TV TALK SHOW ANALYSIS

GALLUP PAKISTAN/GILANI RESEARCH FOUNDATION

TALK SHOWS ANALYSIS REPORT

OCTOBER & NOVEMBER 2016

**A monthly series from
Gallup Media Research Wing looking at
8 Local Talk Shows**

GALLUP PAKISTAN
Affiliated with Gallup International
Pakistan's Foremost Social Research Lab

GILANI RESEARCH FOUNDATION

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TELEVISION
Talk Shows During October/November 2016

In the 8 Talk Shows analyzed during October and November 2016, PTI had the highest representation in both October (31%) and November (33%); 'Politics' was the most popular topic in October (38%) while 'Governance' was the main topic under discussion in November (29%). GALLUP Pakistan/Gilani Research Foundation

Islamabad, January 19, 2017

According to a Monthly Research Study conducted by Gallup Pakistan Media Research Consultancy for Gilani Research Foundation (http://www.gilanifoundation.com), Of all airtime, PTI had the highest representation in both October (31%) and November (33%); 'Politics' was the most popular topic in October (38%) while 'Governance' was the main topic under discussion (of all airtime) in November (29%). The majority of guests were politicians (October 67%, November 62%). This press release will present analysis for two months: October and November 2016.

Content analysis of **8** popular current events talk shows (Off the Record; Capital Talk; Meray Mutabiq; Sawal Yeh Hai; News Eye; Aapas Ki Baat; Nadeem Malik Live and Tonight with Fareeha) consisting of a total of **218** episodes aired on different cable television networks was conducted for October and November 2016. The topics discussed in these shows were categorized into **7** broad categories: 'Economy', 'Governance', 'Law', 'Politics', 'Media', 'Security' and 'Miscellaneous'. Issues that were discussed less frequently, for example sports and socio-cultural subjects, have been included in the 'Miscellaneous' category.
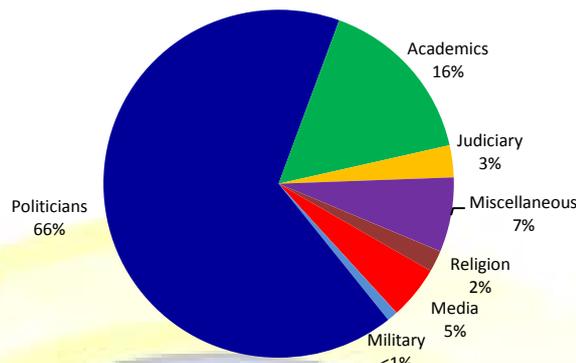
Average Number of Guests: 3 Guests per Episode

On average **3** guests appeared per episode for each show in both months of October and November 2016. While some guests were frequently invited on different talk shows, overall there were **81** unique guests out of a total of **334** guests in the 105 episodes analyzed for October and **112** unique guests out of a total of **341** guests in the 113 episodes analyzed for November. In terms of guests, there were **27** fresh faces during October and **34** fresh faces in November. This number was **54** in July 2016 – there may be a need to attract a larger number of new guests in order to sustain public interest and ensure more varied and substantial content.
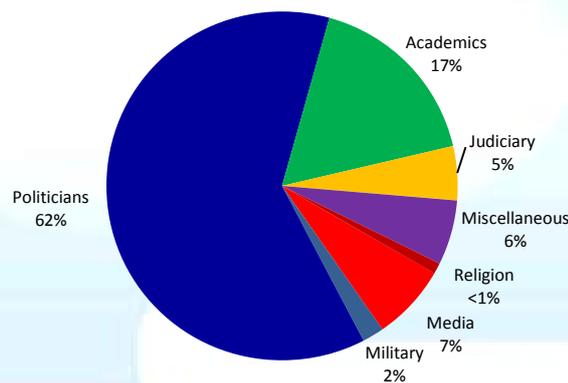
Background of Guests Invited: Politicians Continue to Dominate

Furthermore, in both October and November, the majority of the guests were politicians (67% and 62% respectively), followed by experts and academics like defense analysts at 16% and 17% respectively. In October, 7% of guests were from miscellaneous occupations such as art, cricket, civil society and bureaucracy, followed by 5% media personnel: journalists, anchors etc., judicial representatives at 3% and religious representatives at 2%.Media personnel comprised 7% of the guests in November, followed by guests from miscellaneous fields at 6%, judicial representatives at 5% and the military at 2%. There was negligible religious representation in the month of November.

October 2016

Politicians 66%
Academics 16%
Judiciary 3%
Miscellaneous 7%
Religion 2%
Media 5%
Military <1%

November 2016

Politicians 62%
Academics 17%
Judiciary 5%
Miscellaneous 6%
Religion <1%
Media 7%
Military 2%

Source: TV Content Analysis by Gallup Pakistan Media Research Consultancy for Gilani Research Foundation
(http://www.gilanifoundation.com)

Air- time Share of Political Parties: PTI in the lead

In both October and November 2016, the maximum representation amongst political parties was at 31% and 33% respectively from the Pakistan Tehreek-e-Insaf (PTI), followed by the Pakistan Muslim League Nawaz (PML-N) at 24% and 29% respectively and the Pakistan People's Party (PPP) at 21% and 25% respectively. The Muttahida Qaumi Movement (MQM) occupied fourth place with an airtime of 6% in October; in November the MQM and Pak Sar Zameen party were both in fourth place at 3% each. Other parties and independent politicians constituted the remaining portion of airtime.

Most Discussed Topic in Talk Shows: Politics in October; Governance in November

In the month October, Politics took center stage in talk shows (38%). Politics was followed by discussions on Security (24%) and Governance (22%). Legal matters were conversed on 6% of the time. Miscellaneous topics occupied 5% of airtime, Media related subjects and Economic matters comprised 3% and 1% of talk time respectively.

In the month of November, Governance was the most popular subject of conversation on talk shows. 29% of total airtime in talk shows was dedicated to debating matters of governance. Issues linked to Politics and

Security followed at 22% each. Law and justice related subjects were next and formed 14% of the total. The rest of the airtime was devoted to Miscellaneous matters (7%), the Media (3%) and Economy (3%).

October 2016
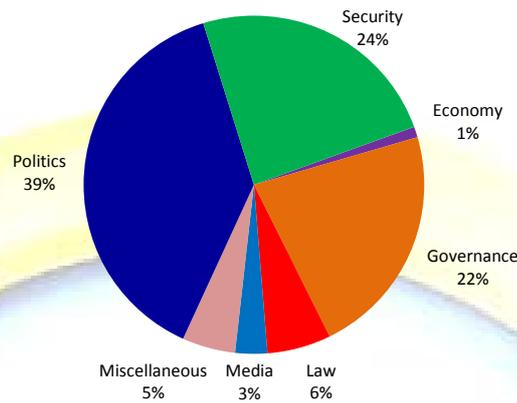
November 2016
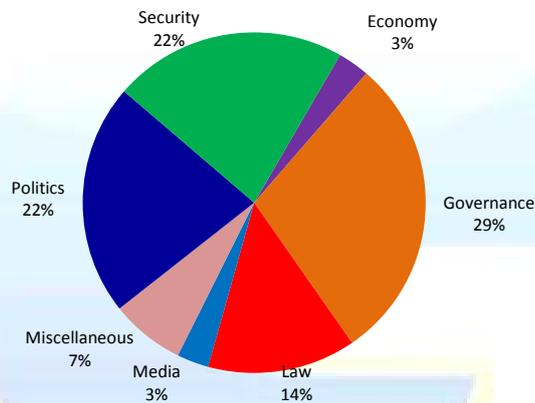
Most Discussed Topics within Governance: Government Performance and Policies in   October; Panama Leaks in November

In October 2016, the most frequently discussed issues under governance were related to governmental policies and their implementation, parliament, democracy etc. (44%). This was followed by conversation on corruption and National Accountability Bureau in general, with specific references to the Panama Leaks (36%). Nawaz Sharif and his performance as a Prime Minister was highlighted 20% of the time.

In November 2016, a significant portion of talktime under the banner of governance focused on Panama Leaks, with particular attention on the Sharif family's implications in corruption (75%). Matters pertaining to general governance like the performance of the government, the National Assembly etc. were scrutinized 18% of the time. The complications surrounding the removal and appointment of the Governor of Sindh were talked about 8% of the time.

Most Discussed Topics within Politics: Imran Khan's call for lockdown in October; General Political Issues in November

In October 2016, political discussions mostly revolved around the PTI's threat to shut down Islamabad and related topics like the Raiwind March and collaboration between Imran Khan and Tahir-ul-Qadri (52%). Inter Party relations and the All Parties Conference was talked about 24% of the time. The majority of remaining airtime was devoted to party-specific politics (MQM 9%, Pak-Sarzameen Party 6%, and PML-N 5%).

In November 2016, most political airtime was general in nature (38%), while Imran Khan's call for Islamabad's lockdown and related matters remained an important topic of discussion (34%). Party specific politics were also subjected to debate (PPP 15%, MQM 8%).

Most Discussed Topics within Security: Pakistan-India Relationship in October, Domestic Security/Crime/Terrorism in November

In October 2016, within Security, the dynamics of the relationship between Pakistan and India and the Kashmir issue occupied 43% of airtime. Another major chunk of talk time constituted debates on domestic security, crime and terrorism (41%). Civil-military relations, military-state interactions, and Raheel Sharif were discussed 16% of the time. There was considerable speculation on the allegations/true agenda of the Pakistan cricket team's push-up celebrations.

In November 2016, domestic security, crime and terrorism were underscored (36%). The Pakistan-India relationship remained in the spotlight at 33%. Civil-military and military-state communications were discussed 28% of the time and Pakistan-Turkey foreign affairs were talked about 3% of the time.

Commentary by Gallup Pakistan Media Research Consultancy Team:

The analysis of talk shows during October and November portrays how political humdrum, governance issues and security concerns continue to dominate the media landscape. The ranking of Politics, Governance and Security may vary from month to month, but it is these three domains that remain prominent. It is also important to note that there is sometimes a very fine line between these three categories, and that most national issues cannot be explored solely through the perspective of a one domain.

It is promising to see a shift, from Politics towards Governance as talk show hosts and guests continue to discuss the Panama Leaks and devote more time to discussing the policies of the state, the rampant problem of corruption in the bureaucracy and measures to tackle it. This is important because this drives the conversation towards more meaningful topics and allows the media and the public to scrutinize the performance of the government more closely. Such debate is somewhat important in driving conversation away from relatively trivial political issues which mostly revolve around political rivalries and power politics.

Politics has a particularly high percentage (38%) in October as Imran Khan and PTI were at the forefront of media discussion due to their threat to shut down Islamabad, as a symbol of their opposition to the ruling government. This may also partly explain why the PTI and PML-N have the higher shares of representation

during October and November. Holistically however, between June and November, there has been a decrease of 6% in airtime devoted to Governance, decrease of 2% in airtime devoted to Politics and decrease of 1%

in airtime devoted to Security. This has been reflected mainly through an increase in debate on Law, which is mostly due to the Panama Leaks case filed in the Supreme Court. Media has also shown a rise in share from 0% to 3% during these six months. *However, the Economy's importance has not been emphasized enough, falling from 7% to 3% over this time period. For a developing economy like Pakistan with chronic economic issues, it is problematic to see Economy being neglected within public agenda.*
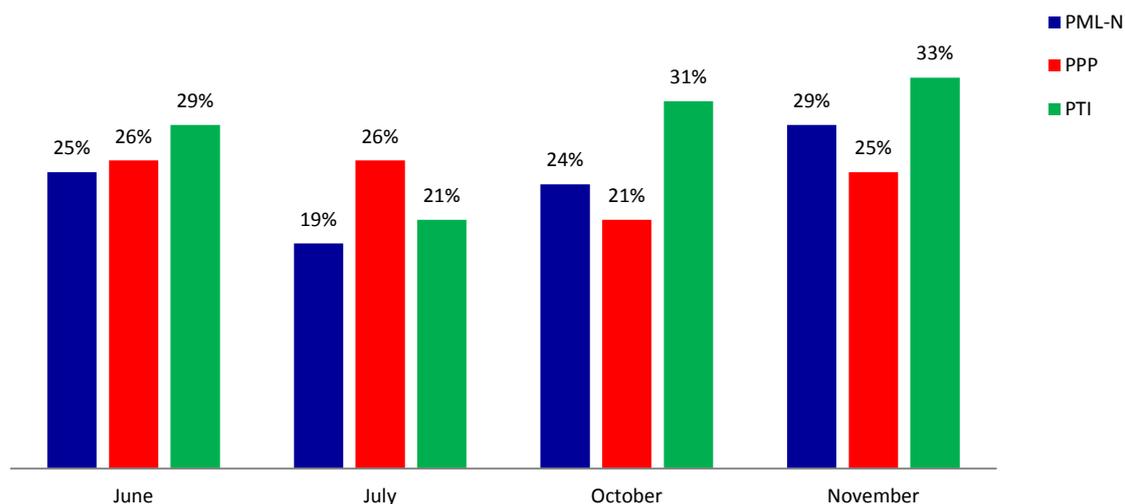
This pattern is welcome in terms of endeavors to improve accountability as well as the transparency of the authorities but it is also alarming considering the continued poor representation of economy in talk shows. The reduced airtime devoted to Politics has not really meant a great shift to more intellectual debates on progress in real terms and other substantial, pressing issues, but is reflected in more engagement with Governance and Law, largely due to the Panama Leaks case. This trend also illustrates the tendency of Pakistani talk shows to discuss the immediate, short- term issues facing the country, while more concrete, long- term debates such as those on development and the energy crisis are neglected and relegated to the sidelines.

Furthermore, a trend that has been persistent over the past months has emerged once again in the talk shows of October and November 2016. *Data reveals that gender- wise representation of guests has remained skewed in these leading talk shows: (June- Male: 92% Females 8%; July- Male: 91% Females 9% ; October - Male: 94% Females 6%; November - Male: 92% Females 8%).* However, the generally low representation of females on talk shows can also be due to the lower participation of women in the political sphere in general. Talk show hosts and the management cadre need to put in extra efforts in order to ensure fairer representation for females.

Trends in Political Representation

This study is part of a larger project hence a comparison of current trends with past ones is helpful in detecting new developments. Comparison of participation of political parties in talk shows reveals that PTI, PML-N and PPP were once again the three parties with the highest representation in talk shows during June. Between June and November, PTI's representation has risen from 29% to 33%, PML-N's share has increased from 25% to 29% and PPP's representation has fallen from 26% to 25%, which lends support to how the representation of these parties is for the most part, quite stable over time, despite some fluctuations in between.

This distribution indicates that media in Pakistan is independent to a large extent and there is little, if any, bias towards propagating the views of a single political party. The fluctuations in representation may be linked to the parties' role in or views on the prevailing situation in the nation, their performance, level of activity in the political domain or their own choices in terms of participation in the media. However, the consistently high representation of the same three parties over these months points to limited airtime occupied by other parties.
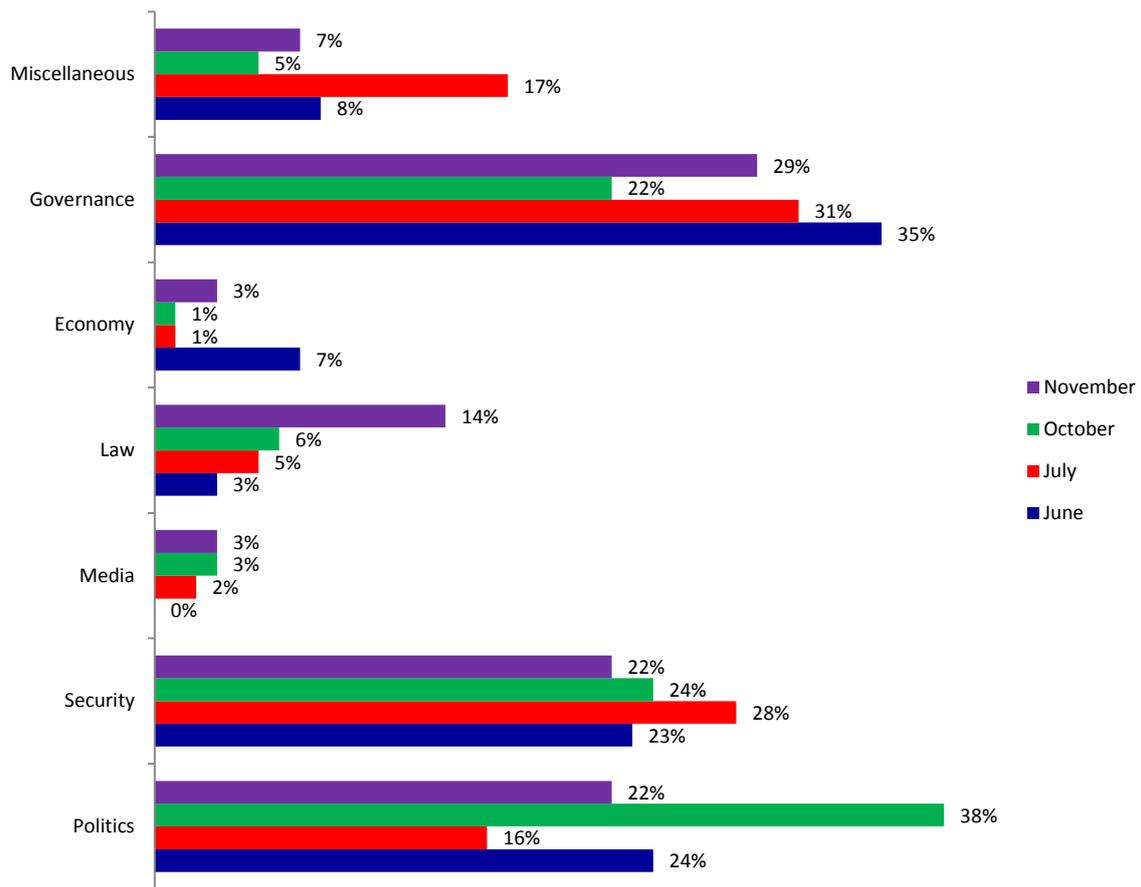
Legend: PML-N, PPP, PTI

June: PML-N 25%, PPP 26%, PTI 29%
July: PML-N 19%, PPP 26%, PTI 21%
October: PML-N 24%, PPP 21%, PTI 31%
November: PML-N 29%, PPP 25%, PTI 33%

Source: TV Content Analysis by Gallup Pakistan Media Research Consultancy* for Gilani Research Foundation
(http://www.gilanifoundation.com)

Trends in Topics Discussed

A topic-wise comparison between the June, July, October and November 2016 reveals that relative to other topics, talk shows usually accord the greatest significance to Politics, Security and Governance. The rise in share exhibited by Governance implies that there has been increased emphasis on the need to eradicate incompetent and dishonest authorities. This month, 29% of airtime dedicated to Governance is in line with the trend of discussing and addressing both short-term and long-term issues. The Panama Leaks scandal has drawn public and political attention to governance issues which means that to some extent, even political debates illustrate concerns over poor governance policies/corruption. Security is accorded the same significance as Politics in November, and greater significance than Governance in October specifically due to the sensitive situation in Quetta, after a terrorist attack on a police training center. In addition to local security concerns, Pakistan's relationship with India also remains on tenterhooks.

Though internal political, security and governance debates have slightly dropped, other issues continue to be sidelined. Economy and Media continue to be underrepresented. Pakistan is a nation whose economy has a pressing need for revival, where media is an important source of information for the public and where bad governance and discrimination is the cause of frequent discontentment from the masses. The increased focus on governance is a good start to this process of revival. But since this change in trend is fairly embedded in current affairs, the extent of this good start is fairly exaggerated. We can expect for the discussion on governance to fairly reduce as the uproar over Panama Leaks dies down. It cannot be denied that this discussion is good for the accountability of our leaders. However, since the solution to these issues is hardly ever found in the quickly, it means our Economy is often neglected for at least a short periods of time, which has more severe consequences in the long-run. The CPEC is already proving to be a propitious project for the local economy and people- 58% of economic discussion in November and almost all economic discussion in October anchored in topics linked to the initiative. Nevertheless, there is still a pressing need to add to the discussions on the local economy during talk shows. Discussions on the media

too remain low, a phenomenon that should be investigated, since it is one of the most influential institutions in Pakistan.

Trends in Background of Guests

A comparison of the background of guests between June, July, October and November 2016 illustrates that politicians dominate the scene throughout these months, (June 68%, July 57%, October 67%, and November 62%). They have a share around 2/3rds of the total in most months except July when military and miscellaneous representation was unusually high. Representation of experts/academics and judiciary shows a rising trend over these six months from June to November 2016. Representation of the military and of the religious domain generally remains low.
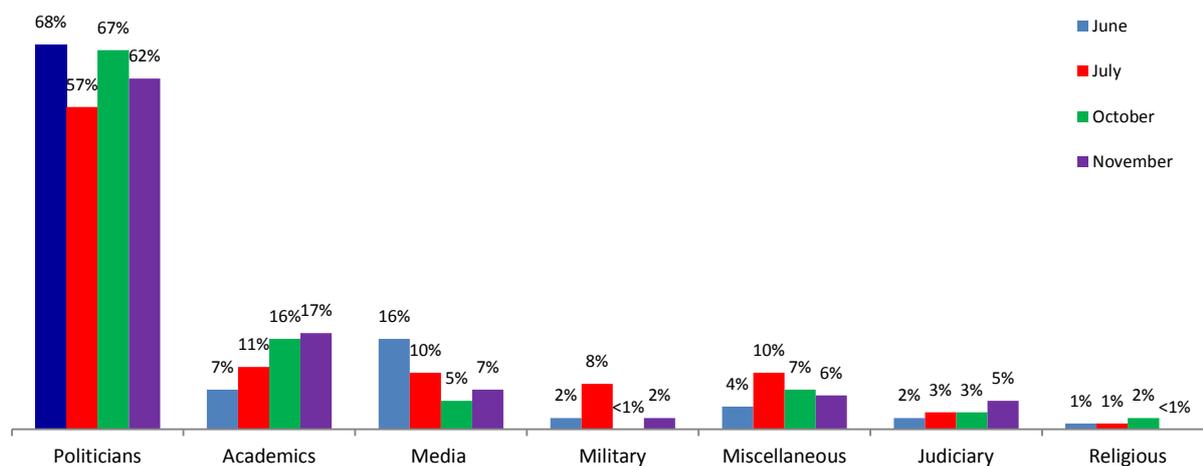
Source: TV Content Analysis by Gallup Pakistan Media Research Consultancy* for Gilani Research Foundation
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Methodology

The study was released by Gilani Foundation and carried out by Gallup Pakistan, the Pakistani affiliate of Gallup International. The duration of the analysis is October and November 2016. This data was obtained after reviewing around 137 hours of video, spread over 2 months, 8 talk shows (Off the Record; Capital Talk; Meray Mutabiq; Sawal Yeh Hai; News Eye; Aapas Ki Baat; Nadeem Malik Live and Tonight with Fareeha) and 218 episodes.

The 8 talk shows have been picked because they have been characteristic of consistently high ratings or the channel they are aired on has a significant share in terms of TV audiences.

Gallup Pakistan conducts TV content analysis on a monthly basis. For a more holistic picture, the trend analysis in this particular Press Release has been done for trends over six months keeping June 2016, July 2016 and October 2016 and November 2016 in mind.

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Gilani Research Foundation is headed by Dr. Ijaz Shafi Gilani who pioneered the field of opinion polling in Pakistan and established Gallup Pakistan in 1980. Currently Dr. Gilani, who holds a PhD from the Massachusetts Institute of Technology (MIT) and has taught at leading universities in Pakistan and abroad, is Chairman of Gallup Pakistan.

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