



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

What are we measuring?

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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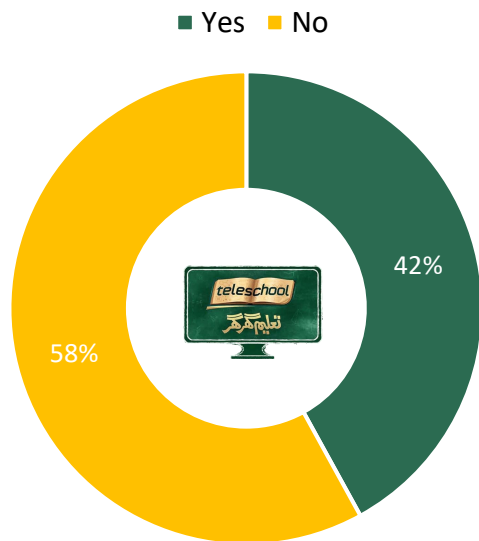
SECTION 1: AWARENESS OF TELESCHOOL IN PAKISTAN



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

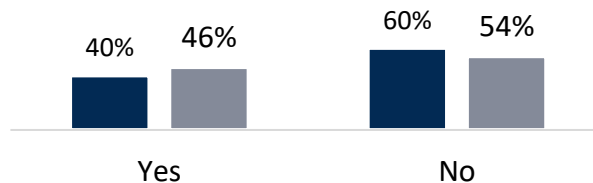
Question: *In light of the nationwide school closure due to Coronavirus, the government has started a National TV transmission on PTV, known Teleschool – Taleem Ghar Ghar, to broadcast educational content for Grade 1 till Grade 12. Have you heard or read about it?*

کورونا وائرس کی وجہ سے ملک بھر میں اسکول بند ہونے کے پیش نظر، حکومت پاکستان نے پہلی کلاس سے بارہویں کلاس تک کی تعلیمی مواد کو نشر کرنے کے لیے قومی پی ٹی وی (پاکستان ٹیلی ویژن) پر ٹرانسمیشن کا آغاز کیا ہے، جسے ٹیلی اسکول - تعلیم گھر گھر کے نام سے جانا جاتا ہے۔ کیا آپ نے اس بارے میں کچھ پڑھا یا سنا ہے؟



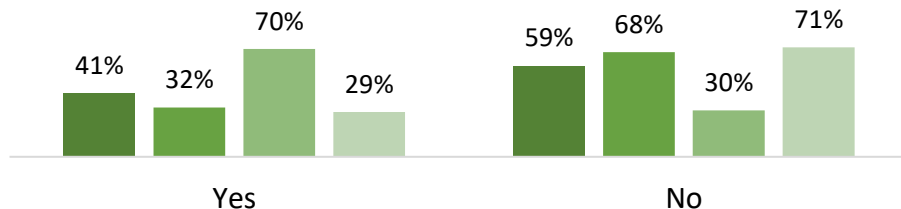
Rural Urban Breakdown

■ Rural ■ Urban



Provincial Breakdown

■ Punjab ■ Sindh ■ KP ■ Balochistan



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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.

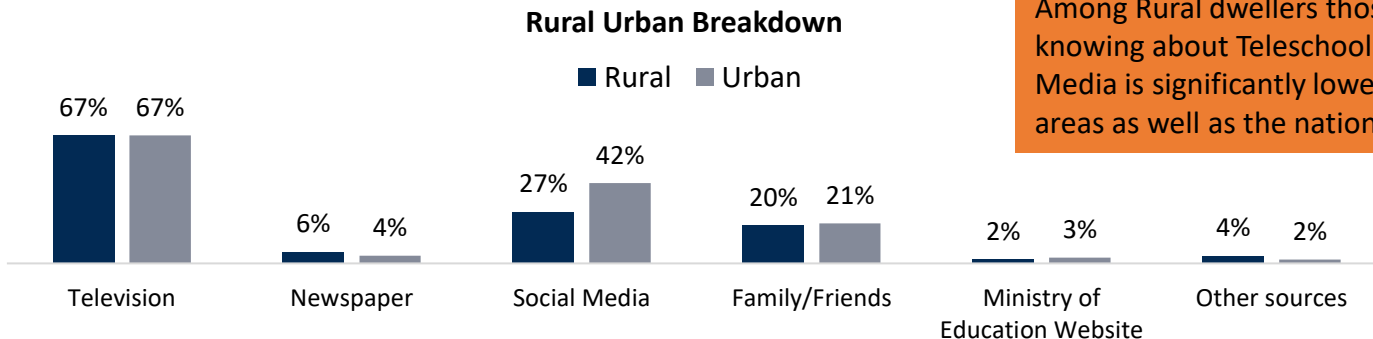
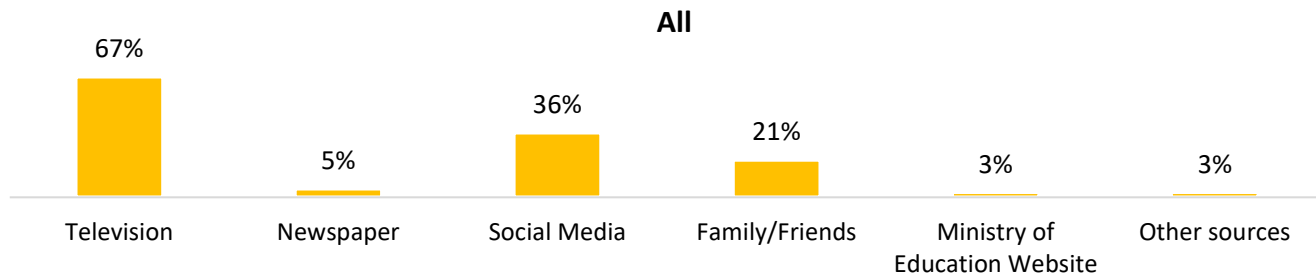


Around **32 Million**
Pakistani Adults/Parents
say they are aware of
Teleschool Initiative by
Ministry of Education and
PTV

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

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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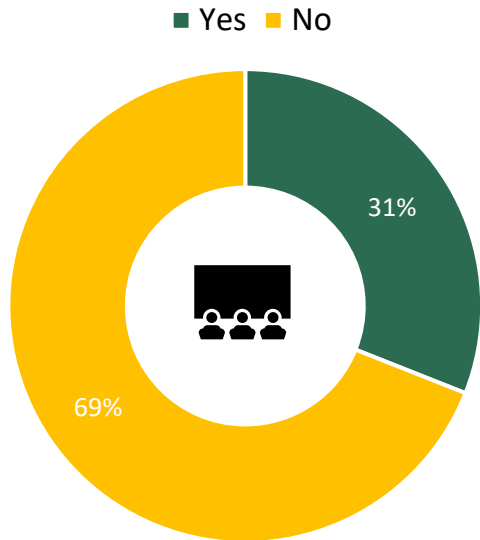
SECTION 2: VIEWERSHIP OF TELESCHOOL IN PAKISTAN



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.

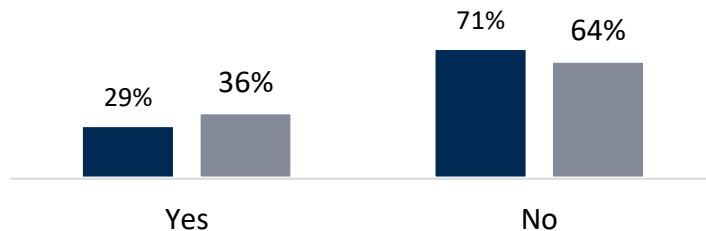


Question: *Have you or children watched the Teleschool transmission?*



Rural Urban Breakdown

■ Rural ■ Urban

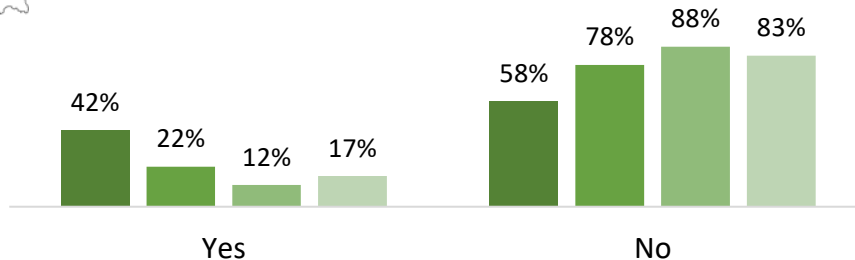


Higher conversion between awareness and viewership in Urban areas.



Provincial Breakdown

■ Punjab ■ Sindh ■ KP ■ Balochistan



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1 in 5 households with a child in the 5-15 year age bracket are already watching Teleschool



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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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.

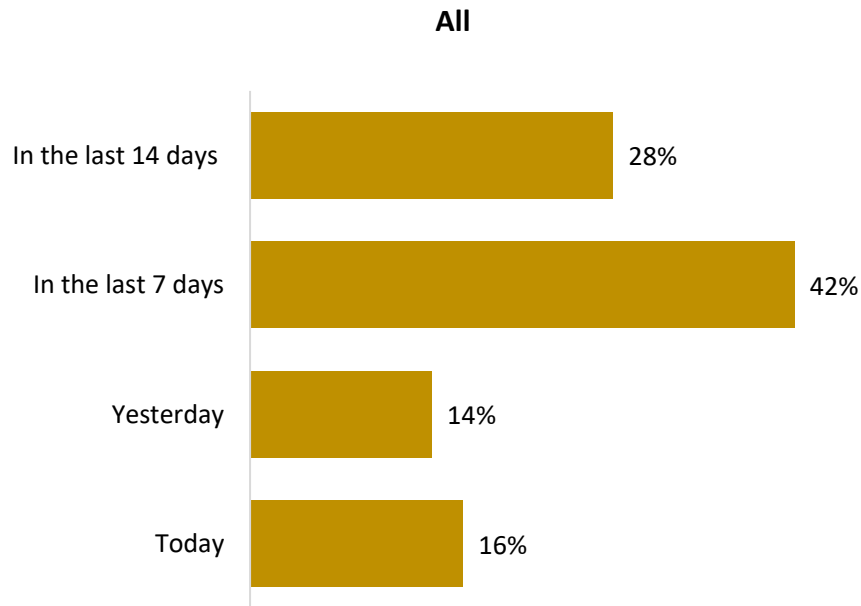


Gallup estimates that around **7-8 million children** in the 5 to 15 year age bracket have already been introduced to Teleschool

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?*



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.

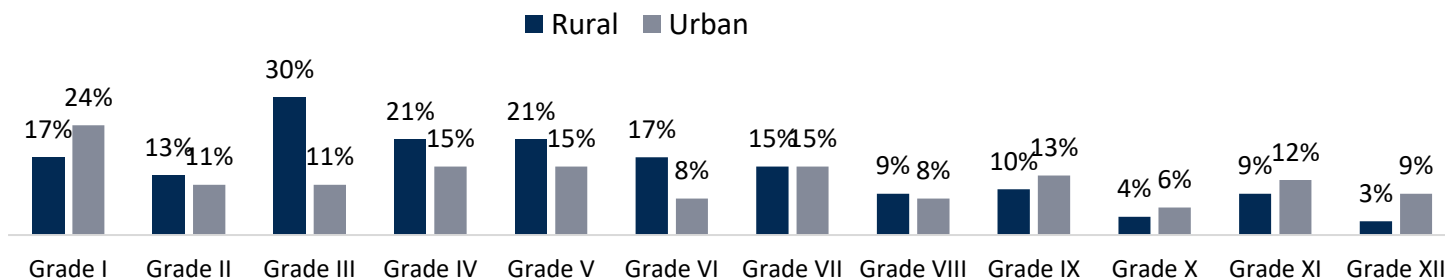
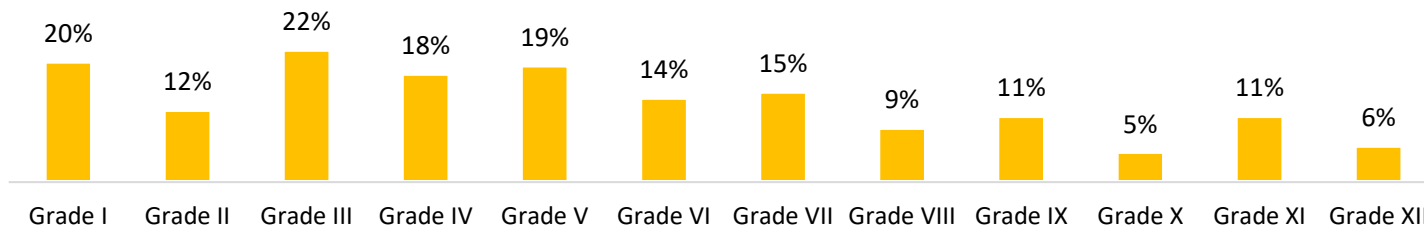
Gallup estimates a **weekly viewership** of around **6 million children** in the 5-15 year age bracket who are watching Teleschool.

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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?*



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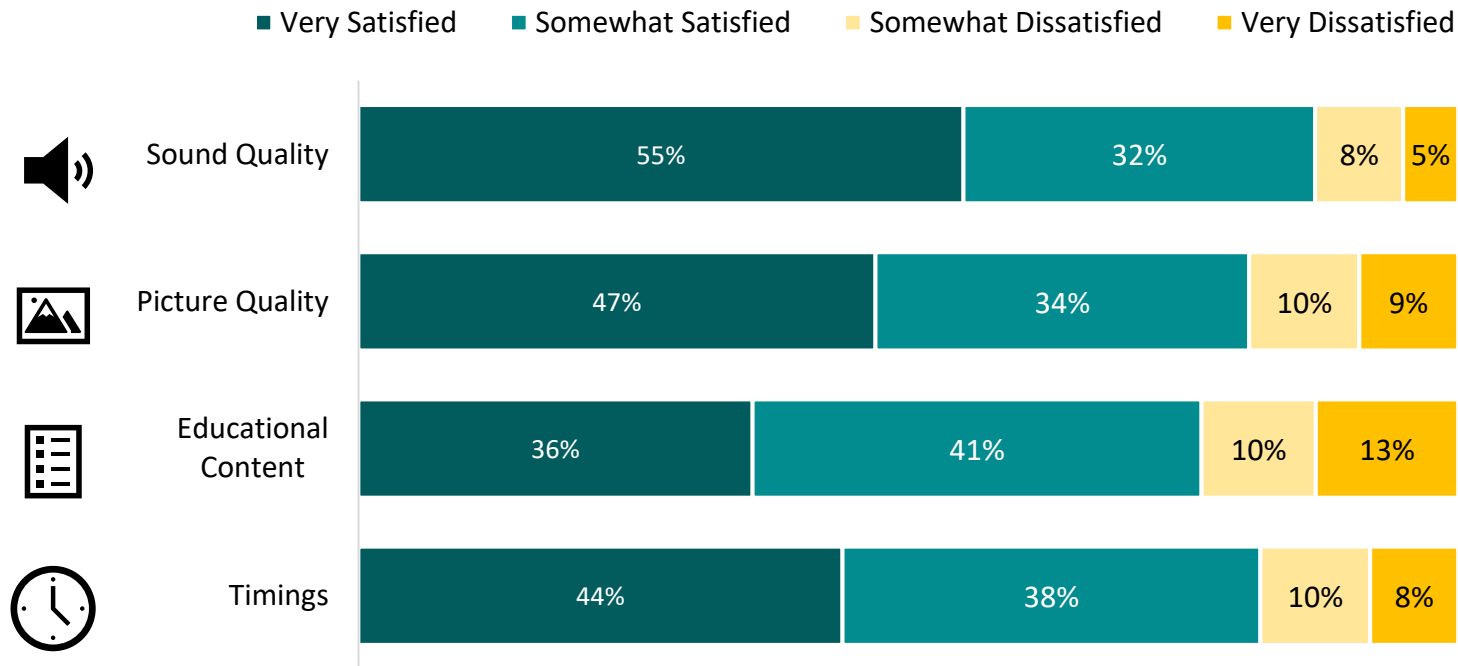


SECTION 3: VIEWERS PERCEPTION ABOUT TELESCHOOL



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**

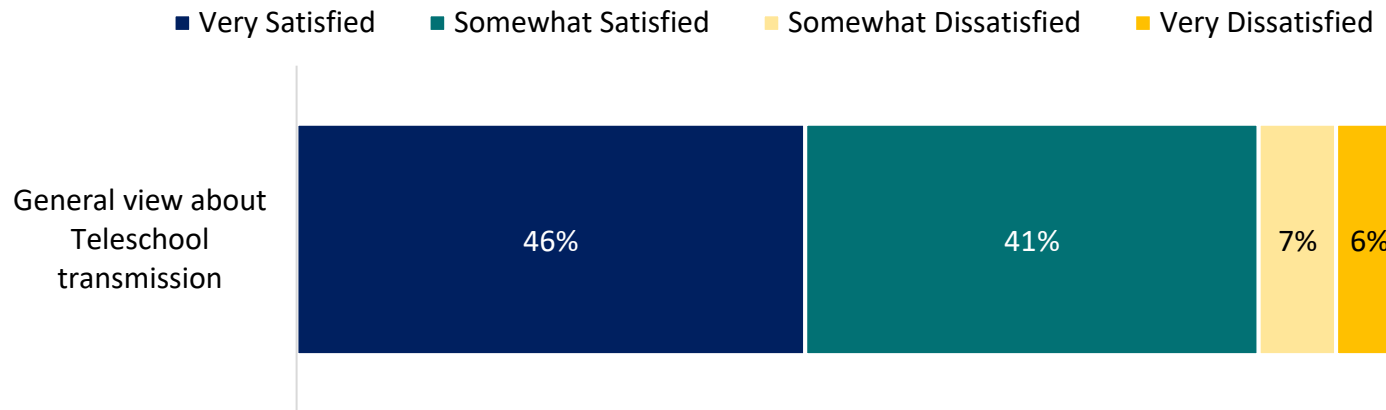
Question: *How satisfied are you with the following aspects of the Teleschool transmission?*



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

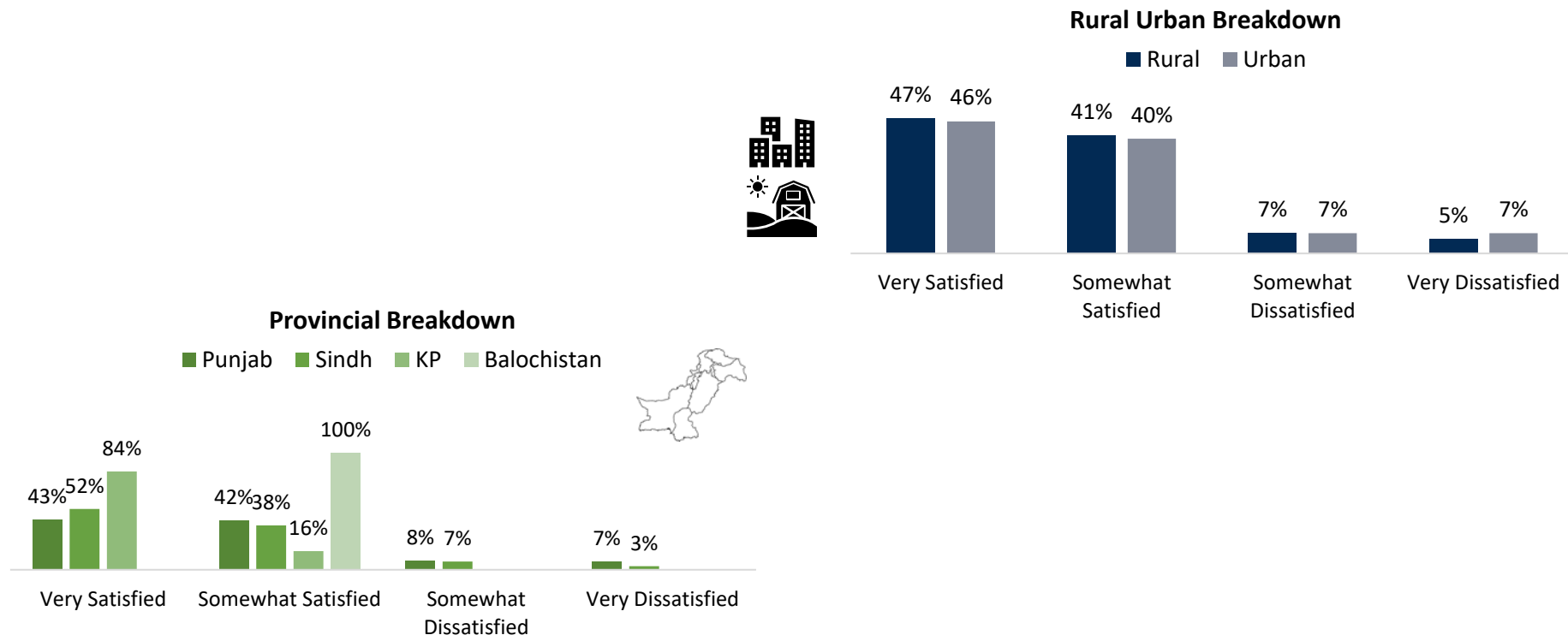
Question: *What is your general view about the Teleschool transmission?*



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?*

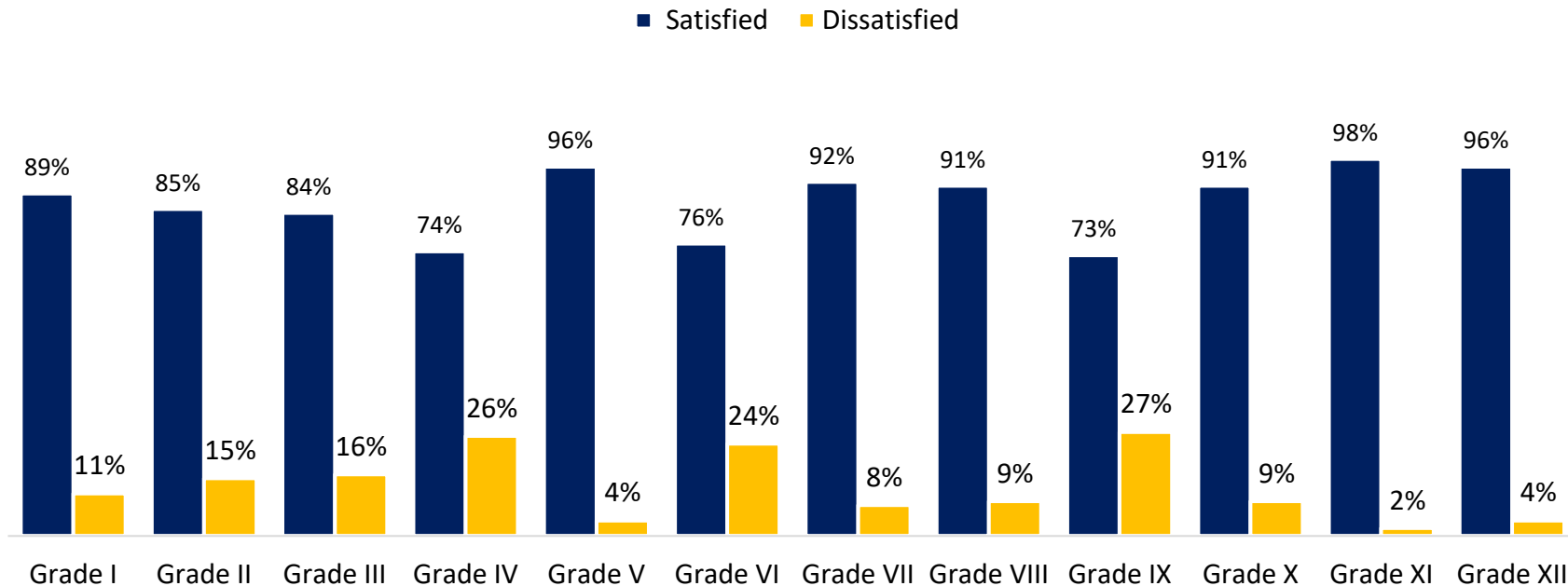


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Fairly Uniform level of satisfaction reported by viewers of all classes content – exception being Grade 9, 6 and 4 (where satisfaction is lower but still 2 in 3 are satisfied)

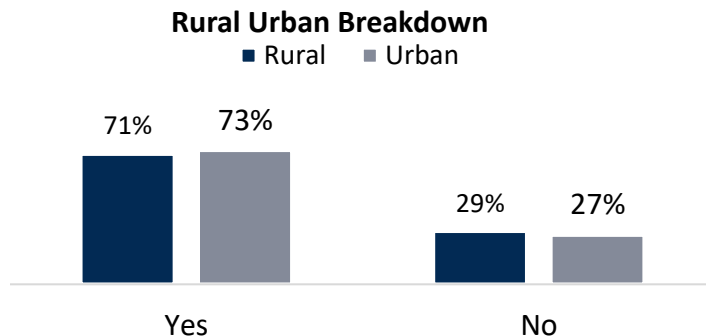
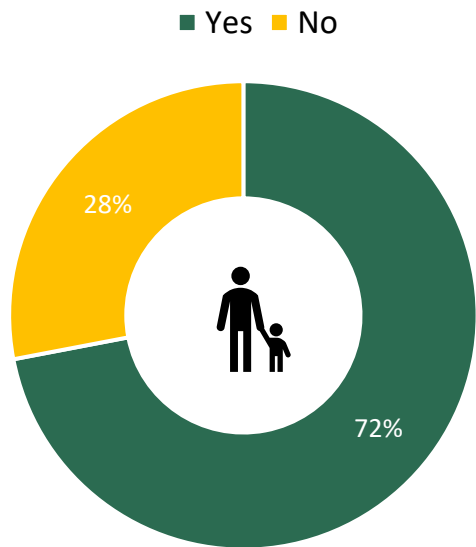
Question: *What is your general view about the Teleschool transmission?*



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?*

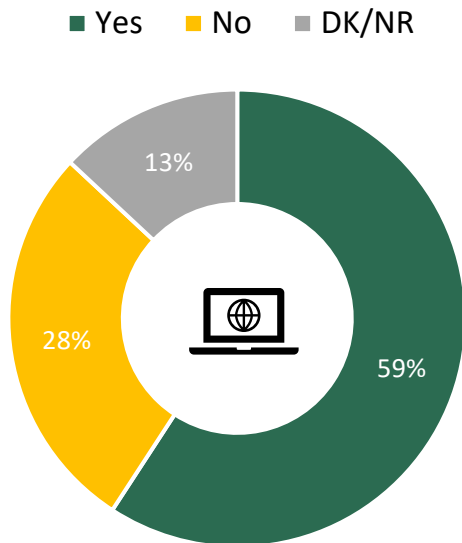


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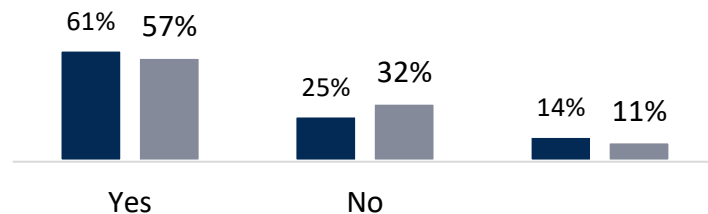
3 in 5 respondents (59%) are aware that the Teleschool transmission can be streamed online. Respondents from Sindh least aware

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



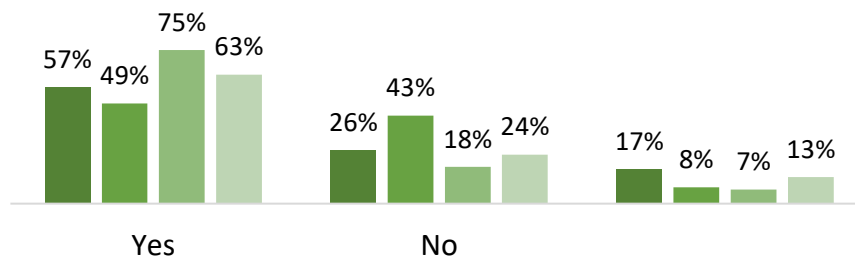
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SECTION 4: NET PROMOTER SCORE (NPS) OF TELESCHOOL



What is Net Promoter Score ?

What Is Net Promoter?

A TRUSTED ANCHOR FOR YOUR CUSTOMER EXPERIENCE MANAGEMENT PROGRAM

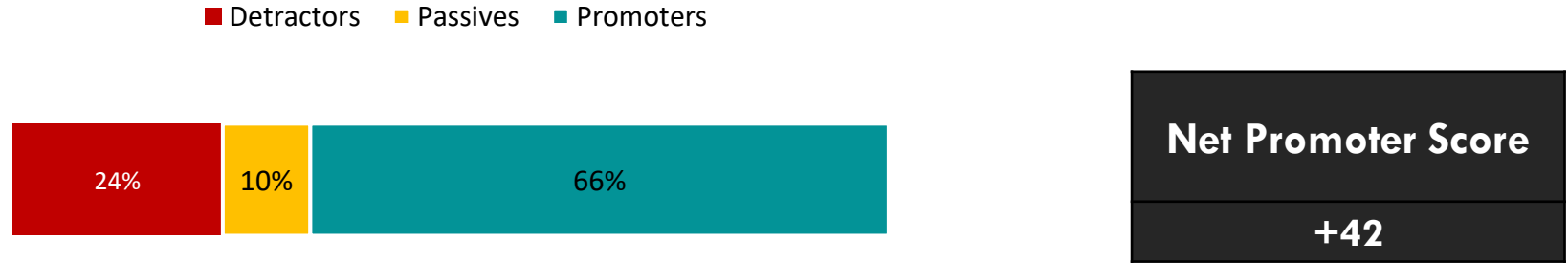
Net Promoter Score®, or NPS®, measures customer experience and predicts business growth. This proven metric transformed the business world and now provides the core measurement for customer experience management programs the world round.



$$\% \text{ PROMOTERS} - \% \text{ DETRACTORS} = \text{NPS (NET PROMOTER SCORE)}$$

Promoters outweigh detractors but nearly 10% passive viewers pose a threat

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?



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

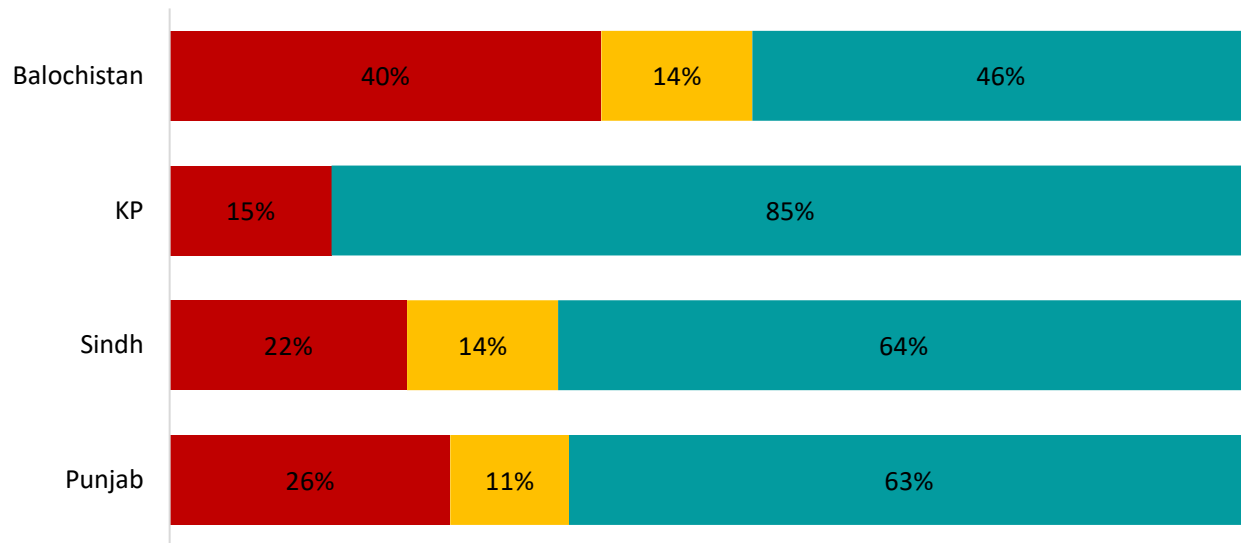
'Promoters' give a score of 9 or 10. They love the transmission or service. They are the repeat watchers, are the enthusiastic evangelist who recommends the transmission to other potential viewers.

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

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?



■ Detractors ■ Passives ■ Promoters



Net Promoter Score

Balochistan +6

KP +70

Sindh +42

Punjab +37

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METHODOLOGY



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 st May -20 th May



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