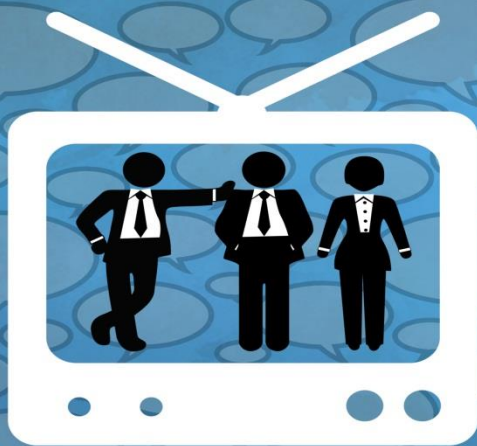




TV TALK SHOW ANALYSIS

GALLUP & GILANI PAKISTAN

TALK SHOWS ANALYSIS REPORT

August 2017

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

Gallup & Gilani

P A K I S T A N

Affiliated with Gallup International

Pakistan's Foremost Social Research Lab

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TELEVISION

Talk Shows During August 2017

In the 8 Talk Shows analyzed during August 2017, PPP and PML-N had the highest representation (30% and 28% respectively); 'Politics' was the most popular topic under discussion (37%), majority of guests were politicians (75%) and females made up only 16% of the total guests. GALLUP & GILANI PAKISTAN

Islamabad, October 30, 2017

According to a Monthly Research Study conducted by Gallup & Gilani Pakistan Media Research Consultancy (www.gallup.com.pk ; www.gilanifoundation.com), , PPP and PML-N had the highest representation (30% and 28% respectively); 'Politics' was the most popular topic under discussion (37%), majority of guests were politicians (75%) and females made up only 16% of the total guests during the month of August 2017.

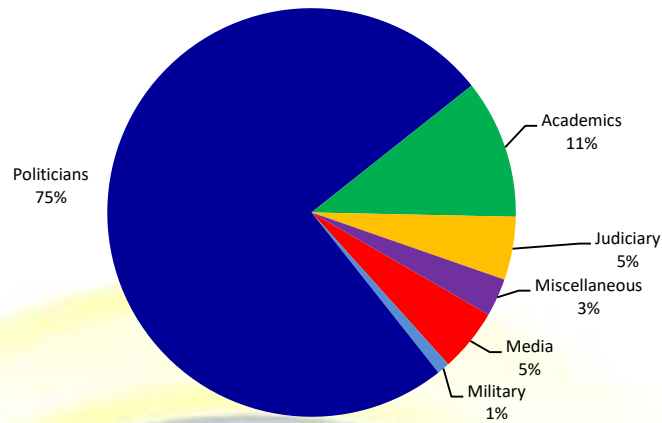
Gallup & Gilani Pakistan's researchers undertook content analysis of **8** popular current events talk shows (Off the Record; Capital Talk; Meray Mutabiq; Sawal Yeh Hai; News Eye; Aapas Ki Baat; Nadeem Malik Live and Tonight with Fareeha), consisting of a total of **128** episodes aired on different cable television networks during August 2017. 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: 4 Guests per Episode

On average **4** guests appeared per episode for each show in August 2017. While some guests were frequently invited on different talk shows, overall there were **126** unique guests out of a total of **468** guests in the 128 episodes analyzed for August.

Background of Guests Invited: Politicians Continue to Dominate

Furthermore, in August, the majority of guests were politicians (75%), followed by academics and experts, like defense analysts and professors (11%). Guests from the media, such as journalists, anchors etc., and the judiciary (judges/lawyers) comprised of 5% of guests each, followed by miscellaneous occupations at 3%. Share of military personnel was the lowest at 1%.



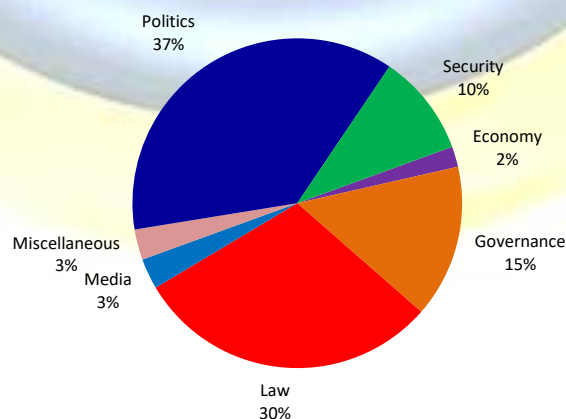
Source: TV Content Analysis by Gallup & Gilani Pakistan Media Research Consultancy (www.gallup.com.pk ; www.gilanifoundation.com)

Air-time Share of Political Parties: PPP and PML-N at the top

In August 2017, the maximum representation amongst political parties was at 30% for Pakistan Peoples Party (PPP), and 28% for Pakistan Muslim League Nawaz (PML-N), followed by Pakistan Tehreek-e-Insaf (PTI) at 22%. Muthahida Qaumi Movement (MQM) occupied fourth place with 5% of airtime, followed by Awami Muslim League (AML), Jamaat-e-Islami, Jamiat Ulema-e-Islam (F) and independents at 2% each. The remaining airtime was constituted by Awami National Party (ANP), Pakistan Awami Tehrik (PAT), the Pakistan Muslim League (Quaid-e-Azam Group) (PML-Q), and various other parties. The representation in airtime is disproportionate to the votes acquired by these parties in the 2013 Elections.

Most Discussed Topic in Talk Shows: Politics

In the month of August, Politics took center stage in talk shows (37%). Politics was followed by discussions on Law (30%) and Governance (15%). Security related issues were conversed on 10% of the time on these talk shows. Media related subjects and miscellaneous topics occupied 3% of airtime each. While economic matters comprised barely 2% of the talk time.



Source: TV Content Analysis by Gallup & Gilani Pakistan Media Research Consultancy (www.gallup.com.pk ; www.gilanifoundation.com)

Most Discussed Topics within Politics: Post Panama Political Scenario: Nawaz Sharif GT road rally/Army-Govt conflict/Judiciary-Govt conflict

The most frequently discussed issue under politics was the post Panama case political scenario (36%) comprising of former Prime Minister Nawaz Sharif's GT road rally and the conflict between the Judiciary-Government post the verdict. 18% of airtime was devoted to Ayesha Gulalai's allegations against Imran Khan and 14% of airtime was given to NA-120 Re-Election 2017. 13% and 8% of airtime was given respectively to PPP politics, and to general political issues. 8% discussed MQM Party and Pak Sar-zameen Party while 7% focused on Tahir-ul-Qadri's politics.

Most Discussed Topics within Law: JIT & Panama Case, Amendments to Article 62-63 of the Constitution, Ayesha Gulalai's allegations against Imran Khan

In August 2017, most of the discussions under law were related to the JIT /Panama Case against Nawaz Sharif along with the ruling government's reservations against the decision (33%). This was followed by discussions on Article 62-63 of the 1973 Constitution of Pakistan (25%). 16% focused on Asif Ali Zardari's corruption case. Discussions related to Benazir's murder case and Tahir ul Qadri's demands for justice for Model Town victims took 7% of the airtime each. These were followed by discussions on the investigative committee on Ayesha Gulalai's allegations against Imran Khan (6%), Musharraf's trial on constitution break case (4%) and the Dawn Leaks case (2%).

Commentary by Gallup & Gilani Pakistan Media Research Consultancy Team:

The analysis of talk shows during August shows a return of the dominance of Politics in the media landscape, having originally emerged as a popular issue in April.

The ranking of Law, Governance and Security may vary from month to month, but it is usually these three domains that remain prominent – this month Politics, Law and Governance bagged the top three positions in terms of airtime on these talk shows. Politics was at center stage of discussion in August – specifically in regards to the Panama Leaks/JIT verdict, Nawaz Sharif's GT road rally and the subsequent tensions between the judiciary and ruling government.

It is important to note that since the Panama Leaks case is being discussed from political, legal and governance perspectives, there is sometimes a very fine line between these categories, and most national issues cannot be explored solely through the perspective of one domain.

Furthermore, Females have always been underrepresented on talk shows (April – Males 89% Females 11%, June – Males 92% Females 8%). In August, females have 16% representation. These figures are highly skewed, and talk show hosts along with the management cadre need to put in extra efforts in order to ensure fairer representation for women. 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.

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 PPP, PML-N and PTI were once again the three parties with the highest representation on talk shows during August. Between June and August, PPP's representation has risen from 22% to 30%; PTI's share has fallen from 35% to 22%; and PML-N's representation has remained stagnant at 28%.

This distribution and the changes in rankings over these months, indicate 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 for that particular month. However, the consistently high representation of the same three parties over these months does point to limited airtime occupied by other parties.



Source: TV Content Analysis by Gallup & Gilani Pakistan Media Research Consultancy*
(www.gallup.com.pk ; www.gilanifoundation.com)

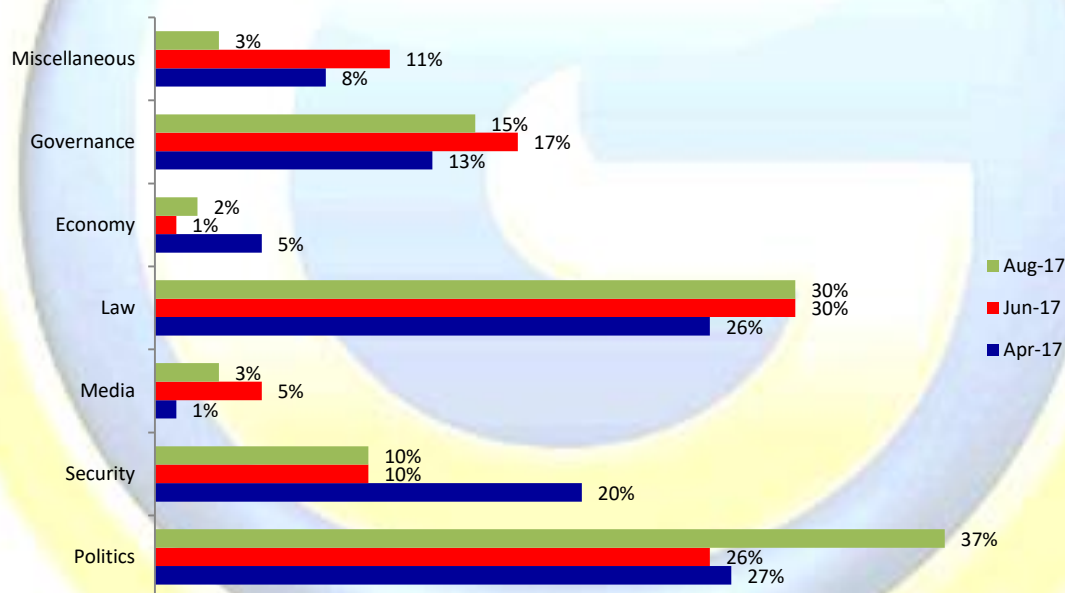
Trends in Topics Discussed

A topic-wise comparison of April, June and August 2017 reveals that relative to other topics, talk shows usually give most airtime to Politics, Security, Law and Governance, as was seen in April through August. However recent focus has specifically been on Politics, Law and Governance in August. There has been a negligible decrease of 2% in discussion on governance between June and August 2017. This can be attributed to an increased interest in political matters pertaining to the JIT and Panama Papers verdict and the ruling party's response and GT road rally in support of the de-throned Prime Minister. Therefore, discussion on politics has risen from 26% to 37% in the month of August. 58% of legal discussions and 36% of political discussions revolved around the Panama Case/JIT verdict which has drawn public, legal and political attention. The issue has been given the largest portion of airtime under Law and Politics.

Airtime devoted to Security has fallen since April from 20% to 10% due to decrease in terrorist activity and general stability in the month of August.

While internal political and security debates have continued, 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 law has continued this process of revival. However, this change in trend is attributed to Pakistan's current affairs, and focus on political issues will continue to increase until the 2018 Elections.

Tax reforms and in general economic progress dominated economic discussions, each with a 50% share. However, the Economy's importance has not been emphasized enough, since there has been a negligible increase of 1% in the airtime being devoted to economic issues between the months of June and August. For a developing economy like Pakistan with chronic economic issues, it is problematic to see the economy being neglected within public agenda. Discussions on the media, too, remain low (3%), a phenomenon that should be investigated, since it is one of the most influential institutions in Pakistan.

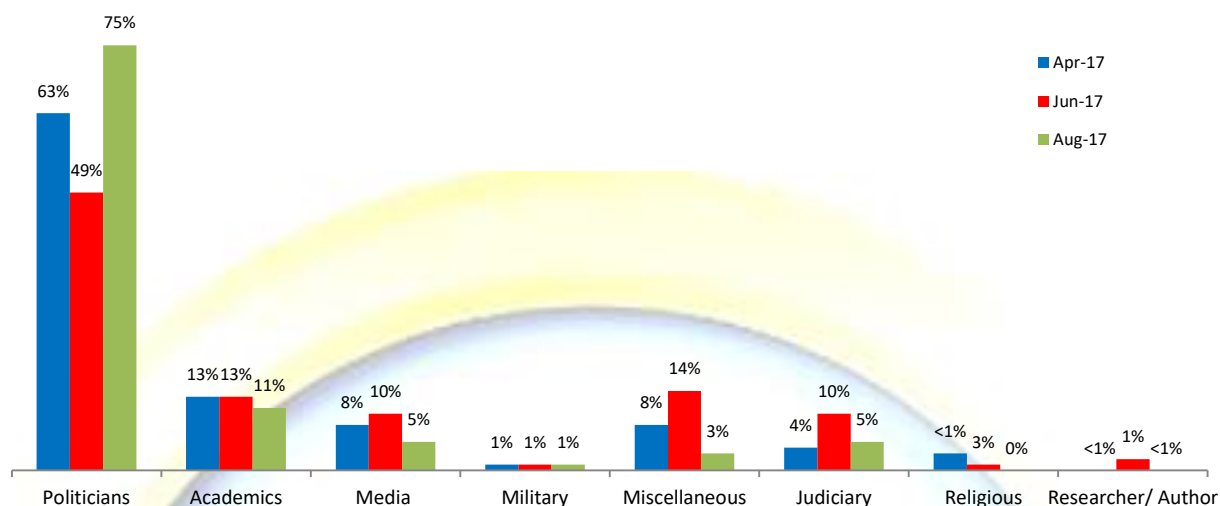


Source: TV Content Analysis by Gallup & Gilani Pakistan Media Research Consultancy*
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Trends in Background of Guests

A comparison of the background of guests between April and August illustrates that politicians have increasingly dominated the scene throughout these months, (April 63%; June 49%; August 75%). They have a share of almost two-thirds in April, nearly half in June and three-fourth in August. Representation of media has declined between June and August (10% to 5%) while guests from academia have fallen by 2%. Share of judicial guests also decreased to 5% in August, which demonstrates a five point decrease from June. Representation of researchers/authors has exhibited a steady negligible share. Similarly, representation of

religious guests still remains relatively low. Share for military has remained constant between February, April and June.



Source: TV Content Analysis by Gallup & Gilani Pakistan Media Research Consultancy*
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Methodology

The study was released by Gilani Foundation and carried out by Gallup & Gilani Pakistan, the Pakistani affiliate of Gallup International. The duration of the analysis is June 2017. This data was obtained after reviewing around **64** hours of video, 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 **101** 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 & Gilani Pakistan conducts media 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 three months, keeping February, April and June in mind.*

About Gilani Research Foundation

Gilani Research Foundation is a not for profit public service project to provide social science research to students, academia, policy makers and concerned citizens in Pakistan and across the globe.

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 and Gilani Pakistan.

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For any queries please contact:
Ms. Amnah Imtiaz
Assistant Manager

Phone: +92-51-2655630
E-mail: amnah.imtiaz@gallup.com.pk