

Findings from Media Survey 2017 in Pakistan

**Based on Gallup Media Survey 2017 conducted with over 12,000
Men and Women across Urban and Rural Pakistan in 4 Provinces
during January 2017**

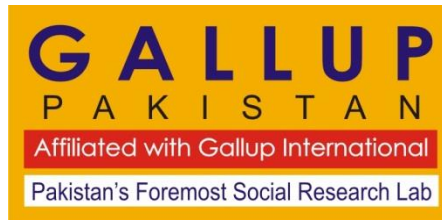


TABLE OF CONTENTS

Executive Summary

- **Section 1:** TV Viewership in Pakistan
- **Section 2:** Internet Usage in Pakistan
- **Section 3:** Mobile Phone Usage in Pakistan
- **Section 4:** Radio Listenership in Pakistan

EXECUTIVE SUMMARY

TV Viewership

- **Viewership:** Nearly 2/3rd Pakistanis (67%) claim to watch Television. Among TV viewers, 74% are regular viewers i.e. they watch TV 4 or more days a week. 21% TV Viewers in Pakistan are occasional viewers and 5% are causal viewers.
- **Age-wise Breakdown of TV Viewers:** Nearly 73% individuals between the ages of 18 and 34; 65% individuals between the ages of 35 and 49; and 54% individuals above the age of 50 reported to watch television. Results show that TV viewership tends to decrease as age increases.
Frequency of TV viewership is also observed to be higher among the younger audience.

EXECUTIVE SUMMARY

Internet Usage

- **Internet Usage:** 18% Pakistanis use the internet
- **Type of Mobile Phone used:** Usage of internet is higher among men (16%), millennials (16%), and households with medium and above levels of income (15%).
- **Most used device for Internet Usage:** 90% Pakistanis use Internet on mobile phone, 6% on laptop, 4% on desktop computer and 1% on tablet.

EXECUTIVE SUMMARY

Mobile Phone Usage

- **Mobile Phone Usage:** 65% Pakistanis use a mobile phone
- **Type of Mobile Phone used:** Among the users of mobile phones, a dominant majority (58%) had a basic phone, 23% had a feature phone, and only 19% had a Smart Phone.
- **Monthly Expenditure on Mobile Phone:** 37% Pakistanis spend less than Rs. 200 per month on mobile phone usage, whereas, only 2% spend more than Rs.1000.
- **Reasons for not using a mobile phone:** 68% Pakistanis cite a lack of need, followed by 14% who do not know how to use a mobile phone.

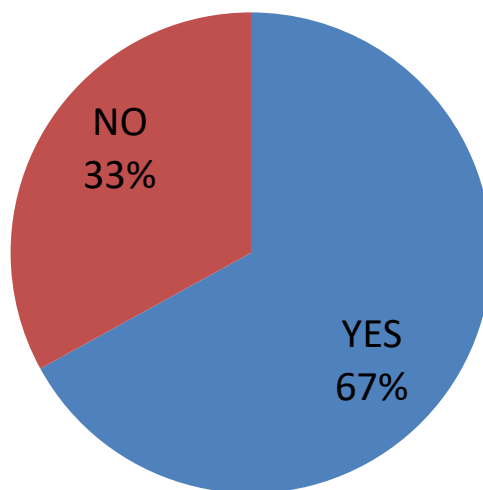
EXECUTIVE SUMMARY

Radio Listenership

- **Radio Listenership:** 9% Pakistanis reported to be radio listeners.
- **Radio Listenership broken down by Gender:** Males are more likely to be Radio Listeners than Females (14% among Males interviewed and 5% among females interviewed).
- **Radio Listenership broken down by Age:** 11% Pakistanis in the age bracket 18-34 reported to listen to the radio; whereas, only 5% respondents above the age of 50+ claimed to be radio listeners.
- **Frequency of Radio Listenership:** Among listeners of radio, those who claimed to listen to the radio 4 or more days a week are considered Regular Listeners (36%); those who responded 1 to 3 days a week are considered Occasional Listeners (40%); and those who said less than one day a week are considered Casual Listeners (24%).

Section 1: TV VIEWERSHIP in Pakistan

1.1 Do you watch Television?



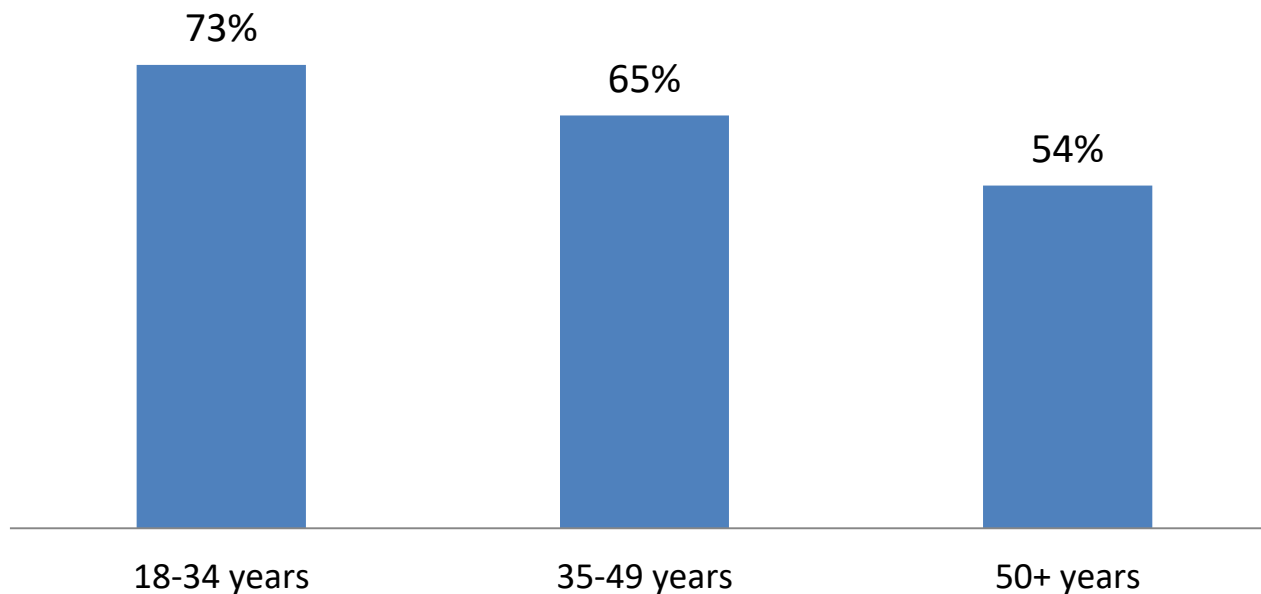
Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Nearly 2/3rd Pakistanis claim to watch Television.

TV viewership has suffered in recent years due to continuous energy outages in Pakistan which have been 12-18 hours a day in rural areas and 8-12 hours in urban areas.

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1.2. Age-wise Breakdown of TV Viewership

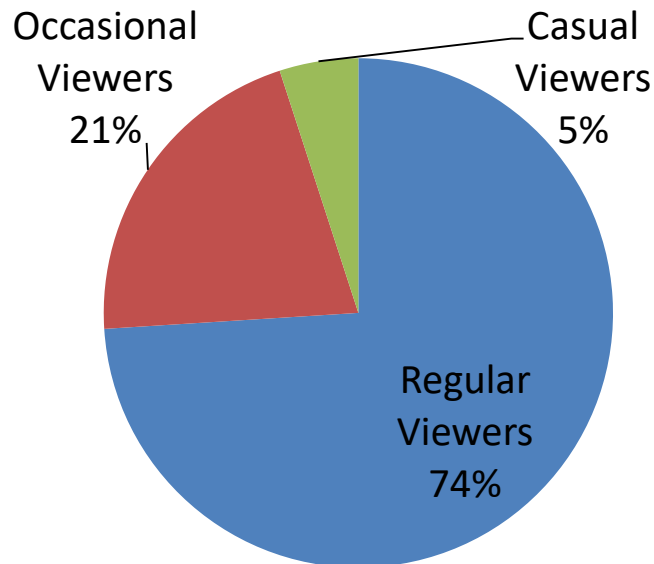


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

While TV viewership varies across the three age brackets, it tends to reduce as age increases.

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1.3 How frequently do you watch Television?



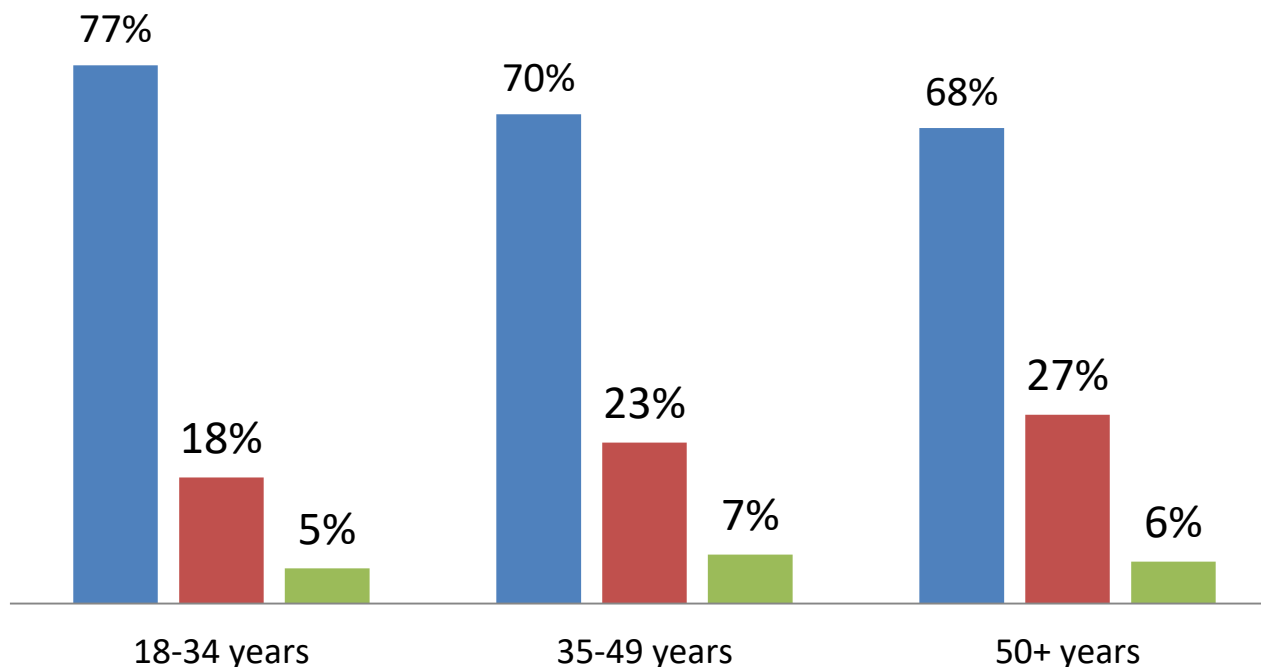
Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Those who responded 4 or more days in a week are defined as **Regular Viewers**, those who responded 1 to 3 days a week are defined as **Occasional Viewers** and those who said less than one day a week are **Casual Viewers**. The results show that nearly 7 out of 10 TV Viewers are Regular viewers i.e. they watch TV 4 or more days a week. 2 in 10 TV Viewers in Pakistan are occasional viewers and 1 in 10 are causal viewers.

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1.4. Age-wise Breakdown of Frequency of TV Viewership



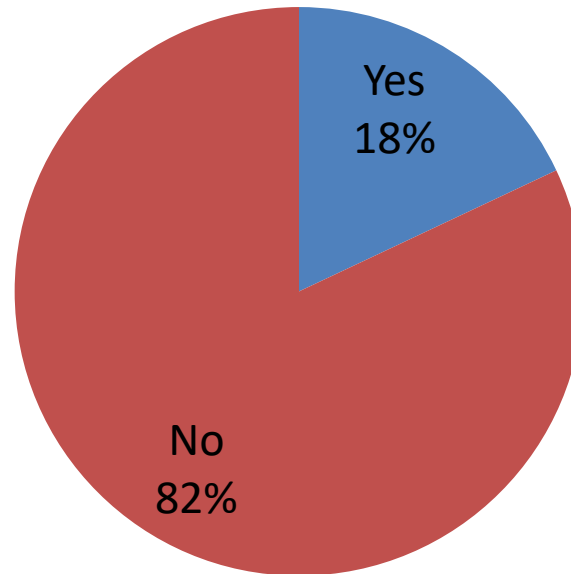
Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Regularity of TV watching decreases as age increases. The younger age bracket tends to watch TV more regularly.

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Section 2: INTERNET Usage Trends

2.1 Do you use the internet?

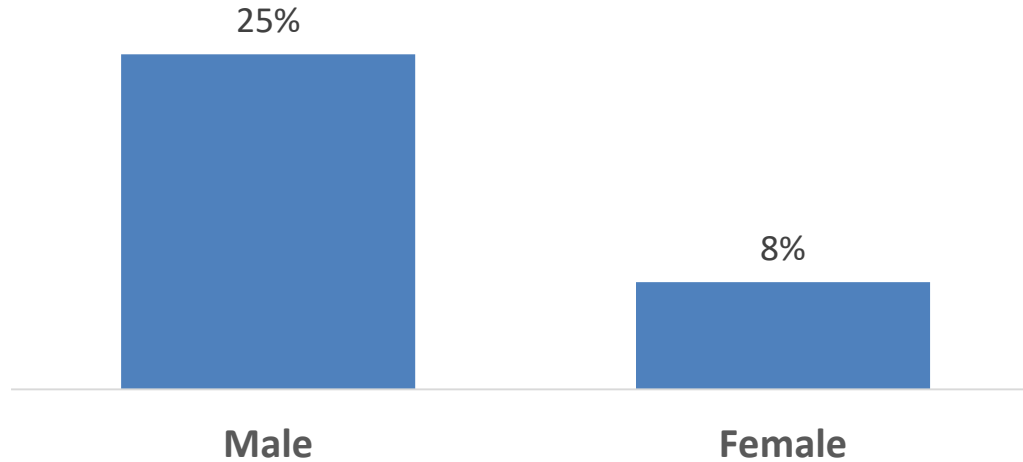


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

18% Adult Men and Women in Pakistan report having access to Internet in the country. Considering there are about 120 Million 18+ Men and Women in the country, this leads to around 20 Million Men and Women reporting to use internet. It should be noted that Internet usage starts at earlier age than 18 and those individuals are not counted here because the survey was restricted to those who were 18 or above.

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2.2 Internet Usage broken down by Gender

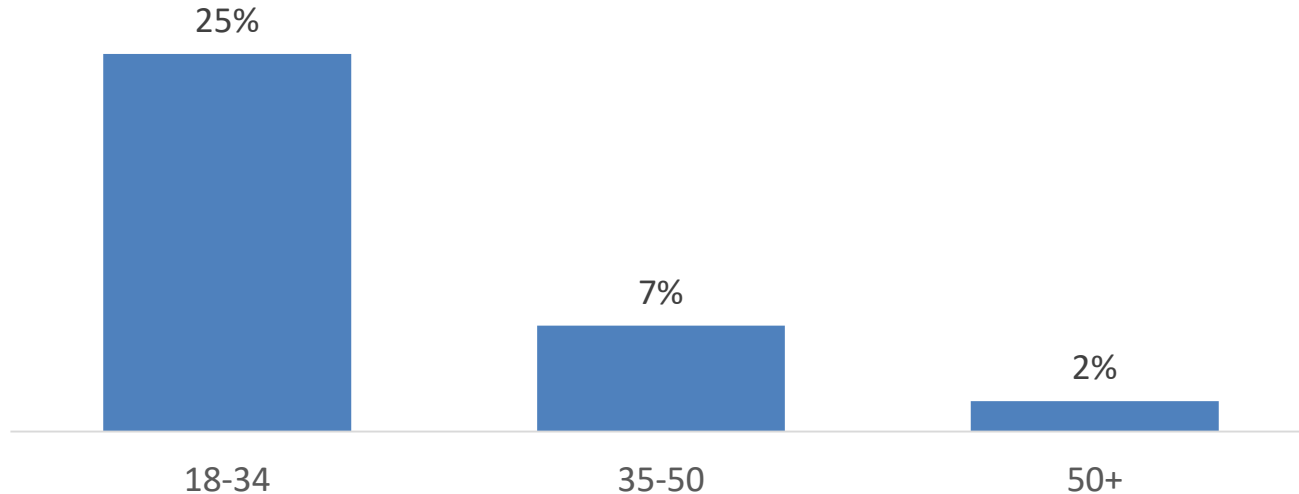


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Males are more likely to be having access to Internet than Females. 25% males surveyed said they had access to Internet as compared to only 8% females.

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2.3 Internet Usage broken down by Age

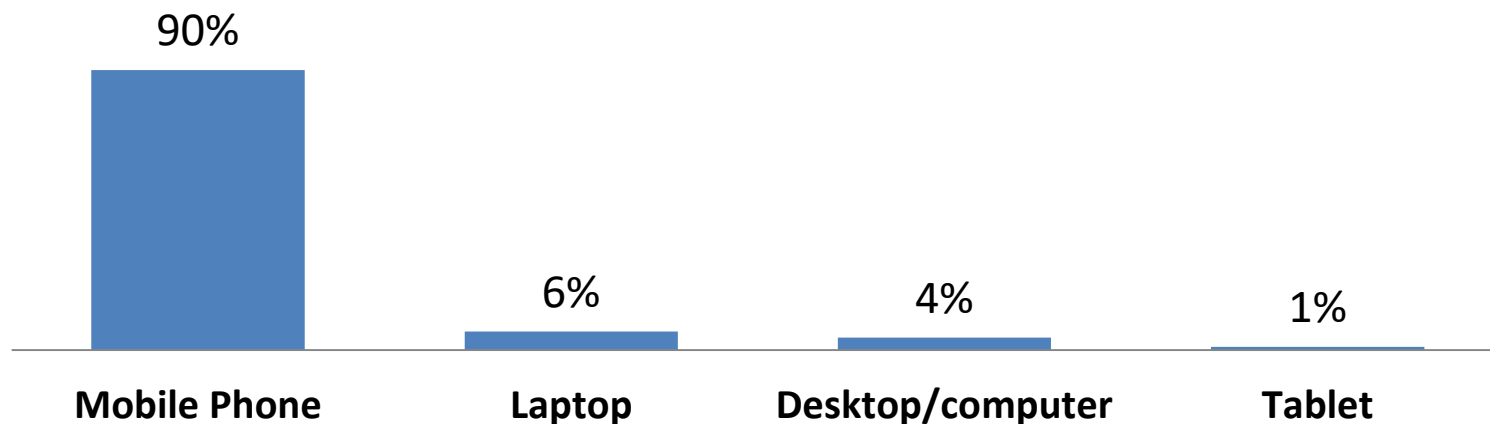


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Internet access reduces with age. 25% of respondents falling in the age bracket 18-34 reported having access to internet as compared to only 2% among 50+ respondents interviewed in the survey.

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2.5 On which devices do you use internet?



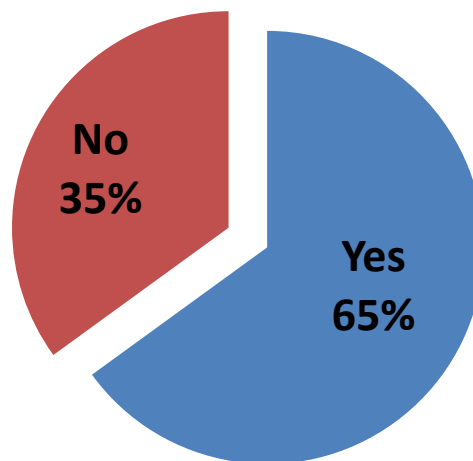
Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

90% Pakistanis use Internet on mobile phone, 6% on laptop, 4% on desktop computer and 1% on tablet.

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Section 3: MOBILE PHONE Usage in Pakistan

3.1 Do you use a mobile phone?

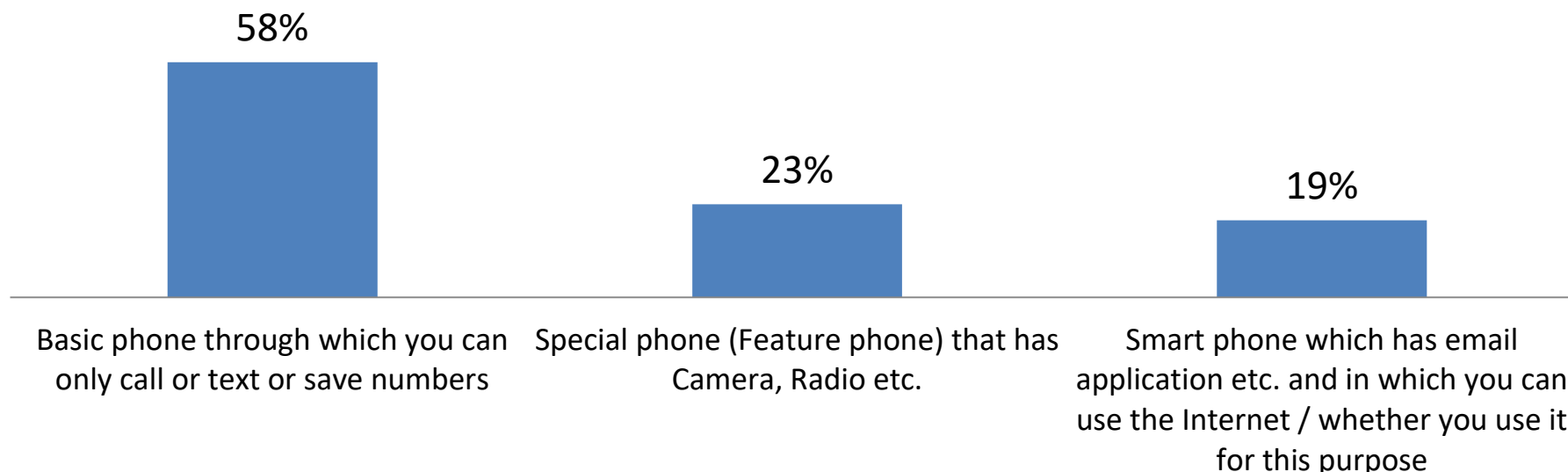


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Respondents were asked if they were using a Mobile phone to which 65% of the respondents said they used Mobile Phone regularly.

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3.2 Please tell us that out of the following types of mobile phones which mobile phone do you use the most?

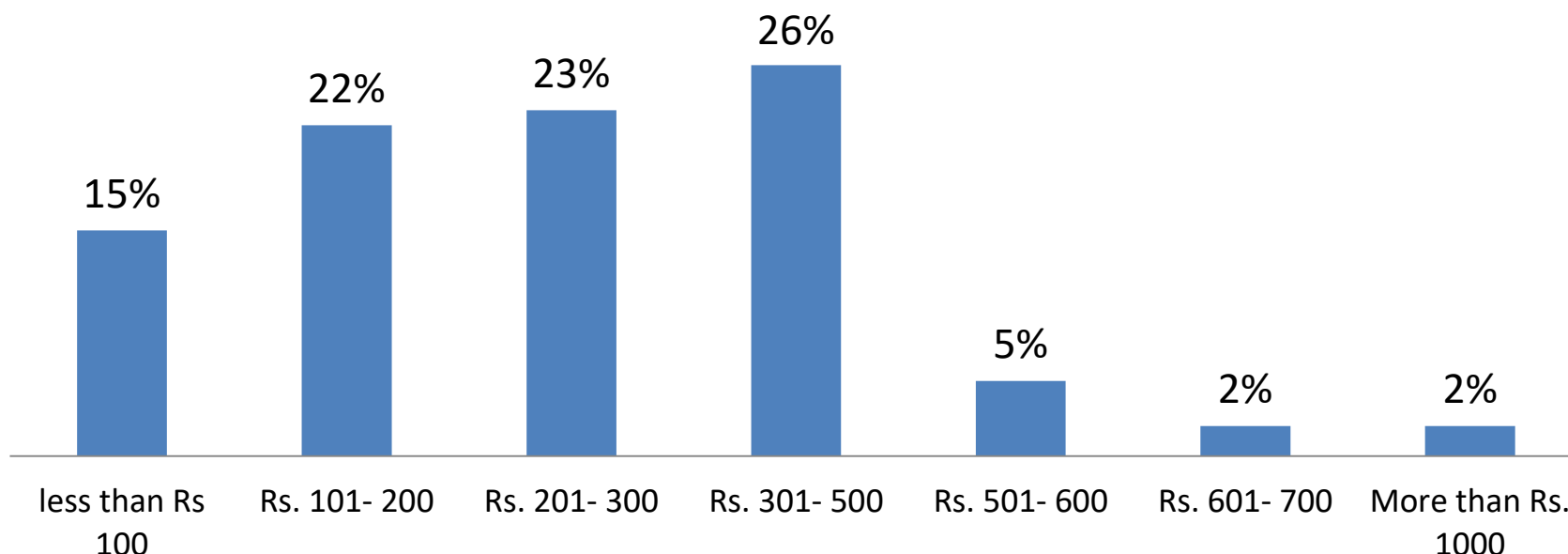


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Among users of mobile phone, 58% Pakistanis use a basic phone/ plain vanilla phone , 23% use a special phone with added features like camera, radio etc. and 19% use a smart phone which has email applications and can access the internet.

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3.3 How much do you approximately spend on your mobile phone in a month?

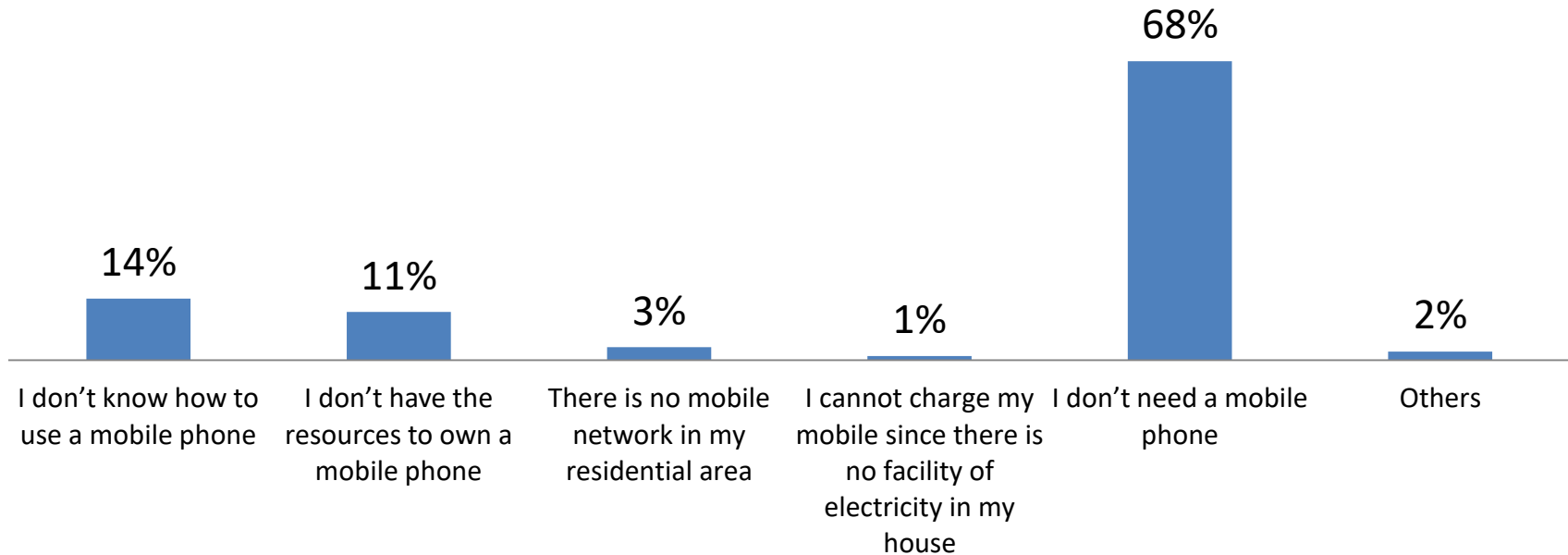


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

15% Pakistanis spend less than Rs. 100 in a month, 22% between Rs. 101 and 200, 23% between Rs. 201 and 300, 26% between Rs. 301 and 500, 5% between Rs. 501 and 600, 2% between Rs.601 and 700 and 2% spend more than Rs.1000.

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3.4 Why don't you use a mobile phone?



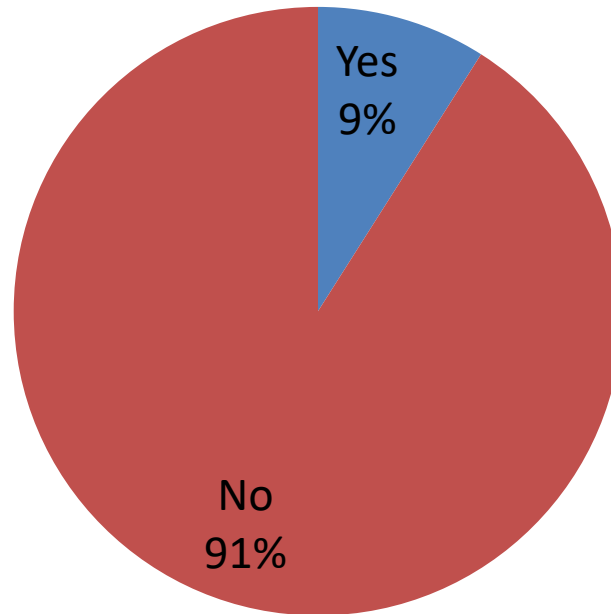
Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

68% Pakistanis cite a lack of need as the main reason for not using a mobile phone, followed by 14% who do not know how to use a mobile phone. Additionally, 11% do not have the resources to own a mobile phone, 3% mention absence of mobile network in their residential area, 2% say others and 1% do not use mobile phone as they cannot charge their mobile since there is no electricity in their house.

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Section 4: RADIO Listenership in Pakistan

4.1 Do you listen to the Radio?

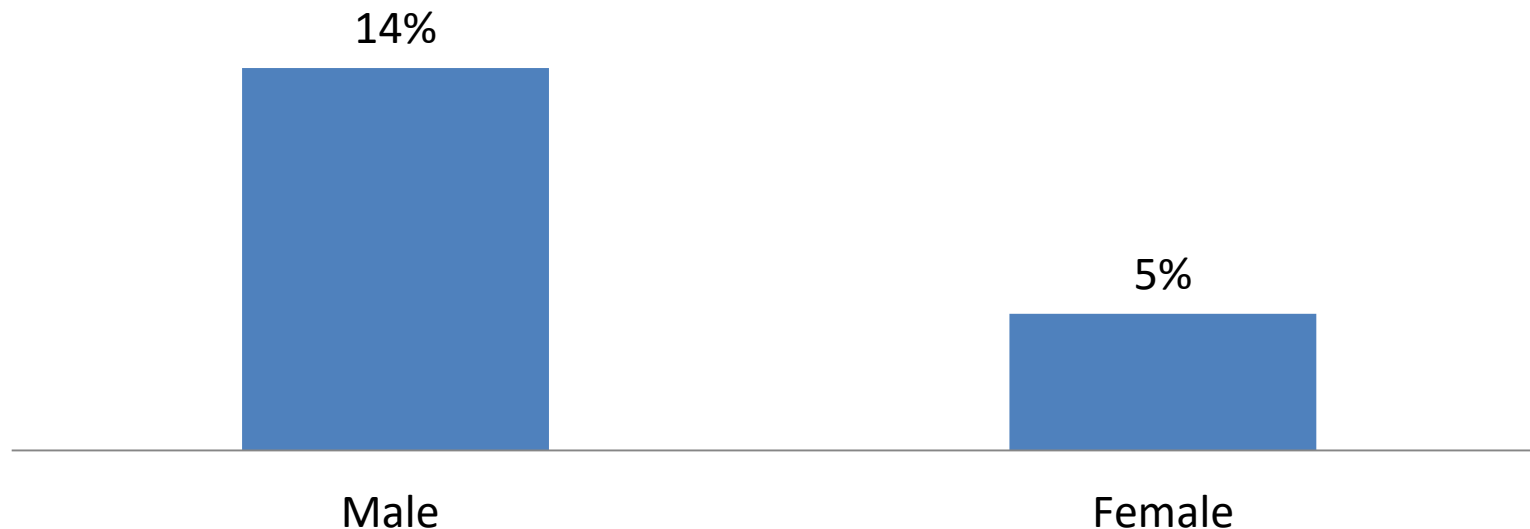


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

The survey conducted by Gallup reveals that 9% of the Pakistani population listens to radio. Radio listenership varies across the country with as low as 2% reported in Central Punjab and as high as 17% in Peshawar Market.

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4.2. Radio Listenership broken down by Gender

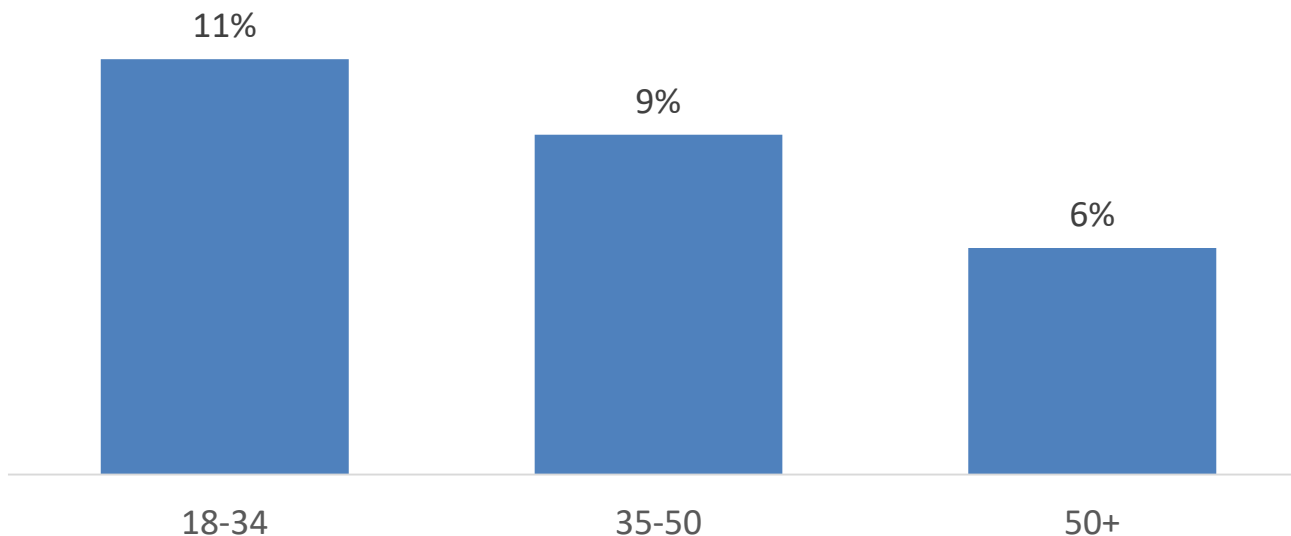


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Males are more likely to be Radio Listeners than Females (14% among Males interviewed and 5% among females interviewed). One of the possible reasons is that many men listen to FM channels while travelling in cars and public transport. Women are less mobile in Pakistan and do not have access to FM channels on the go.

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4.3. Radio Listenership broken down by Age

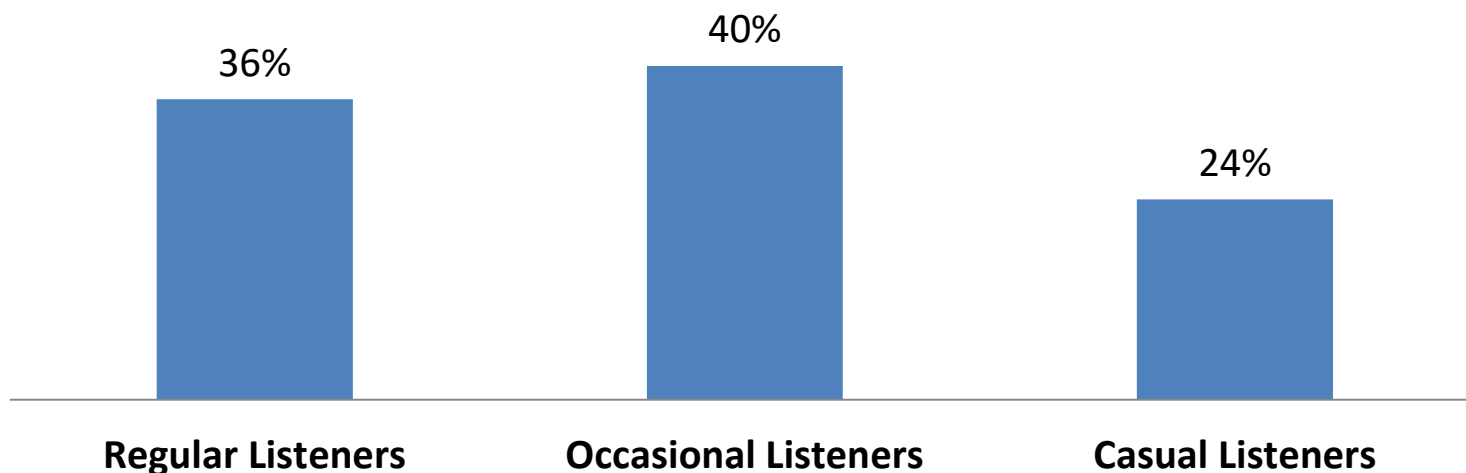


Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Radio listenership decreases with age. The younger age bracket adults i.e. those in the age bracket 18-34, are more likely to be listeners of radio as compared to those above the age of 50+

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4.4 How frequently do you listen to Radio?



Source: Gallup Pakistan Media Survey 2017 (N≈12,000 men and women across all provinces in Pakistan)

Among listeners of radio, those who responded 4 or more days a week are considered Regular Listeners, those who responded 1 to 3 days a week are Occasional Listeners and those who said less than one day a week are Casual Listeners.

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