%	19%	15%	16%	14%

Bigen
BLACK ROSE Color Experts
GARNIER
Godrej
Kala Kola
KEUNE THE ART OF HAIR DESIGN
L'ORÉAL
Olivia
Praima
Samsol

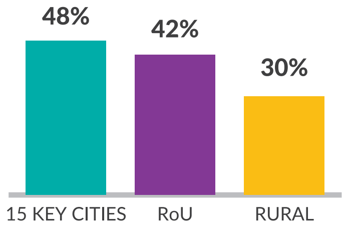
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

SANITARY NAPKIN

2010: 17% → 2020: 35% 18%↑

PUNJAB	32%
SINDH	40%
KPK	30%
BALOCHISTAN	56%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	59%	56%	45%	41%	36%
RURAL	41%	39%	29%	27%	28%

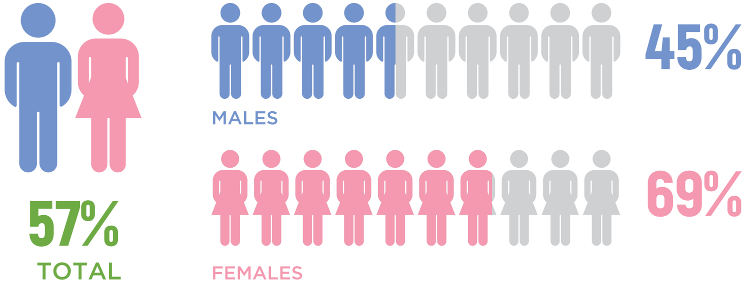
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

always Butterfly

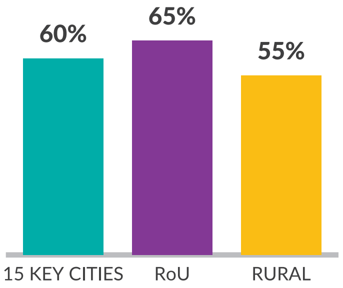
Base: Females only | Source: Consumer Multimedia Index (2010 – 2020)

CREAM/LOTION

2010: 30% → 2020: 57% 27%↑



PUNJAB	60%
SINDH	66%
KPK	30%
BALOCHISTAN	81%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	68%	64%	59%	62%	59%
RURAL	59%	60%	54%	54%	54%

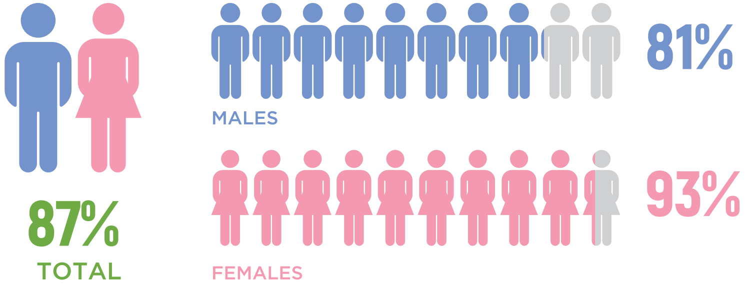
Dove
Golden Pearl
Fair & Lovely
Care
Vaseline Intensive Care
POND'S
Olivia
Tibet

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

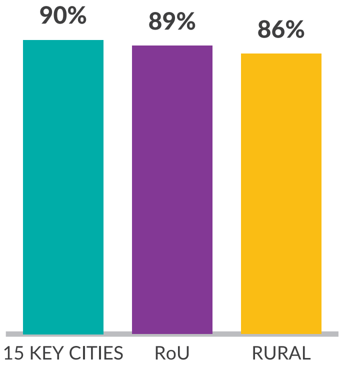
Source: Consumer Multimedia Index (2010 – 2020)

SHAMPOO

2010: 59% → 2020: 87% 28%↑



PUNJAB	88%
SINDH	90%
KPK	83%
BALOCHISTAN	79%



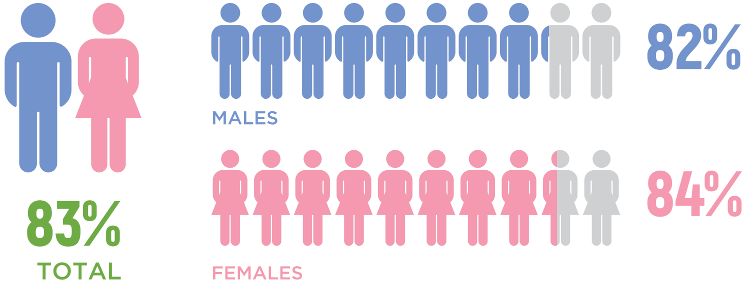
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	90%	91%	89%	89%	90%
RURAL	91%	89%	86%	86%	83%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

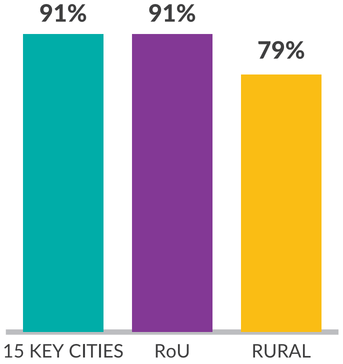
Source: Consumer Multimedia Index (2010 – 2020)

TOOTHPASTE

2010: 66% → 2020: 83% 17%↑



PUNJAB	88%
SINDH	86%
KPK	63%
BALOCHISTAN	85%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	93%	92%	91%	92%	90%
RURAL	87%	83%	78%	79%	76%

Closeup Colgate English

MEDICAM SENSODYNE

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

PERSONAL SOAP

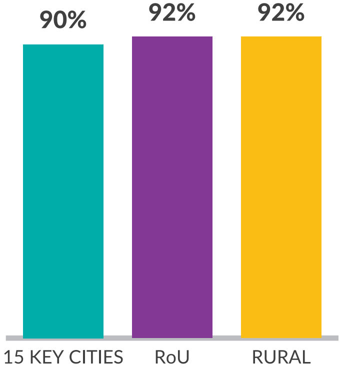
2010: 98% → 2020: 92% -6%↓

92% TOTAL

MALES **90%**

FEMALES **93%**

PUNJAB	92%
SINDH	92%
KPK	92%
BALOCHISTAN	87%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	92%	91%	90%	90%	91%
RURAL	92%	92%	93%	92%	92%

CAPRI Dettol Dove Lifebuoy LUX Safeguard

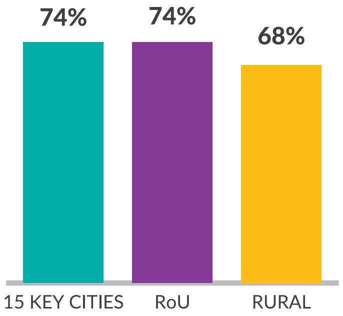
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

HAIR REMOVING CREAM

2010: 84% → 2020: 70% -14%↓

PUNJAB	75%
SINDH	74%
KPK	48%
BALOCHISTAN	84%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	77%	75%	73%	74%	75%
RURAL	70%	70%	66%	66%	71%

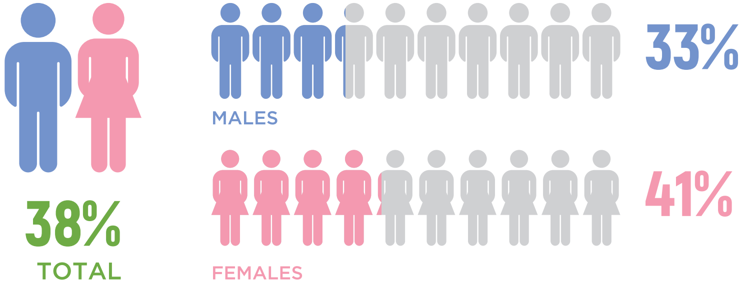
Care EU Veet

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

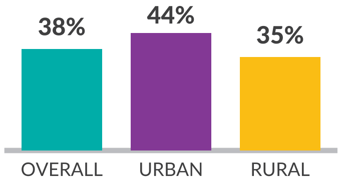
Base: Females only | Source: Consumer Multimedia Index (2010 – 2020)

SANITIZER*

PRE-COVID: 2% → POST COVID: 38% 36%↑



PUNJAB	41%
SINDH	35%
KPK	40%
BALOCHISTAN	19%



SEC A	SEC B	SEC C	SEC D	SEC E
45%	58%	39%	39%	29%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

CAREX® Dettol cool & cool® Johnson's® PALMOLIVE® NATURALS

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)
*During C-19, Hand Sanitizer Penetration was increased to 36% (owing to high health consciousness) | *Source: Ipsos Handbook on post Covid-19 Consumer Behavior in Pakistan

FACIAL PRODUCTS (CLEANSER, MOISTURIZER)

2010: 3% → 2020: 4% 1%↑

4% TOTAL

MALES	2%
FEMALES	6%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	14%	11%	7%	6%	5%
RURAL	3%	3%	1%	2%	1%

PUNJAB	3%
SINDH	7%
KPK	1%
BALOCHISTAN	2%

12-17 YEARS	18-24 YEARS	25-34 YEARS	35-44 YEARS	45-54 YEARS	55 YEARS OR ABOVE
3%	4%	4%	3%	3%	1%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

BIOAQUA BIODERMA BLESSO Cetaphil Clean & Clear Creme 21 Dermacos

GARNIER Golden Pearl Himalaya L'ORÉAL NIVEA Olivia POND'S

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

FOOTWEAR

2014: 81% → 2020: 87% 6%↑

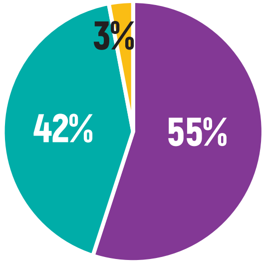
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

aerosoft ORIGINAL COMFORT Bata Borjan CHAWLA GROUP LIZA SHOES Servis stylo

Source: Consumer Multimedia Index (2010 – 2020)

MALE GROOMING

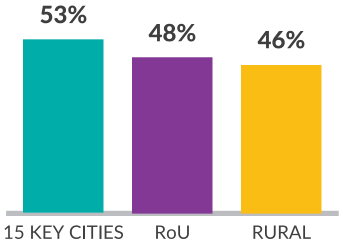
2010: 19% → 2020: 48% 21%↑

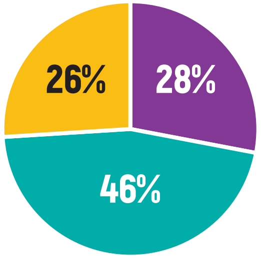


- 🟪 Shaving
- 🟩 Have beard with no trim
- 🟨 Neither shaving nor trim

PUNJAB	39%
SINDH	64%
KPK	40%
BALOCHISTAN	89%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	57%	57%	50%	57%	56%
RURAL	48%	46%	41%	48%	47%





- 🟪 Always from barber
- 🟩 Myself
- 🟨 Both

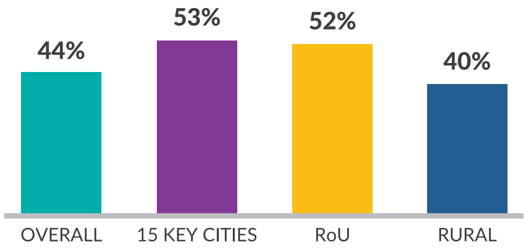
Base: Males only (19-45 years) | Source: Consumer Multimedia Index (2010 – 2020)

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

MOTORCYCLE

2010: 23% → 2020: 44% 21%↑

PUNJAB	51%
SINDH	37%
KPK	20%
BALOCHISTAN	67%

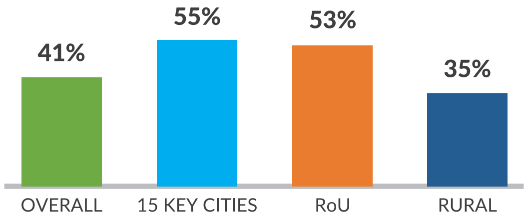


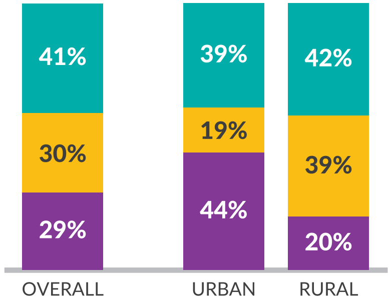
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	62%	63%	51%	52%	41%
RURAL	52%	49%	43%	39%	30%

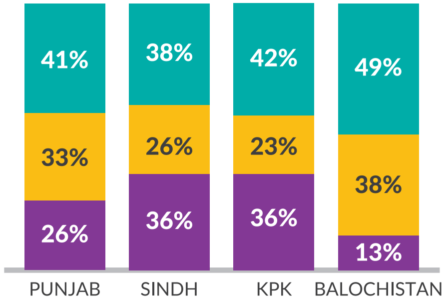
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

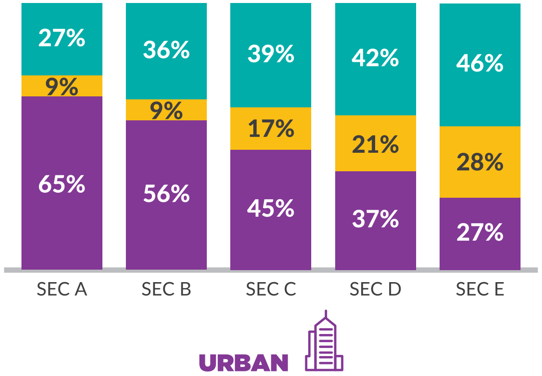
Base: Males Only | Source: Consumer Multimedia Index (2010 – 2020)

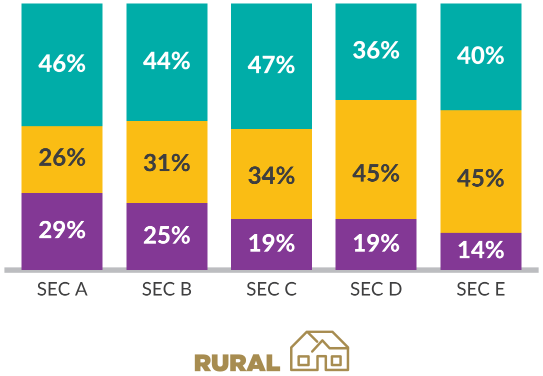
MAKE-UP









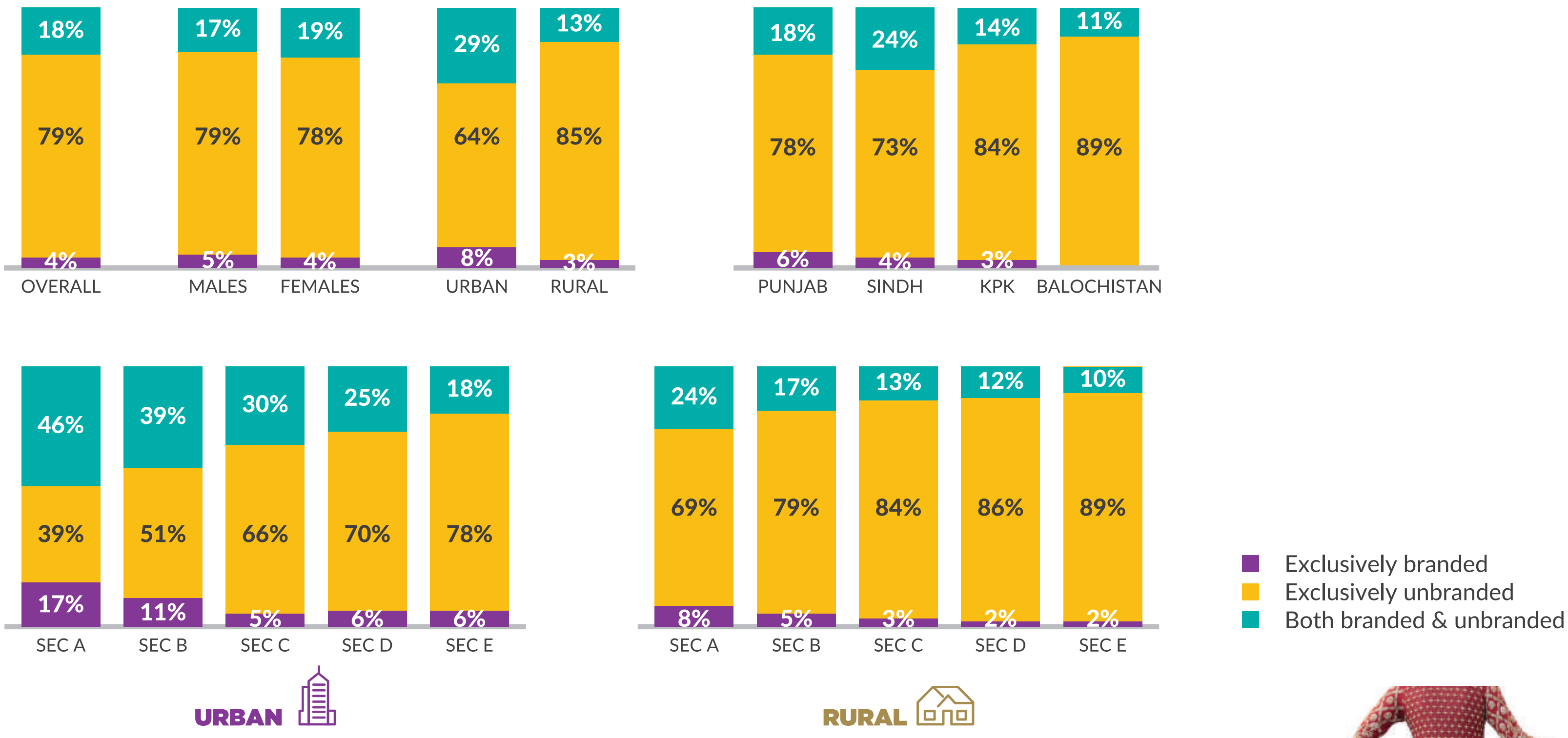


🟪 Exclusively branded
🟨 Exclusively unbranded
🟩 Both branded & unbranded

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Base: Females only | 10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

APPAREL



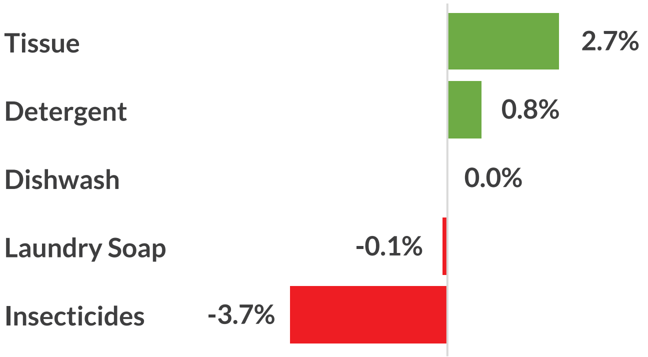
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

AGHA NOOR alkaramstudio almirah Amir Adnan Bareezé Embroidered Classics BEECHTREE CAMBRIDGE® Chapter 2

GulAhmed KHAADI J. Junaid Jamshed MARIA.B. SANA SAFINAZ nishatlinen CHINYERE COTTON & SILK

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

HOUSEHOLD NON-FOOD ITEMS



AVERAGE ANNUAL GROWTH RATE

	CATEGORY PENETRATION (2020)	CONSUMPTION FREQUENCY* (IN A WEEK)	NO. OF BRANDS THAT CONSTITUTE 80% CONSUMERS' SHARE	
			2010	2020
Tissue	10%	4.6	2	6
Detergent	87%	2.5	4	4
Dishwash	84%	15.5	2	3
Laundry Soap	67%	2.4	8	19
Insecticides	22%	0.1	4	7

Avg. Annual growth rate = ((P2-Pn)/Pn)*100)/N
where P2 = Penetration in 2020
Pn = Penetration in earlier year (2010, 2012 etc.)
N = Number of years

Source: Consumer Multimedia Index (2010 – 2020) | *Number of times respective category is consumed/used in a week

TISSUES

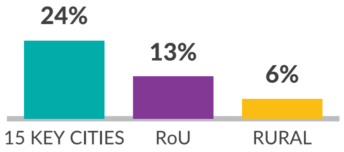
2012: 8% → 2020: 10% 2%↑

10%
TOTAL

MALES 8%

FEMALES 12%

PUNJAB	10%
SINDH	12%
KPK	4%
BALOCHISTAN	21%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	33%	23%	19%	16%	13%
RURAL	12%	9%	5%	4%	5%

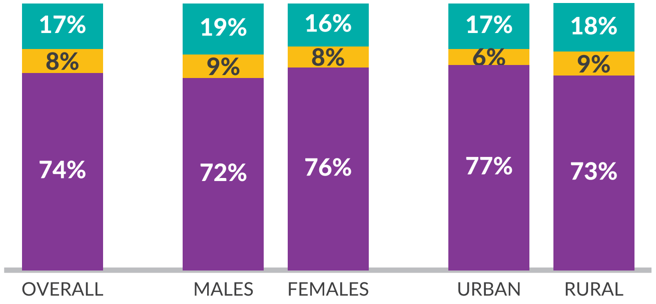
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

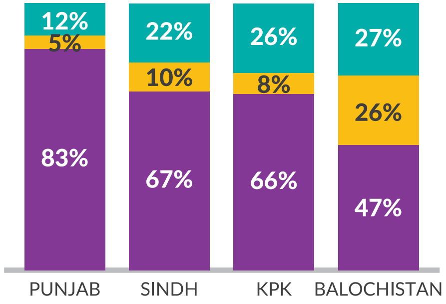
cool & cool · Tulip · Jasmine Tissues · Fay · ROSE PETAL · Tux PREMIUM TISSUES

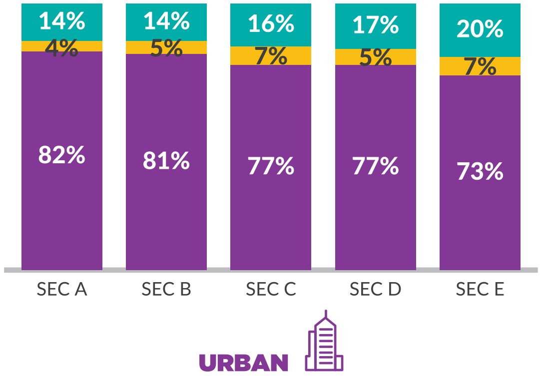
Source: Consumer Multimedia Index (2010 – 2020)

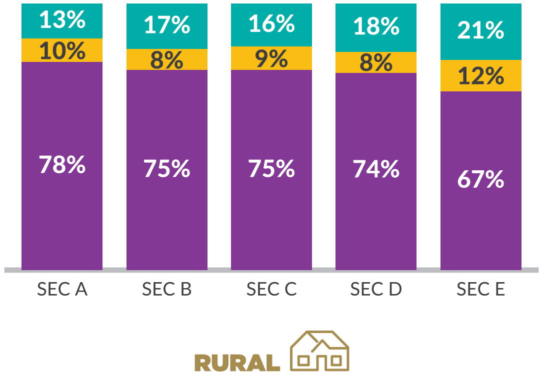
LAUNDRY DETERGENT

2010: 81% → 2020: 87% 6%↑









- 🟪 Exclusively branded
- 🟨 Exclusively unbranded
- 🟩 Both branded & unbranded

ARIEL BONUS TRISTAR Brite Surf excel Easy Wash

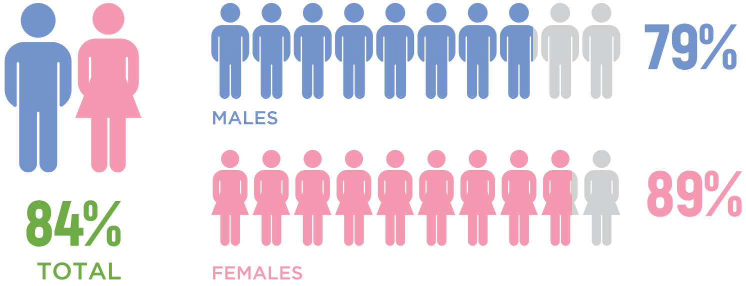
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Penetration based on exclusively branded products' usership | Source: Consumer Multimedia Index (2010 – 2020)

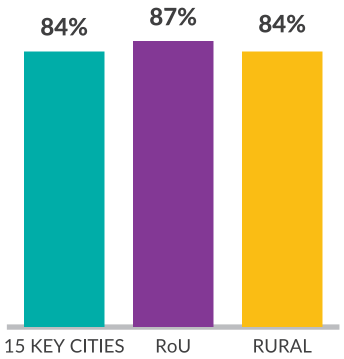
DISHWASH

2014: **84%** → 2020: **84%** 0%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.



PUNJAB	88%
SINDH	86%
KPK	73%
BALOCHISTAN	84%



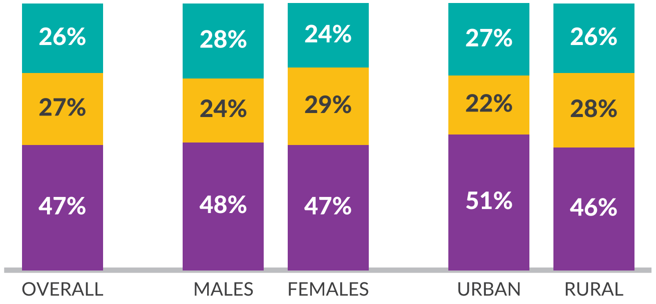
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	87%	85%	85%	86%	85%
RURAL	87%	84%	84%	83%	85%

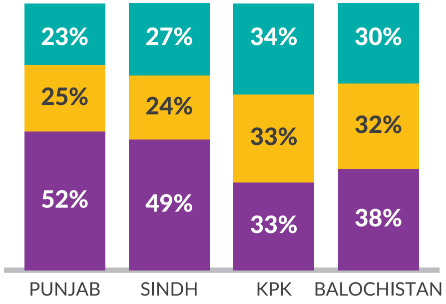
Lemon Max Sunlight Vim

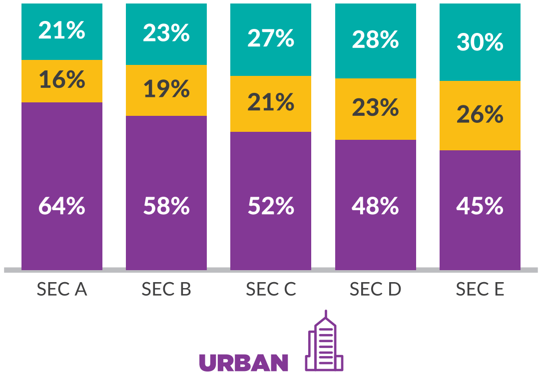
Source: Consumer Multimedia Index (2010 – 2020)

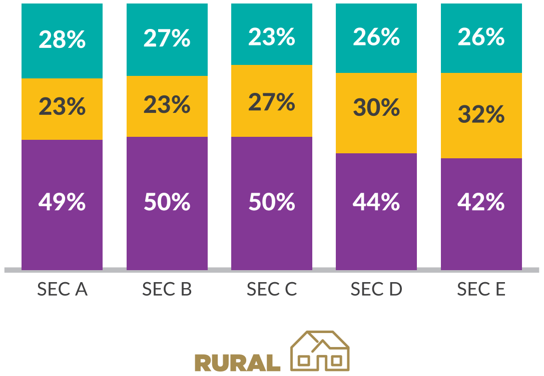
LAUNDRY SOAP

2010: 68% → 2020: 67% -1%↓









■ Exclusively branded
■ Exclusively unbranded
■ Both branded & unbranded

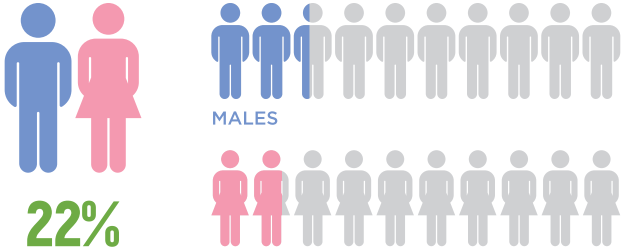
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

101 DARBAR SOAP
Ayyub
BABA
BATAIRA
SUPER BAHU SOAP
COMMANDER کمانڈر
گائے سوپ
ہاری
KOHINOOR WASHING SOAP
مِلن سوپ
SUFI
شوکت سوپ
Kisan

Source: Consumer Multimedia Index (2010 – 2020)

INSECTICIDE

2010: 35% → 2020: 22% -13%↓

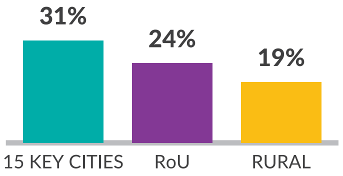


24% MALES

19% FEMALES

22% TOTAL

PUNJAB	20%
SINDH	28%
KPK	13%
BALOCHISTAN	42%



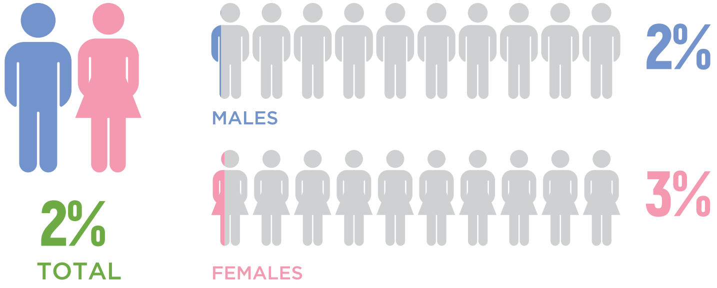
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	38%	32%	28%	25%	25%
RURAL	21%	22%	18%	18%	18%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Cobra HOLLAND
FINIS
Mortein
Metro
Kingtox
POWER PLUS
Tiger

Source: Consumer Multimedia Index (2010 – 2020)

FABRIC SOFTENER



PUNJAB	1%
SINDH	2%
KPK	1%
BALOCHISTAN	2%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	8%	6%	4%	3%	3%
RURAL	2%	1%	2%	1%	1%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

SURFACE CLEANER

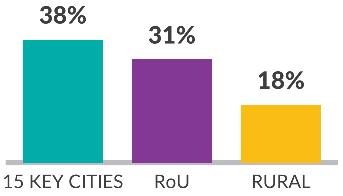
2010: 37% → 2020: 23% -14%↓

23% TOTAL

MALES **20%**

FEMALES **27%**

PUNJAB	31%
SINDH	23%
KPK	6%
BALOCHISTAN	9%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	44%	41%	31%	34%	33%
RURAL	22%	20%	18%	17%	17%

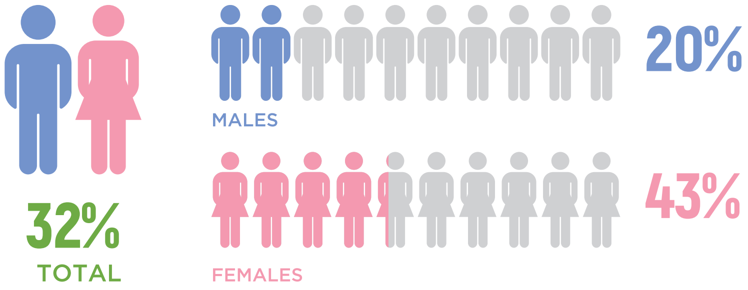
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Dettol FINIS Domex HARPIC King Chemicals Corporation TYFON TOTAL CONTROL

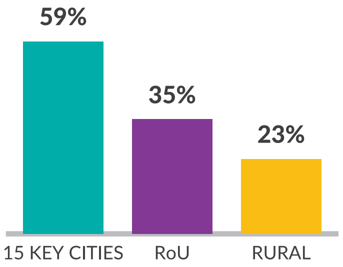
Source: Consumer Multimedia Index (2010 – 2020)

DIAPER

2010: 23% → 2020: 32% 9%↑



PUNJAB	32%
SINDH	32%
KPK	30%
BALOCHISTAN	32%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	75%	48%	44%	49%	41%
RURAL	40%	34%	28%	16%	19%

Carebaby

Bona Papa Baby Diapers

canbebe

Pampers

Drypers

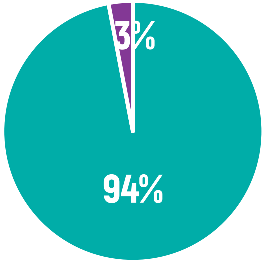
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Base: Parents with kids (less than 5 years of age) | Source: Consumer Multimedia Index (2010 – 2020)

WET WIPES

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

PUNJAB	1%
SINDH	3%
KPK	1%
BALOCHISTAN	2%



🟪 No Kids
🟩 With Kids

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	7%	4%	3%	3%	2%
RURAL	2%	1%	1%	1%	0%

cool & cool · canbebe · FARLIN® · Johnson's®

My mothercare Nobody Cares Like Mother Care · pigeon · Pampers · Susu

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

FROM 100% IMPORT TO EXPORTING MOBILE SETS

“Pakistan’s mobile phone production surpasses imports”, was the headline reported by PTA (Pakistan Telecommunication Authority) in the last year August. About a decade ago, 100% mobile phones were imported or smuggled into Pakistan. It was feature phone era wherein the brands did not offer any warranty services to the customers. Technological advancement in the industry ushered the arrival of 2G and 3G but country’s mobile phone industry remained an import-based and no technology transfer was on the horizon which had been one of the core reasons responsible for Pakistan’s ever-rising trade deficit at that time.

The tides turned when PTA implemented DIRBS (Device Identification Registration and Blocking System). This game changing move by the regulator provided a level playing field to all the players. It initiated the registration of mobile phone devices followed by a significant halt on illegal imports.

Despite the major move by PTA, imported CBU devices were still low cost than manufacturing of the devices locally. However, introduction of proper SKD policy known as MDMP (Mobile Device Manufacturing Policy) brought every user into the tax net as well as the authorities obligated the brands to provide warranty to improve their quality of services to the customers. Thanks to investments by many local and foreign players, at present, 50-60% of mobile devices are being manufactured in Pakistan and by the end of year 2022 the number is expected to climb up to 70-80%.

The future holds many promises and the process that has just begun will herald a new era of localization beyond assembly lines where manufacturing of parts along with allied industries such as accessories, chargers, batteries and packaging, etc. will get a boost.

Apart from self-sufficiency in manufacturing and preparing skilled labour force, another promise that future holds is to be able to export mid-range phones out of the country and become a source of bringing more exchequer into the country.

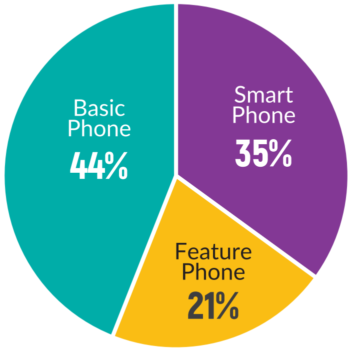
ZEESHAN QURESHI

Chief Executive Officer
DEPLOY (PVT.) LTD.

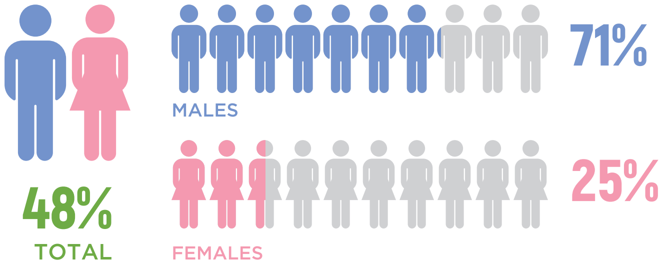
MOBILE PHONE SET

2010: 39% → 2020: 48% 9%↑

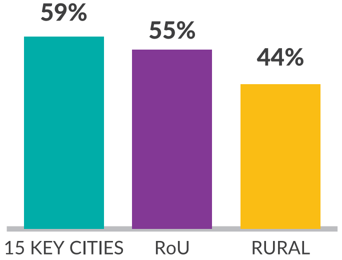
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

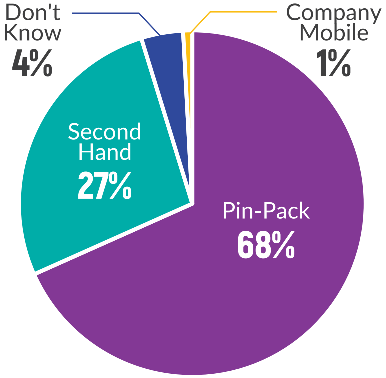


TYPE OF MOBILE

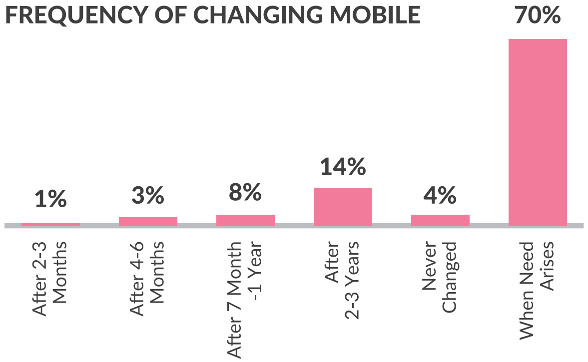


PUNJAB	51%
SINDH	44%
KPK	43%
BALOCHISTAN	51%





BOUGHT NEW OR 2^{ND} HAND



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	67%	62%	58%	55%	51%
RURAL	49%	49%	44%	42%	40%

HUAWEI NOKIA QMobile SAMSUNG

Source: Consumer Multimedia Index (2010 – 2020)

Beyond experiences and innovation

Technological Innovation

Samsung is leading the cross-category innovative technologies that transform user's lives for the better, prioritizing personalization and experience that a global brand should reflect.

IoT, AI, Ecosystem

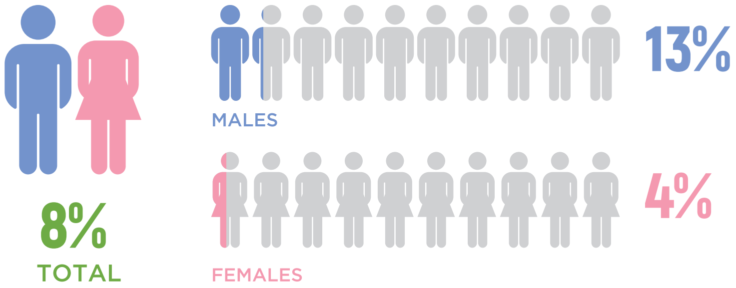
Leveraging an integrated ecosystem with IoT, AI, MLOps, Samsung is constantly ensuring infinite empirical value through customization and privacy features that are secure, efficient and smarter.

Corporate Citizenship

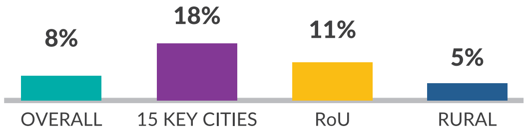
Samsung's partnership with different organizations and educational institutes provisioned vocational AI-based education to underserved students distributing both equipment and training.

MOBILE APPS

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.



PUNJAB	8%
SINDH	10%
KPK	4%
BALOCHISTAN	13%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	27%	21%	13%	13%	8%
RURAL	10%	7%	5%	6%	4%

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

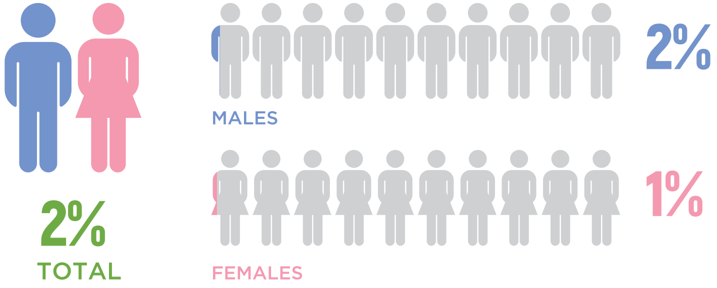
Introducing the new state-of-the-art service stations concept

Total PARCO has proudly launched new state-of-the-art service stations with unique concepts to enhance the customer experience. Customers can find top-of-the-line products and services including TOTAL WASH, TOTAL QUARTZ AUTO CARE, Clean & Fresh restrooms along with the new "Welcome" mobility shop.

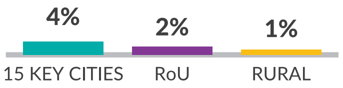
totalparco.com.pk **TOTALPARCOPakistan**

CAR

2010: 2% → 2020: 2% 0%



PUNJAB	1%
SINDH	2%
KPK	1%
BALOCHISTAN	2%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	13%	4%	2%	2%	1%
RURAL	2%	1%	0%	0%	0%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

SUZUKI

Source: Consumer Multimedia Index (2010 – 2020)

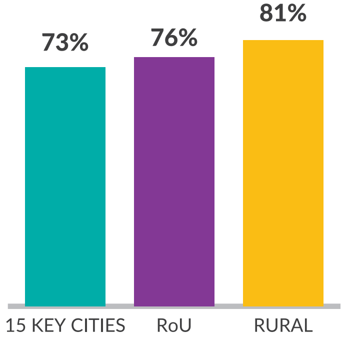
RE-FUELING

79%
TOTAL

MALES 82%

FEMALES 7%

PUNJAB	80%
SINDH	73%
KPK	87%
BALOCHISTAN	78%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	69%	80%	71%	78%	76%
RURAL	82%	78%	86%	84%	74%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

PSO TOTAL Shell

Base: Those who have car/ Motorcycle at home | Source: Consumer Multimedia Index (2010 – 2020)

LUBRICANT

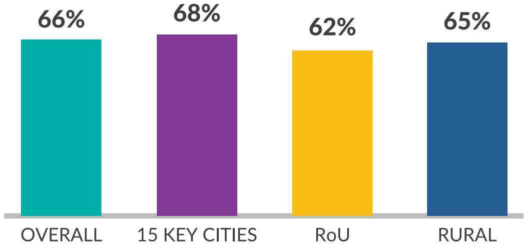
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

66% TOTAL

70% MALES

9% FEMALES

PUNJAB	67%
SINDH	56%
KPK	88%
BALOCHISTAN	67%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	66%	72%	67%	66%	68%
RURAL	70%	64%	69%	67%	56%

PSO · TOTAL · Shell · Atlas Honda · CALTEX · ZIC

Base: Those who have car/motorcycle | 10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

EXPLORE WHAT'S YOUR

CUSTOMER EXPERIENCE

Retention

Customers are retained and at-risk customers are recovered

Share of Spend

Customers choose you more often

Advocacy

Customers share their positive experiences with others

Operational Efficiency

Customers are served in a quality-driven, cost-effective way

Helping your organization ***engage*** around a common CX vision – from C-suite to frontline

Listening to the 'Voice of your Customers' – across all touchpoints and channels. Creating a single source of customer truth

Activating what needs to be done to ensure your CX delivers on your Brand Promise

Embedding the structure and culture to drive continuous CX improvement and customer centricity

For more information, please contact:

M. Haris Rasheed | Head of MSU | **0345 8227 131** | haris.rasheed@ipsos.com

GAME CHANGERS Ipsos

USAGE OF SERVICES

*Question asked for gauging penetration:

DO YOU USE THE FOLLOWING SERVICES?

کیا آپ ان خدمات کو خود استعمال کرتے / کرتی ہیں یا آپ کے گھرانے میں استعمال ہوتی ہیں؟


KFC
#KFCFEELGOOD
WWW.KFCPAKISTAN.COM
111-532-532
Download on the App Store
ANDROID APP ON Google play

EATING OUT (RESTAURANTS & QUICK SERVICE RESTAURANTS)

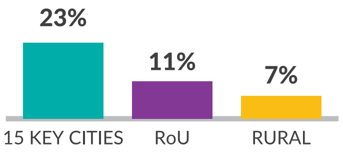
2010: 7% → 2020: 11% 4%↑

11%
TOTAL

MALES 15%

FEMALES 6%

PUNJAB	8%
SINDH	19%
KPK	7%
BALOCHISTAN	16%

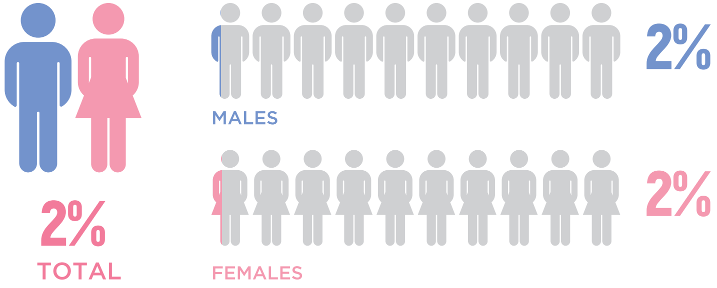


	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	30%	23%	17%	15%	11%
RURAL	9%	9%	7%	6%	7%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

FOOD HOME DELIVERY



PUNJAB	2%
SINDH	3%
KPK	0.1%
BALOCHISTAN	2%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	11%	7%	4%	2%	2%
RURAL	1%	1%	1%	1%	1%

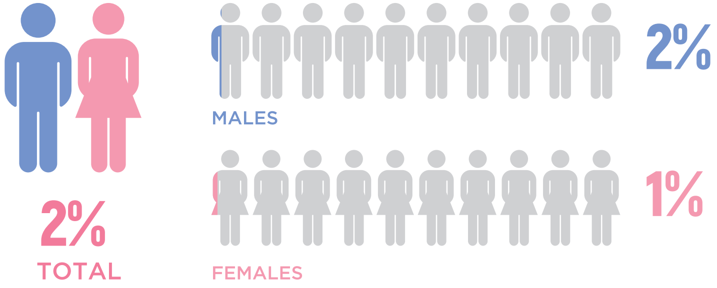
BYKEA Careem cheetay eat مبارك Uber Eats foodpanda

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

RIDE HAILING SERVICE

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.



PUNJAB	1%
SINDH	4%
KPK	0.3%
BALOCHISTAN	0.3%

	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	8%	6%	4%	4%	2%
RURAL	0%	0%	0%	0%	0%

BYKEA AIRLIFT Careem Uber SWVL

10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

Jubilee
INSURANCE

LEADERSHIP
LEADERSHIP
LEADERSHIP
LEADERSHIP

you can TRUST...

Fulfilling promises for 25 years. For a quarter of a century, we at Jubilee Life, have been on an exciting and evolving journey. Today we are proud of the many things we have achieved and learnt from along the way. As a first, we are the largest private insurer in Pakistan with over 7.5 million lives insured. We are also the largest Takaful operator nationwide.

Our innovative and customer-centric approach, offering an array of insurance solutions for various financial protection needs makes us the highest premium writer in the country. Our business acumen and expertise has also made us the fastest growing financial funds in Pakistan.

This year marks 25 years of our commitment - to the future of our communities: to people, to partnerships and to possibilities.

For more info, scan this QR Code

SMS 'DOST' to 8554 to learn more.

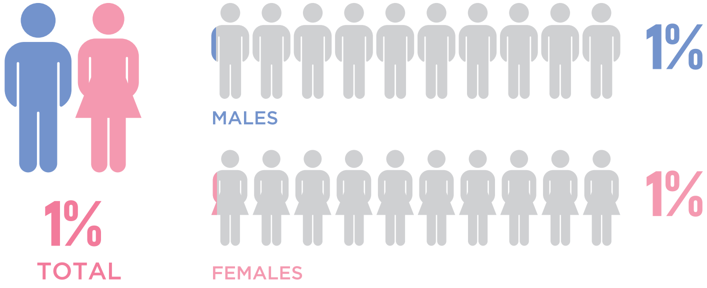
LIFE INSURANCE | FAMILY TAKAFUL

www.jubileelife.com | UAN: (021) 111-111-554 | /JubileeLifeInsurance

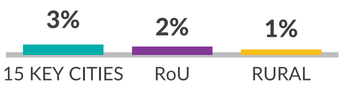
25th Anniversary Celebrating Life

INSURANCE

2016: 1% → 2020: 1% 0%



PUNJAB	1%
SINDH	1%
KPK	0.4%
BALOCHISTAN	1%



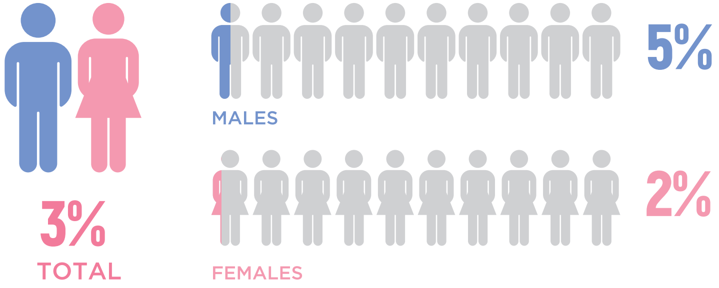
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	4%	3%	2%	1%	1%
RURAL	1%	1%	0%	0%	1%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

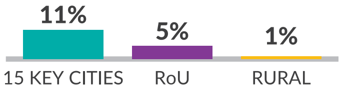
Source: Consumer Multimedia Index (2010 – 2020)

BANKING

2012: 4% → 2020: 3% -1%↓



PUNJAB	6%
SINDH	3%
KPK	1%
BALOCHISTAN	4%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	16%	11%	7%	5%	3%
RURAL	3%	3%	1%	0%	0%

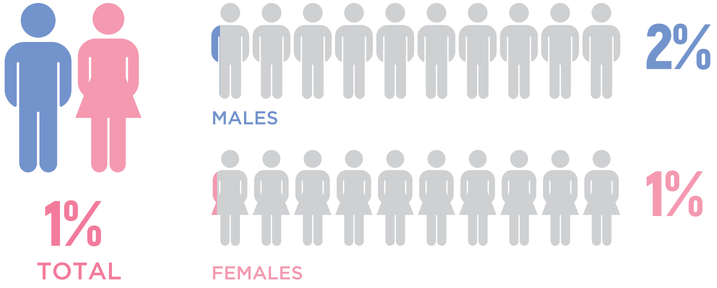
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

AlliedBank askaribank Bank Alfalah HBL HABIB BANK حبیب بینک
Meezan Bank MCB NBP UBL

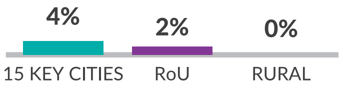
Source: Consumer Multimedia Index (2010 – 2020)

CREDIT CARD

2012: 2% → 2020: 1% -1%↓



PUNJAB	1%
SINDH	2%
KPK	0.3%
BALOCHISTAN	1%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	8%	4%	3%	3%	1%
RURAL	0%	0%	0%	0%	0%

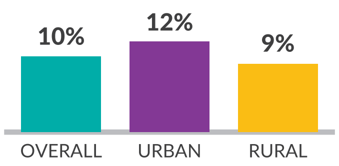
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

INTERNATIONAL TRAVEL

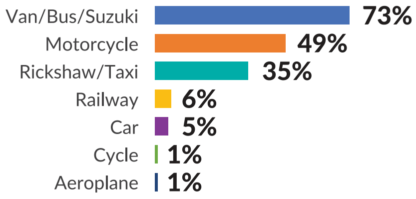
2010: **0.7%** → 2020: **4.2%** 3.5%↑

DOMESTIC + INTERNATIONAL



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	17%	13%	12%	10%	9%
RURAL	10%	10%	8%	9%	9%

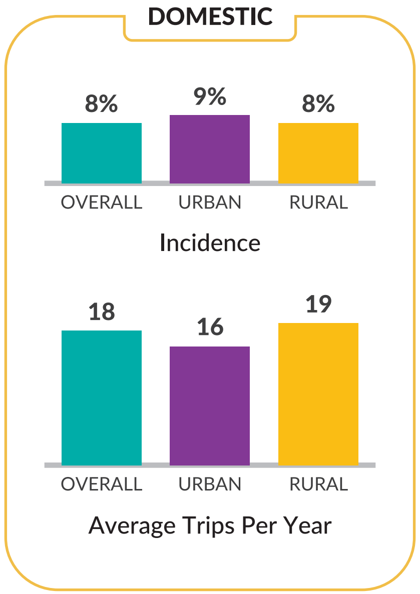
MEANS OF DOMESTIC TRAVEL



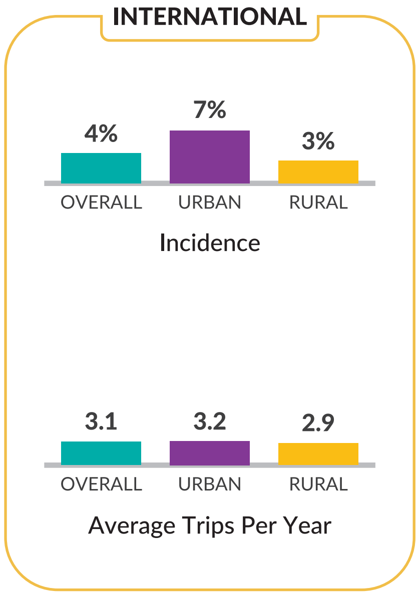
PUNJAB	12%
SINDH	5%
KPK	8%
BALOCHISTAN	8%

Official/ Business trip	36%
Leisure trip	29%
Both business & Leisure trip	22%
Others	13%

DOMESTIC



INTERNATIONAL

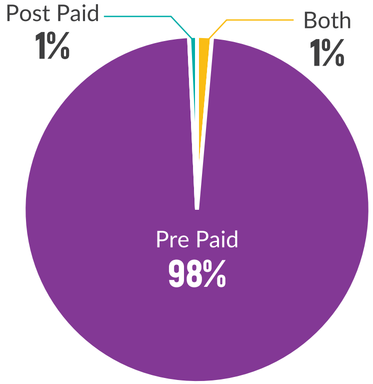


Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

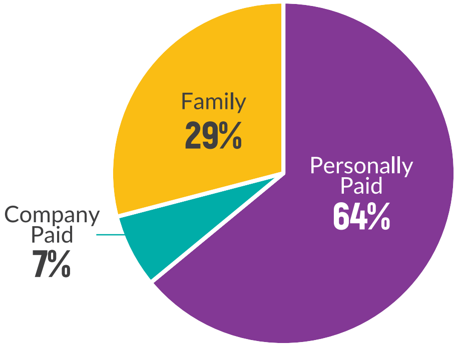
10-year change for this category is not available | Source: Consumer Multimedia Index (2010 – 2020)

MOBILE SERVICE PROVIDER

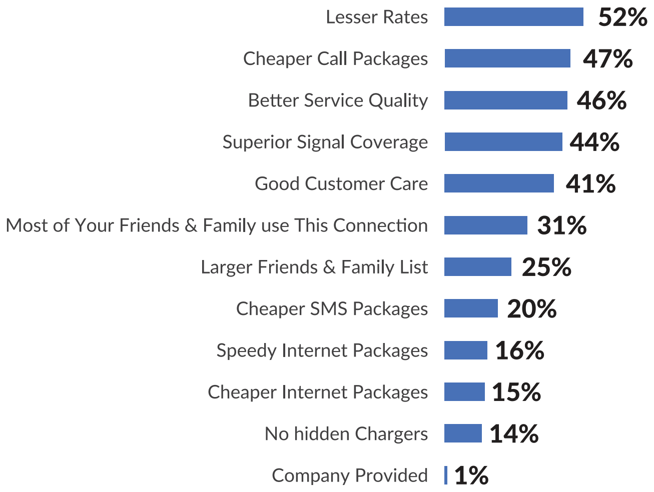
TYPE OF CONNECTION



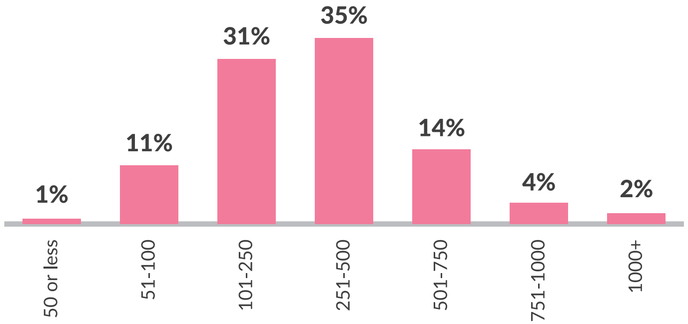
BILL PAID BY (POST-PAID)



REASON FOR CHOOSING A CERTAIN MOBILE SERVICES PROVIDER



AVERAGE MONTHLY TOP UPS (IN RUPEES)



Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

MEGA DIGITAL TRENDS AND FUTURE DIRECTION

Easypaisa was a financial revolution in Pakistan, it literally changed how the common man viewed financial services. It was the first for many things. The ownership of a financial Institution by an cellular company (subsequently Jazz and U-fone also invested in micro finance banks), it converted 90,000 Kiryana into financial centers. The acceptance of these stores as financial centers had a profound effect on financial services then and will continue to do-so. The initial over the counter transactions have been converted into mobile wallets (one minute account opening process) and the data obtained from these transactions has led to digital savings (committee or BeeCees) and nano lending (small ticket loans) to the end customer and working capital for the Kiryana stores. What I see over the next five years is a real dent in our cash economy through the introduction of the most common use case, digital purchase for everyday products. Imagine a universal QR code, soft POS (virtual POS) with tap and pay at physical stores with NFC enabled cards. A wide menu of financial products being provided to the end customer with the introduction of open banking. The introduction of the peer to peer pull IBFT using an alias will further encourage a digital Pakistan. With 55 percent of our population being under 25, weaned on digital phones, it is only a matter of time till digital transactions start to overtake cash.

The second digital revolution was caused by the likes of Uber and Careem in Pakistan. They introduced the concept of the shared economy. This spawned the shared economy concept in many other fields. From buses to bikes. The shared economy concept then moved to rooms, hotels, clothes co-working spaces and Tele-heath. More and more use cases will be found for this kind of platform.

The third revolution was created by food panda. The last mile leg was perfected by them for food delivery. This behavior change not only boasted the restaurants' sales, but also removed one key bottle neck for the e-commerce industry. Now from pharmaceutical services, to doctor visits at home, all are common.

The digital revolution in Pakistan is now gaining momentum. The data that is being generated by these transactions will in turn provide both cross sell and up-sell opportunities.

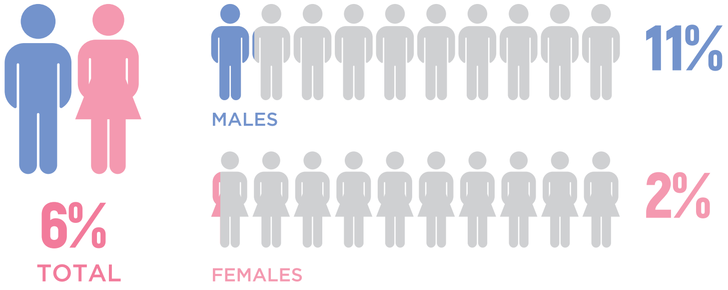
NADEEM HUSSAIN

Founder of EASYPAISA

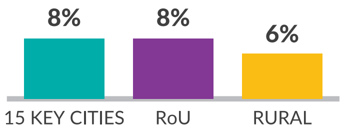
Chief Executive Officer
PLANET N GROUP

MOBILE FINANCIAL SERVICES

2016: 8% → 2020: 6% -2%↓



PUNJAB	8%
SINDH	3%
KPK	7%
BALOCHISTAN	5%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	11%	9%	7%	8%	6%
RURAL	8%	6%	6%	7%	4%

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

easypaisa JazzCash

upaisa mobicash زبان کا پکا

Source: Consumer Multimedia Index (2010 – 2020)

Ipsos OMNIBUS

ACCURATE

FAST

AFFORDABLE

NOT A FULL SURVEY, NEED QUICK ANSWERS TO FEW QUESTIONS ONLY?

Ideal for topical issues, burning questions, market activities, pre-post evaluation, marketing, target profiling, usage & attitudes, syndicated surveys, and zooming into specific TGs (e.g. Young males, house wives etc.)

...WE HAVE A SOLUTION FOR YOU

REPRESENTATIVE & ROBUST SAMPLE

1000 to 3000 respondents
Variable nation-wide quotas

FAST TURN AROUND

Weekly, Monthly/Bi-Monthly waves
Rapid mobilization of data collection (within 24 hrs)

MULTI-MODE

- Online-mobile first
- Face-to-Face-CAPI
- Telephone-CATI

EXTENSIVE DATA

Results on a variety of socio-demographic ceiteria e.g., Urban/Rural, By Provinces, SECs, Age groups etc.

REPORTING DASHBOARD

Smart data tables to augment analyses by standard or customised break-outs.

FLEXIBLE SERVICE

Questions' templates avaiable, Full descriptive and analytical reports, as required.

INVESTMENT: STARTING FROM

PAK RS. 50 ONLY PER QUESTION

*per respondent

For more information, please contact:
Aftab Ahmed | Head of Operations | **0345 8440 717** | aftab.ahmed@ipsos.com

GAME CHANGERS Ipsos

DURABLES AND GADGETS

*Question asked for gauging penetration:

WHICH OF THESE APPLIANCES DO YOU HAVE IN YOUR HOME?

یہ بتائیے ان میں سے کہ کون کون سی اشیاء آپ کے گھرانے میں موجود ہیں؟

dawlance.com.pk dawlancepakistan dawlancepk

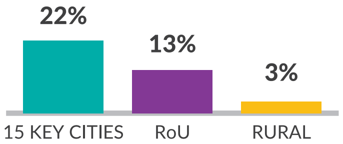
*Based on BHT study conducted by IPSOS in 2019, Dawlance has the highest brand equity in home appliances category

*Ipsos 2019 کی تحقیق کے مطابق ڈاؤلینس پاکستان میں سب سے زیادہ brand equity والا ہوم اپلائنسز کا برانڈ ہے

MICROWAVE OVEN

2010: 5% → 2020: 8% 3%↑

PUNJAB	11%
SINDH	5%
KPK	3%
BALOCHISTAN	1%



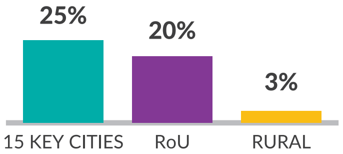
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	41%	30%	18%	11%	6%
RURAL	12%	7%	3%	2%	1%

Dawlance Haier KENWOOD Panasonic LG Electronics ORIENT PEL WESTPOINT

SPLIT AC

2010: 5% → 2020: 12% 7%↑

PUNJAB	12%
SINDH	11%
KPK	16%
BALOCHISTAN	9%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	44%	33%	19%	17%	12%
RURAL	21%	11%	0%	0%	0%

Dawlance Haier GREE ORIENT

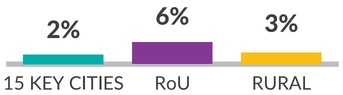
Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

WINDOW AC

2010: 2% → 2020: 2% 0%

PUNJAB	1%
SINDH	6%
KPK	3%
BALOCHISTAN	0%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	3%	4%	2%	2%	1%
RURAL	20%	0%	0%	0%	0%

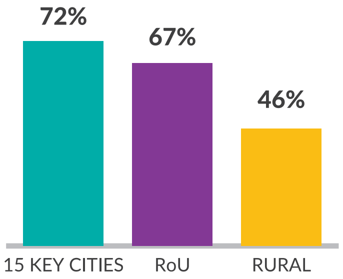
National Haier GE HITACHI Inspire the Next LG Electronics PEL

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

REFRIGERATOR/ FRIDGE

2010: 48% → 2020: 53% 5%↑

PUNJAB	57%
SINDH	43%
KPK	60%
BALOCHISTAN	40%



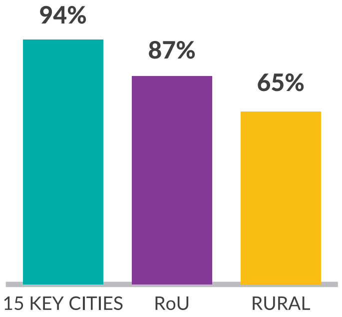
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	80%	76%	71%	69%	61%
RURAL	71%	62%	51%	42%	32%

Dawlance Haier WAVES ORIENT PEL

Source: Consumer Multimedia Index (2010 – 2020)

COLOR TV/LED/LCD

2010: 59% → **2020: 73%** 7%↑



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	100%	96%	89%	88%	80%
RURAL	84%	73%	66%	62%	58%

CHANGHONG SAMSUNG Haier Panasonic LG Electronics

SONY EcoStar ORIENT PHILIPS Nobel

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

CHANGING LIVES FOR A BETTER FUTURE

Since 1956, we are continuously enriching lives across Pakistan with state-of-the-art home appliances. Through constantly innovating and pioneering smart solutions we are here to make a difference in your life and change it for the better.

PEL

Change your life

Pak Elektron Limited Customer Care: (042) 111-102-103 | www.pel.com.pk | www.facebook.com/pel | customercare@pel.com.pk

WASHING MACHINE

2010: 66% → 2020: 62% 4%↓

SEMI AUTOMATIC WASHING MACHINE

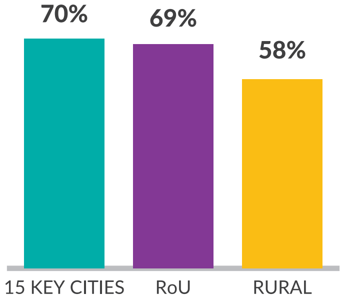
AVERAGE # OF MACHINES 1.04

62% TOTAL

63% MALES

60% FEMALES

PUNJAB	63%
SINDH	60%
KPK	69%
BALOCHISTAN	67%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	59%	67%	71%	74%	71%
RURAL	65%	63%	60%	59%	51%

2010: 6% → 2020: 20% 14%↑

AUTOMATIC WASHING MACHINE

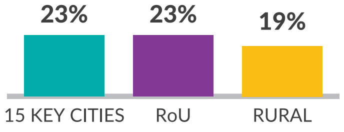
AVERAGE # OF MACHINES 1.09

20% TOTAL

22% MALES

17% FEMALES

PUNJAB	23%
SINDH	11%
KPK	20%
BALOCHISTAN	26%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	28%	24%	24%	22%	18%
RURAL	22%	19%	20%	17%	18%

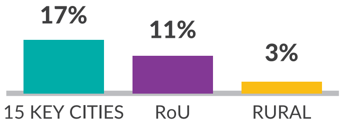
SUPER asia Haier

Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

Source: Consumer Multimedia Index (2010 – 2020)

PERSONAL COMPUTER

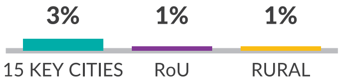
2010: 4% → 2020: 7% 3%↑



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	38%	24%	12%	8%	5%
RURAL	12%	6%	3%	2%	1%

VACUUM CLEANER

2010: 1% → 2020: 2% 1%↑



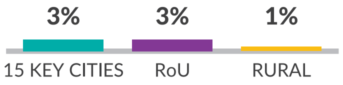
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	9%	3%	2%	1%	1%
RURAL	2%	0%	1%	0%	1%

Source: Consumer Multimedia Index (2010 – 2020)

DISH WASHER

2010: 1% → 2020: 2% 1%↑

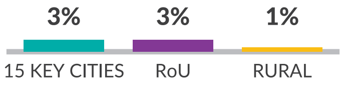
PUNJAB	2%
SINDH	1%
KPK	2%
BALOCHISTAN	3%



ELECTRIC KETTLE

2010: 1% → 2020: 2% 1%↑

PUNJAB	2%
SINDH	1%
KPK	2%
BALOCHISTAN	1%



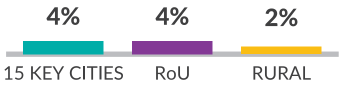
	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	7%	4%	2%	2%	2%
RURAL	2%	2%	2%	1%	1%

Source: Consumer Multimedia Index (2010 – 2020)

DIGITAL CAMERA

2010: 5% → 2020: 2% -3%↓

PUNJAB	2%
SINDH	2%
KPK	2%
BALOCHISTAN	2%

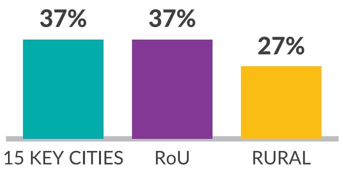


	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	15%	5%	2%	3%	1%
RURAL	2%	1%	1%	2%	2%

PRESSURE COOKER

2010: 34% → 2020: 30% -4%↓

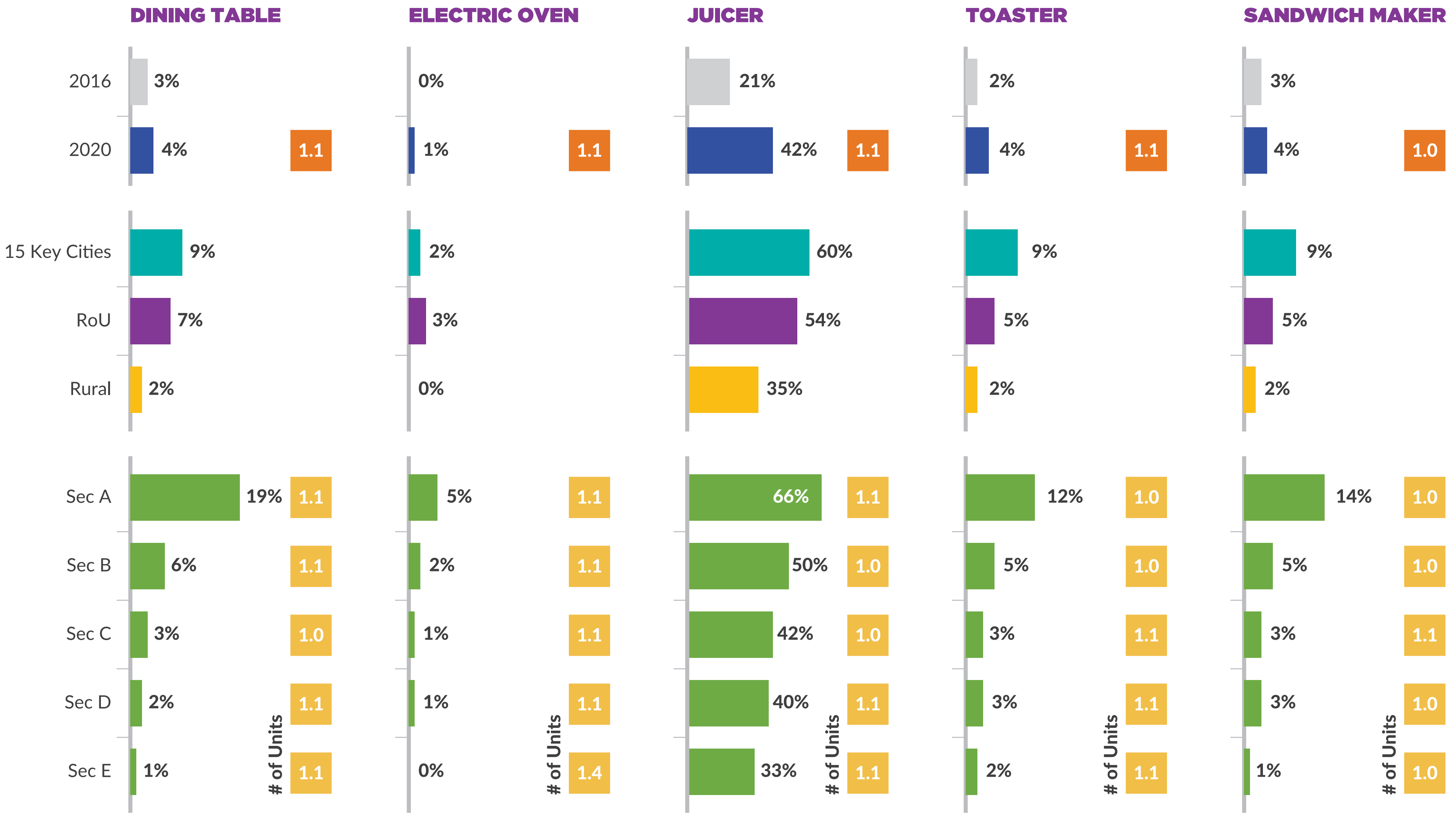
PUNJAB	34%
SINDH	7%
KPK	46%
BALOCHISTAN	30%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	48%	42%	38%	34%	30%
RURAL	27%	32%	27%	25%	24%

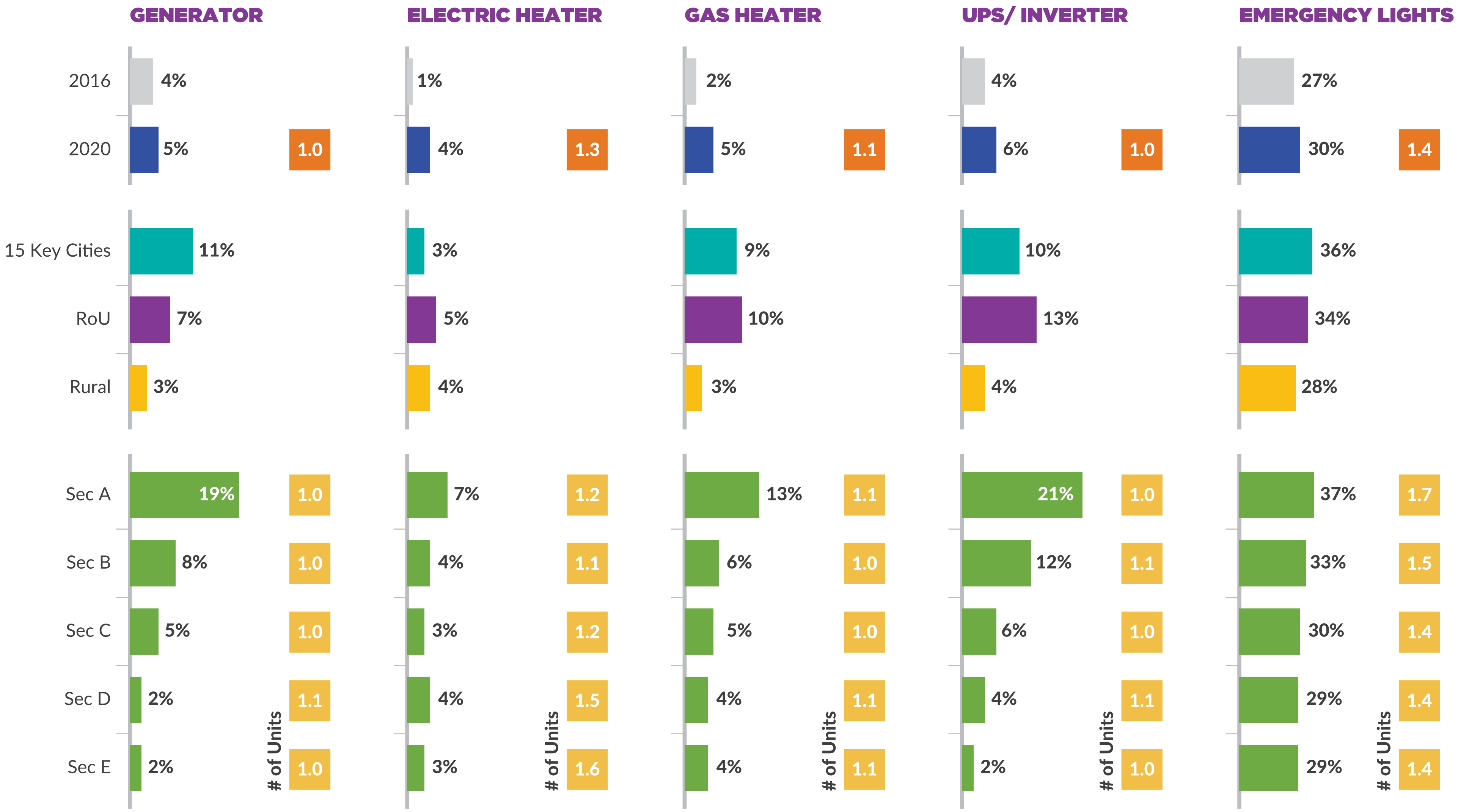
Source: Consumer Multimedia Index (2010 – 2020)

OTHER DURABLES (DINING)



*These were asked in 2020 only | Source: Consumer Multimedia Index (2010 – 2020)

OTHER DURABLES (ENERGY)



*These were asked in 2020 only | Source: Consumer Multimedia Index (2010 – 2020)

SHOPPING HABITS

PAKISTAN'S LEADING PHARMACEUTICAL COMPANY

Atco Laboratories is a pioneer in the field of pharmaceutical innovation and is respected globally for its state of the art facilities and high quality affordable drugs.

We believe:

In supporting humanity by providing quality and affordable healthcare across Pakistan

In value driven ethos that complies with international standards in providing the highest quality healthcare

In transcending boundaries through constant innovations and ventures with multi-nationals

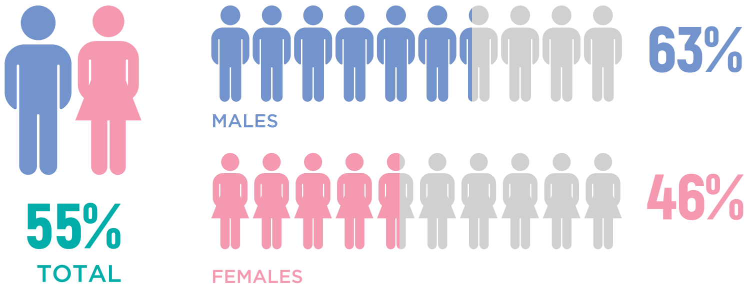
In fulfilling social responsibility by supporting sustainable education and healthcare initiatives

ATCO Laboratories Limited
The house of quality Pharmaceuticals
B-18, S.I.T.E., KARACHI-75700, PAKISTAN. UAN: 111-111-645

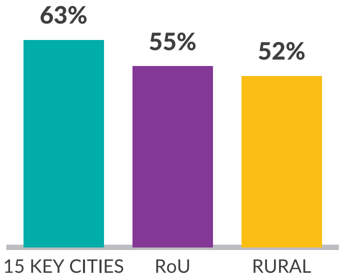
SHOPPING INCIDENCE

2010: 51% → 2020: 55% 4%↑

Question: Please tell me do you shop generally or you don't do shopping yourself?



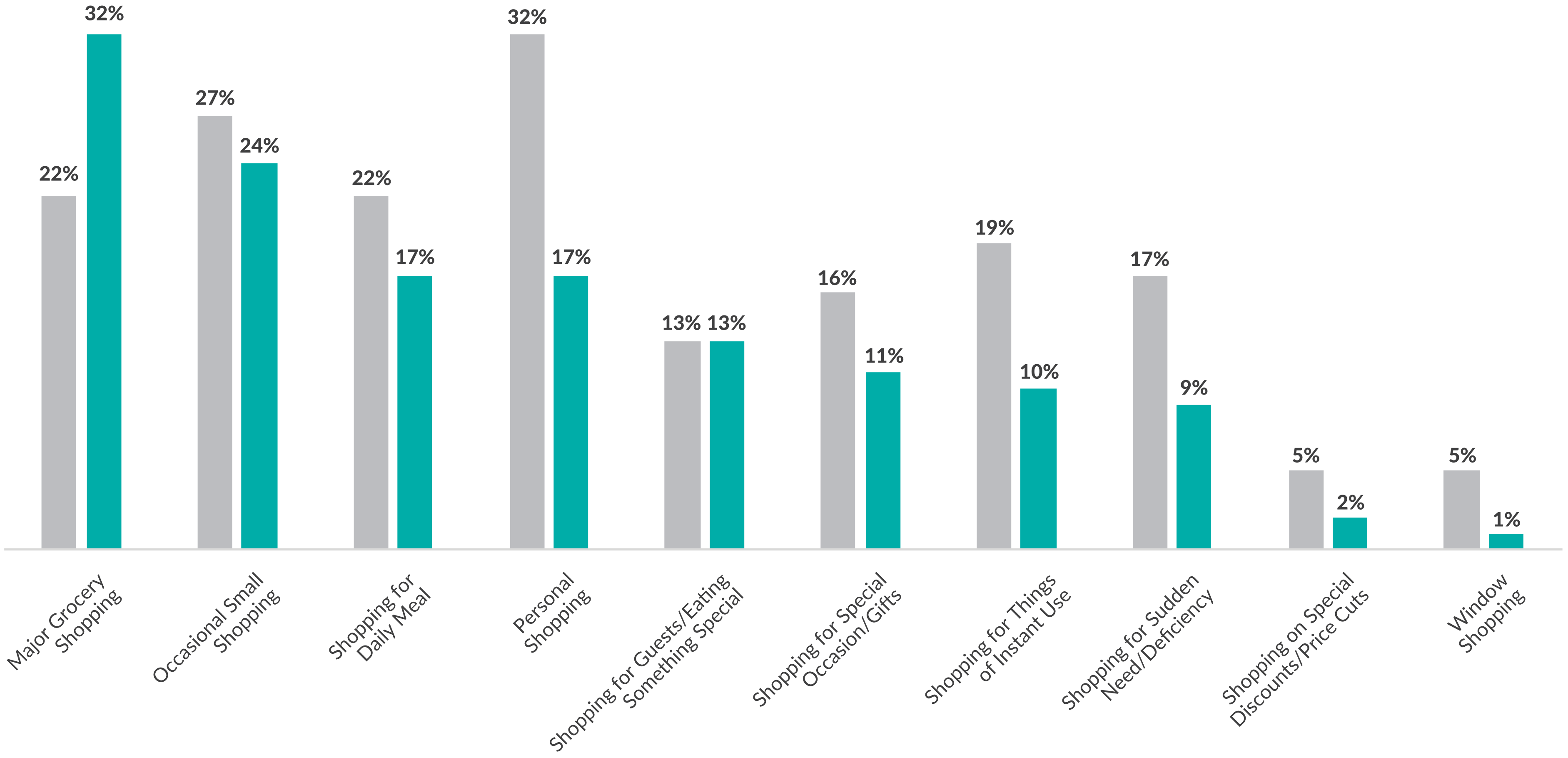
PUNJAB	58%
SINDH	52%
KPK	45%
BALOCHISTAN	61%



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	61%	60%	62%	58%	59%
RURAL	54%	52%	50%	52%	55%

Source: Consumer Multimedia Index (2010 – 2020)

TYPE OF SHOPPING

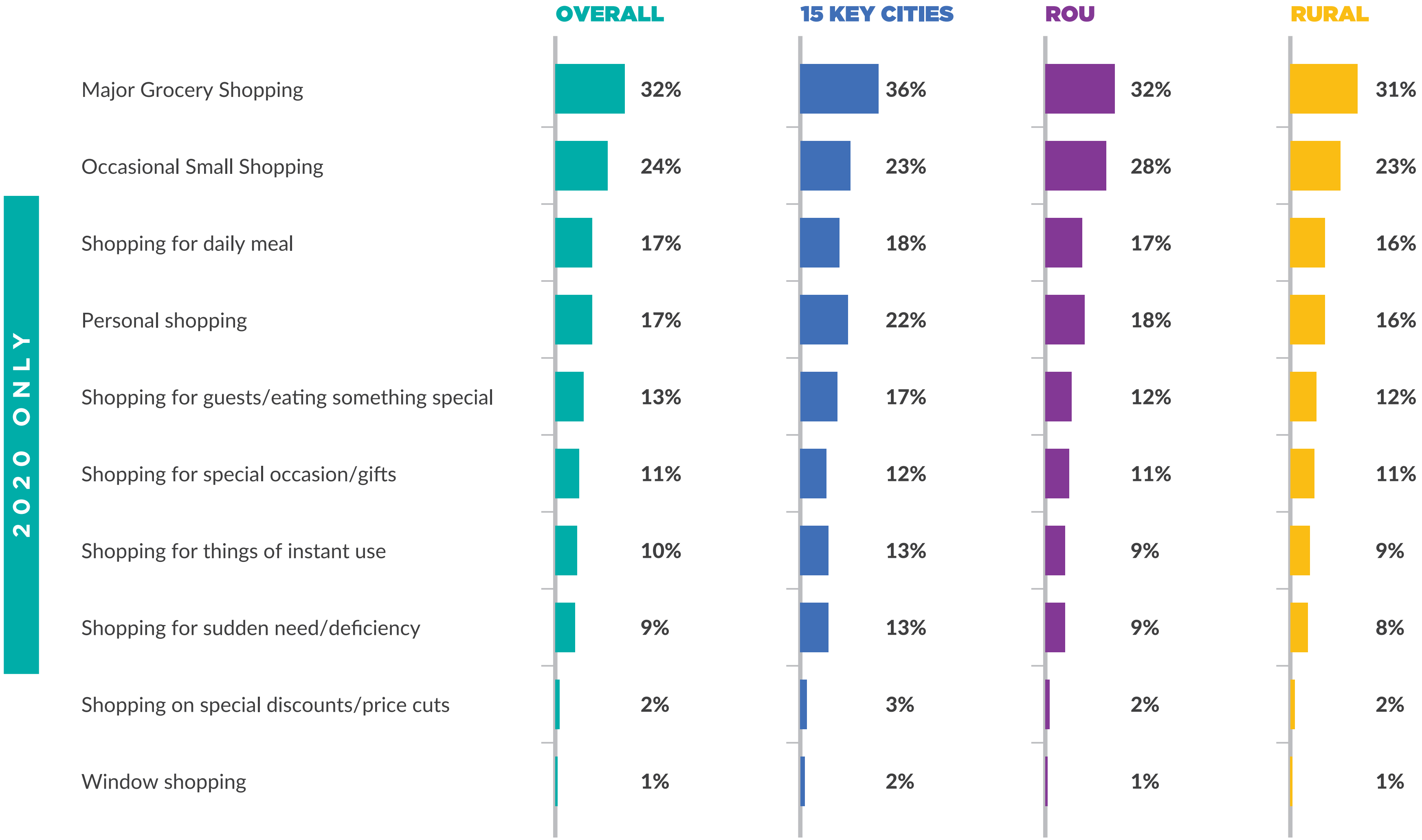


		2010	2020
Major Grocery Shopping		22%	32%
Occasional Small Shopping		27%	24%
Shopping for Daily Meal		22%	17%
Personal Shopping		32%	17%
Shopping for Guests/Eating Something Special		13%	13%
Shopping for Special Occasion/Gifts		16%	11%
Shopping for Things of Instant Use		19%	10%
Shopping for Sudden Need/Deficiency		17%	9%
Shopping on Special Discounts/Price Cuts		5%	2%
Window Shopping		5%	1%

▨ 2010 🟩 2020

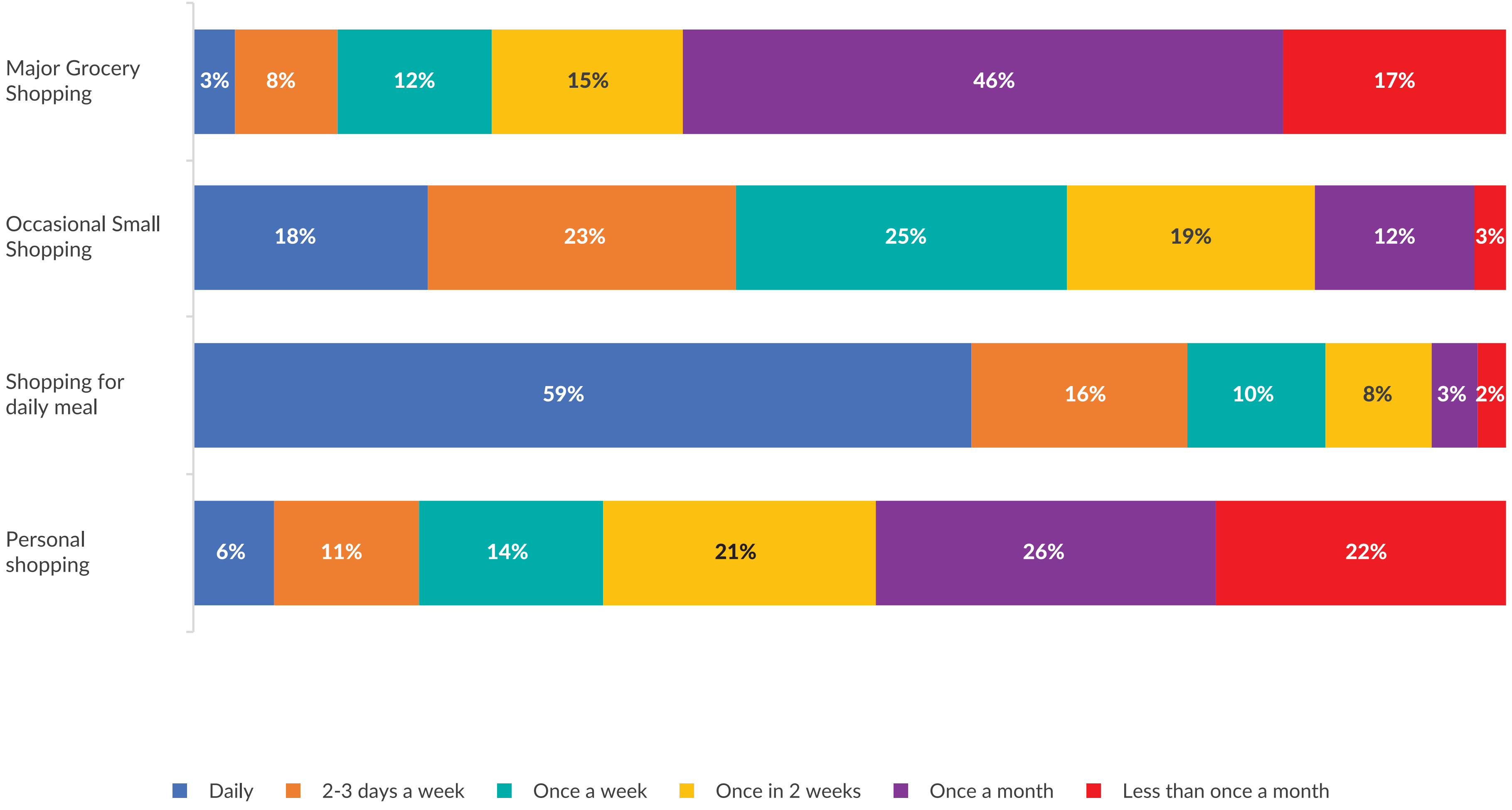
Source: Consumer Multimedia Index (2010 – 2020)

TYPE OF SHOPPING



Base: Shoppers | Source: Consumer Multimedia Index (2010 – 2020) | Multiple response question

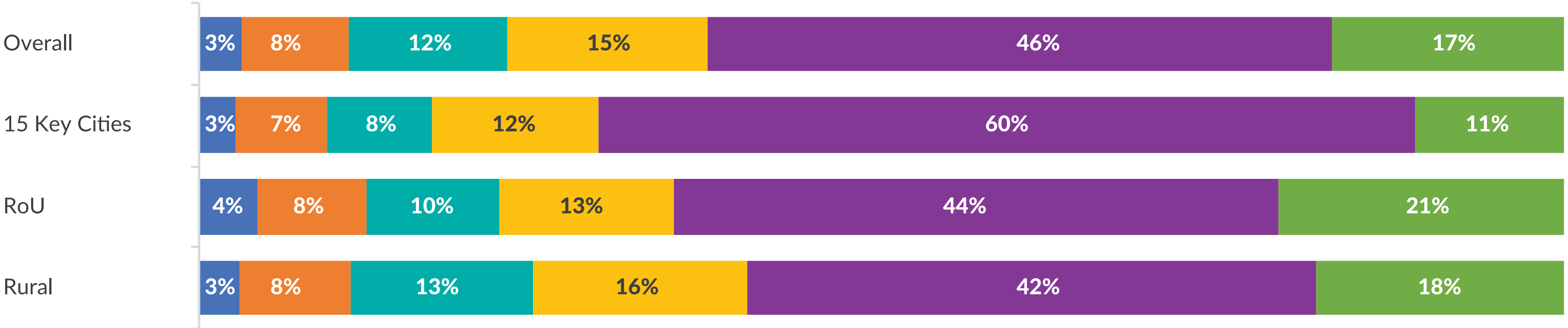
SHOPPING FREQUENCY



Base: Shoppers | Source: Consumer Multimedia Index (2010 – 2020)

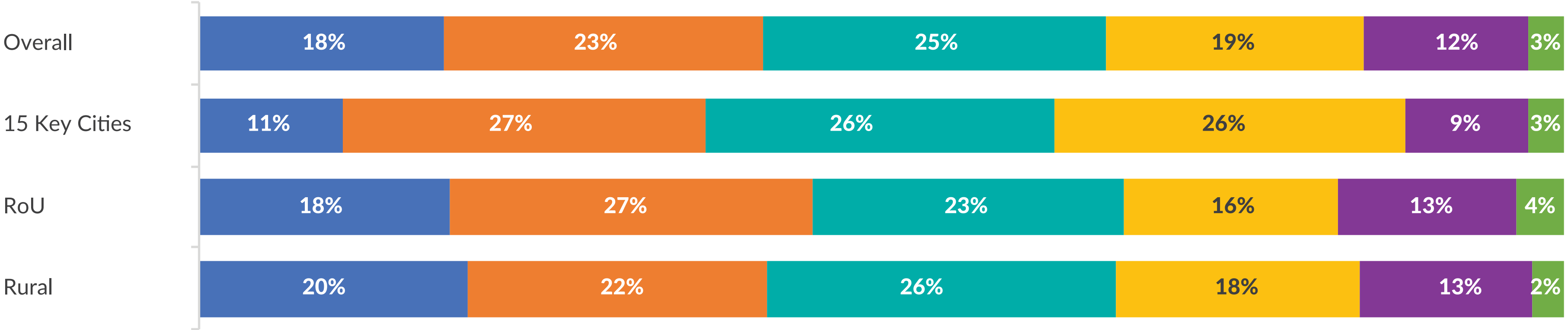
SHOPPING FREQUENCY

MAJOR GROCERY SHOPPING (ایسی خریداری جو آپ کسی خاص وقفے/باقاعدگی کے ساتھ مہینے یا ہفتے کے بعد کرتے/کرتی ہیں) سودا سلف کی سب سے بڑی اکٹھی خریداری:



Base: Those who do Major Grocery Shopping

OCCASIONAL SMALL SHOPPING (خریداریوں کے درمیان اشیاء ختم ہونے کی صورت میں قلیل خریداری) چھوٹی خریداری:



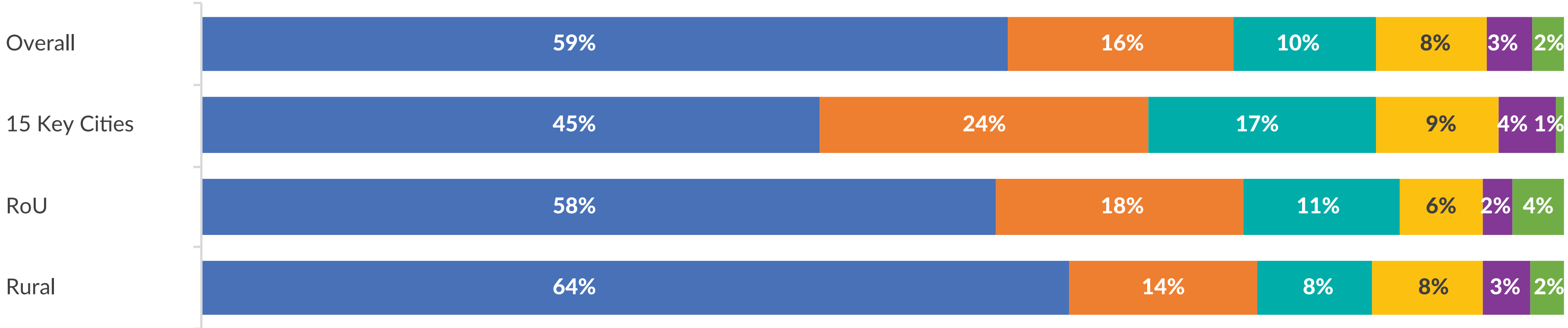
Base: Those who do Occasional Small Shopping

🟦 Daily 🟧 2-3 days a week 🟦 Once a week 🟨 Once in 2 weeks 🟪 Once a month 🟩 Less than once a month

Source: Consumer Multimedia Index (2010 – 2020)

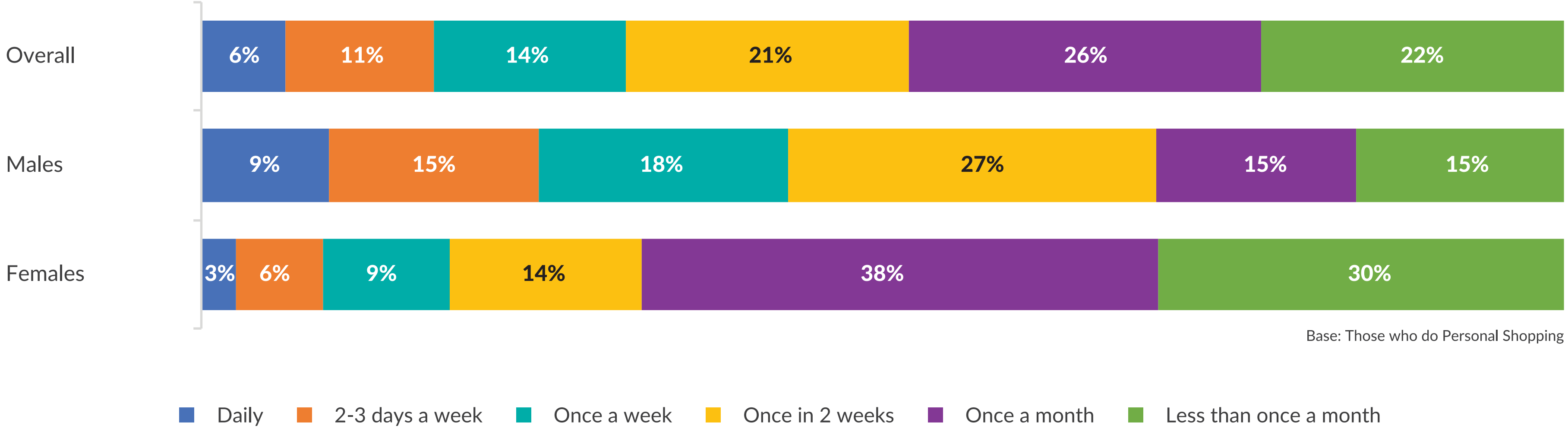
SHOPPING FREQUENCY

SHOPPING FOR DAILY MEAL (آج کے کھانے کے لئے: (آج کا کھانے بنانے کے لئے، لئے گئے مختلف اجزاء/اشیاء وغیرہ)



Base: Those who do Shopping for Daily Meal

PERSONAL SHOPPING (اپنی ذات کے لئے: (اسٹور پر جا کر اپنے لئے کچھ دیکھنا اور خریدنا)

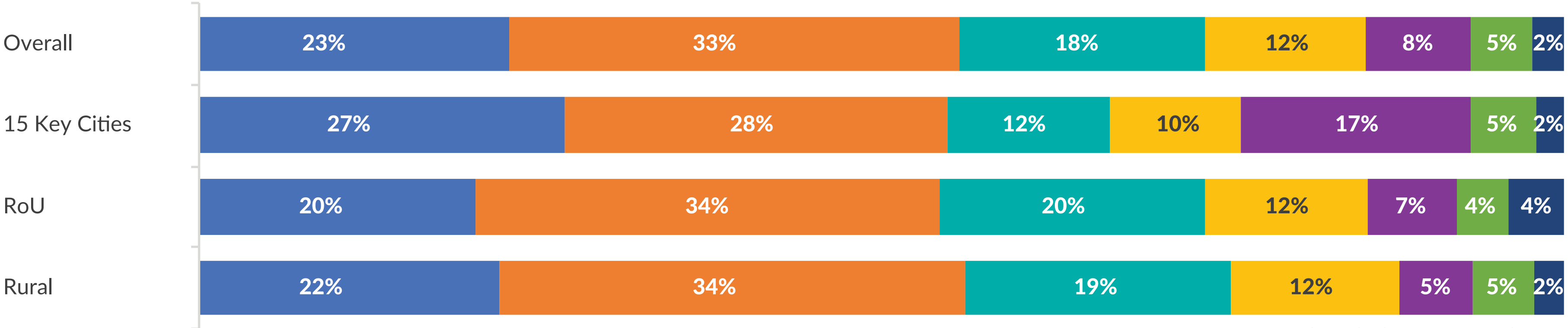


Base: Those who do Personal Shopping

Source: Consumer Multimedia Index (2010 – 2020)

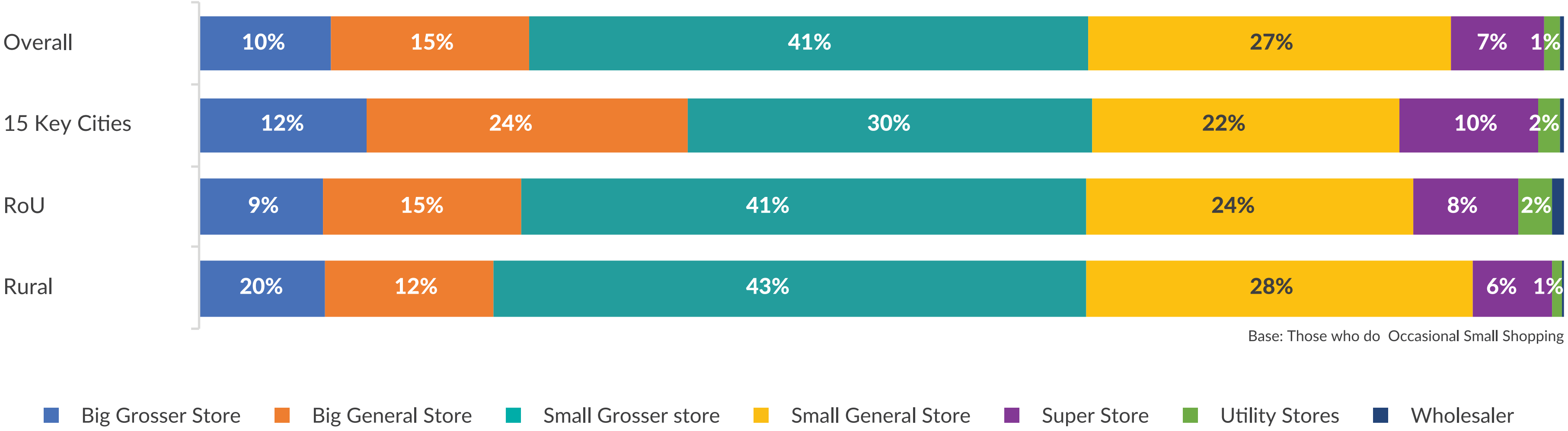
SHOPPING PLACE

MAJOR GROCERY SHOPPING سوداسلف کی سب سے بڑی اکٹھی خریداری: (ایسی خریداری جو آپ کسی خاص وقفے/باقاعدگی کے ساتھ مہینے یا ہفتے کے بعد کرتے/کرتی ہیں)



Base: Those who do Major Grocery Shopping

OCCASIONAL SMALL SHOPPING چھوٹی خریداری: (خریداریوں کے درمیان اشیاء ختم ہونے کی صورت میں قلیل خریداری)

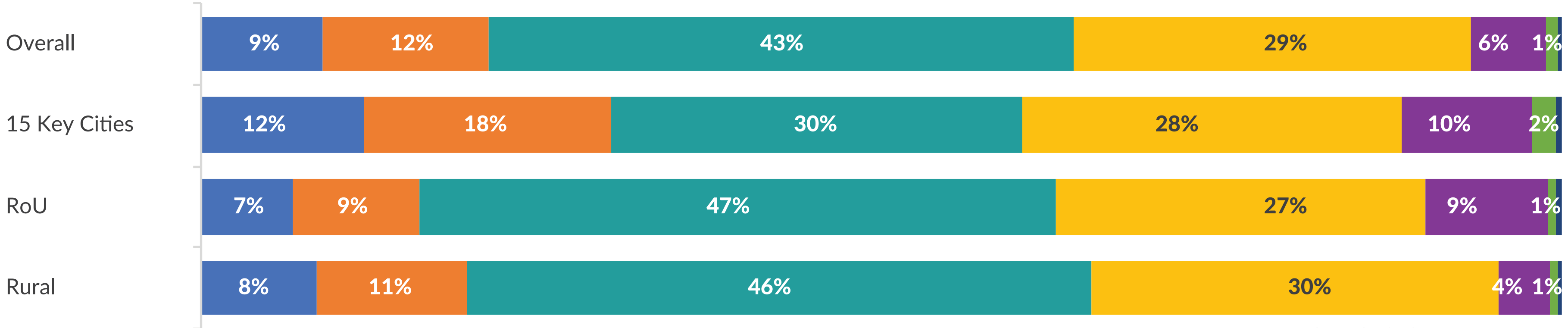


Base: Those who do Occasional Small Shopping

Source: Consumer Multimedia Index (2010 – 2020)

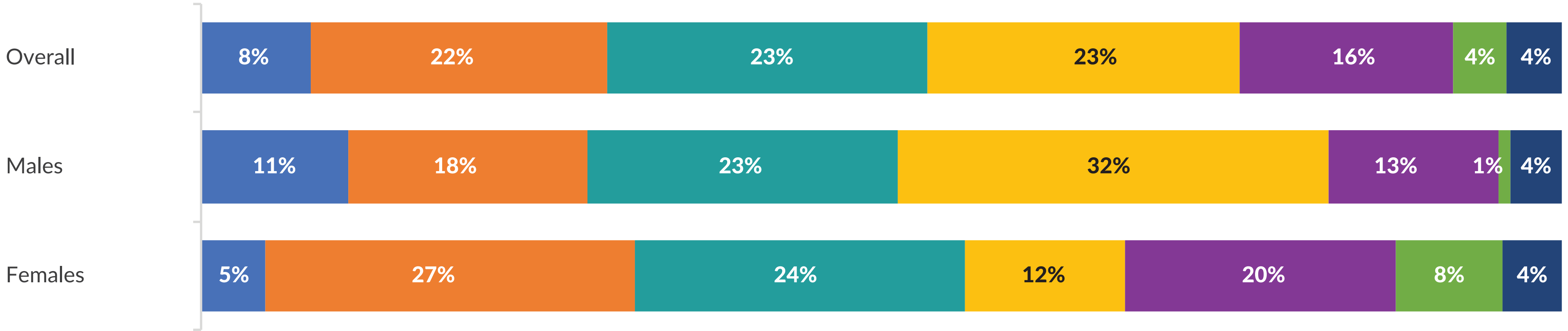
SHOPPING PLACE

SHOPPING FOR DAILY MEAL آج کے کھانے کے لئے: (آج کا کھانے بنانے کے لئے، لئے گئے مختلف اجزاء/اشیاء وغیرہ)



Base: Those who do Shopping for Daily Meal

PERSONAL SHOPPING اپنی ذات کے لئے: (اسٹور پر جا کر اپنے لئے کچھ دیکھنا اور خریدنا)



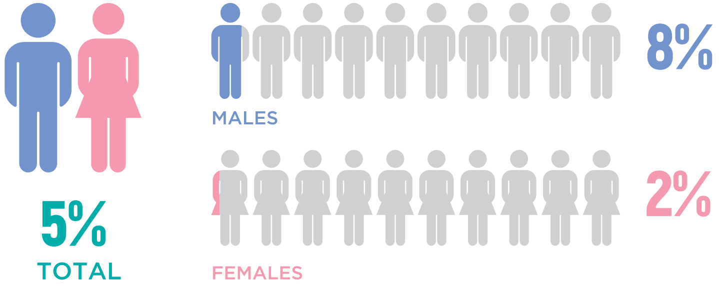
Base: Those who do Personal Shopping

■ Big Grosser Store ■ Big General Store ■ Small Grosser store ■ Small General Store ■ Super Store ■ Utility Stores ■ Wholesaler

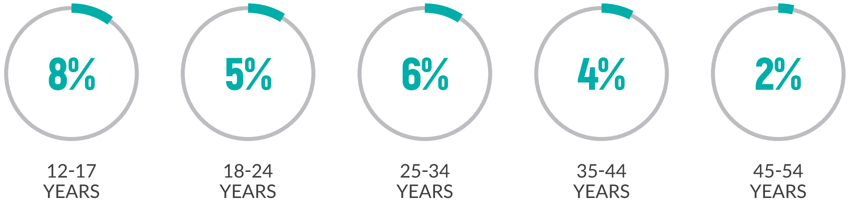
Source: Consumer Multimedia Index (2010 – 2020)

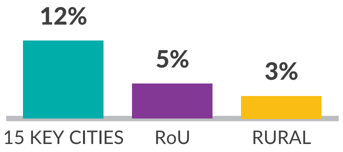
ONLINE SHOPPING INCIDENCE

2016: **0.01%** → 2020: **5%** 5%↑



	SEC A	SEC B	SEC C	SEC D	SEC E
URBAN	16%	13%	8%	7%	4%
RURAL	8%	4%	3%	3%	2%





Only those brands' logos are placed which constitute 80% of the consumers' share within the relevant category. They are in alphabetical order from left to right.

AliExpress

daraz

Yayvo.com

Source: Consumer Multimedia Index (2010 – 2020)

RURAL PAKISTAN, THE NEXT BIG GROWTH OPPORTUNITY

Had "Rural" Pakistan been an independent unit with 142 million population, it would be the 9th largest 'country' in the world. Pakistan's economy was known and dominated by Agriculture for a long period. Nevertheless, with two-third people living in villages, agriculture sector GDP was a third of the total. Over time this agriculture contribution reduced further to a mere 19% in 2020-21 as per official provisional estimates.

This seems to paint a gloomy picture, but actually leaves a huge growth potential. If we are able to reform our strategy pertaining to research, superior seeds, hydroponic farming, soil rotation, precision technologies, biofortification, fertilisers, pesticides and mechanical harvesting, Pakistan can aspire to increase crops' output many folds. This is happening in most of the world already.

Other areas of importance are dairy, livestock, forestry, and fishing, which total 64% of the agriculture GDP. Productivity, while never high, has further declined in the last few decades. Research, innovation, breeding, fodder mix, mechanisation in milking and slaughtering and ample cold supply chain will increase volumes, create employment, and increase prosperity. Better technological infrastructure would increase produce and nutritious value food for Pakistanis. Perhaps also enhance export potential of the country.

The purpose is to highlight immense potential of an avenue of growth of rural Pakistan, for all FMCGs and Services' sector organisations. Improved roads' condition, better transportation, media reach and telecom penetration have already generated awareness and latent demand for packaged and branded products in the rural population. Increased rural consumers' shares in food, non-food and household categories during the last decade (as presented in subsequent pages of this book) may provoke thoughts in KLI based marketers, to roll out brands targeting rural segments, with relevant positioning and advertising.

SARFARAZ AHMED REHMAN

Chief Executive Officer
FAUJI FERTILIZER COMPANY LIMITED

RURAL PAKISTAN GROWTH POTENTIAL

SHARE OF RURALITES

2 IN 3 MOTORBIKE ONWERS

1 IN 4 BANKING USERS

1 IN 3 LAPTOP USERS

2 IN 5 TRAVELLERS (ABROAD)

1 IN 5 CAR OWNERS

1 IN 2 LCD/LED OWNERS

1 IN 2 SMART PHONE OWNERS

4 IN 5 SATELITE DISH VIEWERS

2 IN 3 SHAMPOO USERS

2 IN 3 CARBONATED SOFT DRINKS' USERS

2 IN 3 REFUELERS

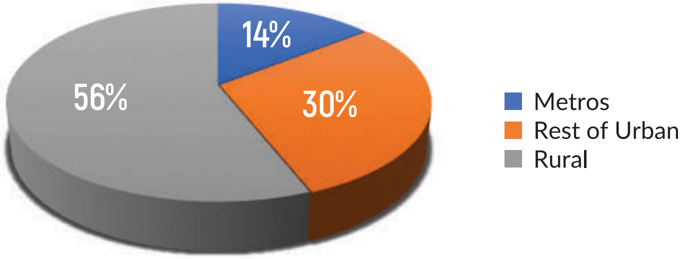
1 IN 2 BOTTLED WATER DRINKERS

Source: Consumer Multimedia Index (2010 – 2020)

ZOOMING INTO RURAL PAKISTAN

POPULATION* CHANGES

	2010	2020
TOTAL POPULATION	173M	215M
KHI, LHR, ISB/RWP	20M	31M
OTHER URBAN CITIES	43M	63M
RURAL AREAS	109M	121M



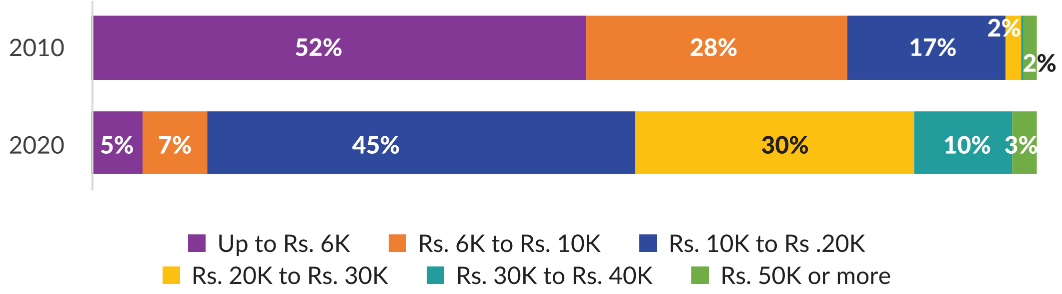
NO. OF HOUSEHOLDS (MILLIONS)

	URBAN	RURAL
TOTAL	15.5	18.4
SEC A	1.5	0.7
SEC B	1.9	1.8
SEC C	3.1	4.6
SEC D	3.4	5.9
SEC E	5.4	5.3

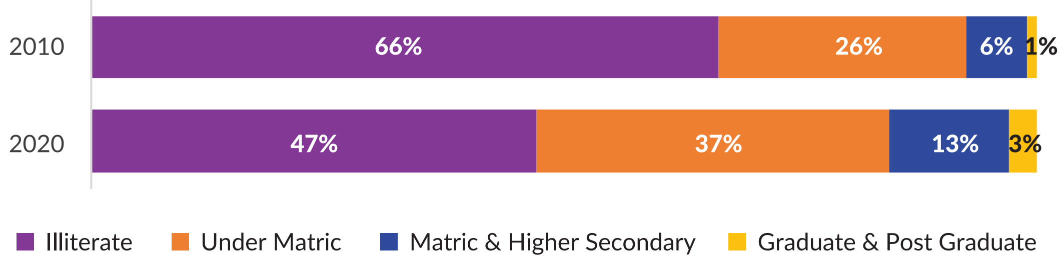
AVERAGE MONTHLY INCOME (PKR)

2010 **11,072** → 2020 **25,260**

MONTHLY HOUSEHOLD INCOME



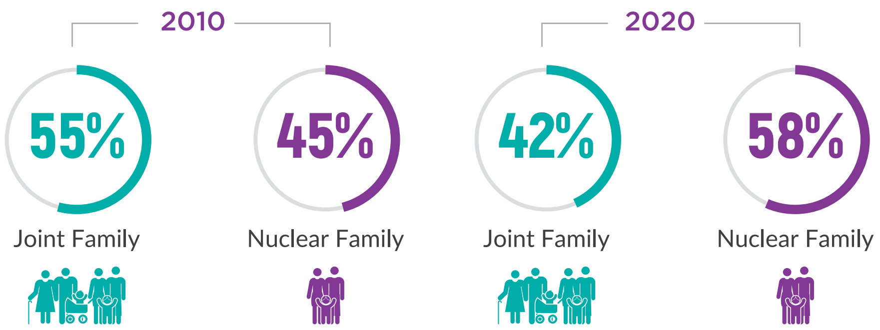
EDUCATION



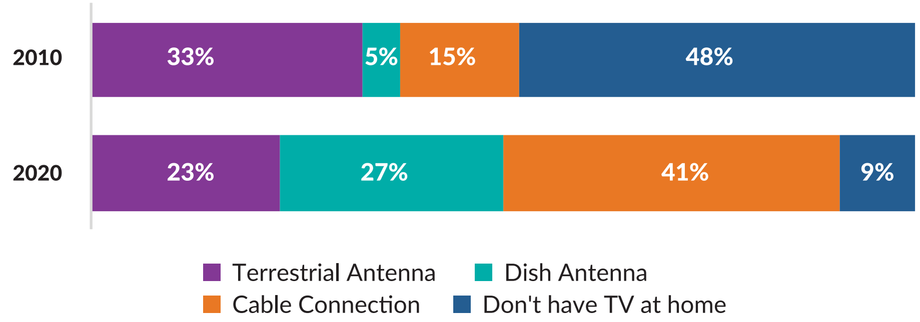
Source: Pakistan bureau of statistics | *Economic Survey of Pakistan 2020-21

RURAL LIFE

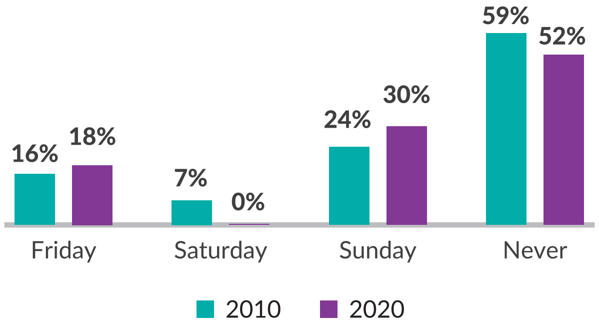
FAMILY STRUCTURE

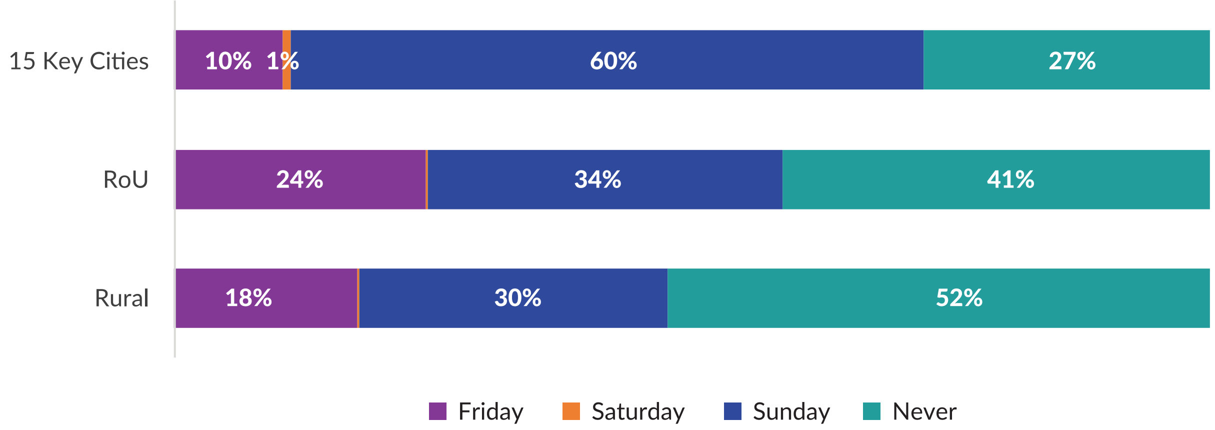


RECEPTION SOURCE OF TV



HOLIDAYS





Source: Consumer Multimedia Index (2010 – 2020)

HOUSING QUALITY INDICATORS

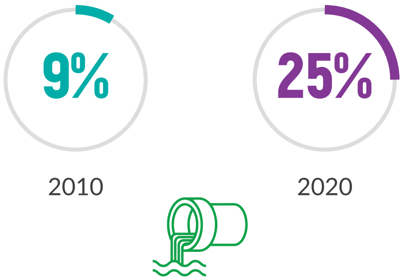
				2020 ONLY				
ROOF MATERIAL		**2010**	**2020**	**SEC A**	**SEC B**	**SEC C**	**SEC D**	**SEC E**
Grass/Leaves	گھاس / پتوں اور تنکوں سے بنی ہوئی ہے	2%	1%	0%	0%	0%	1%	2%
Wood	لکڑی / بانس کی بنی ہوئی ہے	6%	11%	0%	0%	4%	12%	27%
Mud and Wood	لکڑی اور مٹی سے بنی ہوئی ہے	11%	13%	0%	0%	5%	15%	29%
Mud	مٹی کی بنی ہوئی ہے	7%	16%	0%	1%	4%	15%	42%
Mud and stones	مٹی اور پتھروں سے بنی ہوئی ہے	2%	3%	1%	3%	6%	3%	0%
Guarder/TR/Brick	گارڈر، ٹی آر اور اینٹوں کی بنی ہوئی ہے	25%	30%	38%	44%	43%	34%	0%
Readymade concrete	کنکریٹ کی تیار شدہ چھت استعمال ہوئی ہے	1%	4%	5%	8%	7%	4%	0%
Iron steels	لوہے کی شیٹوں کی بنی ہوئی ہے	2%	1%	0%	1%	2%	1%	0%
Iron guarded	لوہے کے گارڈ سے بنی ہوئی ہے	26%	10%	11%	15%	15%	10%	0%
Concrete/RCC	لوہے کے گارڈر، لکڑی کے بالوں اور اینٹوں، پتھروں سے بنی ہوئی ہے	18%	11%	44%	28%	14%	5%	0%

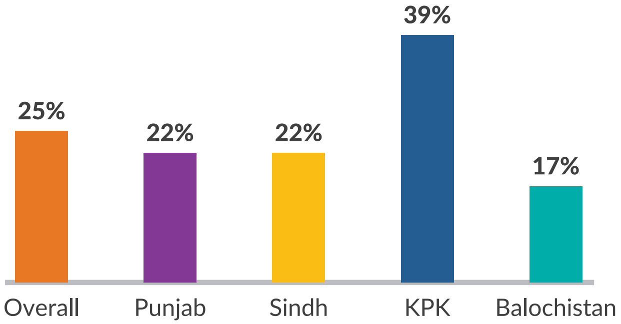
WALL MATERIAL		**2010**	**2020**	**SEC A**	**SEC B**	**SEC C**	**SEC D**	**SEC E**
Grass	گھاس / پتوں اور تنکوں سے بنی ہوئی ہے	1%	2%	0%	0%	1%	1%	4%
Wood	لکڑی / بانس کی بنی ہوئی ہے	2%	3%	0%	0%	1%	3%	7%
Mud	مٹی کی بنی ہوئی ہے	23%	41%	0%	1%	23%	44%	89%
Concrete	لوہے کے گارڈر، لکڑی کے بالوں اور اینٹوں، پتھروں سے بنی ہوئی ہے	1%	4%	7%	11%	5%	3%	0%
Iron	لوہے کی شیٹوں کی بنی ہوئی ہے	1%	1%	2%	2%	2%	1%	0%
Wood/mud/stone	لکڑی اور مٹی سے بنی ہوئی ہے	7%	4%	1%	5%	8%	6%	0%
Brick/cemented	اینٹوں اور سیمنٹ کی بنی ہوئی ہے	66%	45%	90%	81%	62%	43%	0%

Source: Consumer Multimedia Index (2010 – 2020)

SEWERAGE SYSTEM

UNDERGROUND SEWERAGE LINE

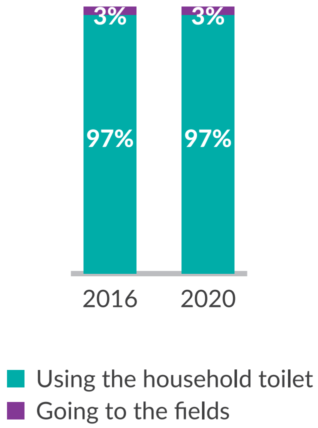




SEC A	30%
SEC B	27%
SEC C	26%
SEC D	24%
SEC E	24%

TOILET FACILITY AT HOME

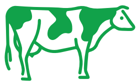
PREFERENCE OF USING TOILET

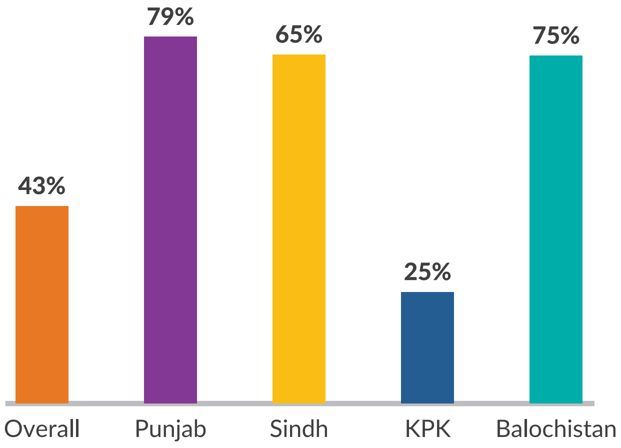


Source: Consumer Multimedia Index (2010 – 2020)

DOMESTIC LIVESTOCK

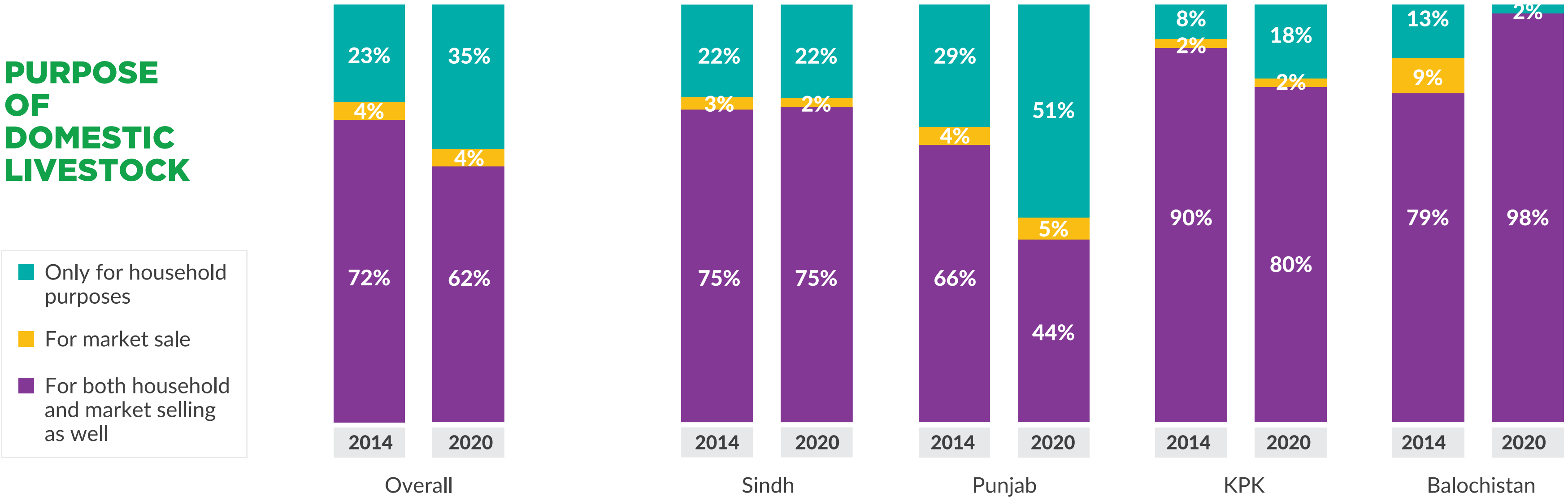
AVAILABILITY OF LIVESTOCK





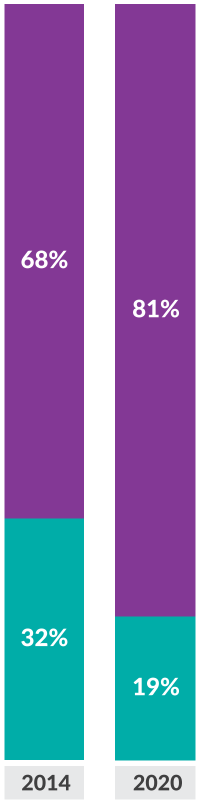
SEC A	38%
SEC B	41%
SEC C	42%
SEC D	44%
SEC E	44%

PURPOSE OF DOMESTIC LIVESTOCK



Source: Consumer Multimedia Index (2010 – 2020)

CROP FARMING & LAND OWNERSHIP

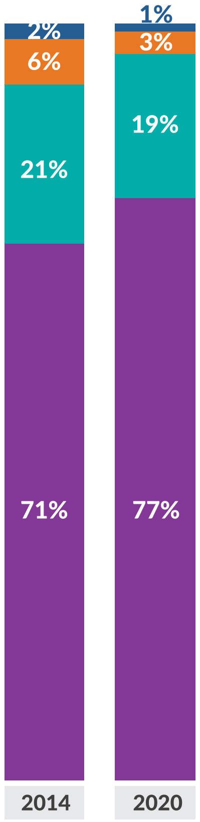


Crop Farming

🟩 I do crop farming
🟪 We don’t do crop farming

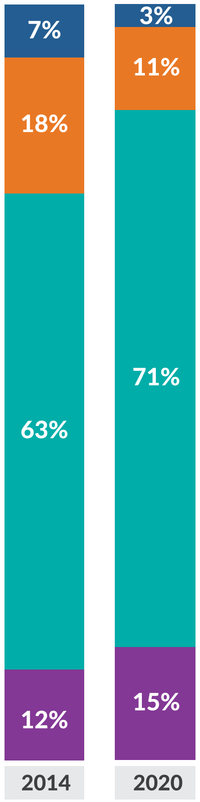
Land Ownership of
Crop Farmers

🟩 On your land
🟪 Someone else's land



Land Size of
Land Owners

🟪 Less than 12.5 Acres
🟩 From 12.5 Acres to 49 Acres
🟧 50 Acres to 99 Acres
🟦 More 100 Acre

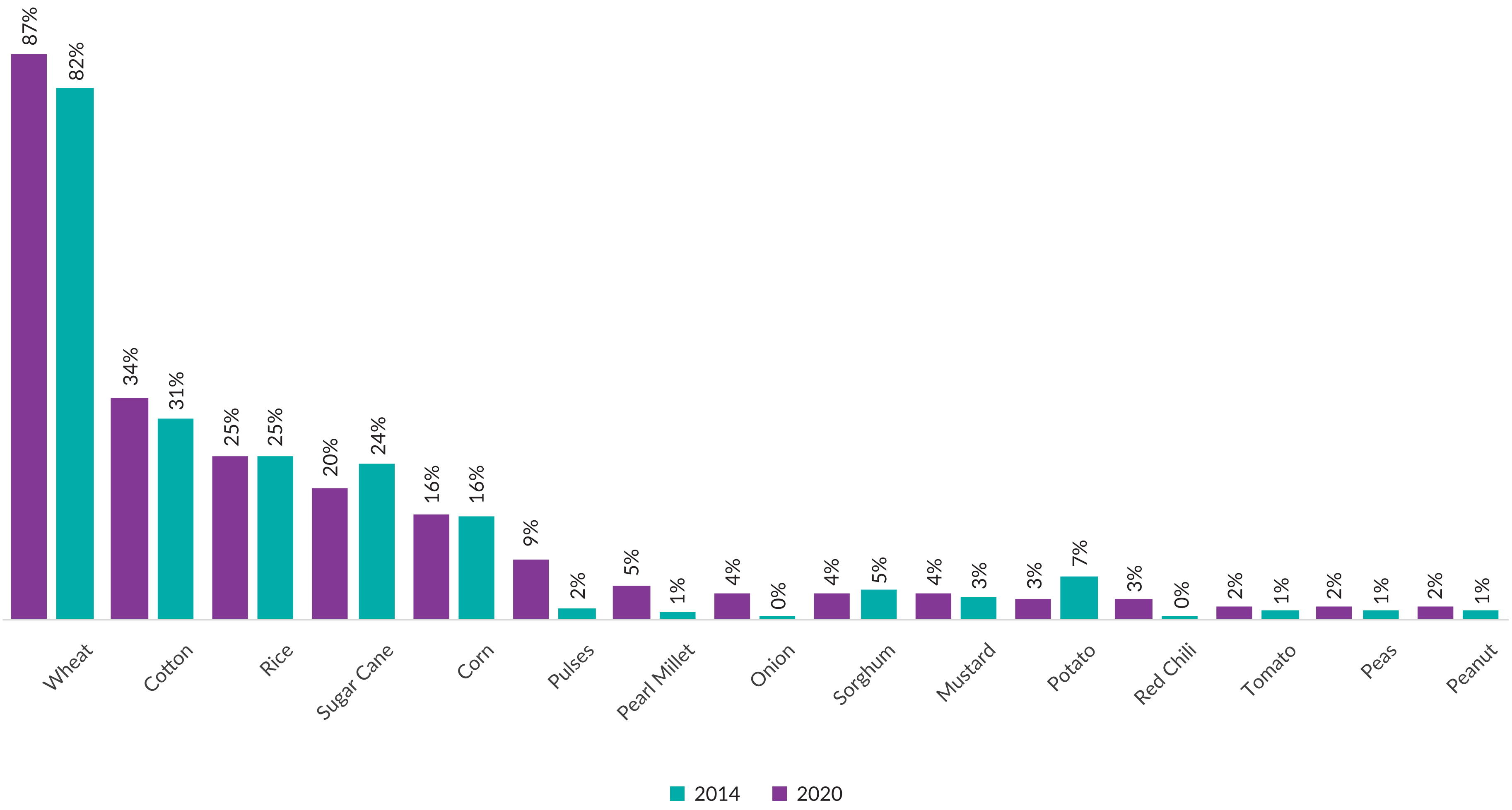


No. of Crops Cultivated
in an Year

🟪 One Crop
🟩 Two Crops
🟧 Three Crops
🟦 More than three Crops

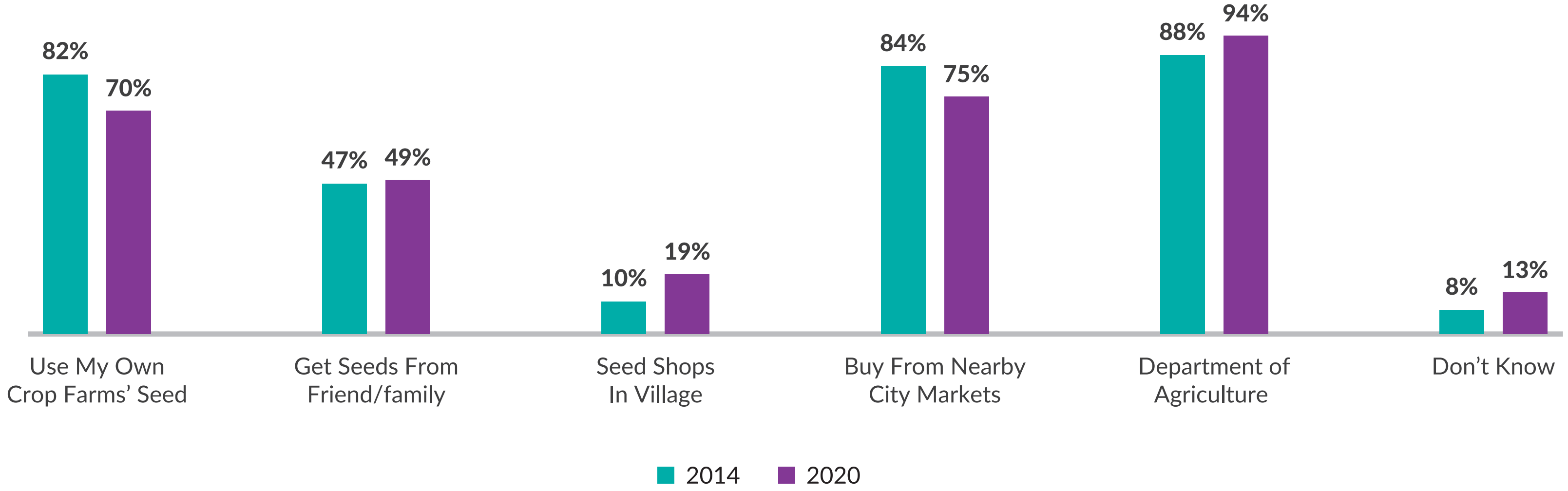
10-year data is not available | Source: Consumer Multimedia Index (2010 – 2020)

CROPS CULTIVATED



Source: Consumer Multimedia Index (2010 – 2020)

CROP SEEDS – PLACE OF PURCHASE



	2014	2020
Use My Own Crop Farms' Seed	82%	70%
Get Seeds From Friend/family	47%	49%
Seed Shops In Village	10%	19%
Buy From Nearby City Markets	84%	75%
Department of Agriculture	88%	94%
Don't Know	8%	13%

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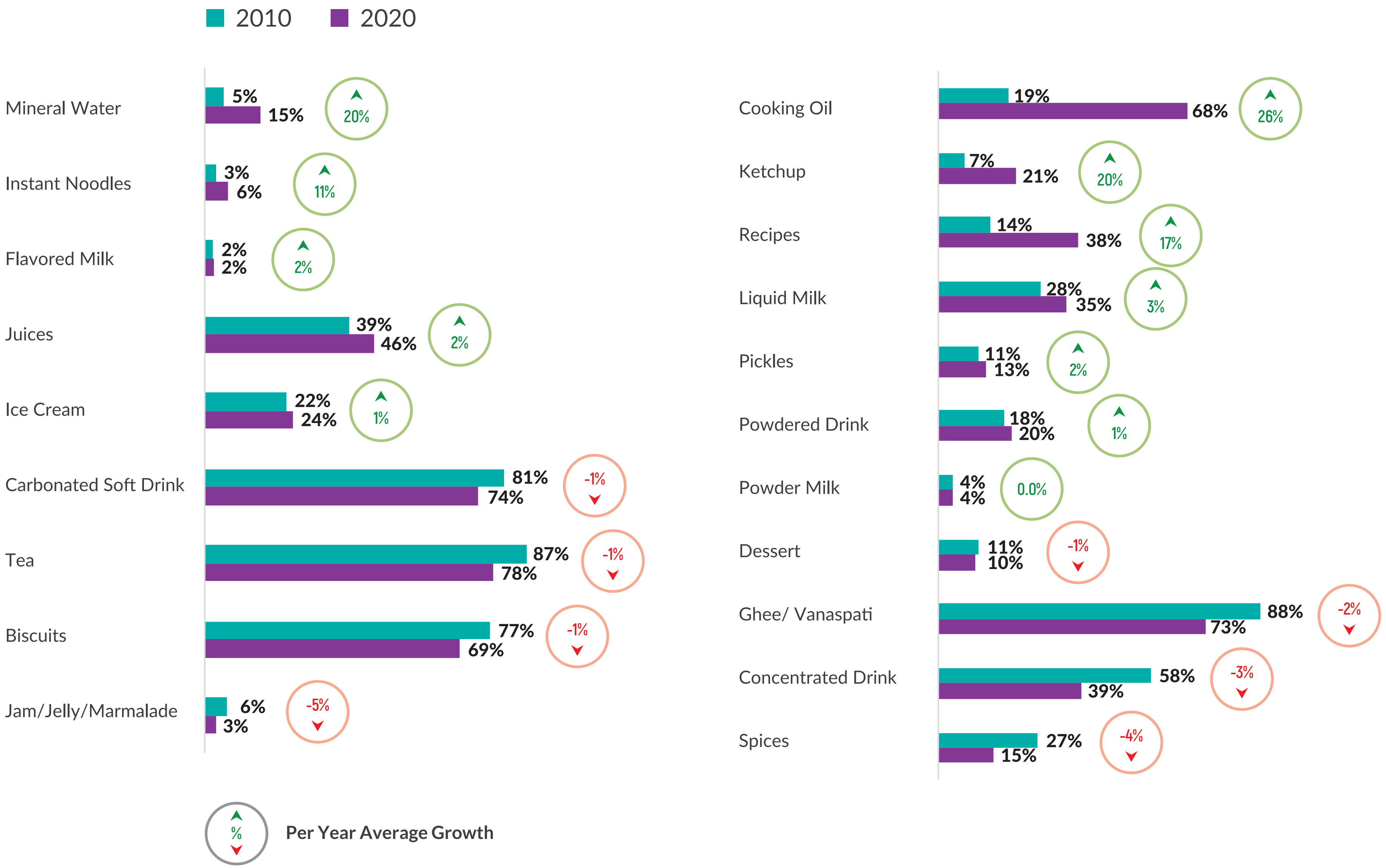
They are in alphabetical order and from left to right.

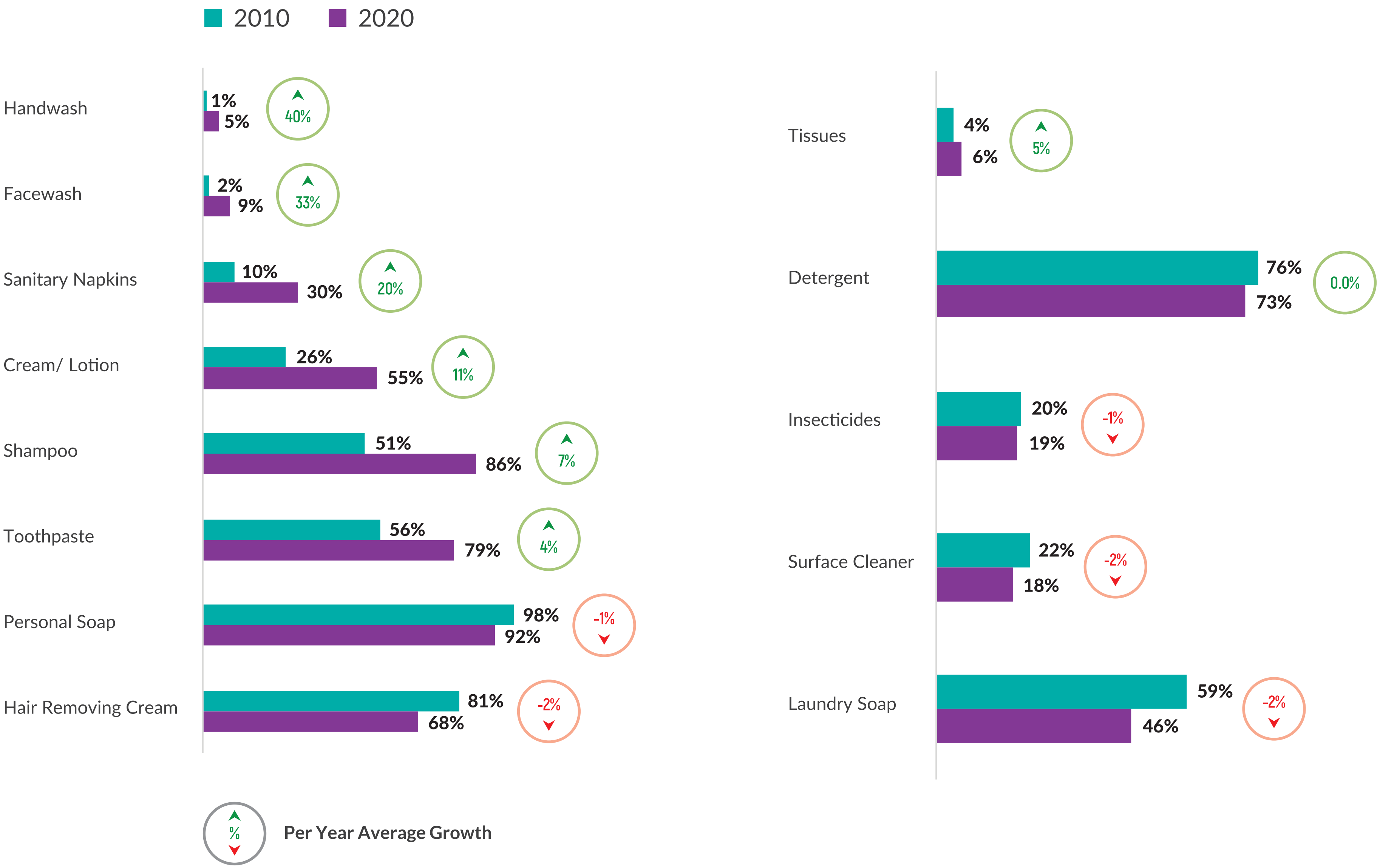
10-year data is not available | Source: Consumer Multimedia Index (2010 – 2020)

EVOLUTION OF CATEGORIES' PENETRATION IN RURAL PAKISTAN



Source: Consumer Multimedia Index (2010 – 2020)

EVOLUTION OF CATEGORIES' PENETRATION IN RURAL PAKISTAN



Source: Consumer Multimedia Index (2010 – 2020)

URBAN-RURAL SPLIT OF ABSOLUTE NUMBER OF PAKISTANI CONSUMERS (IN MILLIONS)

2020 ONLY

Source: Consumer Multimedia Index (2010 – 2020)

URBAN-RURAL SPLIT OF ABSOLUTE NUMBER OF PAKISTANI CONSUMERS (IN MILLIONS)

2020 ONLY

Source: Consumer Multimedia Index (2010 – 2020)

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SOURCE: IPSOS, PAKISTAN CONSUMER MULTIMEDIA INDEX (CMI), 2021

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