

JAN - DEC 2013

**GALLUP PAKISTAN**

**MEDIA CYBERLETTER**



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Dear Colleagues,

It gives me pleasure to introduce to you the Gallup Pakistan TV Ratings Analysis 2013.

Keeping its tradition of more than 20 years, Gallup has compiled all relevant information that a media professional needs to understand the overall media landscape in the country in one document based on Gallup TV Ratings Service Data.

The Gallup TV Ratings Service is the only National TV Ratings Service in Pakistan with more than **5500 men and women** spread across all **4 provinces** and covering **urban and rural areas**. As compared to alternative TAM Solutions, Gallup Pakistan's service is statistically more accurate and has far smaller sampling errors and design effects.

The Cyberletters of Gallup, with their new dynamic look, are part of the re-engineering and overhaul exercise at Media Research Department in specific and Gallup brand name overall.

Do you have any views or feedback on the content of the Cyberletter? Drop us a line or a call.

**Nihan Rafique**

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**Jawaid Muhammad Salik**, Executive Director,

Media Research Division, Gallup Pakistan



# BROADCASTING ENVIRONMENT - BASIC FACTS

## Total Household

26.5  
Million



## Total Individuals

180  
Million

## Total TV Household

21  
Million



## Total Individuals

124  
Million

## Total Cable Penetration

11.5  
Million



## Total Individuals

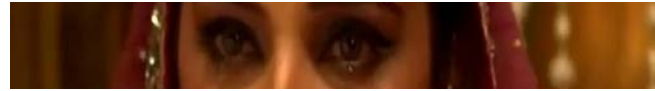
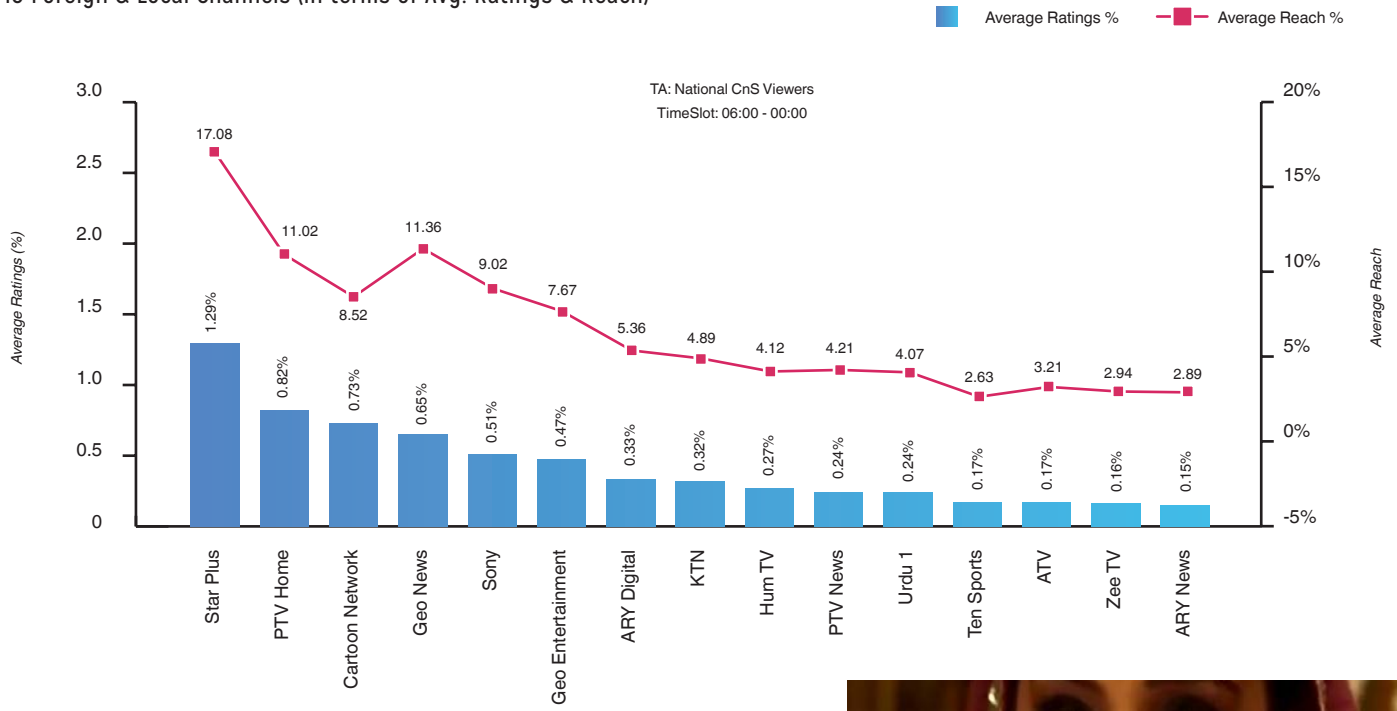
68.2  
Million

### Total Number of Local Channels: 88

News	Entertainment	Sports	Children	Music
AAJ News	A Plus	Geo Super	Cartoon Network	8XM
ABB Tak	ARY Digital	PTV Sports	Nickelodeon	ARY Music
AJK TV	ATV	Ten Sports		G Ka Boom
ARY News	Express Entertainment			Jalwa
Business Plus	Geo Kahani	<b>Food</b>		K2
Capital TV	Geo Entertainment	ARY Zauq		Oxygene
Channel 5	Hum TV	Masala	<b>Movies</b>	Play
City 42	Indus Vision	Zaiqa	Film World	
Dawn News	Koh-e-Noor		Filmax	<b>Real Estate</b>
Dunya TV	Light Asia	<b>Regional</b>	Filmazia	Value TV
Express News	PTV Global	Apna TV	HBO	
Geo Tez	PTV Home	AVT Khyber	Silver Screen	
Geo News	PTV National	Awaz	Starlite	
Indus News	TV One	Dharti		
Jaag (CNBC Pakistan)	Urdu 1	Kashish		
Khyber News	nVibe	Kook	<b>Educational</b>	
KTN News		KTN	Health TV	
Metro One		Mehran	Virtual TV	
News One		PTV Bolan		
PTV News		Punjab TV		
PTV World (English)		Raavi		
Royal News		Rohi TV		
Samaa TV	<b>Religious</b>	Sabz Baat		
Sindh News	ARY QTV	Sindh TV	<b>Agricultural</b>	
Vsh News	Haq TV	Urooj	Sohni Dharti	
Waqt TV	Madni	Waseb TV		

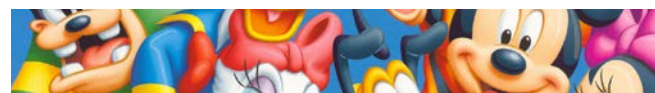
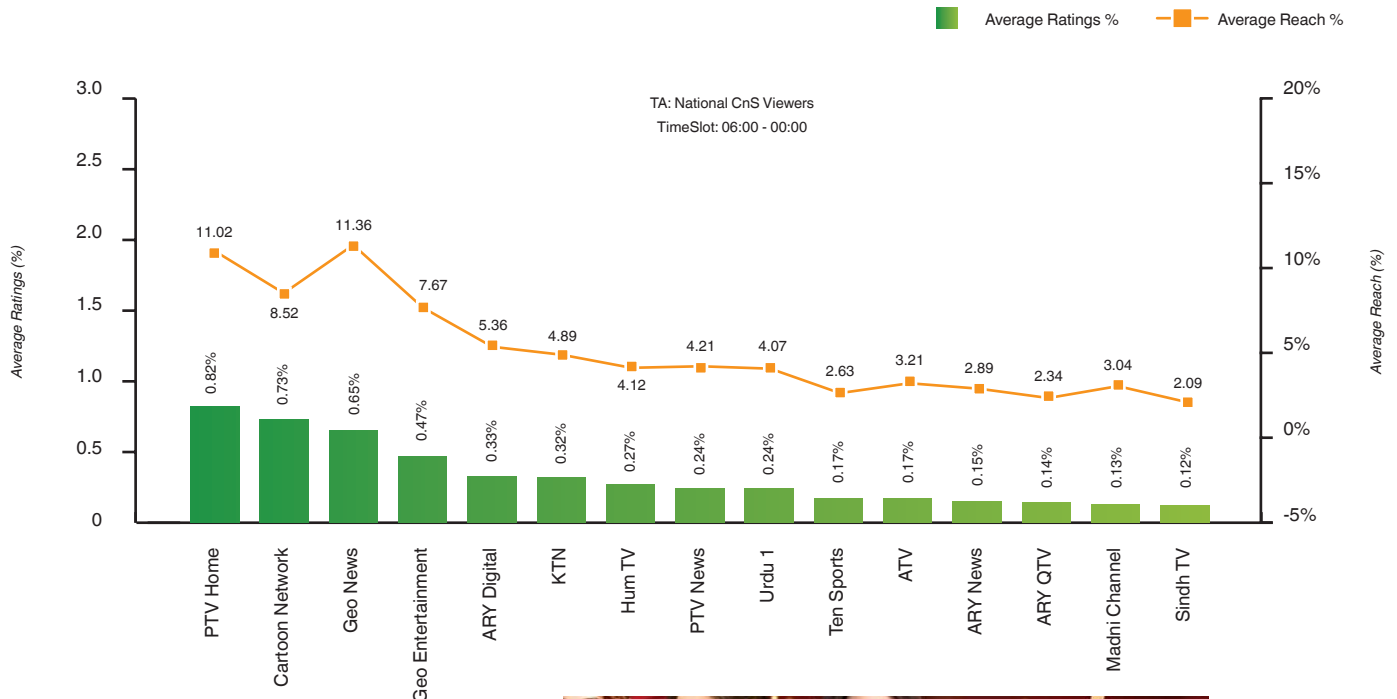
# TOP 15 CHANNELS DURING 2013

Top 15 Foreign & Local Channels (in terms of Avg. Ratings & Reach)



# TOP 15 CHANNELS DURING 2013

Top 15 Local Channels (in terms of Avg. Ratings & Reach)



# TOP RANKER

Top 15 Best Performing Programs of 2013

Target Audience: All age 4+ Cable & Satellite National Viewers

Rank	Channel	Date	Week Day	Start Time	Program	Duration (min)	Rating (%)	Rating (000)	Share (%)
1	Hum TV	07.03.2013	Wednesday	19:23	Ek Pagal Si Karki	34	11.05	7,490	36.3
2	ATV	07.02.2013	Tuesday	19:18	Mangoes	37	10.97	7,435	39.7
2	Hum TV	07.03.2013	Wednesday	19:00	Utran	22	10.82	7,332	37.4
4	Geo Entertainment	07.06.2013	Saturday	20:00	Dil Mohallay ki Haweli	59	9.13	6,191	23.7
5	Geo Entertainment	10.15.2013	Tuesday	13:29	Qubool Hai	30	7.39	5,068	46.0
6	ARY Digital	09.24.2013	Tuesday	19:28	Matam	30	7.21	4,806	24.3
7	Geo News	12.10.2013	Tuesday	20:04	Capital Talk	49	6.89	4,867	21.3
8	Geo News	09.07.2013	Saturday	20:04	Aapas Ki Baat	52	6.16	4,510	21.2
9	Geo Entertainment	10.15.2013	Tuesday	12:59	Jalebia	29	6.10	4,188	39.3
10	KTN	03.07.2013	Thursday	19:10	Pahnja Parawa	45	5.81	4,048	20.3
11	Ten Sports	09.05.2013	Thursday	20:37	Straight Drive	18	5.56	4,066	18.8
12	Geo News	11.19.2013	Tuesday	07:59	Geo News	56	5.54	4,186	49.1
13	TV One	09.04.2013	Wednesday	20:00	Tamanna	57	5.52	4,040	16.9
14	Geo Entertainment	01.10.2013	Thursday	21:30	Mil K B Hum Na Miley	30	5.51	3,999	25.6
15	KTN	11.23.2013	Saturday	16:09	Ghareeb Abad Ji Azra Ayen Shammi	35	5.42	4,091	28.0

## Methodology:

Period: January 1st - December 31st 2013

Ranking based on number of viewers (1st criteria) and average market share (2nd criteria)

Minimum Duration: 15 minutes

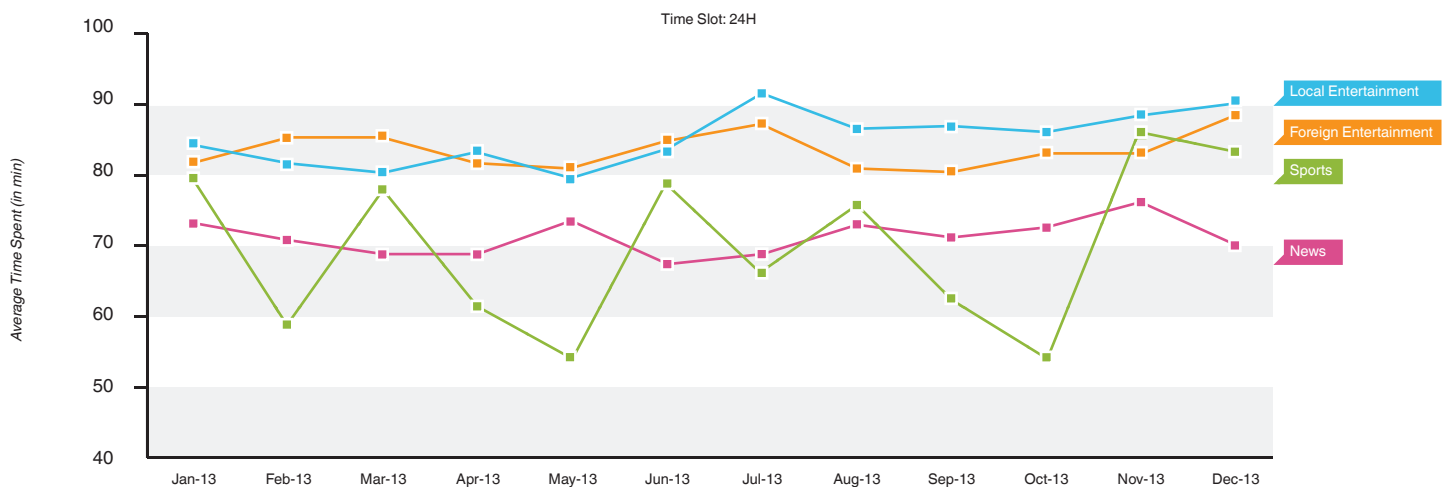
Children's Program and PTV Home broadcasts are not included.

Top ranker based on best episode (multiple occurrences of the same program are excluded)

# MONTH-WISE GENRE-WISE VIEWERSHIP REVIEW

Target Audience: National, CnS Viewers

Function: Average Time Spent per Tune-in Viewer



Foreign Entertainment includes Star Plus, Sony, Colour, Set Max, Star Gold, Star World, Zee TV, Zee Smile

Local Entertainment includes A+, ARY Digital, ATV, AXN, Dharti TV, Express Ent., Geo Ent., Hum, Indus Vision, PTV Home, TV One, Vibe

News includes Aaj, ARY News, Express News, Geo News, PTV News, Indus News, Khyber News, KTN News, Samaa, Sindh News, Waqt News

Sports includes Geo Super, PTV Sports, Ten Sports, ESPN, Star Sports, Super Sports

# GENRE-WISE MARKET SHARE

Target Audience: All Viewers

Time Slot: 24 Hours

Period: January - December 2013

Target Audience: All Viewers

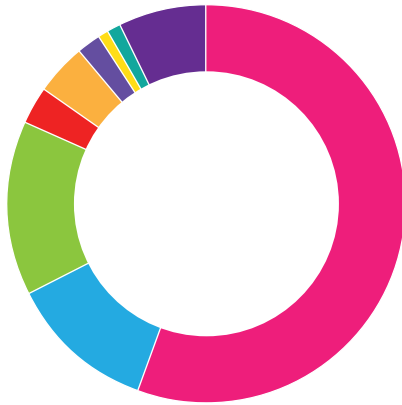
Time Slot: 24 Hours

Period: January - December 2013

Target Audience: All Viewers

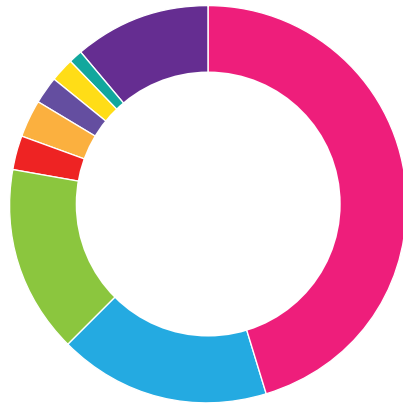
Time Slot: 24 Hours

Period: January - December 2013



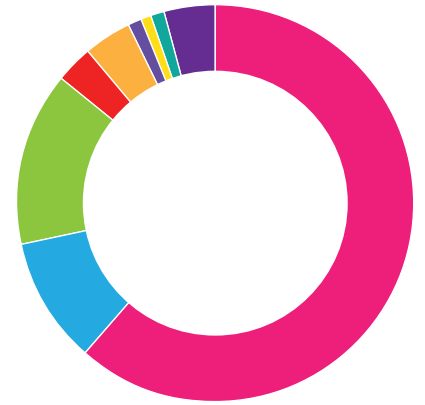
**REGION: NATIONAL**

Local Entertainment	55%
Foreign Entertainment	12%
News	14%
Regional	3.3%
Children	3.6%
Sports	1.6%
Religious	1.4%
Movies	0.8%
Music	0.5%
Cooking	0.3%
Education	0.02%
Others	6.8%



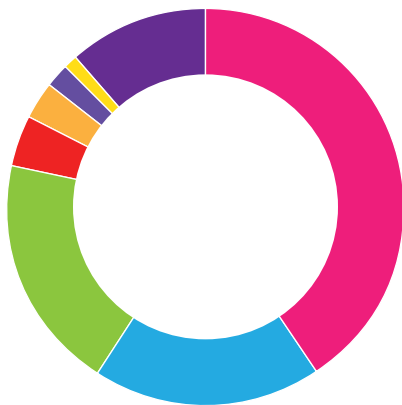
**REGION: URBAN**

Local Entertainment	45%
Foreign Entertainment	17%
News	15%
Regional	03%
Children	03%
Sports	02%
Religious	02%
Movies	02%
Music	01%
Cooking	0.6%
Education	0.02%
Others	11%



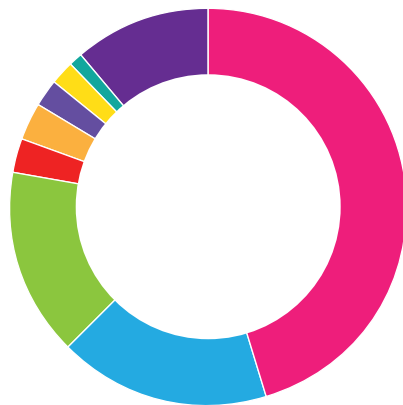
**REGION: RURAL**

Local Entertainment	61%
Foreign Entertainment	10%
News	14%
Regional	3.4%
Children	04%
Sports	1.2%
Religious	1.1%
Movies	0.7%
Music	0.5%
Cooking	0.14%
Education	0.02%
Others	4.4%



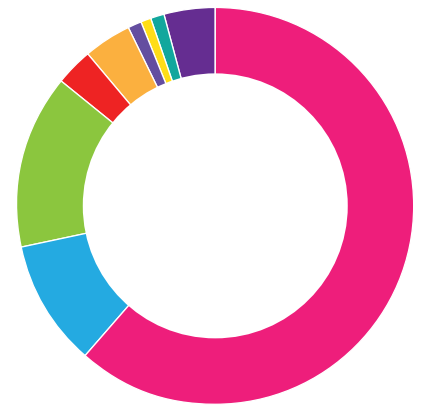
**REGION: METROS**

Local Entertainment	40%
Foreign Entertainment	18%
News	19%
Regional	0.3%
Children	04%
Sports	03%
Religious	02%
Movies	01%
Music	01%
Cooking	01%
Education	0.03%
Others	11%



**REGION: LARGE CITIES**

Local Entertainment	31%
Foreign Entertainment	18%
News	17%
Regional	3.5%
Children	1.8%
Sports	3.5%
Religious	2.3%
Movies	1.5%
Music	0.7%
Cooking	0.6%
Education	0.04%
Others	19%



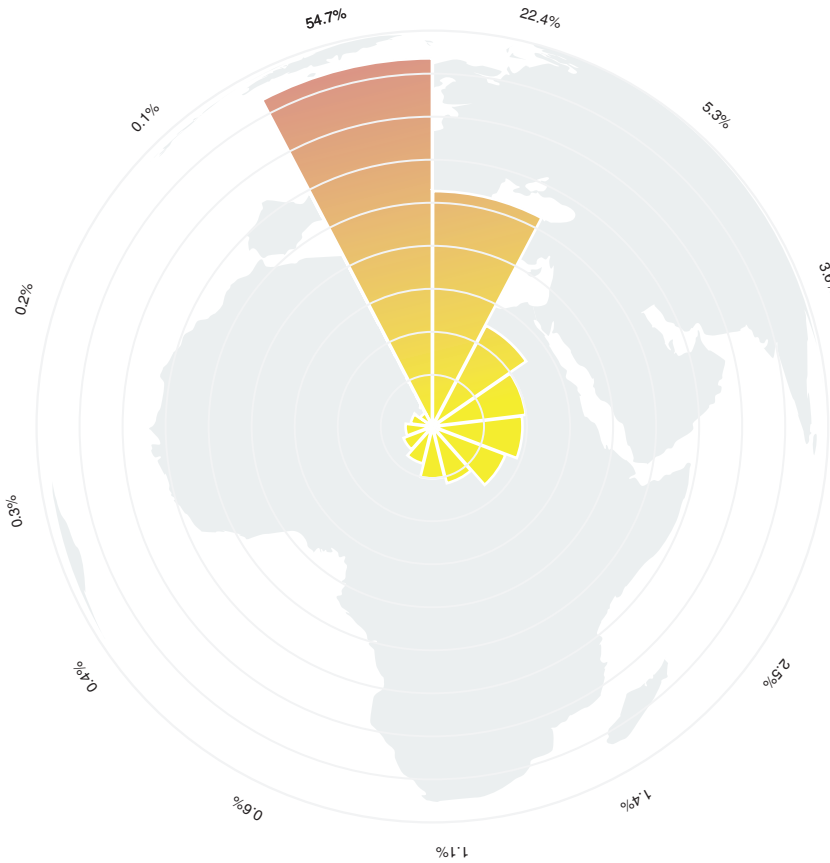
**REGION: SMALL CITIES & TOWNS**

Local Entertainment	54%
Foreign Entertainment	14%
News	10%
Regional	5.5%
Children	2.8%
Sports	1.8%
Religious	02%
Movies	1.1%
Music	0.5%
Cooking	0.26%
Education	0.005%
Others	8.36%

# LOCAL CHANNELS SHARE (%)

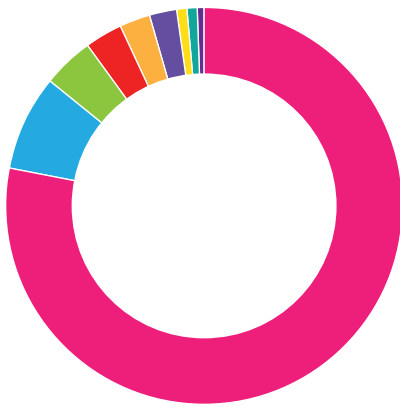
Time Slot: 24 Hours

Period: January - December 2013



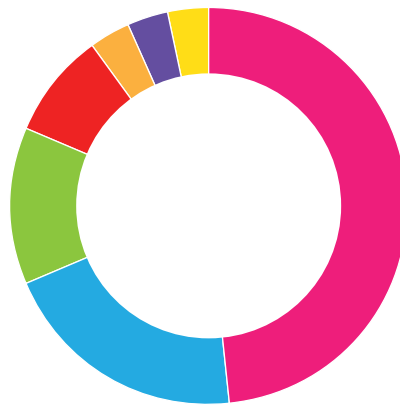
**CATEGORY: LOCAL NEWS**

PTV News	54.7%
Geo News	22.4%
ARY News	5.3%
Express News	3.6%
Samaa TV	3.3%
AAJ News	2.5%
KTN News	1.4%
Metro One	1.1%
Dunya News	0.8%
Indus News	0.7%
Sindh News	0.6%
Din News	0.5%
Geo Tez	0.4%
Dawn News	0.4%
Dhoom TV	0.3%
Business Plus	0.3%
Channel 5	0.2%
CNBC Pakistan	0.2%
Waqt TV	0.1%
Royal News	0.1%
City 42	0.1%
Capital TV	0.1%
Khyber News	0.1%
News One	0.1%
VSH News	0.1%
AJK V	0.1%
PTV World (English)	0.1%
AAB Tak	0.1%



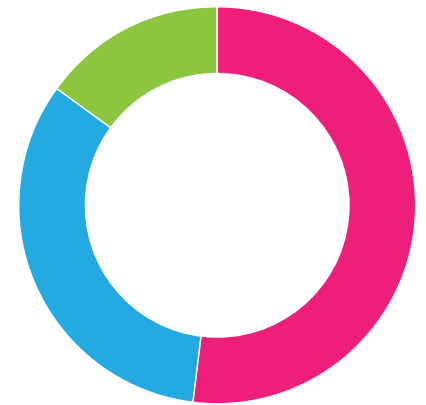
**LOCAL ENTERTAINMENT CHANNELS**

PTV Home	76.8%
ATV	7.7%
Geo Entertainment	4.2%
ARY Digital	3.0%
Hum TV	2.4%
Urdu 1	2.1%
A Plus	1.0%
PTV National	0.7%
TV One	0.6%
Geo Kahani	0.5%
Express Entertainment	0.4%
Indus Vision	0.4%
PTV Global	0.1%
Kohe Noor	0.1%
Light Asia	0.1%
Vibe TV	0.1%



**LOCAL MUSIC CHANNELS**

ARY Music	48.5%
8XM	20.2%
Jalwa	12.8%
Oxygene	8.5%
K2	3.5%
Channel G	3.2%
Play TV	3.2%



**LOCAL SPORTS CHANNELS**

Ten Sports	52.2%
PTV Sports	32.9%
Geo Super	14.9%



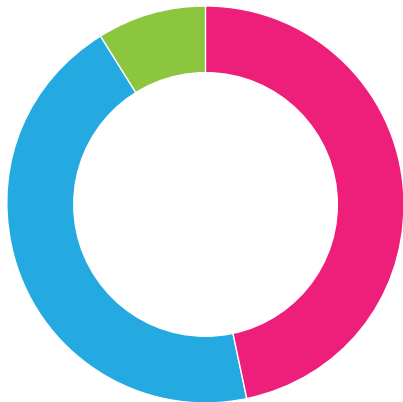
# LOCAL CHANNELS SHARE (%)

Target Audience: All National Viewers

Period: January - December 2013

Time Slot: 24 Hours

Based on Average Ratings



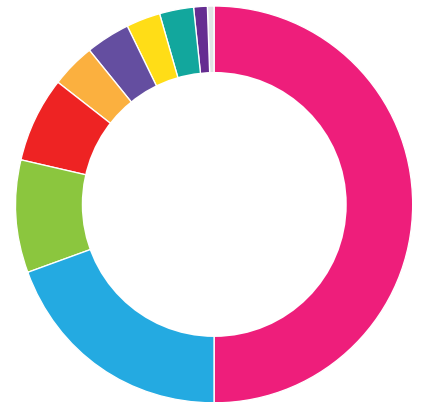
LOCAL RELIGIOUS CHANNELS

ARY QTV	46.8%
Madni Channel	44.5%
Haq TV	8.7%



LOCAL MOVIE CHANNELS

HBO	37.0%
Film World	35.1%
Filmazia	20.3%
Silver Screen	3.8%
Filmax	2.2%
Star Lite	1.5%



LOCAL REGIONAL CHANNELS

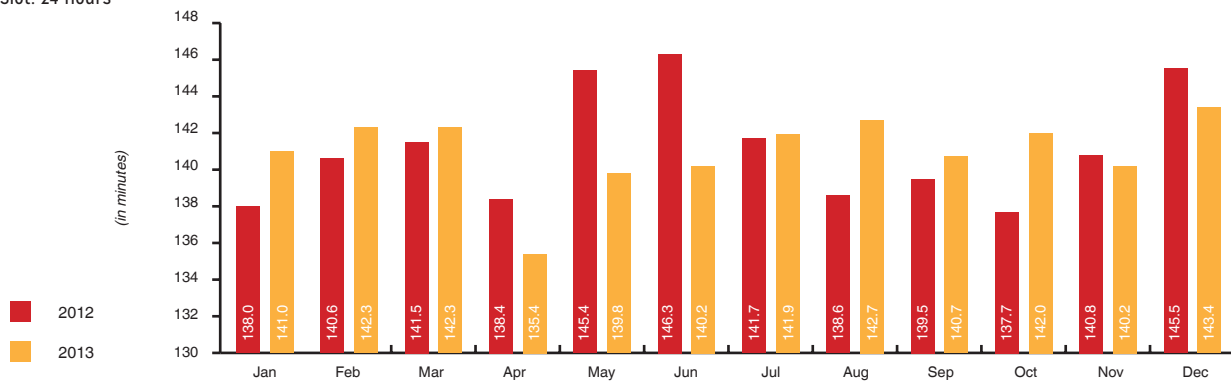
KTN	47.6%
Sindh TV	18.4%
Kashish TV	8.7%
Mehran TV	6.4%
Waseeb	3.6%
Apna Channel	3.2%
AVT Khyber	2.8%
PTV Bolan	2.6%
Awaz	0.9%
Dharti TV	0.5%
Kook	0.4%
Arooj	0.3%
Raavi	0.2%
Rohi TV	0.2%
Punjab TV	0.1%
Sabzbaat	0.1%



## AVERAGE TIME SPENT (2012 VS 2013)

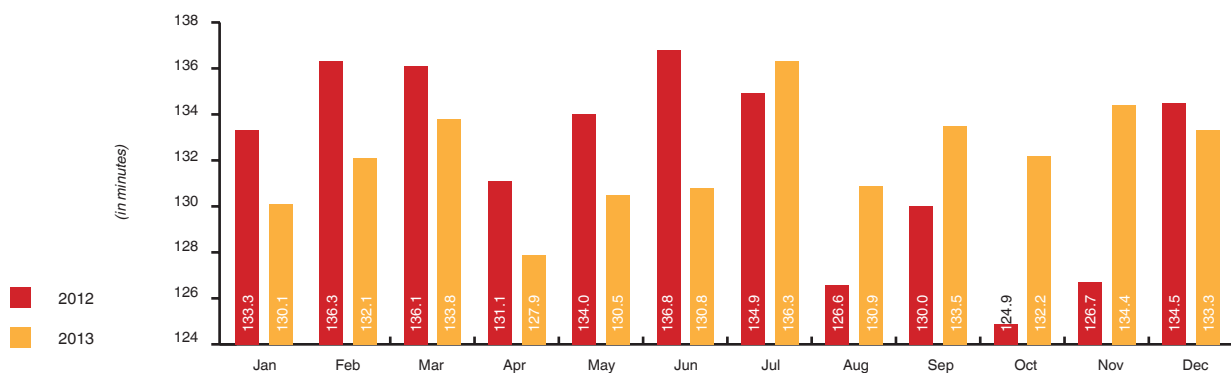
Target Audience: All National Viewers

Time Slot: 24 Hours



Target Audience: All Cable & Satellite Viewers

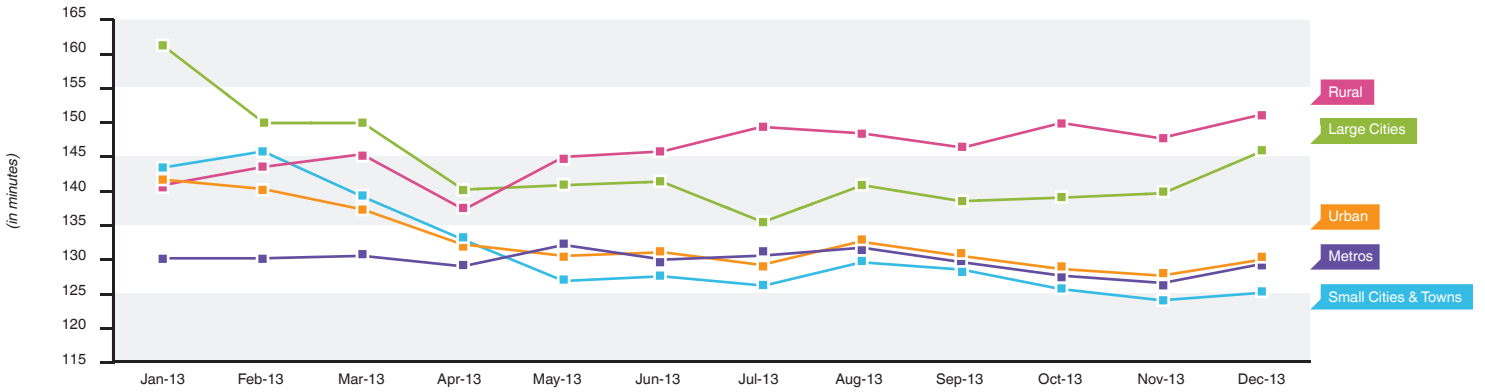
Time Slot: 24 Hours



# DAILY AVERAGE TIME SPENT PER VIEWER

Geographical Segment-wise

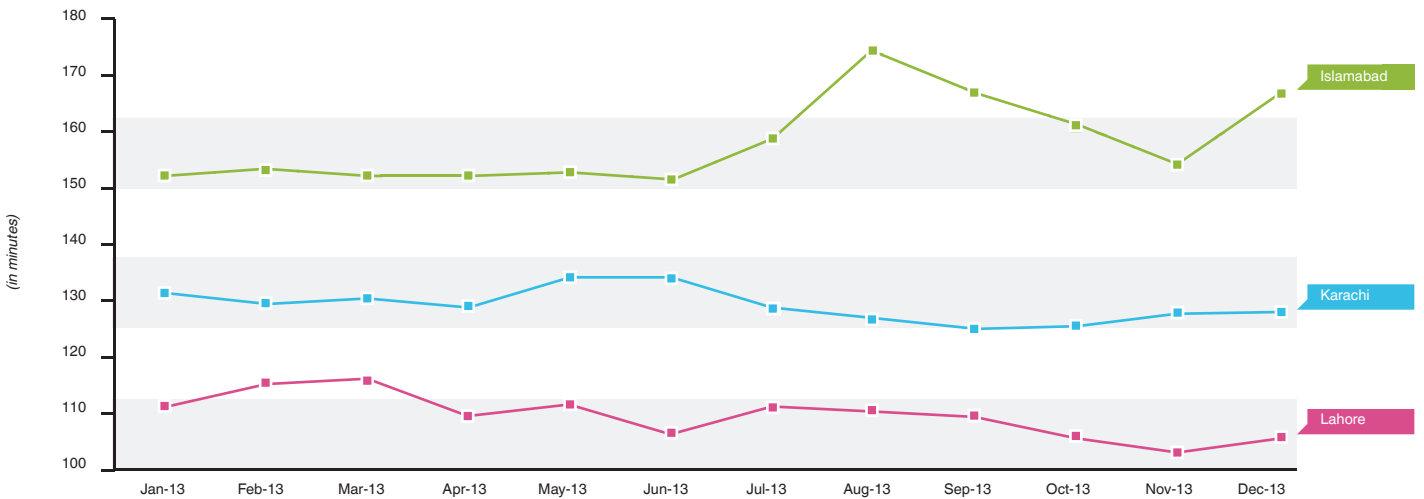
Target Audience: All Viewers



# DAILY AVERAGE TIME SPENT PER VIEWER

Geographical Segment-wise

Target Audience: All Viewers

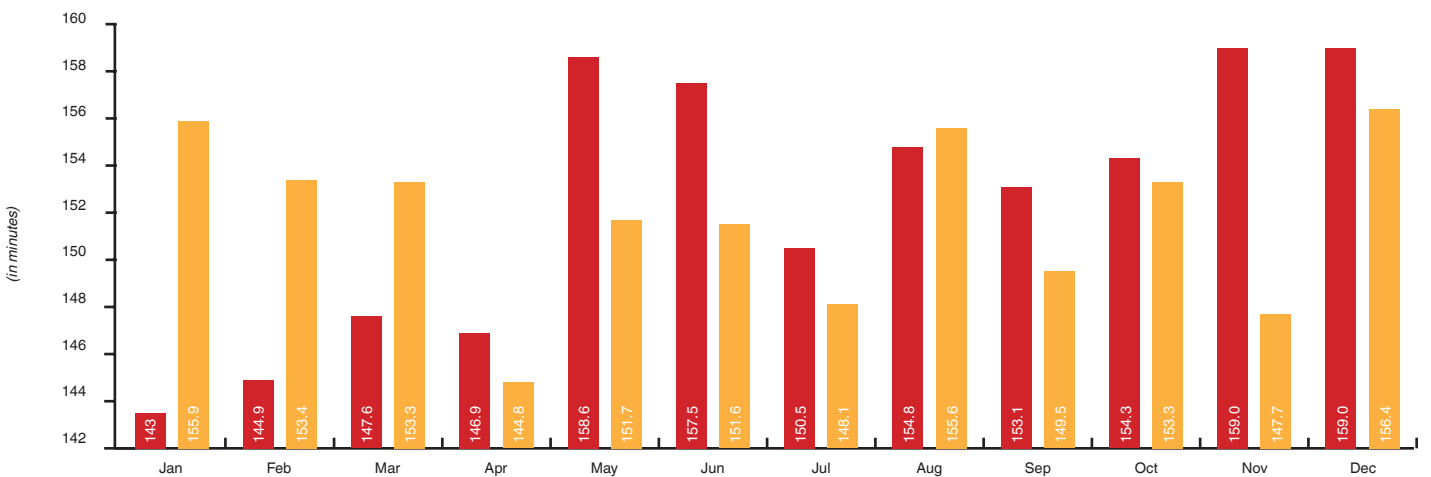


# AVERAGE TIME SPENT (2012 VS 2013)

Target Audience: Non CnS Viewers

Time Slot: 24 Hours

2012 2013



# Gallup TV Ratings Services

the only national TV ratings services in Pakistan



We know the Media Landscape in Pakistan,  
**inside and out**, better than anyone!



Gallup Pakistan Media Editorial Team

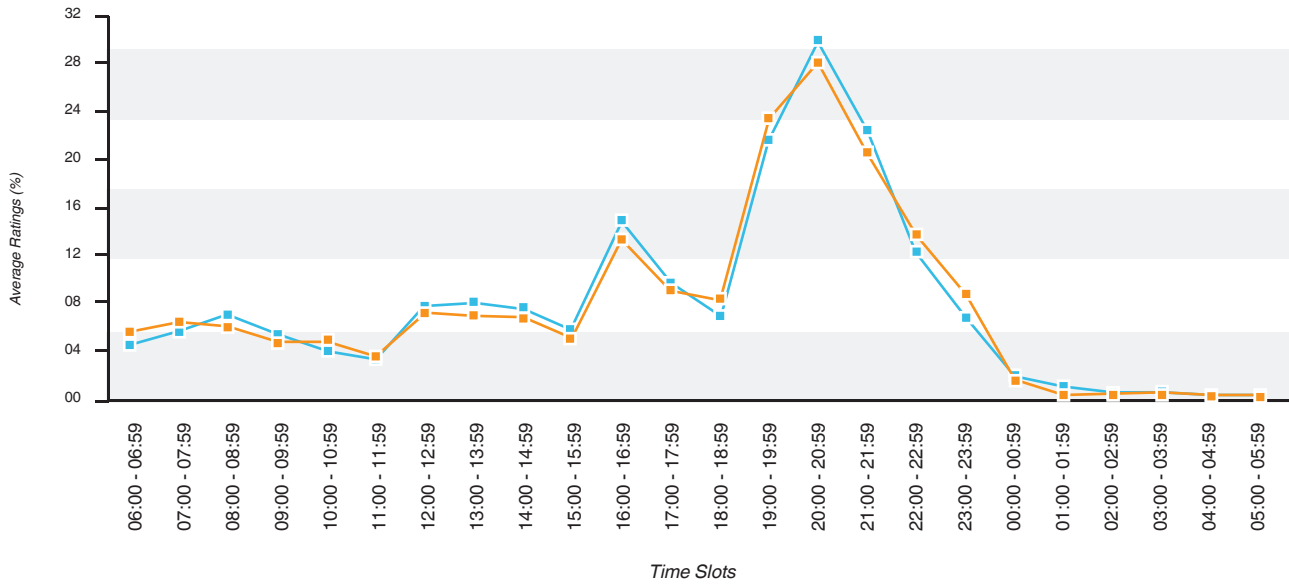
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**Web:** [www.gallup.com.pk](http://www.gallup.com.pk)

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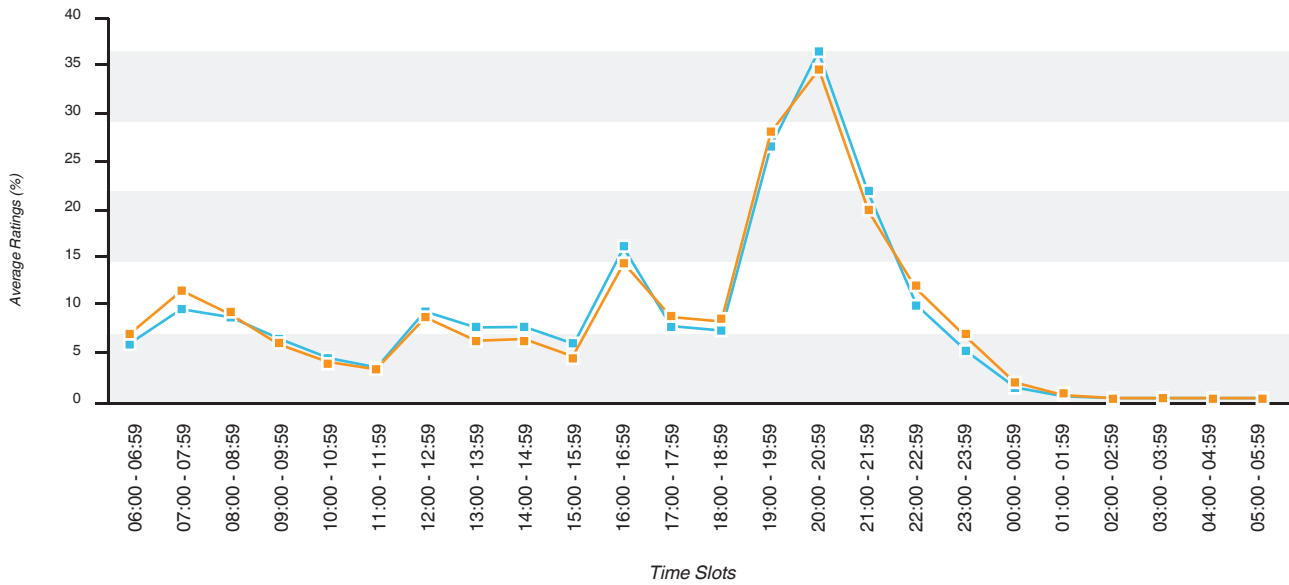
# HOURLY RATINGS (2012 VS 2013)

Target Audience: National CnS Viewers



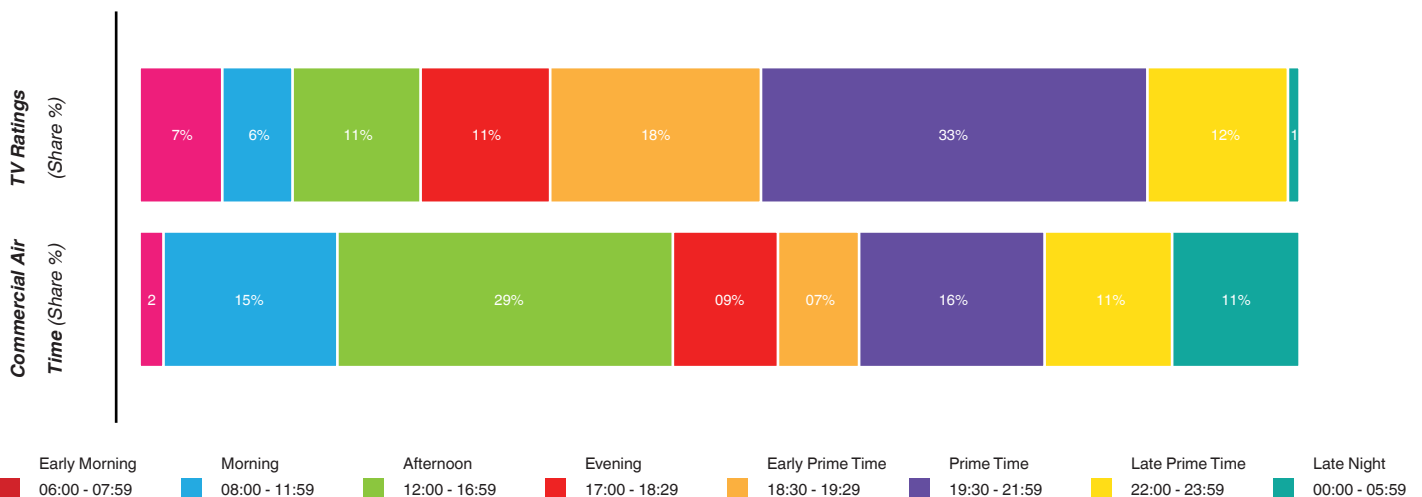
# HOURLY RATINGS (2012 VS 2013)

Target Audience: All National Viewers



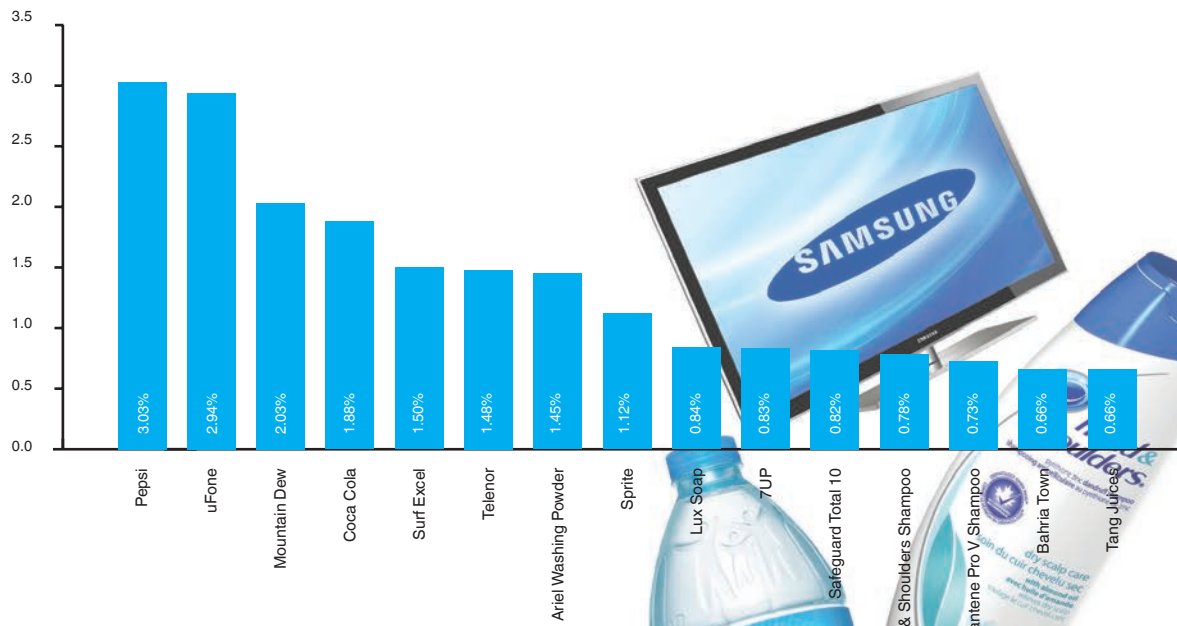
# TIMESLOT-WISE SHARE: VIEWERSHIP VS CAT

Target Audience: National CnS Viewers



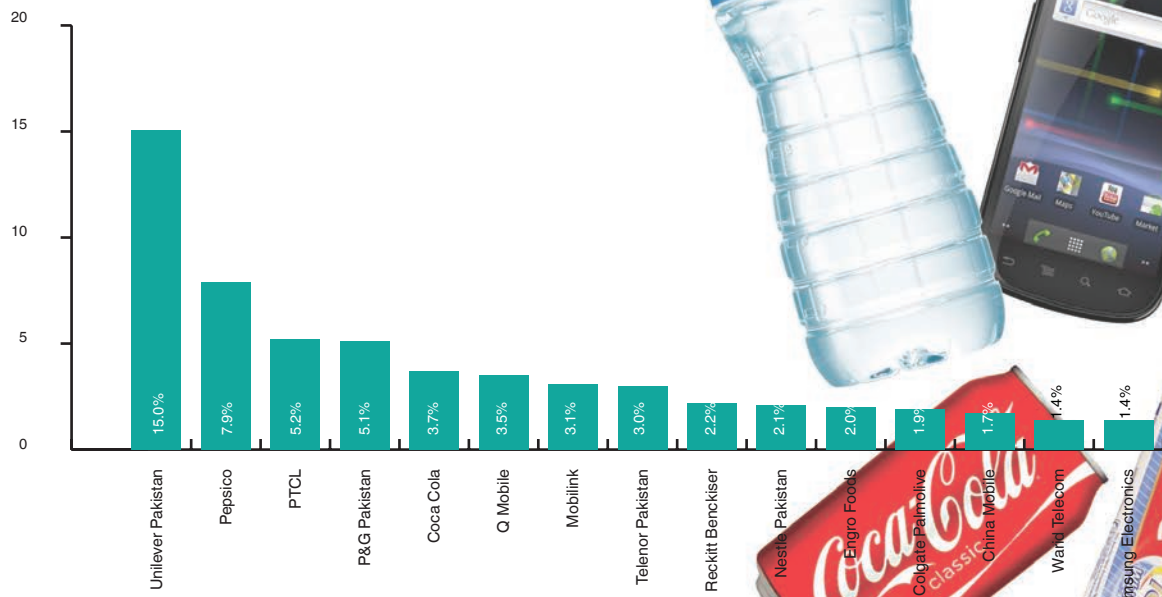
# TOP 15 BRANDS OF 2013 (MEDIA: TV)

In terms of Air Time



# TOP 15 ADVERTISERS OF 2013 (MEDIA: TV)

In terms of Air Time



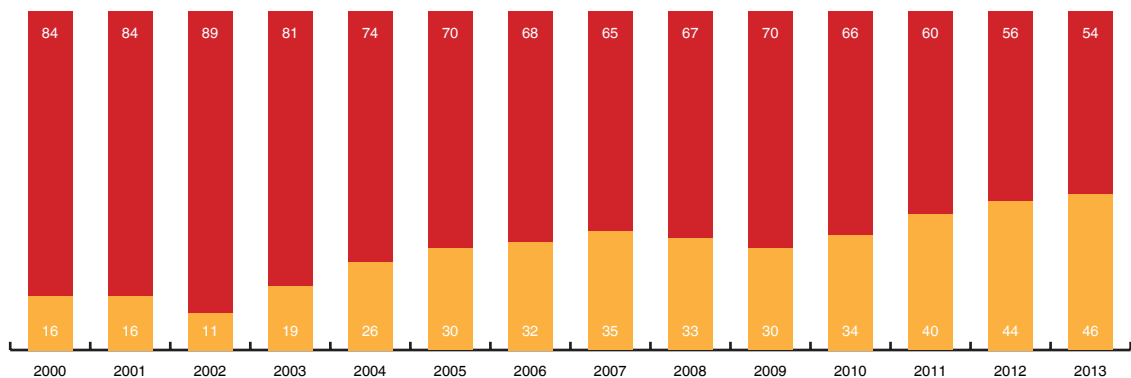
# TERRESTRIAL VS CABLE & SATELLITE CHANNELS SHARE (%)

Region: National

Target Audience: All Viewers

■ All Terrestrial (Combined)

■ Cable & Satellite (Combined)



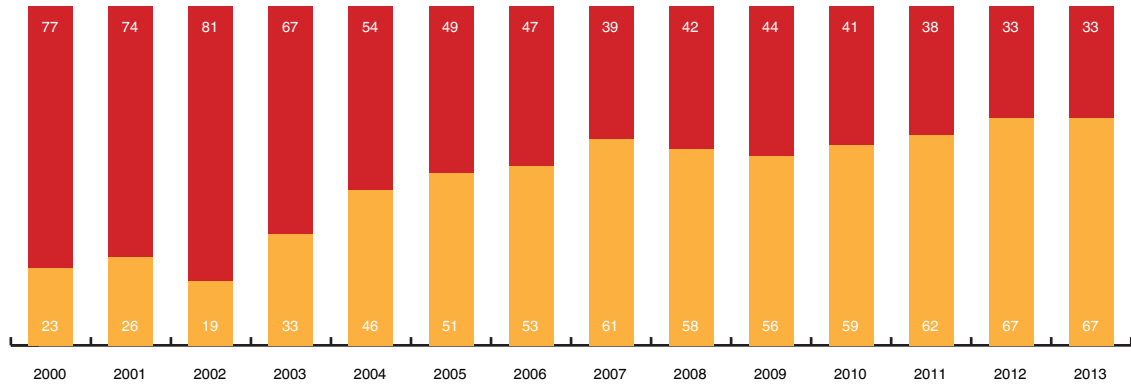
## TERRESTRIAL VS CABLE & SATELLITE CHANNELS SHARE (%)

Region: Urban

Target Audience: All Viewers

All Terrestrial (Combined)

Cable & Satellite (Combined)



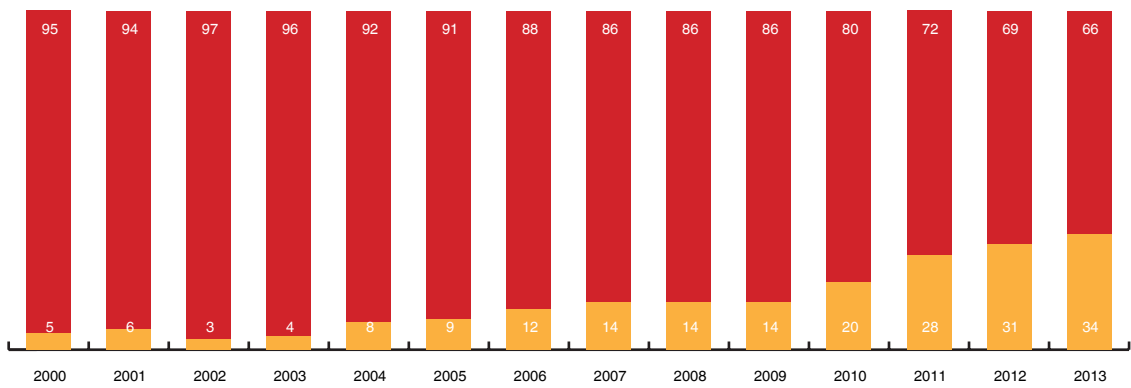
## TERRESTRIAL VS CABLE & SATELLITE CHANNELS SHARE (%)

Region: Rural

Target Audience: All Viewers

All Terrestrial (Combined)

Cable & Satellite (Combined)



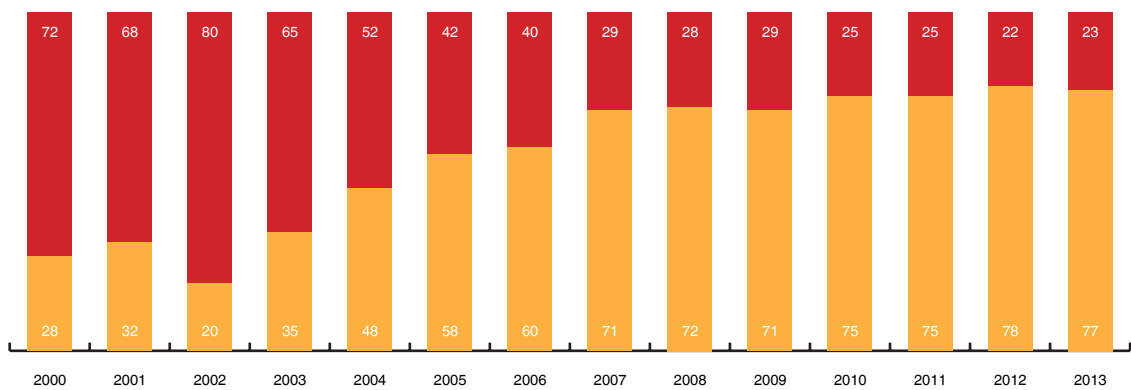
## TERRESTRIAL VS CABLE & SATELLITE CHANNELS SHARE (%)

Region: Metros

Target Audience: All Viewers

All Terrestrial (Combined)

Cable & Satellite (Combined)



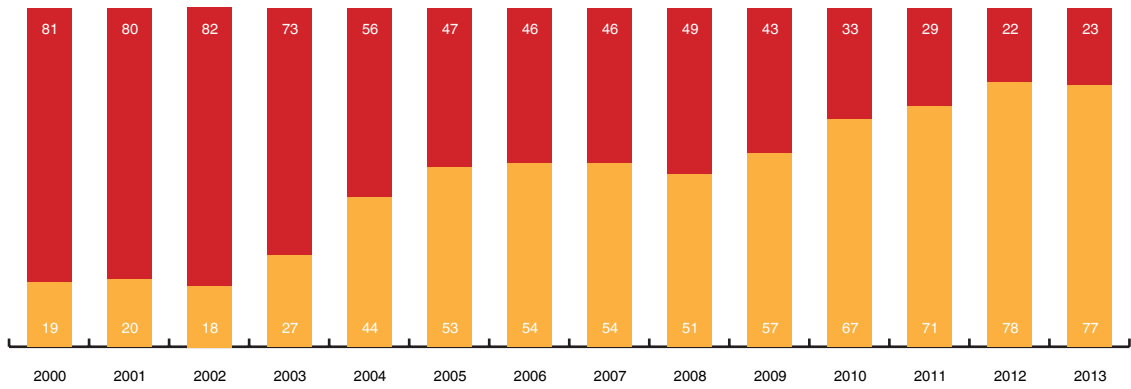
# TERRESTRIAL VS CABLE & SATELLITE CHANNELS SHARE (%)

Region: Large Cities

Target Audience: All Viewers

All Terrestrial (Combined)

Cable & Satellite (Combined)



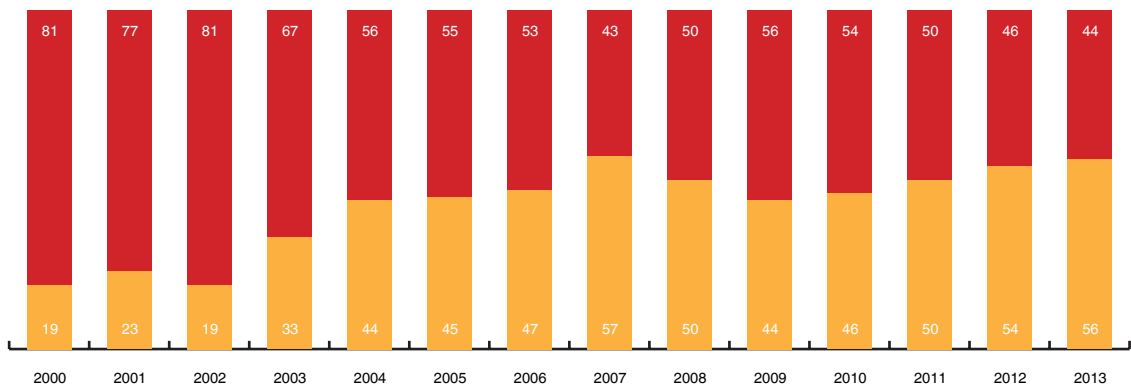
# TERRESTRIAL VS CABLE & SATELLITE CHANNELS SHARE (%)

Region: Small Cities & Towns

Target Audience: All Viewers

All Terrestrial (Combined)

Cable & Satellite (Combined)



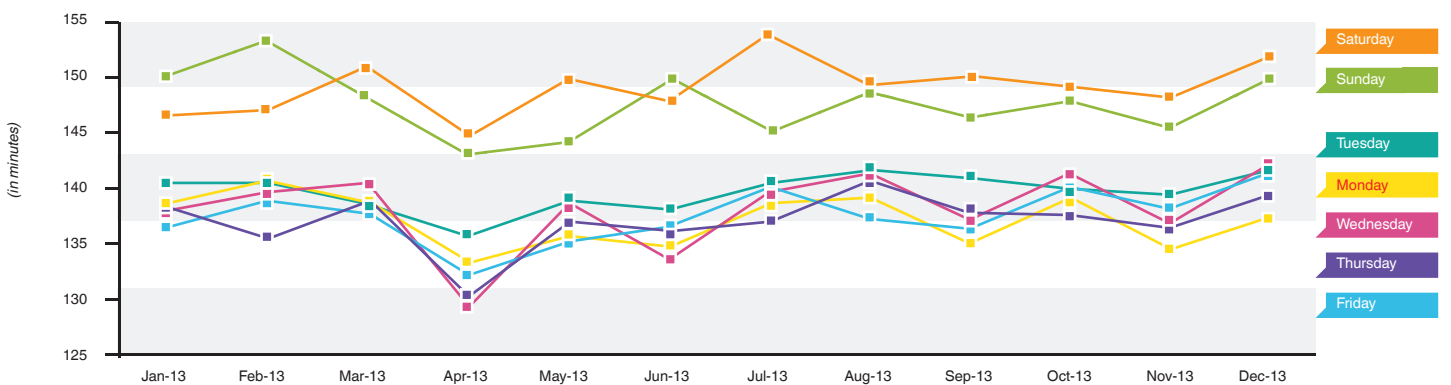
# AVERAGE TIME SPENT PER VIEWER

Region: National

Target Audience: All Viewers

Year 2013

Day Wise Comparison



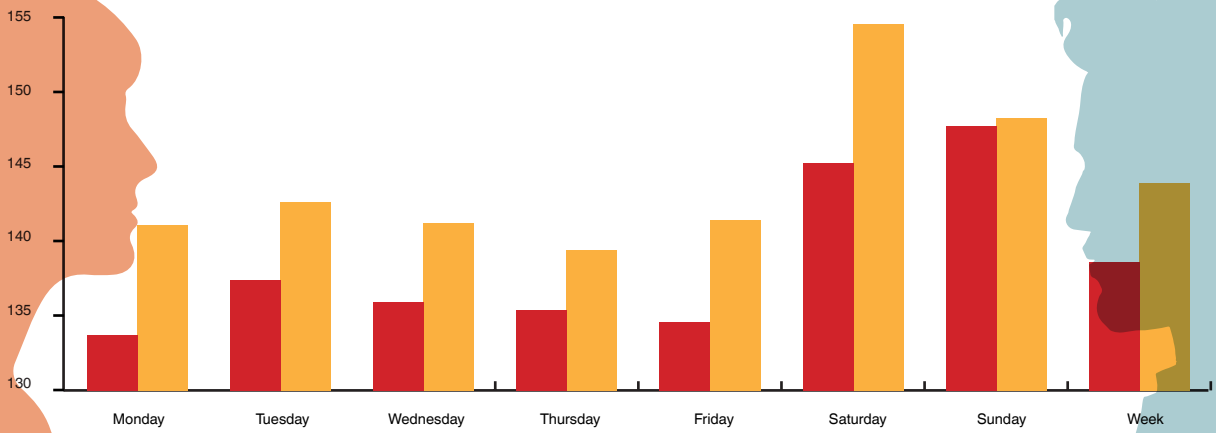
# MEN -VS- WOMEN (AVERAGE TIME SPEND PER VIEWER)

Year 2013

Target Audience: All National Viewers

Men Women

(in minutes)



# DAILY VIEWING TIME PER INDIVIDUAL - 2012 VS 2013

Data Source: Gallup Pakistan

Target Audience: All National Viewers



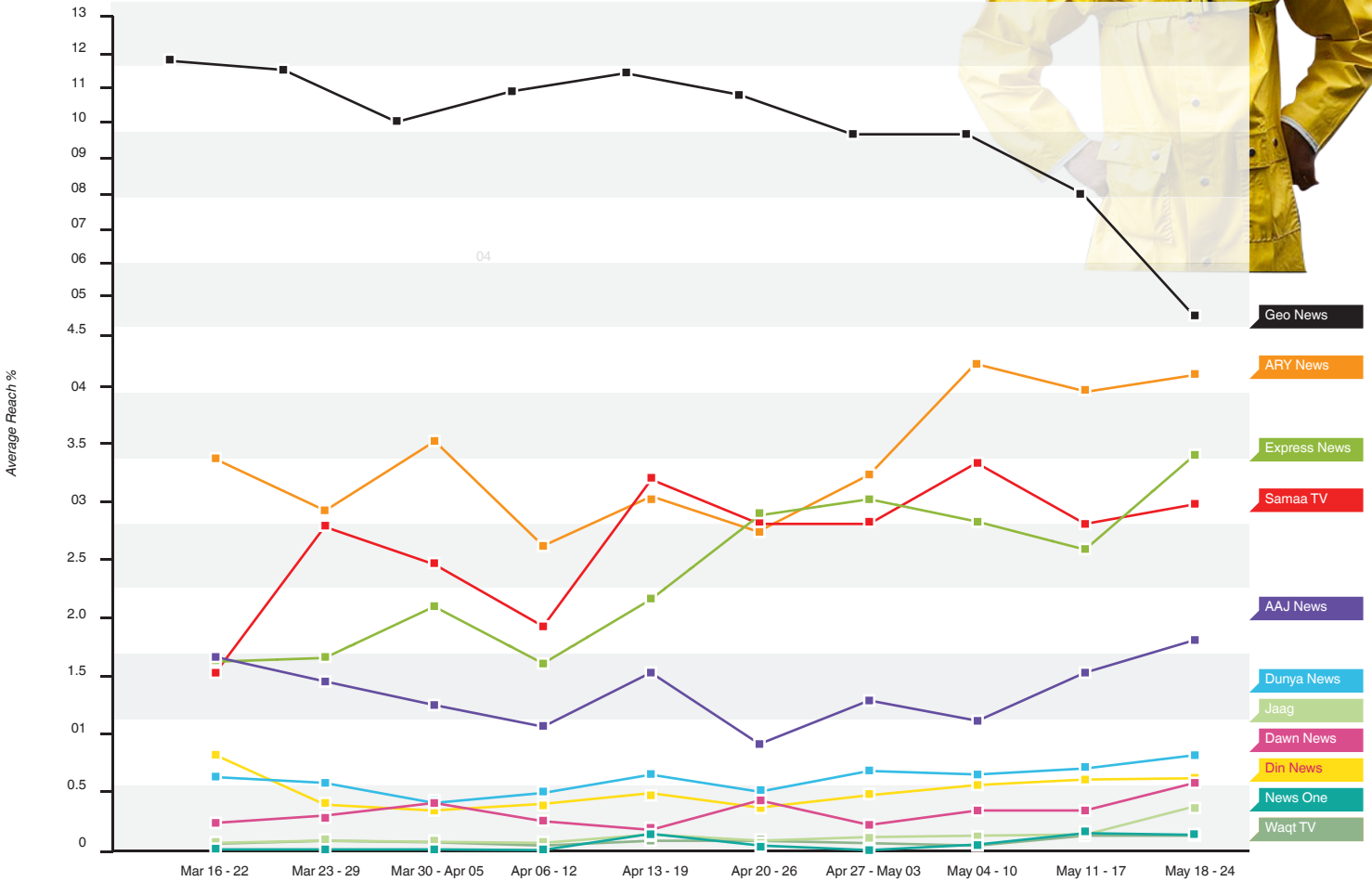
# EFFECT ON RATINGS

ON OTHER NEWS CHANNELS

DUE TO BAN ON

The ratings are of the period when Geo was un-officially taken of Cable Channels or its number sequence was changed. At the time of compilation of the report, new data was not available.

## GEO NEWS



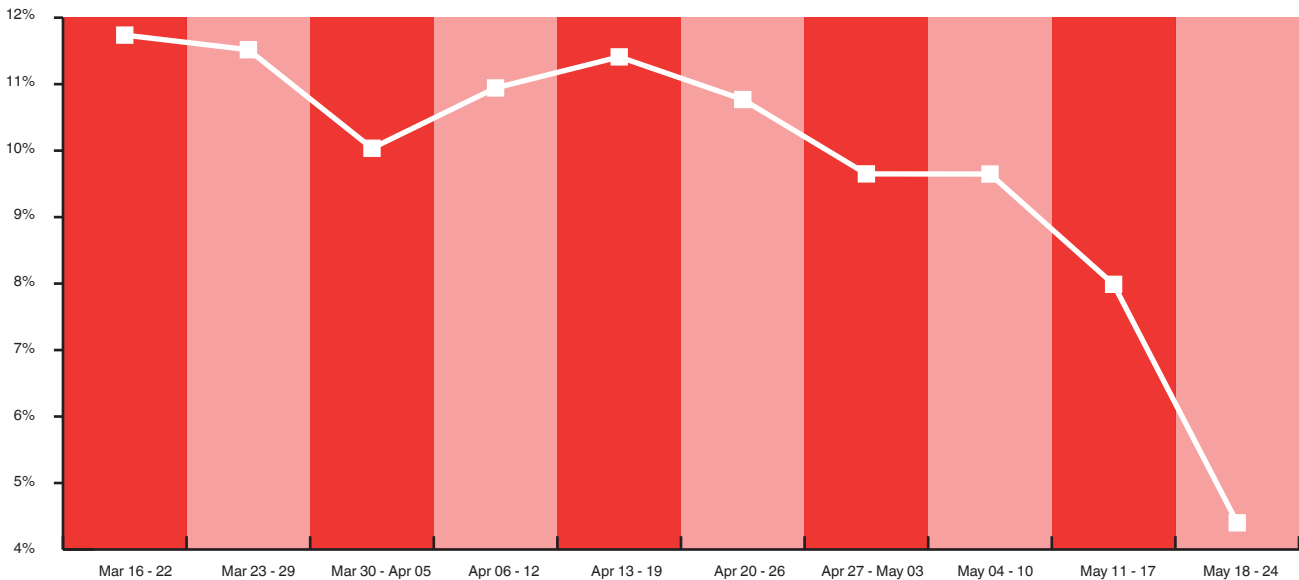
## VIEWERSHIP PATTERN

Period: Mar 16 - May 24, 2014

Target Audience: All National Cable & Satellite Viewers

Function: Average Reach %

### GEO NEWS



# YEARLY CUMULATIVE REACH - 2013

Target Audience: All age 4+ National Viewers

Period: Jan 01 - Dec 31, 2013

Channel Name	Yearly Cumulative Reach (%)	Monthly Average Cumulative Reach%
<b>TOTAL</b>	<b>99.947</b>	<b>99.728</b>
A Plus	15.577	6.696
AAJ News	31.291	10.745
Al Jazeera English	12.163	3.316
Apna Channel	12.940	3.122
ARY Digital	40.033	19.019
ARY Musik	22.110	7.513
ARY News	35.426	13.187
ARY Qtv	31.482	10.831
ARY Zauq	10.591	2.346
ATV	48.040	25.872
AVT Khyber	9.735	2.068
AXN	20.253	5.191
BBC World	25.131	5.120
Business Plus	8.871	1.975
Capital TV	3.661	0.521
Cartoon Network	34.670	14.637
Channel 5	5.757	1.638
Channel G	4.154	1.027
City 42	2.561	0.519
CNN	20.440	5.267
Dawn News	10.112	2.326
DHARTI TV	6.868	1.615
Din News	11.948	3.240
Dunya News	12.046	3.315
Express Entertainment	18.934	5.580
Express News	25.058	10.158
Fashion TV	4.756	0.832
Filmazia	17.800	4.447
GEO Entertainment	42.385	22.892
GEO Kahani	17.184	3.186
GEO News	58.741	30.513
GEO Super	17.433	5.001
GEO Tez	11.925	2.066
Haq TV	10.850	4.147

Channel Name	Yearly Cumulative Reach (%)	Monthly Average Cumulative Reach%
HBO	27.400	8.678
Hum TV	36.629	14.728
Indus News	16.850	4.321
Indus Vision	20.935	6.004
Jalwa	8.894	1.858
Kashish TV	9.571	5.239
Khyber News	2.497	0.348
Kook	5.432	1.056
KTN	30.951	14.059
KTN News	8.623	2.962
M TV	18.105	5.026
Masala TV	14.084	4.282
News One	4.193	0.514
Nickelodeon	14.260	2.220
Oxygene	12.873	1.925
PLAY TV	5.023	1.036
PTV Home	81.898	65.115
PTV National	21.476	6.679
PTV News	52.980	33.372
PTV Sports	33.841	10.744
Punjab TV	5.917	0.794
Rohi TV	5.763	1.101
Samaa TV	19.361	7.263
Silver Screen	12.358	1.352
Sindh News	7.827	2.960
Sindh TV	31.515	11.040
Sony	47.234	24.868
Star Plus	51.390	30.829
Ten Sports	32.402	13.334
TV One	25.644	7.913
Urdu 1	25.342	12.042
Vibe TV	2.872	0.753
Waqt TV	4.245	1.156
Waseb	7.476	3.376
AAG TV (Discontinued)	4.783	0.703
<b>OTHER</b>	<b>63.102</b>	<b>45.937</b>

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