



MARKET

The turn of the century brought the media boom to Pakistan. There was a radical scenario shift in electronic media and from just a few state-run channels we have now gone to having almost fifty private channels in the country. The positive change in policies of the Government of Pakistan since then has doubled the market size. That was the first step when ARY Digital entered into the scenario. Many private businesses and media groups entered this arena but in the span of 6 years, only a few have made a mark. ARY Digital has emerged as a pioneer in the satellite television history of Pakistan.

ARY Digital took advantage of the Government's media friendly policies to participate in the growth of electronic media. Television advertisement spending surged from PKR. 3.6 billion in 2004-05 to 6.8 billion in 2005-06 and 10.55 billion in 2006-7, registering a phenomenal increase. Satellite television revenues increased from PKR. 2.3 billion in 2004-5 to 2.9 billion in 2005-6 and 6.75 billion 2006-7, serving as a litmus for the rapid growth of industry in this period. (Source: Gallup, Pakistan.)

What started off as a single channel soon became the largest Asian broadcasting network in the world, with over eleven channels on the palette and growing.

ACHIEVEMENTS

Sitara-e-Imtiaz by the Government of Pakistan:

The President and CEO of ARY Digital Network, Mr. Salman Iqbal, was awarded Sitara-e-Imtiaz by the President of Pakistan, General Pervez Musharraf, for the coverage of the 2005 earthquake disaster in Pakistan by ARY Digital, ARY One World and associated channels. This highest civilian award of the country was bestowed upon Mr. Salman Iqbal for the tremendous supplies mobilisation and information efforts for the victims of the earth quake through his channels. The most important pillar of this effort was a week long live special transmission on ARY Digital dedicated to the cause.

Young Global Leader (2007) by the World Economic Forum:

Mr. Salman Iqbal also received the prestigious Young Global Leaders Award 2007 from the World Economic Forum. This honour is bestowed each year by the World Economic Forum to recognise and acknowledge the top 250 young leaders (all below 40 years of age) from around the world for their professional accomplishments and contribution in shaping the future of the world. With a nation that is in the midst of a media boom, the ARY Digital Network, under the leadership

of Salman Iqbal, has pioneered and set new grounds for television in Pakistan, South Asia and around the world.

Muslim Power 100 (2007): Mr. Salman Iqbal has been included in the honourable Muslim Power 100 List 2007. This list compiles and acknowledges the contribution of the 100 most powerful men and women in Britain. The objective of the event is to endorse the positive contribution of Islam and Muslims in the British Society. Salman was honoured for his contribution to Muslim life in Britain through the ARY Digital Network for which ARY Digital is the flagship channel in the UK as well. In his efforts, he has highlighted community issues and brought forward an image of the people that sets them apart from the propaganda that Muslims face as a nation in today's time.



HISTORY

ARY Digital is a subsidiary of the ARY Group established in 1970. The ARY Group of companies is a Dubai-based holding company founded by a Pakistani businessman, Haji Abdul Razzak Yaqoob (ARY), who is the chairman of the group. It is a family owned concern with its main operations being handled by the four brothers, Haji Jan Mohammad, Haji Abdul Razzak Yaqoob, Haji Mohammad Iqbal and Haji Abdul Rauf.

The channel started operations in the 2000 when the group acquired a private television channel that catered to the Southeast Asian community in the UK, and named it ARY Digital.

Realising the potential, when the Government of Pakistan allowed licenses for private satellite television channels, ARY Digital stepped into the Pakistani market. Salman Iqbal was given the reigns of the international operations as Global CEO and President and his uncle, Haji Abdul Rauf, started making the base for the network in Pakistan.

Currently, the network consists of channels including ARY Digital (Asia-Mid East-UK/Europe-USA) (Entertainment), ARY One World (News), The Musik (Music), QTV (Religion), FTV Pakistan (Fashion), Zauq (Food), VHI (Music & Lifestyle) HBO, Nick, ARY Bangla and many new ventures in the pipeline. Most of the network's in-house channels have their own specialised programming catering to Urdu speakers living in Pakistan and abroad.

The ARY Digital Network has now grown as a structured organisation that has spread its footprint across the globe. Today, the channels (namely ARY Digital, ARY One World, The Musik and QTV) beam across South East Asia, Middle East, United Kingdom, Europe and North America, promoting Pakistan's soft image and rich culture across the world. As an ambassador for the great people of Pakistan, ARY Digital Network has a vision to become a vital organisation contributing positively towards a more prosperous Pakistan in the near future.

THE PRODUCT

ARY Digital is referred to by many as the drama or family channel of the country. It is a channel that enjoys immense mass appeal from all age groups. The genre of programmes includes dramas, sitcoms, magazine shows, special events, children's programmes, morning shows, reality shows, special programming, occasion based programming and cricket. The country's most popular actors, directors, writers, celebrities and other talents work regularly with the channel. Following is an overview of what ARY Digital has to offer:

Dramas/Soaps: ARY Digital is proud to produce and present some of the best dramas of its time. Upon regular surveys, it has been found that viewers consider ARY Digital as one of the only two or three channels in the country that have maintained a good standard in their presentation and carry forward the famous drama serial genre of Pakistan. Some of the most famous drama serials and soaps that ARY Digital has presented and produced are Riyasat, Kabhi Na Kabhi, Mohrat, Dohri, Koi To Ho, Ghar Gharonda, Kaisa Hai Yeh Jahan, Khwaish, Yeh Wada Raha, Janam, Sarkar Sahab, Sherdil and Kaisa Yeh Junoon.



Comedy Shows: Non-stop hilarity is ARY Digital's trademark, with specialised segments and shows that are extremely popular such as Loose Talk, Lyari King Live, Mein Aur Tum, Ghaffars at Dhorajee, Rubber Band, Khabadar. These programmes encompass a complete half hour slot daily and stay unrivaled.

Game Shows/Reality Shows/Magazine Shows:

On this front as well, ARY Digital has presented and produced a number of super hits. It began with the legendary ARY Star Gold Quiz, which hooked people to the TV as the fight for one kilogram of gold continued every week between contestants. ARY Digital was the first to bring 'Kiya Aap Banen Gay Karorpati' (a 'Who Wants to be A Millionaire' franchise for Urdu Language) to Pakistan. Most recently, the channel has taken the lead in another direction i.e. mega budget reality shows such as 'The Ultimate Challenge', an adventure reality show shot in remote locations throughout Pakistan that boasts daring stunts by its contestants, such as sky diving in Dubai. Also important to mention is 'Chupa Rustam Kon', which has been shot in the beautiful hills of Murree, Pakistan.

A similar standard has been achieved for the live shows as well as the magazine/lifestyle shows. Major testaments would be programmes like Heart to Heart with Samina Peerzada, Marina Mornings, Sangam, Aik Aur Pehloo with Sania Saeed and most recently Good Morning Pakistan with Shaista Wahidi.

Special Events: The Channel has also enjoyed the privilege of providing entertainment beyond TV screens. Some of the most important events in this regard would include the Bryan Adams concert in Karachi that was witnessed by more than 10,000 people and the Stereo Nation and Sukhbir shows that were again attended by some of the largest number of fans in Pakistan's entertainment history. Besides this the channel regularly presents excellent shows on special occasions such as 14th August, 6th September, New Year, both Eids and Basant.

Cricket: ARY Digital is the first South Asian

satellite channel to step into the world of cricket broadcasting. ARY Digital has owned the European rights of all the ICC tournaments till 2007. The channel has broadcasted the famous Indian tour to Pakistan in March 2004, the Asia Cup 2004, the Holland tri-nation series, the Afro Asia Cup and the West Indies Tour of Pakistan in 2006, Bangladesh Tour of Pakistan 2008 and the AlBarakah 20/20 Cup in Canada 2008 and many more. Therefore, when it is cricket season, viewers turn to ARY Digital for excitement and thrill. Every media player's responsibility goes beyond simply providing quality entertainment. Media also acts as a generator for national cohesion and support. For this purpose, special shows are organised on national days, Eid, Valentine's Day, New Year's Eve, and the like. After the earthquake of 2005 in Pakistan, ARY Digital was at the forefront of the efforts in mobilising the masses and bringing help to the millions who were affected.

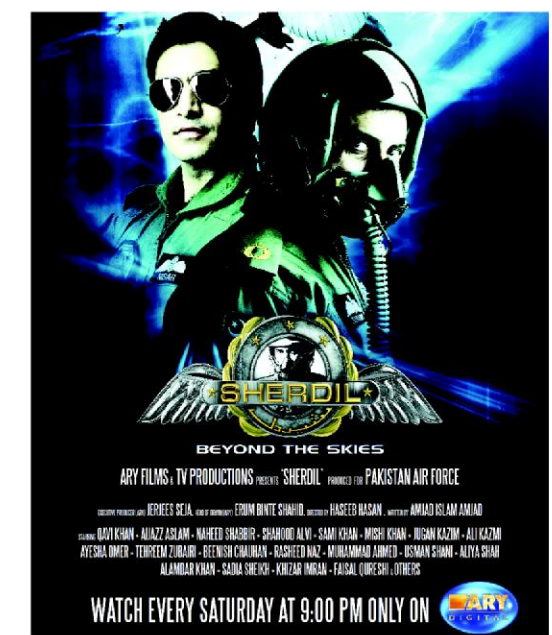
RECENT DEVELOPMENTS

ARY Digital thrives over the process of constantly discovering new dimensions to entertainment. It believes in raising the bar everyday. Some recent developments include the fact that over a short span of time, the channel is now able to produce over 70% of its programming in house. After mastering in-house productions, the channel is now moving towards international co-productions with different affiliates. The channel has been commissioning many new productions to the most recognised production houses in the region, such as soaps like Khwaish (a Balaji Telefilms Production) and Yeh Vaada Raha (BAGS Production).

The channel has introduced reality programmes and game shows such as 'The Ultimate Challenge' and 'Chupa Rustam Kon', which have re-painted the very canvas of the reality show concept in Pakistan with mega budgets and novel concepts. In addition to this, it also holds the credit of bringing internationally franchised reality shows like 'Fear Factor' and 'Khatron Kay Khilari' to Pakistan.

The channel has also set the trend for live shows. Currently 'Good Morning Pakistan' and 'The Mother's Show' are most popular among ladies.

On the drama front, one of the most recent and talked about projects includes 'Sherdil', which



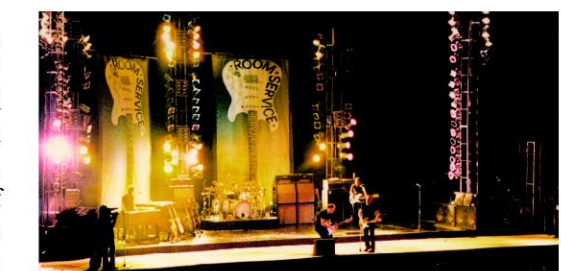
was produced by ARY Films and TV Productions for Pakistan Air Force. Similarly, the channel also presented another mega-serial produced by ARY Films and TV Productions in 2008 called 'Kaisa Yeh Junoon', the first ever drama serial based on extremism and its effects on the Muslim youth.

PROMOTION

ARY Digital is a true believer in projecting its products to the maximum level in front of the viewers in the most effective and positive manner. Besides corporate promotions for ARY Digital, the main focus of marketing is to promote individual programmes and attract viewers' involvement. Each programme is promoted at different levels across the country and around the world, starting from regular advertising in above and below-the-line medium, extending to viewer involvement and reward based campaigns during different events and happenings. Thousands participate in each campaign and the response can be easily measured by their numbers.

BRAND VALUES

The basic brand values of ARY Digital have always been to present itself as a Pakistani family entertainment channel that strives to provide the very best of local and international entertainment to all segments of society. In the process, ARY Digital is very sensitive towards the local culture and values of the people of Pakistan and hence uses the power of media positively. ARY Digital has, over time, gained the credibility of a responsible member of society by generating help and support whenever needed.



www.arydigital.tv

THINGS YOU DIDN'T KNOW ABOUT ARY DIGITAL

- ARY Digital is the first global satellite channel from Pakistan.
- ARY was the first Pakistani satellite channel to procure international cricket broadcast rights.
- The channel brought in Bryan Adams to Pakistan, the first western megastar to perform in a live concert in Pakistan.
- ARY Digital presented SAF Star Gold Quiz, the first ever live quiz show broadcasted by any satellite channel in Pakistan.
- ARY Digital was the first Pakistani satellite channel to procure broadcast rights for international events such as IIFA Awards, Zee Cine Awards and Bollywood Awards.