

Cyberletter Media

Overall Media Research Edition

Overall Media Research Edition: **May 1, 2010 to May 30, 2011**
Produced by: Gallup Pakistan Jointly with Gilani Research Foundation

2010-2011 Edition

In this Issue



PM Online on TV
Page 1



Telecom and Mobile
Page 2



TV Advertising
Page 3



Indian Channels on TV
Page 4

From the Editor

Dear Reader,

We are happy to present to you the May Edition of **Gallup Pakistan's Media Cyber letter**. This Edition looks at TV audience figures as well as Mobile Phone Companies and their Profiles. We look forward to your comments and feedback. More details can be found on our website www.gallup.com.pk

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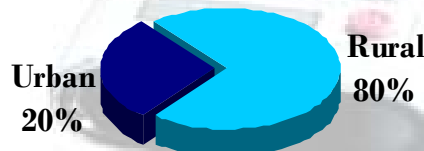
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8.6 million Pakistanis claim to have watched PM Online Aired on 1st March 2011

According to estimates compiled by Gilani Research Foundation using **Gallup Pakistan's TV Ratings Services**, **8.6 million** Pakistanis have watched PM Online aired on **PTV & Samaa TV** on 1st March 2011. Not so surprisingly 80% of these 8.6 million Pakistanis hailed from Rural areas and only 20 % from Urban areas. According to Gallup Media Research Experts the number is very sizeable in comparison with other High Ratings Programs in the country. The prime reason for such a high figure appears to be near monopoly of PTV in Rural TV viewers of Pakistan. Furthermore, a sizeable number (2-3 million Urban Men and Women) do not have access to Cable Channels and therefore have PTV as there only available channel. The figure contradicts the prevalent view in the country that Cable Televisions are the only source of information in the country and PTV has lost its relevance.

Viewership of the PM online on TV



Dr Ijaz Gilani, Chairman of Gallup Pakistan says "PTV is still by far the most watched Television Channel in Pakistan. It is true that it has lost its top position in Urban Areas. But how big is Urban Pakistan? 33% of Pakistan!"






84% TV Viewers watched World Cup Semi Final Pakistan vs. India on TV

According to a Face to Face Survey conducted Nationally by Gallup Pakistan; covering both Urban and Rural Households; an estimated **65 million Men and Women** claim to have watched at least some portion of the Pakistan-India Semi Final. The number is huge, and analysts at Gallup say "**the number shows the evolution of TV as the main source of information and entertainment for Pakistanis**". It is also of interest to note that these million men and women watched the match overwhelmingly on **PTV** and its associated channels. The reason for this lies in the fact that a substantial number of TV viewers live in Rural areas where PTV is the only source of information, and in this case, watching sports. In Urban Areas, **Geo Super** was the main source for viewing the match.

Important: It should be noted that the figure above is from a random sample based National Public Opinion Survey conducted around the time of the match between India and Pakistan.

Profile of Telecom Service Providers

It is interesting to note that unlike the popular perception, the subscribers of telecom companies are largely similar in their profile. The table below may help media planners at Telecom companies to plan their advertising and pricing campaigns.

							Overall
Gender	Male	52	50	50	52	56	52
	Female	48	50	50	48	44	48
Age of Respondents (in Years)	18 to 34	61	61	62	59	50	54
	35 to 49	24	24	26	28	25	25
	50 & more	15	15	12	13	24	21
Household Income (Per Month)	Low (up to Rs.7,000)	8	2	6	2	5	11
	Lower Medium (Rs.7,000-15,000)	62	49	53	47	41	58
	Middle and above (Rs. 15,000+)	26	43	37	43	51	27
	No Response	4	6	4	8	3	4
Location	Rural	60	48	61	48	61	65
	Urban	40	52	39	52	39	35

Data Source: Gallup Pakistan

Find out for your business planning or just for fun! Who does better among **Young** and **Seniors**? Who does better in **Rural** and **Urban**? Who does better among **Low** and **High** Income groups? Apparently, there is no Gender Gap



Profile of Mobile Users : Overwhelmingly Rural!2

Mobile phone is increasingly becoming a major media of communication for most people in Pakistan. A rising number of Pakistanis claim that they use mobile phone to remain informed.

The most interesting aspect of this mobile revolution in Pakistan is the penetration of the phenomenon to the very grass root level. Mobile phone is a common and widely spread phenomenon in Pakistan. 65% of all Mobile phone users live in Rural areas contrary to popular perception that the phenomenon is Urban. Similarly 58% of Mobile Users earn between 7,000 Rs. to 15,000 Rs. In short mobile phone users are common Pakistanis. This information is useful for advertising campaigns for Telecom companies.

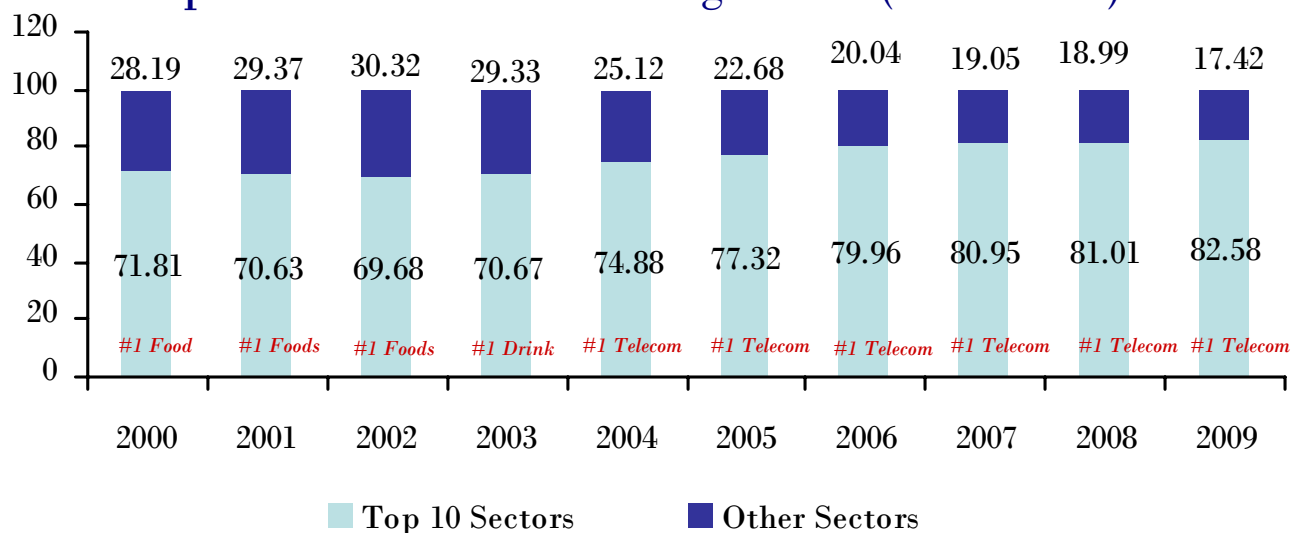
If overwhelming majority of Telecom clients are living in Rural areas, perhaps ad campaigns should be run on both Cable Channels (thus covering Urban clients) as well as on Terrestrial channels like PTV and ATV (thus covering Rural clients).

An analysis by Advertising Expenditure Monitoring Team shows that Telecom Advertising Budgets fail to account for the above Rural reality of Mobile Phone.

Share of Top 10 sectors over 2000-2010: Telecom strikes the Industry with a surprise

Gallup estimates over the past 10 years show an interesting shift in TV advertising in the country. Since 2003 Telecom has taken over Food Category as the Number 1 Sector with highest volume (seconds) of advertisements. Perhaps telecom struck the advertising industry by a surprise as no one in early 2000 could have projected that telecom sector would become such a dominant player. Of interest is rising power of Top Ten Sectors. **Top Ten Sectors had around 70 percent share of TV advertising**, the share has risen to 82 % in 2009. The figure underlines the need for advertising industry to bring those sectors who traditionally do not advertise into its fold. It would be an interesting food for thought to discuss which areas should be targeted for this end?

Top Ten Sectors Advertising on TV (2000-2010)



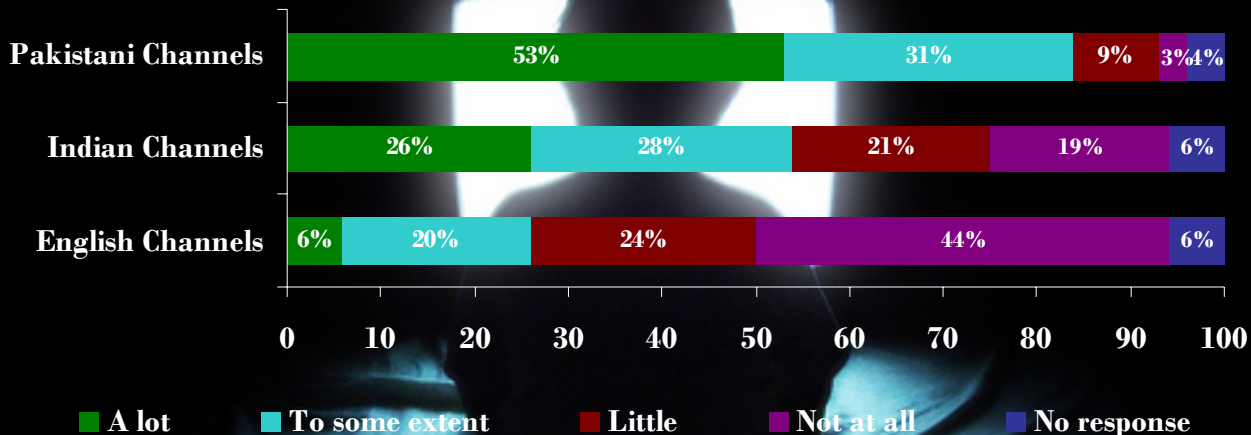
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Showing Of Indian Channels On Cable TV Is Sharply Contested: Nearly Half Support And Half Oppose: GILANI POLL

A detailed study of the data revealed that comparatively more ruralites (46%) were against cable television showing Indian channels than their urban counterparts (36%). The survey also revealed that relatively more men (45%) than women (39%) were against this practice.

“To what extent are the following television channels watched in your household?”



CONSPIRACY TO WARD OFF POLITICAL AGITATION?

In another follow-up question, a nationally representative sample of men and women from across the country were asked the following question: “Some people believe that Indian channels are being shown on cable channels to keep public aloof of the national news whereas others say that they are being shown on public demand. What is your opinion?” Majority (51%) believed that Indian channels are being shown on public demand as opposed to 26% who were of the opinion that it was to distract the public. A considerable 23% gave no response.

For details and other relevant research material on media, please visit our Website or contact the Cyberletter Team.

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A year to thank,
 share and reinvent
 Gallup & Gilani: 1980-2011



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