RAPID ASSESSMENT OF TELESCHOOL INITIATIVE

A pro bono exercise by Gallup Pakistan for Ministry of Education Government of Pakistan
Introduction & Context

Gallup Pakistan was approached by Ministry of Education in late April 2020 with a request to conduct a Rapid Assessment of its Teleschool initiative. Gallup Pakistan is the country’s foremost social and media research firm working since 1980.

In response to the request by Ministry of Education, Gallup research team created a Knowledge Attitude and Practices framework design for this Rapid Assessment.

This report presents the main findings of the study.

The activity has been done pro bono for the Ministry of Education and we would like to outline the need for further detailed research on the subject. One significant further improvement required is to add a qualitative assessment with Educational stakeholders including students, parents and teachers in order to better understand their perceptions in a qualitative way.

We are pleased to report that given the infancy of the Teleschool initiative we see quite strong performance so far with respect to:

I. Awareness
II. Viewership
III. Rating of Viewers on hosts of Quality matrices
IV. Strong loyalty among viewers as expressed by Net Promoter Score

If there are any queries, they may be addressed to Bilal I Gilani, Executive Director Gallup Pakistan who was the Director of this research study.

He can be contacted at bilal.gilani@gallup.com.pk

Caution: Findings below the national level have significantly different error margin calculations. We advise use of the below national numbers only as telling broad direction of the results and not as statistically significant numbers.

Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
Gallup has developed a Rapid Assessment Matrix which is based on 4 key strands. Each of these are covered in different sections of this presentation:

1. Awareness of the Teleschool Initiative in Pakistan (Section 1)

2. Viewership of Teleschool initiative among various population segments (Section 2)

3. Rating of Viewers on hosts of Quality matrices about Teleschool Initiative (Section 3)

4. Loyalty of Viewers of the Teleschool Initiative (Section 4)

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Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
SECTION 1: AWARENESS OF TELESCHOOL IN PAKISTAN

GALLUP PAKISTAN
Affiliated with Gallup International
Pakistan's Foremost Social Research Lab
Question: In light of the nationwide school closure due to Coronavirus, the government has started a National TV transmission on PTV, known Teleschool – Taleem Ghar Ghar, to broadcast educational content for Grade 1 till Grade 12. Have you heard or read about it?

Awareness: Nearly 2 in 5 Pakistanis (42%) claim to know about the Teleschool initiative. Significantly higher awareness reported among respondents from KP (70%).

Rural Urban Breakdown

<table>
<thead>
<tr>
<th>Rural</th>
<th>Urban</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>40%</td>
<td>60%</td>
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<tr>
<td>46%</td>
<td>54%</td>
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</table>

Provincial Breakdown

<table>
<thead>
<tr>
<th>Punjab</th>
<th>Sindh</th>
<th>KP</th>
<th>Balochistan</th>
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</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
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<tr>
<td>41%</td>
<td>32%</td>
<td>29%</td>
<td>59%</td>
</tr>
<tr>
<td>32%</td>
<td>70%</td>
<td>30%</td>
<td>68%</td>
</tr>
<tr>
<td>29%</td>
<td>59%</td>
<td>30%</td>
<td>71%</td>
</tr>
</tbody>
</table>

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Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5.
Awareness: Nearly 2 in 5 Pakistanis (42%) claim to know about the Teleschool initiative.

Around 32 Million Pakistani Adults/Parents say they are aware of Teleschool Initiative by Ministry of Education and PTV.
Source of Information: Television is the main source of information on Teleschool transmission for majority Pakistanis (67%), followed by 36% who mentioned social media.

Among Rural dwellers those who report knowing about Teleschool through Social Media is significantly lower than Urban areas as well as the national average.

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Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
SECTION 2: VIEWERSHIP OF TELESCOOL IN PAKISTAN
Nearly 1 in 3 Pakistanis (31%) claim that they or their children have seen the Teleschool transmission. Highest proportion of respondents from Punjab (42%) claim the same.

Conversion between knowing and watching is significantly high! In a short span of time.

Question: Have you or children watched the Teleschool transmission?

Rural Urban Breakdown

<table>
<thead>
<tr>
<th>Rural</th>
<th>Urban</th>
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</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>29%</td>
<td>36%</td>
</tr>
<tr>
<td>71%</td>
<td>64%</td>
</tr>
</tbody>
</table>

Provincial Breakdown

<table>
<thead>
<tr>
<th>Punjab</th>
<th>Sindh</th>
<th>KP</th>
<th>Balochistan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>42%</td>
<td>22%</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>58%</td>
<td>78%</td>
<td>88%</td>
<td>83%</td>
</tr>
</tbody>
</table>

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Among all Pakistani households having child within the 5-15 year age bracket, **around 20% households claim that someone is watching Teleschool**

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Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
Teleschool has reached to around 4 million households in Pakistan!

There are **approx. 21 million** households who have a child in the 5 to 15 age group.

Teleschool has viewership in **4 million households** within a short span of time.

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*Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5*
Gallup estimates that around **7-8 million children** in the 5 to 15 year age bracket have already been introduced to Teleschool.

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Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
Majority respondents who claim to have seen Teleschool, watched the transmission in the past 7 days

Question: *When was the last time you/your child/children watched the Teleschool transmission?*

- In the last 14 days: 28%
- In the last 7 days: 42%
- Yesterday: 14%
- Today: 16%

Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
1.5 to 2 million daily viewership among 5 to 15 age group / 6 million weekly viewership in the same age group

Gallup estimates a **daily viewership** of around **1.5 million to 2 million children** in the 5-15 year age bracket who are watching Teleschool.

Gallup estimates a **weekly viewership** of around **6 million children** in the 5-15 year age bracket who are watching Teleschool.

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Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
Teleschool transmission for Grade III, Grade I and Grade V most watched

Question: You/Your child/children had watched the Teleschool transmission for which grade?

<table>
<thead>
<tr>
<th>Grade</th>
<th>Rural</th>
<th>Urban</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade I</td>
<td>17%</td>
<td>24%</td>
</tr>
<tr>
<td>Grade II</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Grade III</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Grade IV</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Grade V</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>Grade VI</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Grade VII</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Grade VIII</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Grade IX</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>Grade X</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Grade XI</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>Grade XII</td>
<td>9%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5

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SECTION 3: VIEWERS PERCEPTION ABOUT TELESCHOOL
Significant majority of viewers of Teleschool are satisfied with all aspects of the transmission. Highest satisfaction rated with sound quality (87%). Some dissatisfaction with educational content (23%) is reported that needs to be worked on.

### Question: How satisfied are you with the following aspects of the Teleschool transmission?

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Very Satisfied</th>
<th>Somewhat Satisfied</th>
<th>Somewhat Dissatisfied</th>
<th>Very Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sound Quality</td>
<td>55%</td>
<td>32%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Picture Quality</td>
<td>47%</td>
<td>34%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Educational Content</td>
<td>36%</td>
<td>41%</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Timings</td>
<td>44%</td>
<td>38%</td>
<td>10%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
Nearly 9 in 10 viewers of the transmission (86%) hold a favorable opinion of the Teleschool transmission. 13% are dissatisfied.

**Question:** What is your general view about the Teleschool transmission?

- **Very Satisfied:** 46%
- **Somewhat Satisfied:** 41%
- **Somewhat Dissatisfied:** 7%
- **Very Dissatisfied:** 6%

Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
Rural respondents more satisfied with the transmission than urban respondents. 15% viewers from Punjab are dissatisfied.

Question: *What is your general view about the Teleschool transmission?*

### Rural Urban Breakdown

<table>
<thead>
<tr>
<th></th>
<th>Very Satisfied</th>
<th>Somewhat Satisfied</th>
<th>Somewhat Dissatisfied</th>
<th>Very Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural</td>
<td>47%</td>
<td>41%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Urban</td>
<td>46%</td>
<td>40%</td>
<td>7%</td>
<td>7%</td>
</tr>
</tbody>
</table>

### Provincial Breakdown

<table>
<thead>
<tr>
<th>Province</th>
<th>Very Satisfied</th>
<th>Somewhat Satisfied</th>
<th>Somewhat Dissatisfied</th>
<th>Very Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Punjab</td>
<td>43%</td>
<td>42%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Sindh</td>
<td>52%</td>
<td>38%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>KP</td>
<td>100%</td>
<td></td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Balochistan</td>
<td>84%</td>
<td>16%</td>
<td>7%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5

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Fairly uniform level of satisfaction reported by viewers of all classes content – exception being Grade 9, 6 and 4 (where satisfaction is lower but still 2 in 3 are satisfied)

Question: *What is your general view about the Teleschool transmission?*

Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
7 in 10 viewers believe that the children watching the Teleschool transmission need adult supervision to gain benefit from the content.

Question: Do you think that the Teleschool educational content needs adult's supervision to benefit from or children manage on their own?

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Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
3 in 5 respondents (59%) are aware that the Teleschool transmission can be streamed online. Respondents from Sindh least aware.

Question: Did you know that there is a possibility to stream the Teleschool transmission online?

**Rural Urban Breakdown**

- Yes: 61% Rural, 57% Urban
- No: 25% Rural, 32% Urban

**Provincial Breakdown**

- Punjab: 57% Yes, 49% No
- Sindh: 75% Yes, 25% No
- KP: 63% Yes, 37% No
- Balochistan: 26% Yes, 24% No

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Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
SECTION 4: NET PROMOTER SCORE (NPS) OF TELESCHOOL
What is Net Promoter Score?

A TRUSTED ANCHOR FOR YOUR CUSTOMER EXPERIENCE MANAGEMENT PROGRAM

Net Promoter Score®, or NPS®, measures customer experience and predicts business growth. This proven metric transformed the business world and now provides the core measurement for customer experience management programs the world round.

% PROMOTERS - % DETRACTORS = NPS (NET PROMOTER SCORE)
1. DETRACTORS
‘Detractors’ give a score lower or equal to 6. They are not particularly thrilled by the product or the service. They, with all likelihood, won’t watch the transmission again, could potentially damage the initiatives reputation through negative word of mouth.

2. PASSIVES
‘Passives’ give a score of 7 or 8. They are somewhat satisfied but could easily switch to a competitor’s offering if given the opportunity. They probably wouldn’t spread any negative word-of-mouth but are not enthusiastic enough about the transmission to promote them.

3. PROMOTERS
‘Promoters’ give a score of 9 or 10. They love the transmission or service. They are the repeat watchers, are the enthusiastic evangelist who recommends the transmission to other potential viewers.

Source: Gallup Pakistan Coronavirus Attitude Tracker Survey 2020, Wave 5
Question: How likely are you to recommend the Teleschool transmissions to other parents for their children during the nationwide closure of schools due to Coronavirus?

Highest net promoter score for Teleschool Initiative in KP (+70); lowest in Balochistan (+6)

<table>
<thead>
<tr>
<th>Province</th>
<th>Promoters</th>
<th>Passives</th>
<th>Detractors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balochistan</td>
<td>46%</td>
<td>14%</td>
<td>40%</td>
</tr>
<tr>
<td>KP</td>
<td>85%</td>
<td></td>
<td>15%</td>
</tr>
<tr>
<td>Sindh</td>
<td>64%</td>
<td>14%</td>
<td>22%</td>
</tr>
<tr>
<td>Punjab</td>
<td>63%</td>
<td>11%</td>
<td>26%</td>
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</tbody>
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METHODOLOGY
DEMOGRAPHICS

Sample Size : 1200 Households
(18+ Males and Females who have a child in the age 5 – 15 year age group)

Coverage : Pakistan (over 100 Districts covered)
Urban and Rural

Sampling Method : Multi-Stage Stratified Sampling

Error Margin : +2 - 3% at 95% Confidence Level

Interview Mode : Telephone

Field Dates : 1\textsuperscript{st} May - 20\textsuperscript{th} May
CONTACT US:

isb@gallup.com.pk  www.gallup.com.pk