



Special Press Release

Media**Television Viewership Habits****Television viewership in Pakistan: Millennial television viewers in Pakistan less interested in news channels; more interested in local entertainment channels. (Gallup Pakistan)**

Islamabad, June 5, 2017

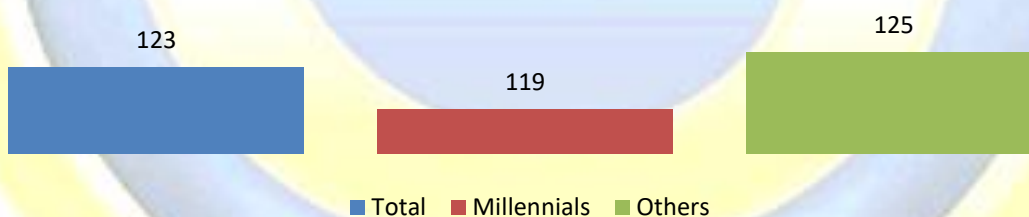
Gallup Pakistan is releasing this press release in relation to Television Viewership Habits in Pakistan. The purpose of this press release is to provide our readers interesting findings from the Gallup Pakistan TV Ratings Panel spread over 3000 households across Pakistan (the only national TV Ratings in Pakistan). This press release provides findings at two levels – a comparison of television viewership between millennials and other viewers for different genres for the year 2016 and a trend of television viewership habits over the past eight years.

Television Viewership in Pakistan: An average Pakistani spends 2 hours in front of TV screen

On average a television viewer in Pakistan spends 2 hours daily watching television (123 minutes). This result translates into 14 hours of television viewership per week, 56 hours in a month and 672 hours annually, which means an average Pakistani spends 12% of his active time (approximately 17 out of 24 hours) watching television.

Millennials are watching less TV than other age groups

Breaking the national results by age categories, it is observed that millennials on average watch 119 minutes of television daily, while other viewers watch 125 minutes. These figures illustrate, that on average other viewers (Age 30+) watch 6 more minutes daily in contrast to millennial viewers.

Overall Television Viewership in 2016

*Millennials: Age 18-30 *Others: Age 30+

Source: Gallup Pakistan TV Ratings Panel

(www.gallup-international.com; www.gallup.com.pk, www.gilanifoundation.com)

Television Viewership Habits by Genre: Millennials watch less news channels and more local entertainment

- 1. News Channels** A millennial news channel viewer watches 10% (9 minutes) less of news compared to other viewers

On average a millennial news channels viewer in Pakistan spends 81 minutes daily watching news channels, while other viewers watch 90 minutes daily.

- 2. Local Entertainment** Other viewers watch 2% less of entertainment channels per day compared to millennial viewers

On average a millennial local entertainment viewer in Pakistan spends 86 minutes daily watching local channels, while other viewers watch 84 minutes daily.



3. **Foreign Entertainment** A millennial foreign entertainment viewer watches 19% (12 minutes) more of foreign content than other viewers

On average a millennial foreign entertainment viewer in Pakistan spends 74 minutes daily watching foreign channels, while other viewers watch 62 minutes daily.

4. **Movies** Other viewers watch 26% (15 minutes) more of movie channels than millennials

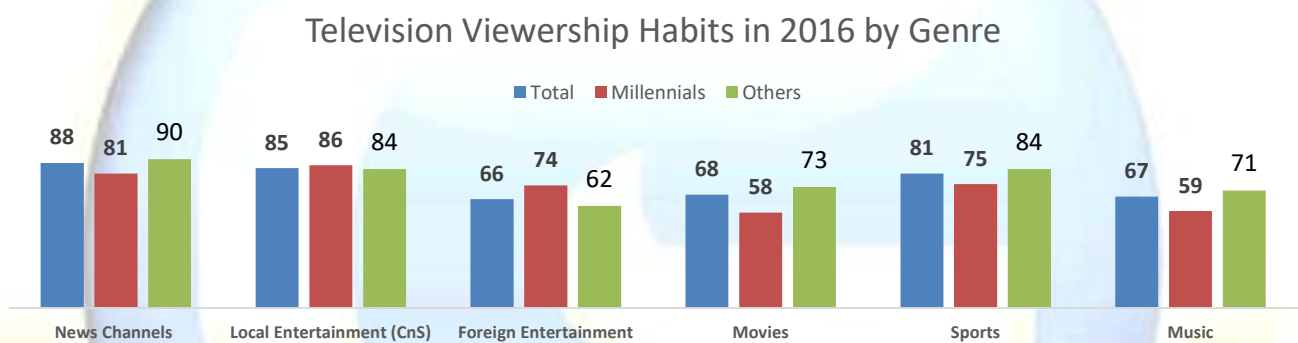
Among movie viewers in Pakistan, millennials on average watch 58 minutes of movie channels daily, while other viewers spend 73 minutes.

5. **Sports** A millennial sports viewer watches 11% (9 minutes) less of sports than other viewers

Among sports viewers in Pakistan, millennials on average watch 75 minutes of sport channels daily, while other viewers spend 84 minutes.

6. **Music Channels Viewership** Millennial viewers watch 17% (12 minutes) less of music channels than millennials

On average a millennial music channel viewer in Pakistan spends 59 minutes daily watching music channels, while other viewers watch 71 minutes.



*Millennials: Age 18-30 *Others: Age 30+

Source: Gallup Pakistan TV Ratings Panel
(www.gallup-international.com; www.gallup.com.pk, www.gilanifoundation.com)

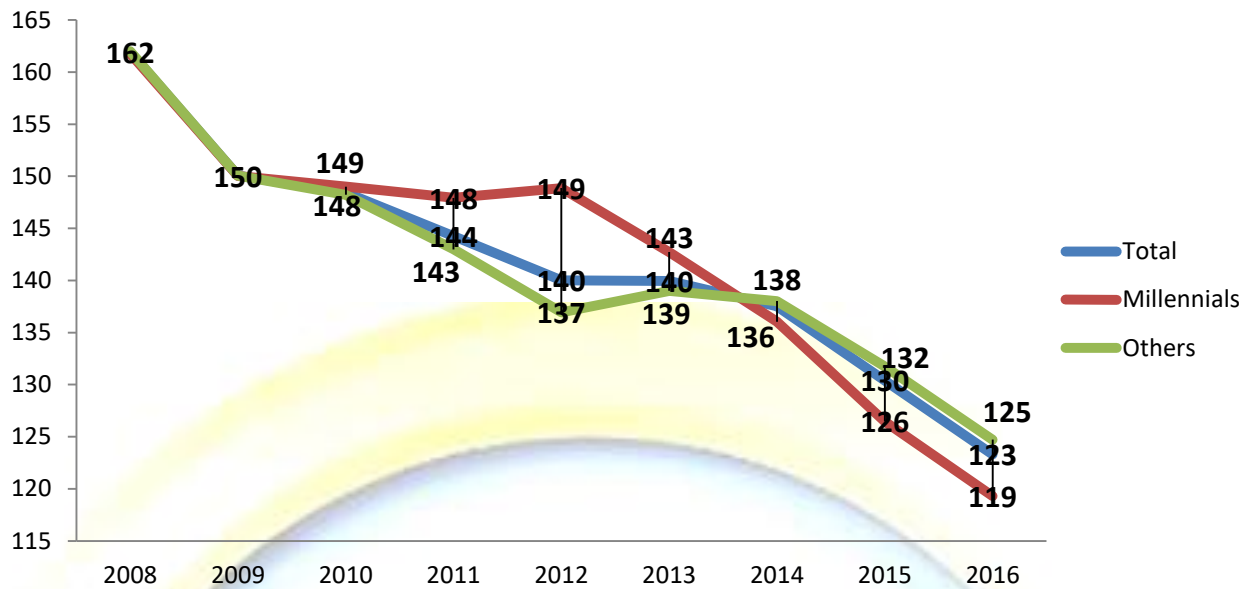
Trends in Television Viewership Habits

1. **Overall Trend:** Since 2008, millennial vs. others TV viewership pattern has changed significantly

In 2008, an average television viewer in Pakistan was watching 2.7 hours of television daily; millennials and other viewers on average were also watching television for the same amount of time. However, television viewership trends have not remained consistent. Over a period of 8 years, overall daily television viewership in Pakistan has declined by 39 minutes (from an average daily viewership of 162 minutes in 2008, to 123 minutes in 2016).

Similarly, there have been shifts in viewership among millennials and other viewers as well. While, the daily viewership average for both millennials and other viewers was at par in 2008 (162 minutes) and 2009 (150 minutes), millennials were watching 1 more minute of television in 2010 and 5 more minutes in 2011. The gap was widest in 2012, where millennials on average were watching 12 more minutes of television compared to other viewers. This gap narrowed down to 4 minutes in 2013.

In 2014, a reversal in television viewership trends was observed whereby other viewers on average were watching 2 more minutes daily in contrast to millennials. The gap widened to 6 minutes in 2015 and remained constant for the year that followed.



Source: Gallup Pakistan TV Ratings Panel
(www.gallup-international.com; www.gallup.com.pk, www.gilanifoundation.com)

2. News Channel

News channel viewership has observed fluctuating trends over the years; with an average daily viewership share of 74 minutes in 2008, the average viewership has increased by 14 minutes to 88 minutes in 2016.

Millennials Vs. Others

Millennials were watching 9 more minutes of news channel in 2008 compared to other viewers (79 vs 70 minutes). The share of news channel viewership for both millennials and other viewers converged to 74 minutes in 2009. The gap between millennials and other viewers widened again in 2011, where by millennials were watching 5 more minutes compared to other viewers.

Since 2013, news channel viewership trends have reversed. The gap between other viewers and millennials started to widen gradually, with other viewers watching 2 more minutes in 2013 to 9 more minutes in 2016.



Source: Gallup Pakistan TV Ratings Panel
(www.gallup-international.com; www.gallup.com.pk, www.gilanifoundation.com)



3. Local Entertainment CnS

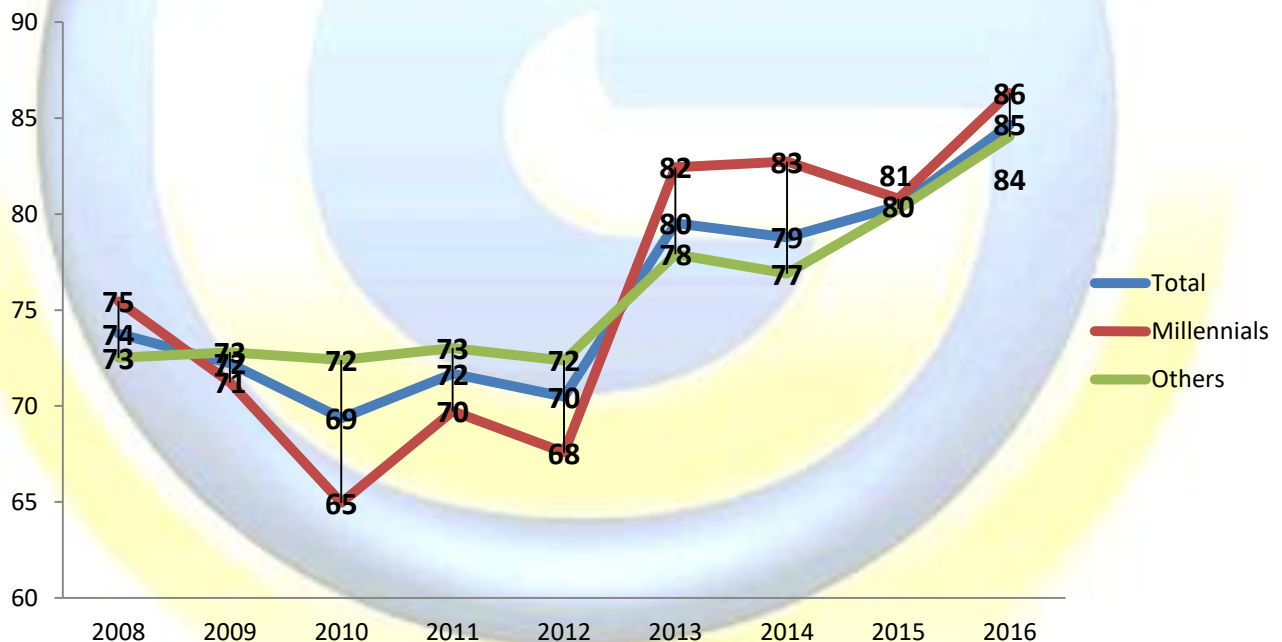
Over a period of 8 year, daily television viewership share for local entertainment has witnessed an 11 minutes increase, from average daily viewership of 74 minutes in 2008 to 85 minutes in 2016.

For other viewers, local entertainment viewership trends remained consistent between 2008 and 2012, rising and falling by 1 minute over the four years. In 2013, other viewer's viewership share for local entertainment increased by 6 minutes to 78 minutes, then decreased to 77 minutes in 2014, increasing to 80 minutes in 2015 and increasing by 4 minutes to 84 minutes in 2016.

For millennials, local entertainment viewership trends have observed greater shifts. In 2008, millennials on average watched 75 minutes of local entertainment daily, declining to 71 minutes in 2009 and to 65 minutes in 2010. The local entertainment share increased to 70 minutes in 2011, decreased by 2 minutes in 2012, followed by a sharp increase of 14 minutes to 82 minutes in 2013. Over a period of 8 years, millennials viewership share of local entertainment has increased by 11 minutes.

Millennials Vs. Others

In 2008, millennials were watching 2 more minutes of local entertainment than other viewers. The gap remained constant but reversed in 2009 and was widest in 2010, with other viewers watching 7 more minutes than millennials. A reversal in trend was observed in 2013, with millennials watching 4 more minutes than other viewers, the gap increasing to 6 minutes in 2014. In recent years, the gap between millennials and other viewers is converging.



Source: Gallup Pakistan TV Ratings Panel
(www.gallup-international.com; www.gallup.com.pk, www.gilanifoundation.com)

4. Foreign Entertainment

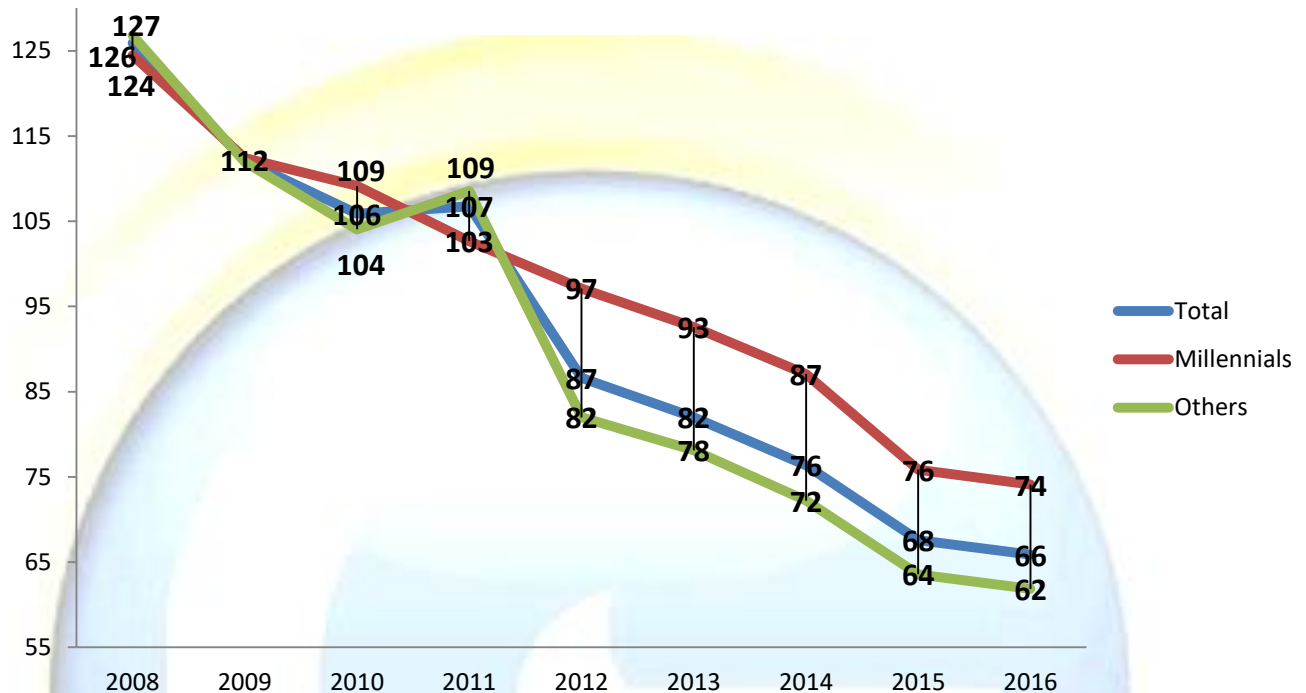
In 8 years, share of foreign entertainment viewership has decreased by 60 minutes. The average daily viewership of foreign channels was 126 minutes in 2008 that reduced to 66 minutes in 2016. India soaps and movie channels constituted a major share of foreign entertainment and the sharp decline in viewership is the result of the ban on airing Indian content by PEMRA (the media regulatory body in Pakistan) due to the ongoing tensions between the two countries.

Viewership share for millennials has observed a 50 minute decline, from an average daily viewership of 124 minutes in 2008 to 74 minutes in 2016. On the contrary, the viewership share



of other viewers has reduced by a significant 65 minutes, from an average daily viewership of 127 minutes in 2008 to 62 minutes in 2016.

The gap between millennials and other viewer's share of foreign entertainment was quite narrow in 2008, at a standing of 3 minutes (millennials 124 minutes; others 127 minutes). The gap was widest in 2012, with millennials watching 15 more minutes of foreign entertainment daily compared to other viewers. Till 2014, the gap between millennials and other viewers remained at 15 minutes and dropped to 12 minutes in 2015 and 2016.



Source: Gallup Pakistan TV Ratings Panel
(www.gallup-international.com; www.gallup.com.pk, www.gilanifoundation.com)

5. Movies

Over a period of 8 year, daily television viewership share for movies has witnessed a 5 minutes increase, from average daily viewership of 63 minutes in 2008 to 68 minutes in 2016.

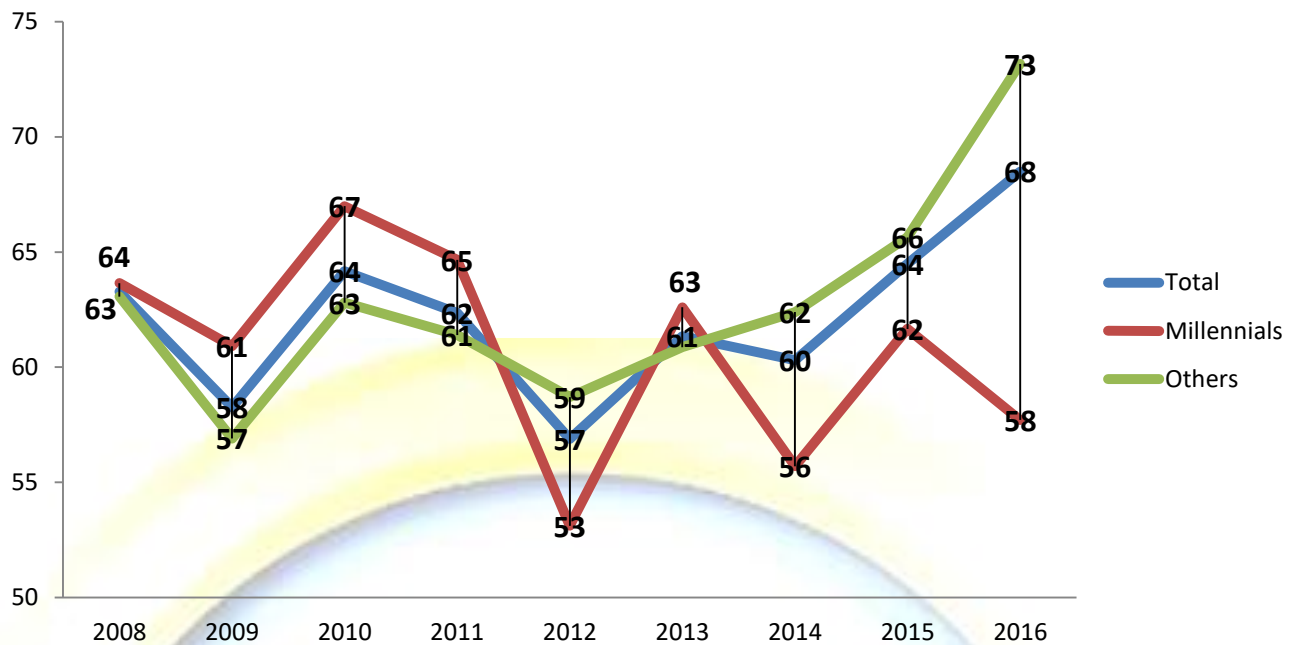
For other viewers, movie viewership trends have fluctuated over a span of 8 years. In 2010, other viewer's viewership share for movies was 63 minutes that decreased to 59 minutes in 2012 and increased to 62 minutes in 2014. The most prominent change was observed between 2015 and 2016, where the share increased by 7 minutes.

For millennials, movie channel viewership trends have observed greater shifts than other viewers. In 2008, millennials on average watched 64 minutes of movies daily, declining to 61 minutes in 2009. The share increased to 67 minutes in 2010, decreased by 2 minutes in 2011, followed by a sharp decrease of 12 minutes to 53 minutes in 2012. Over a period of 8 years, millennials viewership share of movies has decreased by 6 minutes.

Millennials Vs. Others

In 2008, millennials were watching 1 more minute of movies daily on average than other viewers. In recent years, the trend has reversed with other viewers watching more movies. In 2016, the gap between millennials and other viewers was widest, with other viewers watching 15 more minutes of movies than millennials.

With digitalization and internet penetration, increasingly millennials are watching movies online which explains the decline in the share of television viewership.



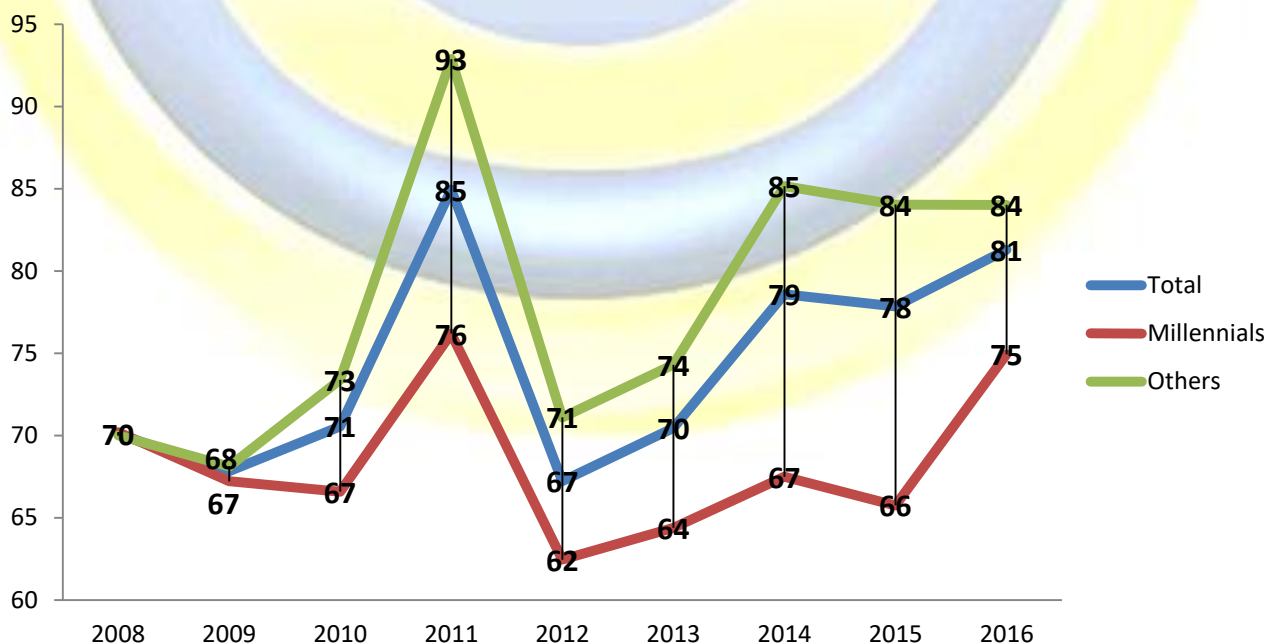
Source: Gallup Pakistan TV Ratings Panel
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6. Sports

In 8 years, share of sports viewership has increased by 11 minutes. The average daily viewership of sports channels was 70 minutes in 2008 that increased to 81 minutes in 2016.

Viewership share for millennials has observed a 5 minute increase, from an average daily viewership of 70 minutes in 2008 to 75 minutes in 2016. On the contrary, the viewership share of other viewers has increased by 14 minutes, from an average daily viewership of 70 minutes in 2008 to 84 minutes in 2016.

Millennials and other viewers were watching 70 minutes of sports channels daily on average in 2008. The gap was widest in 2014 and 2015, with other viewers watching 18 more minutes of sports daily compared to millennials. The gap has partially narrowed down to 9 minutes in 2016.



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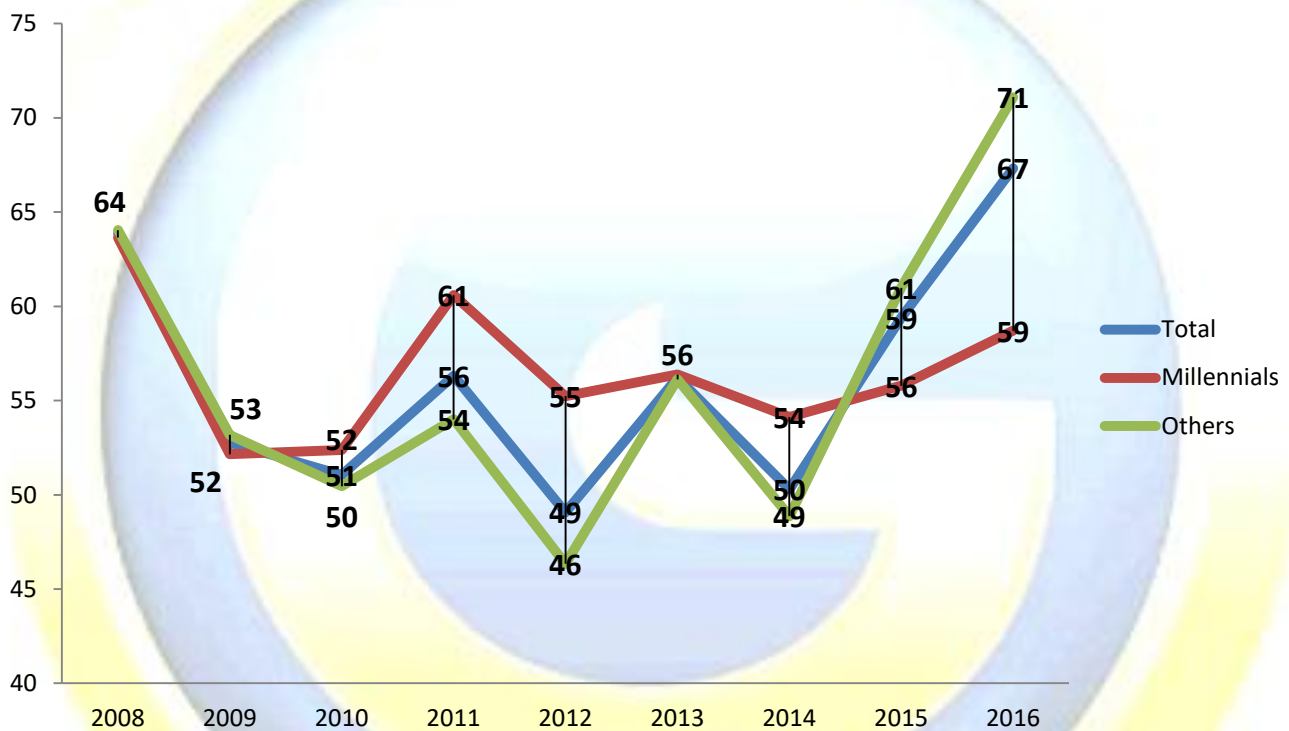
7. Music Channels

Music channel viewership has observed fluctuating trends over the years; with an average daily viewership share of 64 minutes in 2008, the average viewership has increased by 3 minutes to 67 minutes in 2016.

Millennials Vs. Others

Millennials and other viewers were watching 64 minutes of music channels in 2008. On average millennials were watching more music channels daily between 2010 and 2014, the gap being widest in 2012, where millennials were watching 9 more minutes than other viewers.

Since 2015, the trends have reversed. The gap between other viewers and millennials started to widen gradually, with other viewers watching 5 more minutes in 2015 to 12 more minutes in 2016. This recent gap can be explained by millennials listening to music online and using digital music players.



Source: Gallup Pakistan TV Ratings Panel
(www.gallup-international.com; www.gallup.com.pk, www.gilanifoundation.com)

The study was released by Gilani Research Foundation based on Gallup Pakistan's TV Ratings service which is the only National TV Ratings in Pakistan.

For more survey data see website www.gallup.com.pk or write to Ms. Amnah Imtiaz at amnah.imtiaz@gallup.com.pk

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