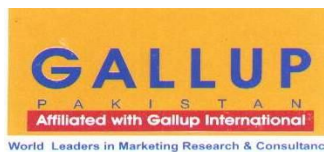




CABLE VIEWERSHIP IN PAKISTAN

Submitted by



Gallup Pakistan Media Research Team

July 12th, 2013

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CABLE VIEWERSHIP INCREASE BY 20% IN PAST TWO YEARS: GALLUP PAKISTAN MEDIA RESEARCH TEAM

According to a report released by Gallup Pakistan, Cable Viewership in Pakistan has now reached 64% up from 55% in year 2010.

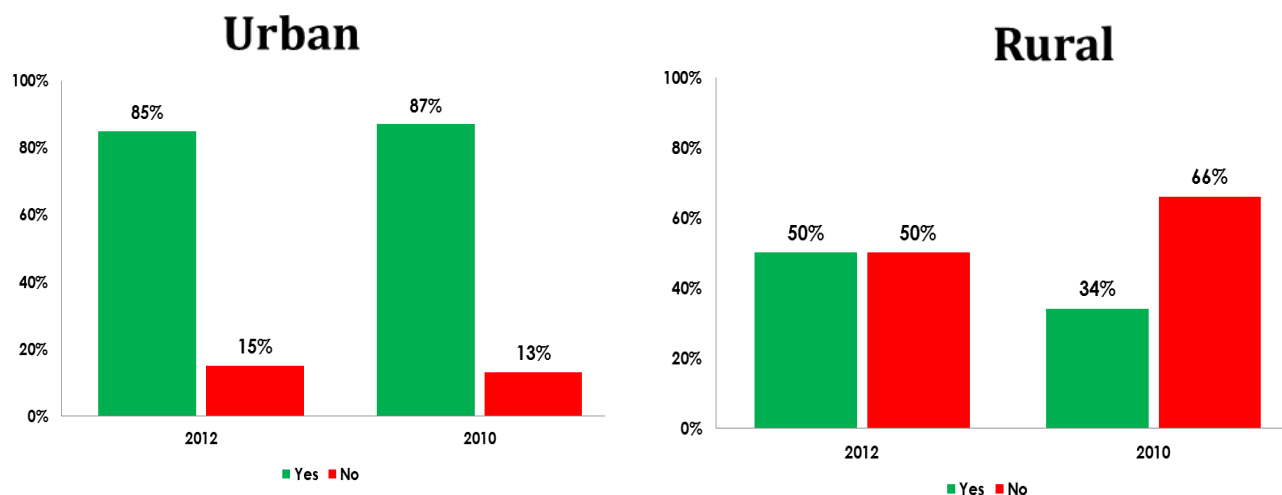
1. URBAN VS RURAL VIEWERSHIP OF CABLE CHANNELS

Understandably so, viewership of Cable Channels is much higher (85%) in Urban areas than in Rural areas (50%) in the year 2013.

However, the growth in viewership has been mainly contributed by growth of viewership of Cable Channels in Rural areas.

Rural viewership of Cable Channels was 34% in year 2010 and therefore **registered a 16% growth rate and reached the current figure of 50%.**

Urban viewership of Cable channels has stagnated at the same level in past two years.



Source: Gallup Media Survey 2013 (N= 10,000 men and women in Urban and Rural areas of four provinces)

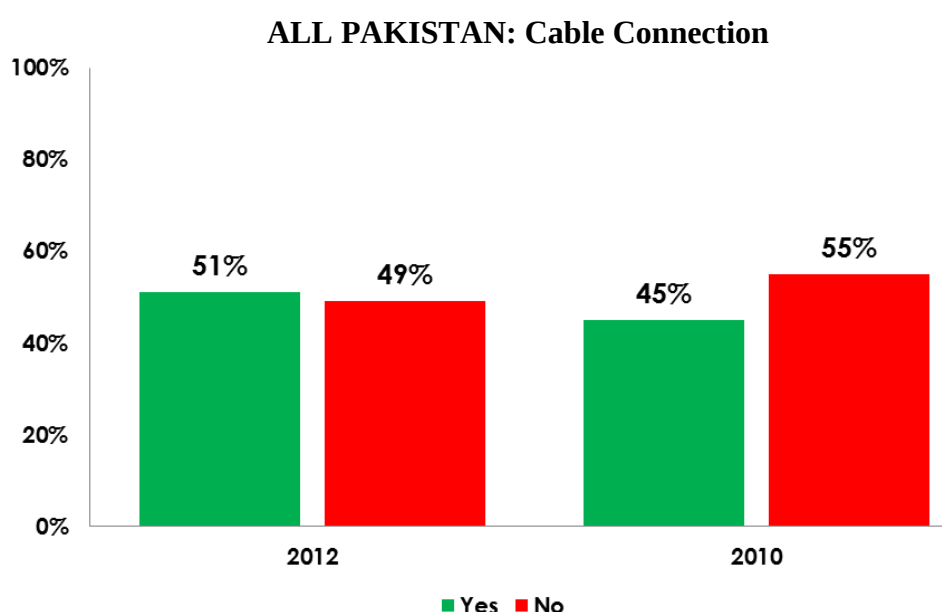
THE MAJOR IMPLICATION OF THIS IS THAT THE SHARE OF RURAL CABLE VIEWERS HAS INCREASED DRAMATICALLY OVER THE PAST FEW YEARS.



2. VIEWERSHIP VS OWNERSHIP OF CABLE CONNECTION AT HOME

Interestingly a significant proportion of Cable Viewers do not have access to cable at their own home. They visit a friend's house, a restaurant or any other place which has cable access.

At All Pakistan level, 51% of Households claim to have a cable connection. **This would lead to around 13 million Cable Connections in the country.** This also shows that around 16% of Cable Viewers are watching Cable Channels not in their own household.



Source: Gallup Media Survey 2013 (N= 10,000 men and women in Urban and Rural areas of four provinces)

There is a significant difference in Urban / Rural proportions for this finding. In Urban areas the 86% of households have access to a cable connection. **This would mean around 5.4 million cable connections in Rural areas as compared to 7.74 million cable connections in Urban areas.**

In Rural areas, due to logistical as well as financial reason, only 30% households claim to have access to a cable connection at their home.



3. EXPONENTIAL INCREASE IN ACCESS TO CABLE CONNECTION IN RURAL AREAS

Over the past two years, access to a cable connection at household level in Rural areas has increased from 19% to 30% (a growth of 11 percent).

4. IMPLICATIONS OF THIS FOR MEDIA INDUSTRY

i. The major implication of this for the media and advertising industry is that the need to have an Audience Measurement System which measures Rural Audiences has increased over the past years. The current People Meters are NOT MEASURING A SIGNIFICANT POPULATION OF CABLE VIEWERS WHO EXIST IN RURAL AREAS. This is in addition to the inadequate amount of meters even for Urban areas, which in most cases lead to findings which are statistically insignificant.

Gallup TV Ratings, as an alternative, not only cover the Rural TV Audience Market, but also offers a much larger sample size, which yields statistically significant results at ALL PAKISTAN Level but also at various small TV Markets.

ii. Secondly, Rural Cable Viewers are a growing market and the TV Channels vying to get audience should concentrate on Rural Viewers, if they want to increase their audience size. The urban TV viewers market is not only stagnant now but also heavily cluttered. This fact is also borne by small Reach Percentages being generated by both Gallup and Media Logic data.

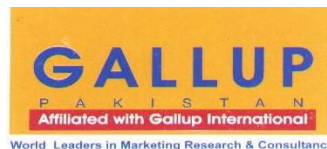
GALLUP PAKISTAN continues to strive in providing the Media and Advertising Industry, with valid data to help rethink the current situation and plan for future.



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