

GALLUP PAKISTAN

MEDIA CYBERLETTER 2014



Dear Colleagues,

It gives me pleasure to introduce to you the Gallup Pakistan TV Ratings Analysis 2014.

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.



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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

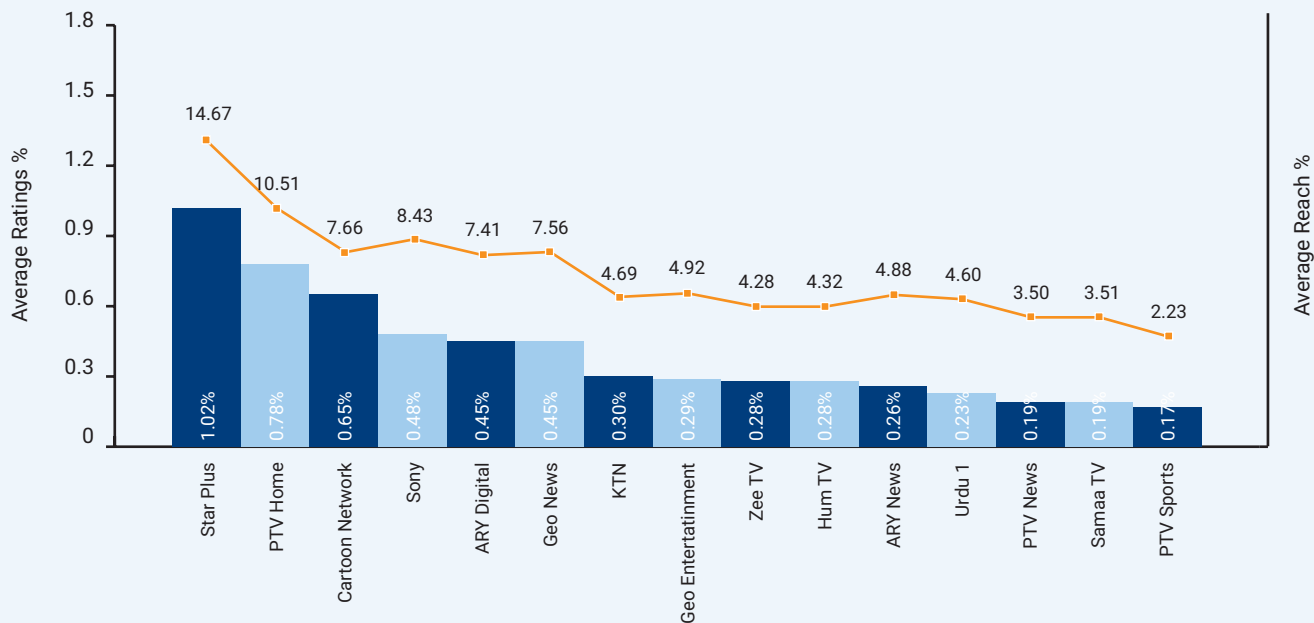
68.2
Million

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		Jalwa
ARY News	Express Entertainment			K2
Business Plus	Geo Kahani	Food		Oxygene
Capital TV	Geo Entertainment	Masala		
Channel 5	Hum TV	Zaiqa	Movies	
City 42	Indus Vision		Film World	
Dawn News	Koh-e-Noor		Filmax	Health
Dhoom	Light Asia		Filmazia	HTV
Din News	PTV Global		HBO	
Dunya TV	PTV Home		Silver Screen	
Express News	PTV National	Regional	Starlite	
Geo Tez	TV One	Apna TV		
Geo News	Urdu 1	AVT Khyber		
Indus News	nVibe	Awaz	Educational	
Jaag (CNBC Pakistan)		Dharti	Virtual TV	
Khyber News		Kashish		
KTN News		KTN		
Metro One		Mehran		
News One		PTV Bolan		
PTV News		Punjab TV		
PTV World (English)		Raavi		
Royal News		Rohi TV		
Samaa TV	Religious	Sabz Baat		
Sindh News	ARY QTV	Sindh TV		
Vsh News	Haq TV	Urooj		
Waqt TV	Madni	Waseb TV		

Top 15 Channels during 2014

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

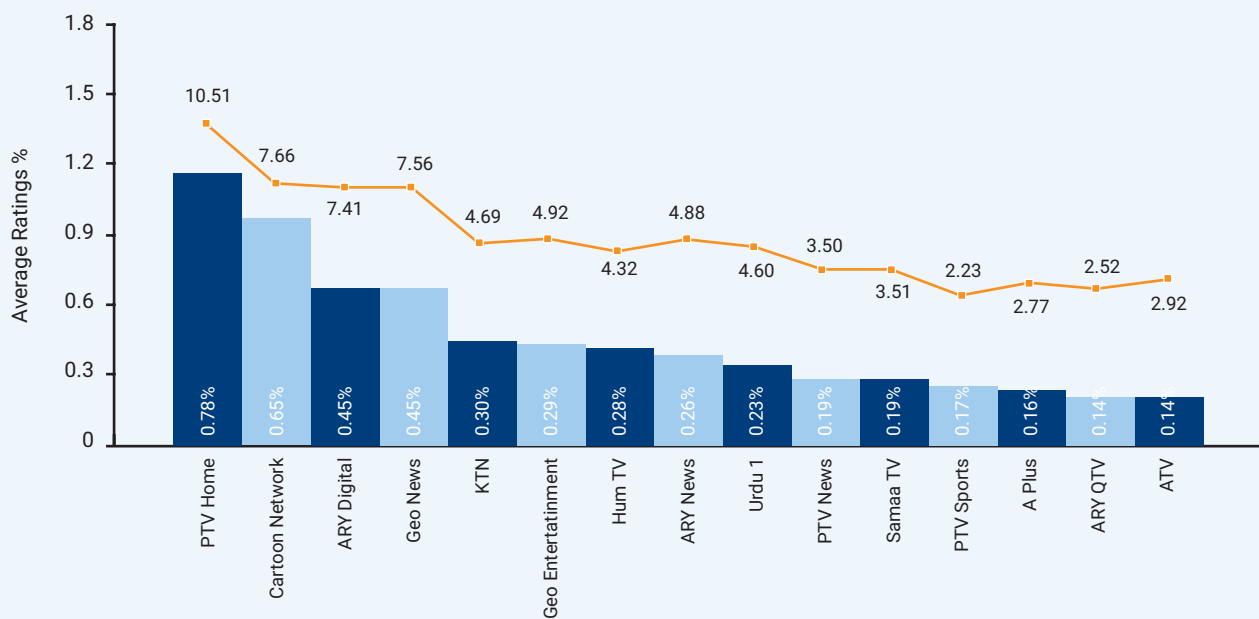
Target: Audience: National CnS Viewer | Timeslot: 06:00 AM - 11:59 PM



Top 15 Channels during 2014

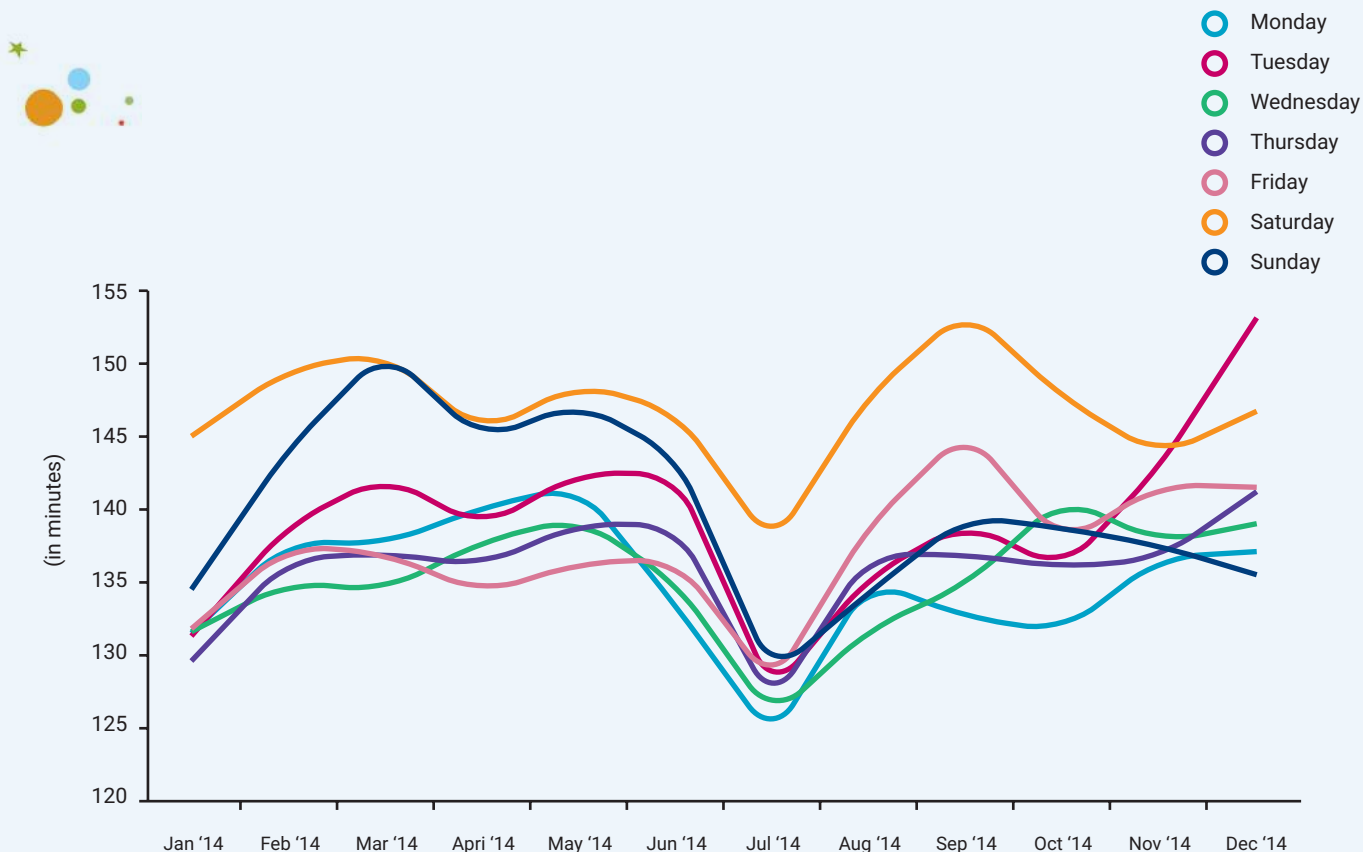
Top 15 Local Channels (in terms of Avg. Ratings and Reach)

Target: Audience: National CnS Viewer | Timeslot: 06:00 AM - 11:59 PM



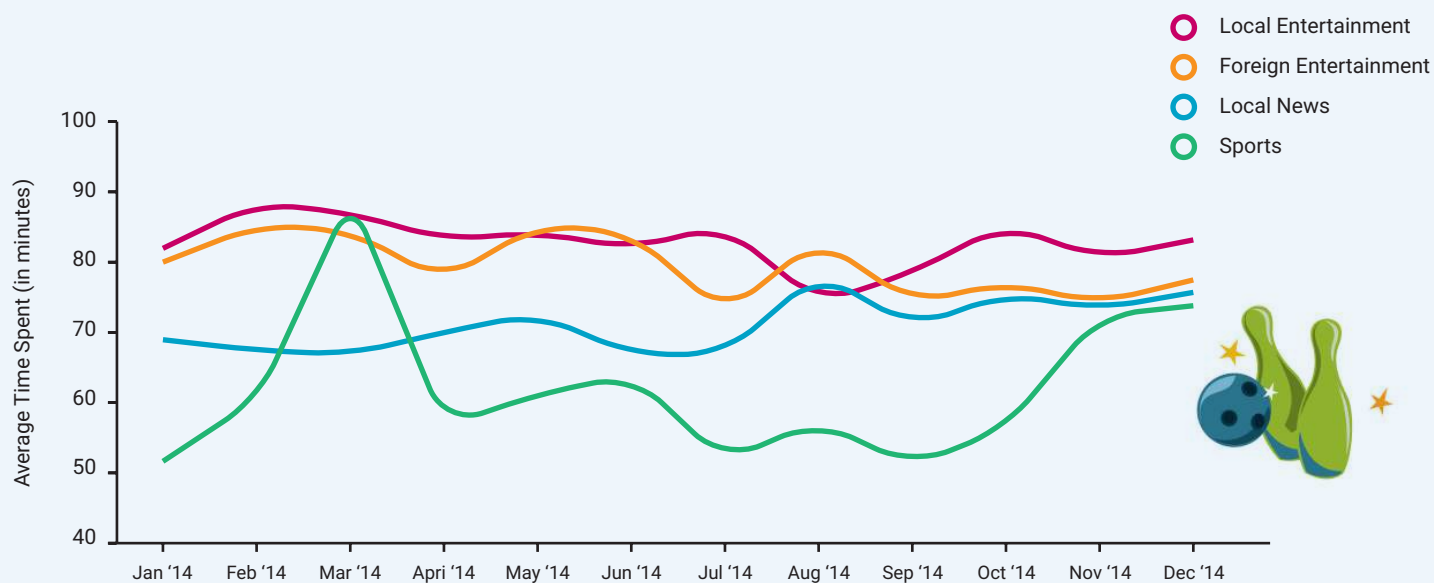
Average Time Spent per Viewer

Year: 2014 | Day-wise Comparison | Target Audience: All viewers | Region: National



Month-wise Genre-wise Viewership Review

TA: National, CnS Viewers | Function: Average Time Spent per Tune-in Viewer



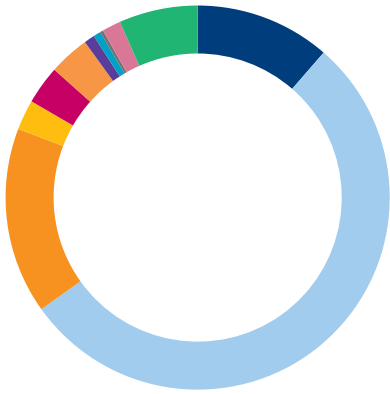
Foreign Entertainment includes Colours, Fashion TV, Sab TV, Set Max, Sony, Star Gold, Star Plus, Star Movies, Star World, Zee TV

Local Entertainment includes A+, ALite, ARY Digital, ARY Zindagi, ATV, Express Entertainment, Geo Kahani, Geo Entertainment, HUM TV, Indus Vision, Koh-e-Noor, Light Asia, PTV Global, PTV Home, PTV National, TV One, Urdu 1

Local News include AAJ News, Aab Tak, AJK TV, ARY News, Business+, Capital TV, Channel 5, City 42, Dawn News, Dhoom, Din News, Dunya TV, Express News, Geo Tez, Geo News, Jaag, Khyber News, KTN News, Metro One, News One, PTV News, PTV World, Royal News, Samaa TV, Sindh News, VSH News, Waqt TV

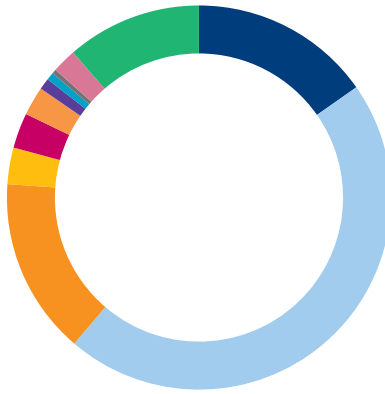
Genre-wise Market Share

National



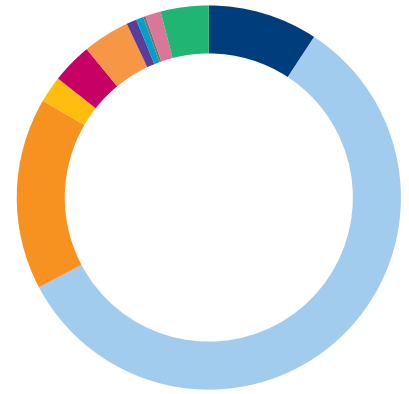
Foreign Entertainment	11.384
Local Entertainment	53.747
Local News	15.684
Sports	2.536
Regional	3.244
Children	3.418
Movies	0.889
Music	0.625
Cooking	0.258
Education	0.01
Religious	1.57
Others	6.635

Urban



Foreign Entertainment	15.274
Local Entertainment	45.98
Local News	14.864
Sports	3.08
Regional	2.955
Children	2.452
Movies	0.954
Music	0.649
Cooking	0.367
Education	0.005
Religious	2.053
Others	11.367

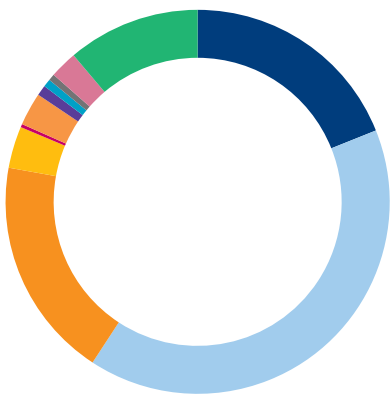
Rural



Foreign Entertainment	9.244
Local Entertainment	58.018
Local News	16.135
Sports	2.237
Regional	3.403
Children	3.948
Movies	0.854
Music	0.612
Cooking	0.198
Education	0.013
Religious	1.304
Others	4.034

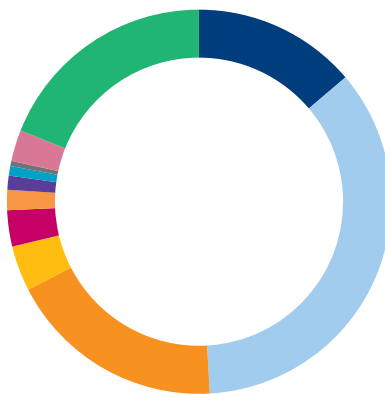
Genre-wise Market Share

Metros



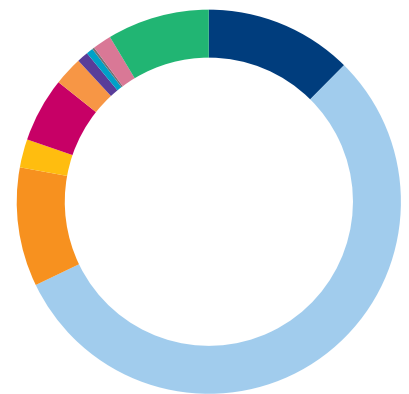
Foreign Entertainment	18.936
Local Entertainment	40.283
Local News	18.631
Sports	3.518
Regional	0.262
Children	2.786
Movies	0.873
Music	0.66
Cooking	0.553
Education	0.004
Religious	2.314
Others	11.18

Large Cities



Foreign Entertainment	13.796
Local Entertainment	35.307
Local News	18.33
Sports	3.815
Regional	3.046
Children	1.697
Movies	1.18
Music	0.815
Cooking	0.411
Education	0.016
Religious	2.633
Others	18.954

Small Cities & Towns

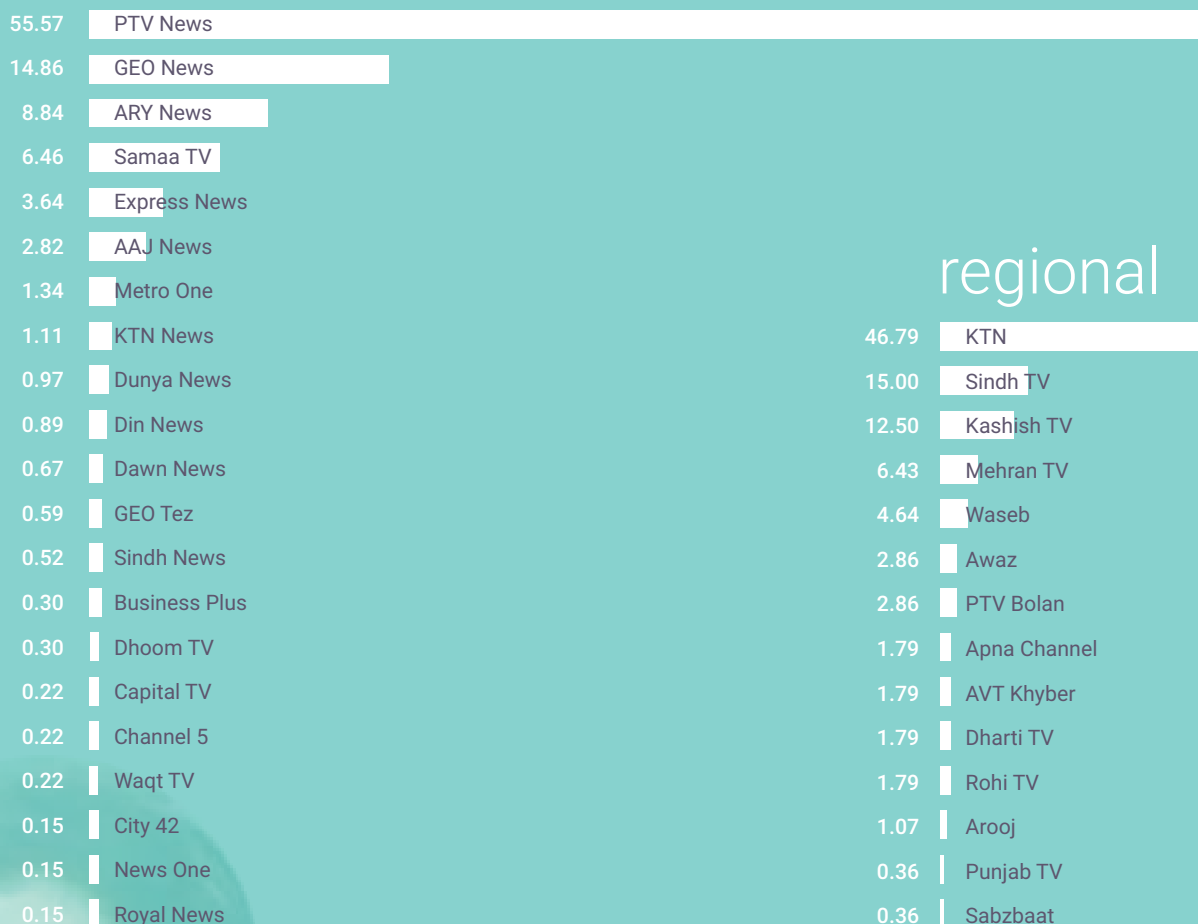


Foreign Entertainment	12.429
Local Entertainment	55.431
Local News	10.006
Sports	2.386
Regional	5.433
Children	2.433
Movies	0.941
Music	0.574
Cooking	0.176
Education	0.002
Religious	1.585
Others	8.604

Local Channels Share (%)

Timeslot: 24 Hours | Period: January - December, 2014

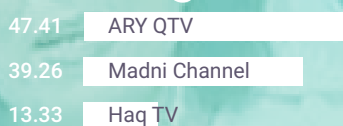
news



regional



religious



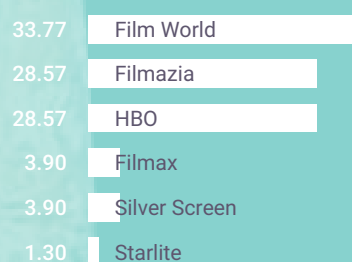
music



entertainment

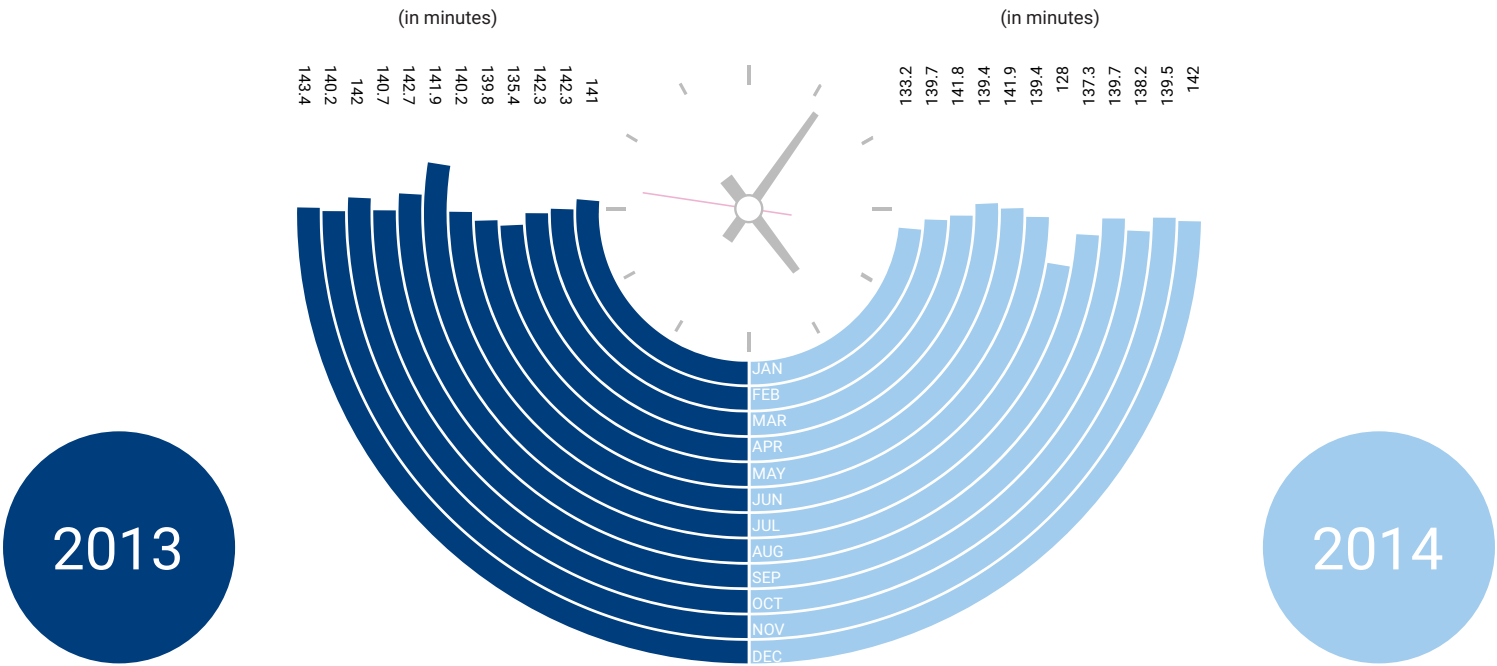


movies



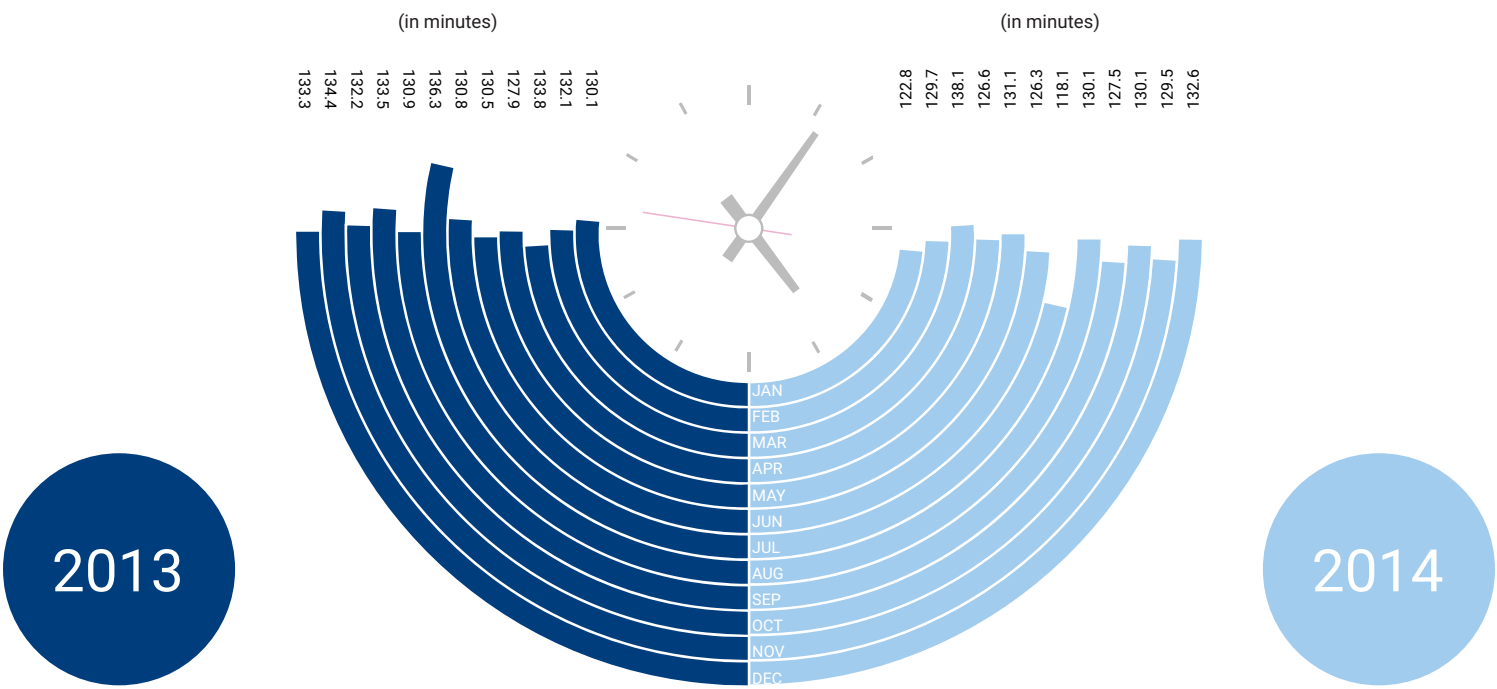
Average Time Spent

Region: National, All National Viewers, Timeslot: 24 H



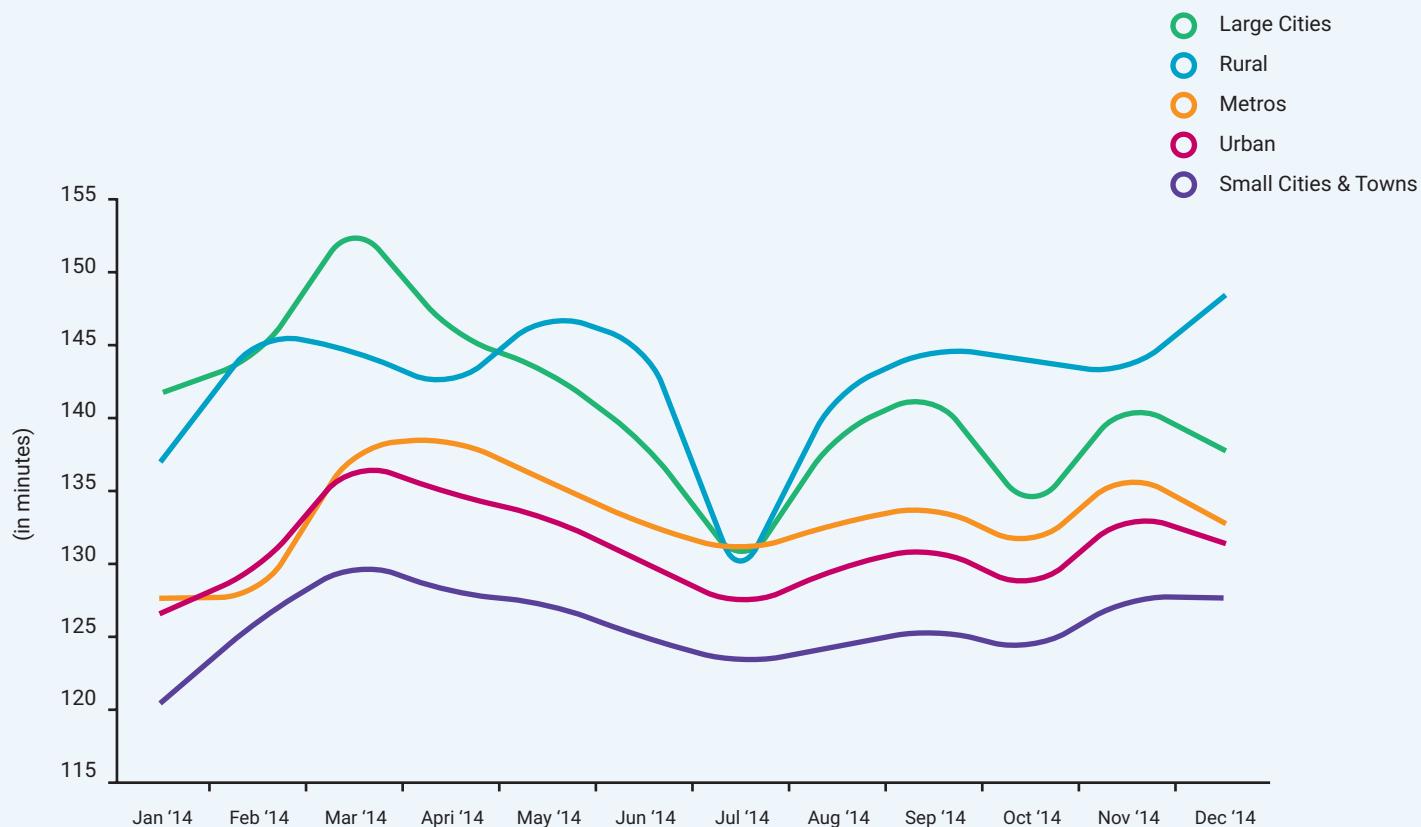
Average Time Spent

Region: Cable & Satellite Viewers, All National Viewers, Timeslot: 24 H



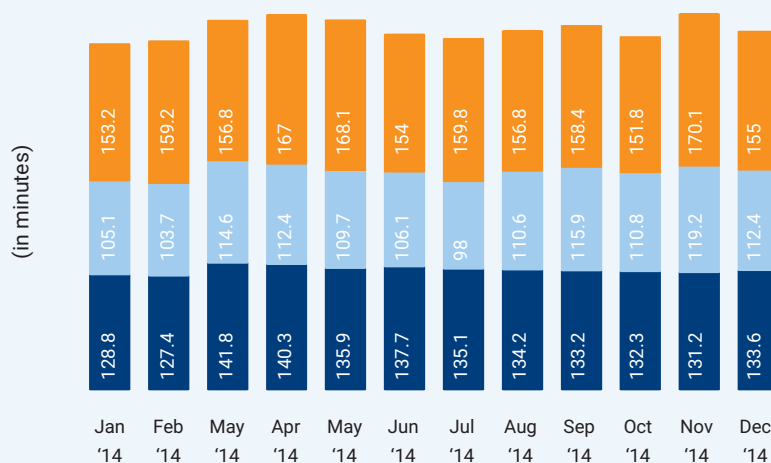
Daily Average Time spent per viewer

Geographical Segment wise | Target Audience: All Viewers



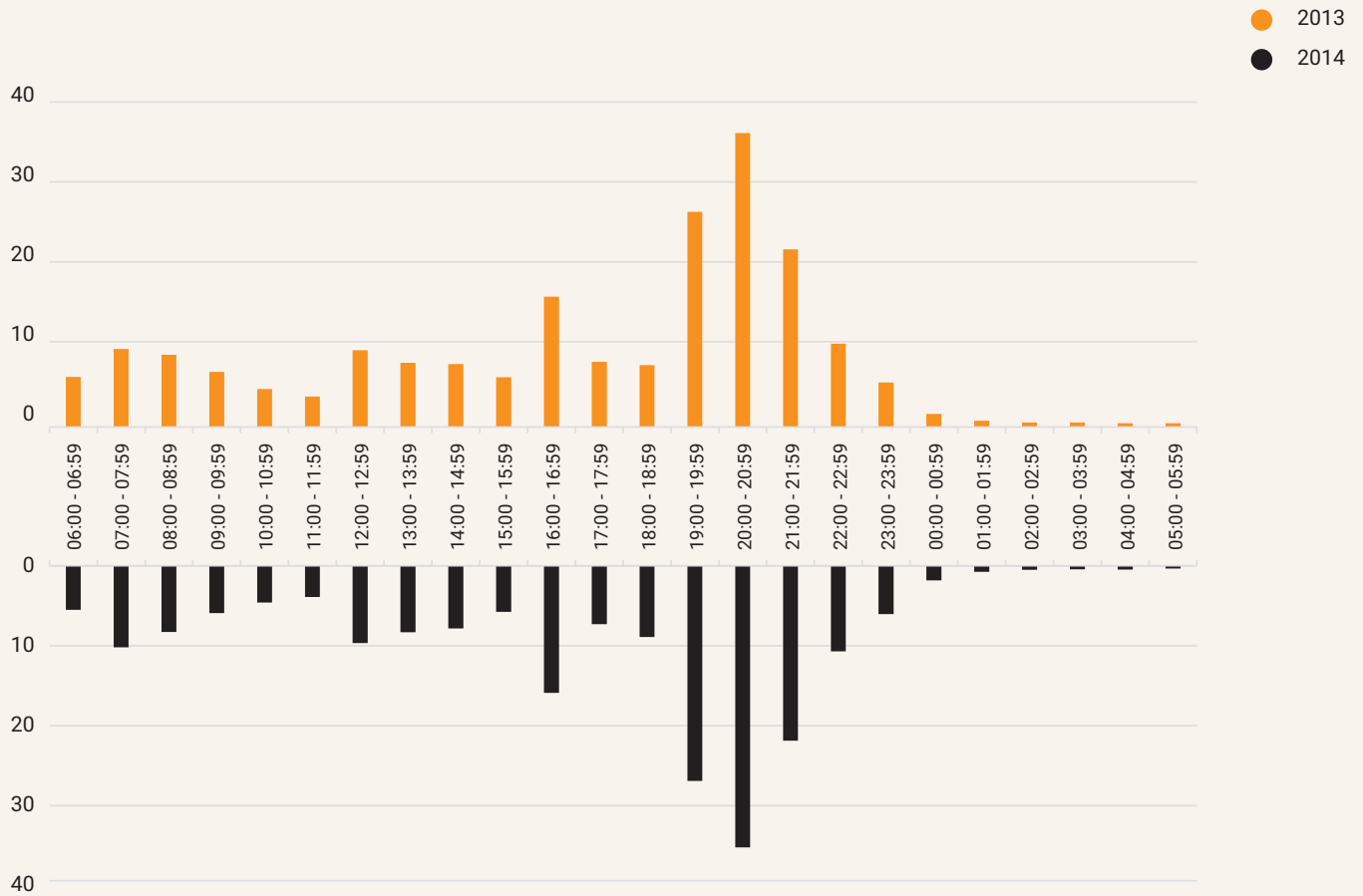
Daily Average Time spent per Tune-in Viewer (Karachi - Lahore - Islamabad)

Target Audience: National Viewers



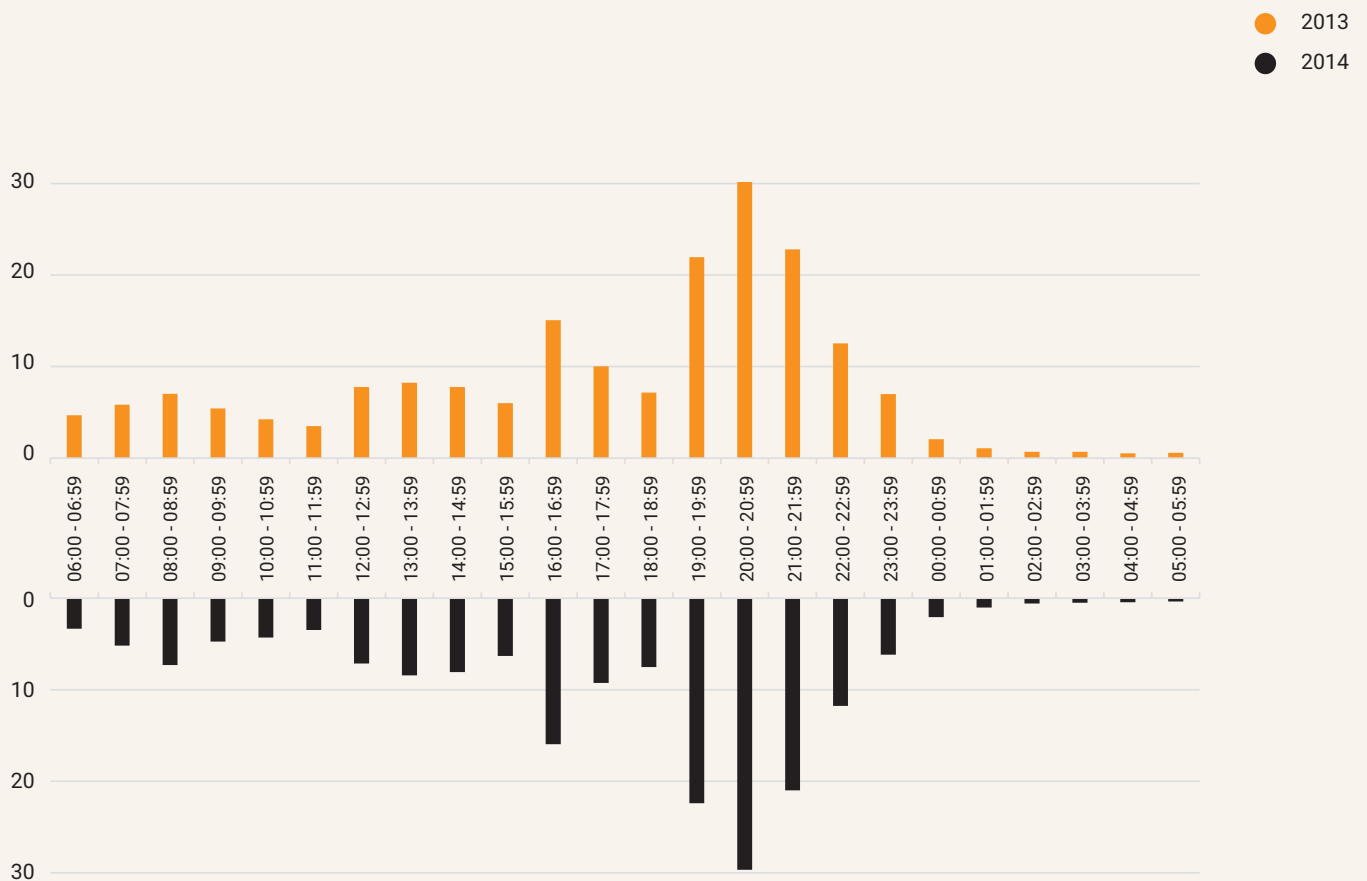
Hourly Ratings (2013 vs 2014)

Target Audience: All National Viewers | Function: Average Ratings %



Hourly Ratings (2013 vs 2014)

Target Audience: Cable & Satellite Viewers | Function: Average Ratings %



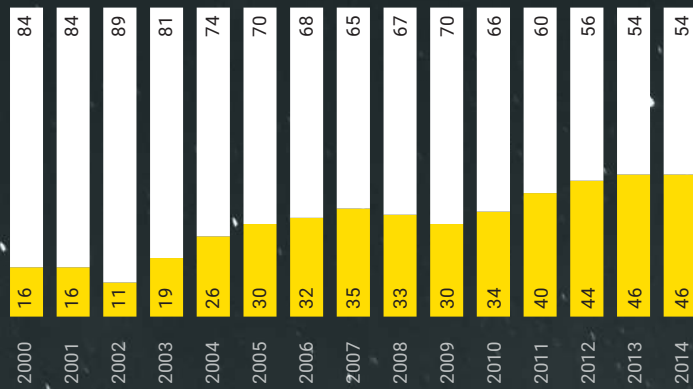
Terrestrial vs Cable & Satellite Channels Share %

Target Audience: All Viewers

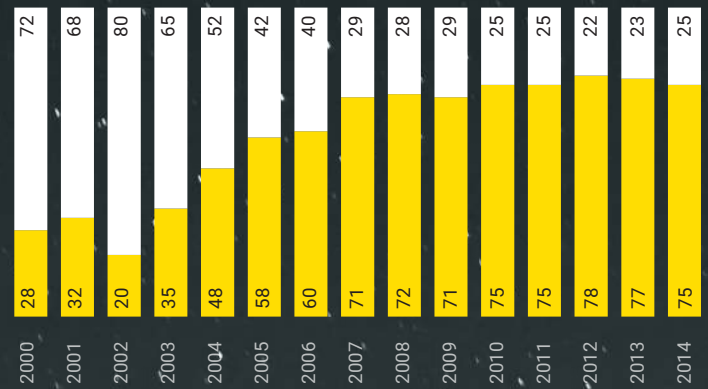
All Terrestrial
(Combined)

Cable & Satellite
(Combined)

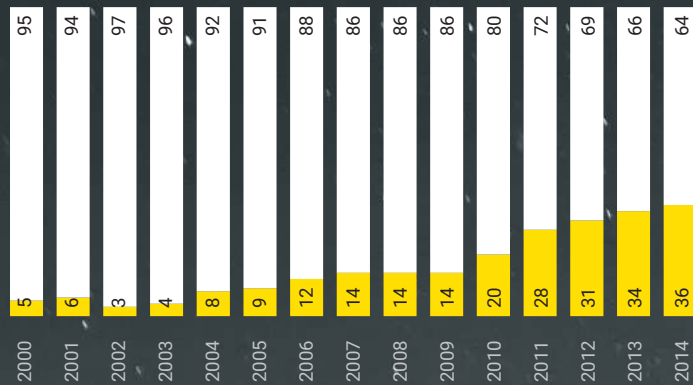
National



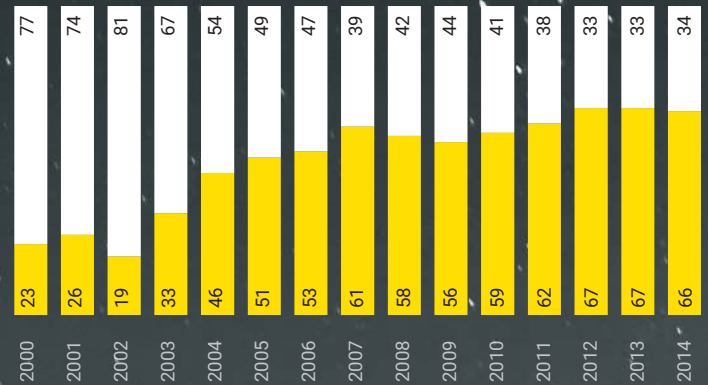
Metros



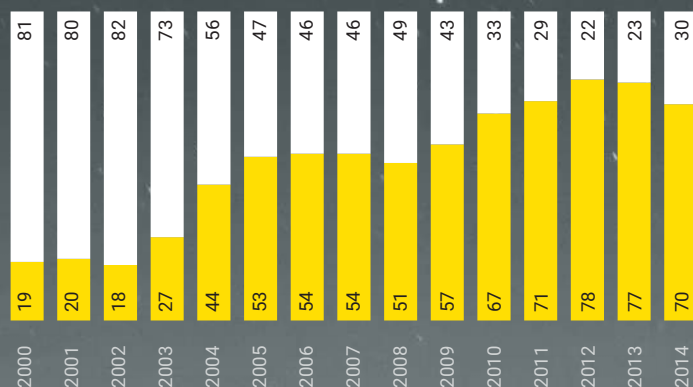
Rural



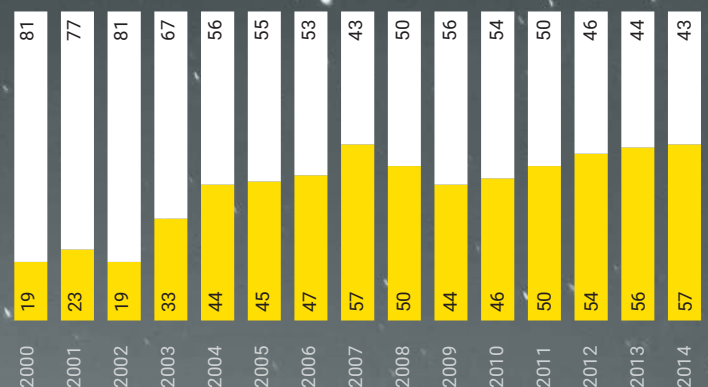
Urban



Large Cities

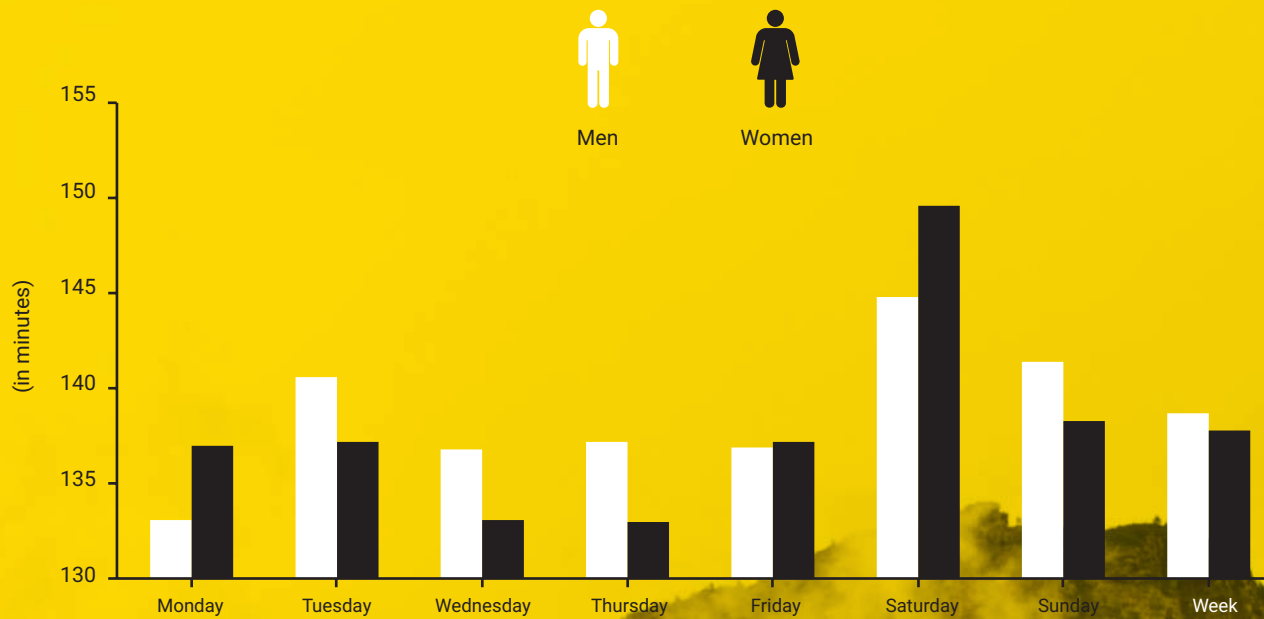


Small Cities & Towns



Men vs. Women (Average Time Spend per Viewer)

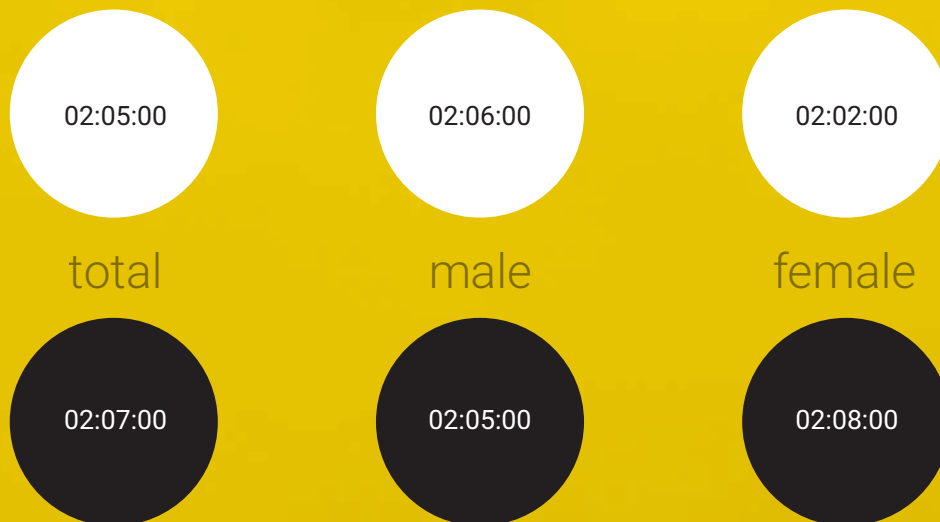
Year 2014 | Target Audience: All National Viewers



Daily Viewing Time per Individual - 2013 vs. 2014

Data Source: Gallup Pakistan | Target Audience: All National Viewers

● 2013
● 2014



Yearly Cumulative Reach - 2014

Period: Jan 01 - Dec 31, 2014 | Target: All Age 4+ National Viewers

Channel Name	Yearly Cumulative Reach %	Monthly Average Cumulative Reach %
TOTAL	99.89	99.81
A Plus	18.27	9.53
AAJ News	24.55	11.05
Al Jazeera English	8.69	2.84
Apna Channel	8.97	2.39
ARY Digital	41.58	22.20
ARY Musik	17.29	8.35
ARY News	35.06	16.67
ARY Qtv	25.79	11.95
ATV	43.70	22.33
AVT Khyber	5.83	1.43
AXN	14.04	4.01
BBC World	17.56	4.00
Business Plus	8.67	1.98
Capital TV	5.61	1.49
Cartoon Network	31.88	12.82
Channel 5	4.07	1.83
City 42	4.14	1.18
CNN	11.40	3.41
Dawn News	10.41	4.39
DHARTI TV	6.66	2.45
Din News	12.38	4.93
Dunya News	15.90	4.02
Express Entertainment	18.49	8.24
Express News	23.13	11.27
Fashion TV	6.71	1.53
Filmazia	12.33	6.01
GEO Entertainment	35.89	17.61
GEO Kahani	16.70	5.77
GEO News	46.24	23.61
GEO Super	14.45	3.93
GEO Tez	12.31	3.21
Haq TV	7.52	5.34
HBO	17.72	6.54
Hum TV	32.48	16.04
Indus Vision	16.47	5.19
Jaag	10.40	2.66
Jalwa	12.69	3.38

Channel Name	Yearly Cumulative Reach %	Monthly Average Cumulative Reach %
Kashish TV	10.04	6.40
Khyber News	2.26	0.27
KTN	18.80	13.57
KTN News	8.82	3.64
M TV	15.12	4.72
Masala TV	12.52	3.86
News One	6.09	1.64
Nickelodeon	9.49	3.34
Oxygene	6.67	1.36
PLAY MAX	3.87	2.29
PTV Home	79.10	60.54
PTV National	20.07	6.75
PTV News	52.91	30.98
PTV Sports	35.98	12.06
Punjab TV	3.97	0.52
Rohi TV	6.42	2.74
Samaa TV	21.28	10.02
Silver Screen	6.40	1.88
Sindh News	6.79	2.81
Sindh TV	20.35	9.92
Sony	43.07	25.12
Star Plus	47.13	30.83
Ten Sports	26.46	11.86
TV One	24.32	9.29
Urdu 1	26.16	16.97
Vibe TV	3.78	0.67
Waqf TV	5.42	1.66
Waseb	7.13	3.87
OTHER	60.17	47.64



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