

Television Viewership Overview 2013



BASIC FACTS

Medialogic Pakistan - TAM Coverage Top 9 Cities

Total Number of Households 05.7 | millions

Total Number of Individuals 37.9 | millions

Total TV Households 04.9 | millions

Total Individuals in TV households 32.6 | millions

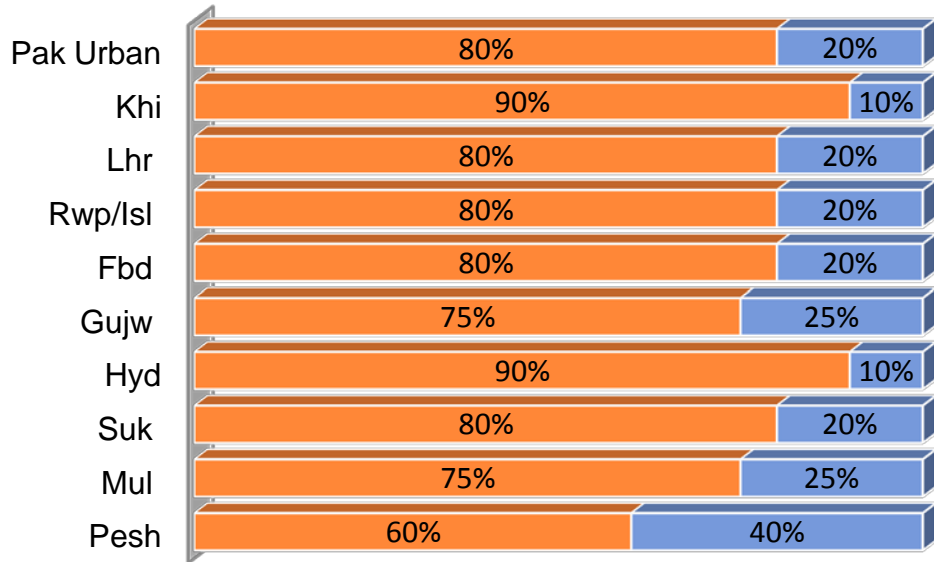
Total Households with Cable 04.0 | millions

Total Individuals in Cable homes 28.2 | millions

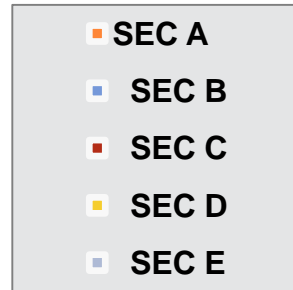
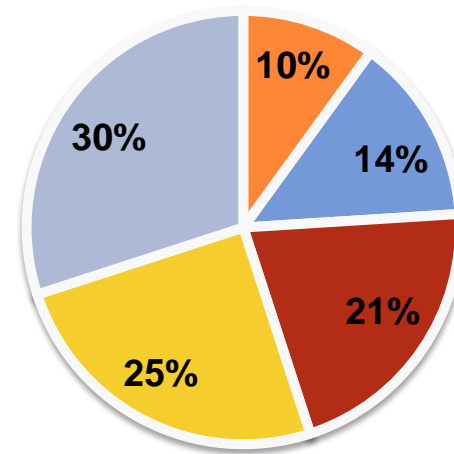
Panel Composition

City-wise Cable Penetration

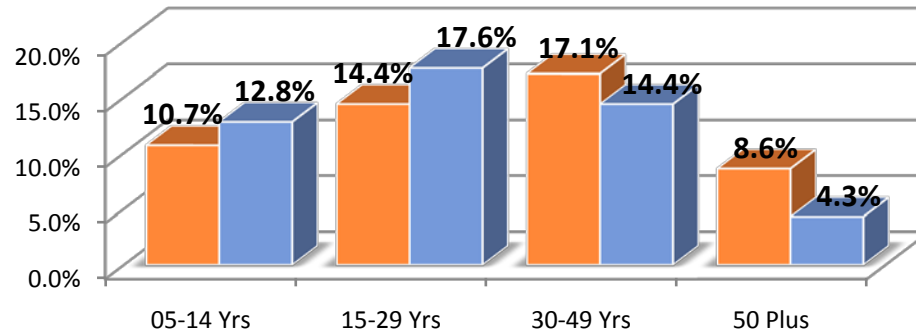
■ Cable ■ Antenna



SEC's Representation



Age/Gender Break Up



Current TV Environment

News	Entertainment	Sports	Kids	Music
GEO News	ARY DIGITAL	Geo Super	Cartoon Net Pak	8XM
Samaa	Hum	PTV Sports	Nicklodeon	ARY MUSIK
ExpNews	GEO Ent	TenSports	Movie	MTV Pak
Aaj TV	Alite	Food	HBO	Oxygene
Dunya TV	Aplus	ARY ZAUQ	Filmmax	Play
ARY NEWS	ARUJ TV	Masala	Filmazia	Vibe
BusinessPL	Atv	Zaiqa	StarliteTV	*Jalwa (Replaced Kook)
Channel 5	Axn	Regional	SilverScren	
City42	Exp Ent	ApnaChannel	FilmWorld	
CNBC Jaag	Hum Sitarey	ApnaNews	Warner Bros	
Dawn News	IndusVision	AVT Khyber	Educational	
Dhoom	KoheNoor	Kashish	Health TV	
Din News	PTVHome	KTN	ValueTV	
Indus News	TV one	Mehran	Sohni Dharti	
MetroOne	Urdu1	Punjab TV		
News1	* Geo Kahani (Replaced Aag)	Sabz Baat		
PTVNews		Sindh TV		
Royal News		VASH		
SUN	Religious	Wasebtv		
WaqtNews	ARY Qtv	AwazTV		
* PTV World	Madni	PTV Nat		
* Capal News		SindhNews		
* Abb Takk		KhyberNews		
* Geo Tez				

Four (4) news channels launched in 2013 .

One channel (Jalwa) added in the music genre by replacing a regional channel (Kook).

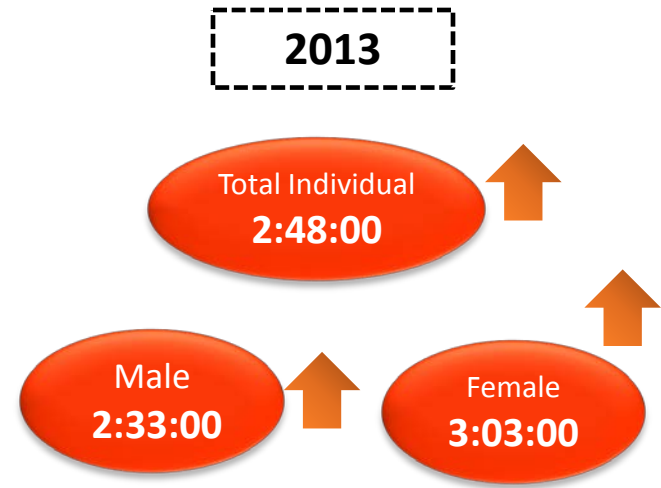
Geo Kahani added in the Ent genre by replacing Aag (music channel)....

* Channels launched in 2013

Media Trends & TV Insights 2013

- **Genre-wise Market Share 2012 vs. 2013**
- **Average Daily Viewing Time 2012 vs. 2013**
- **Hourly Viewership 2012 vs. 2013**
- **Monthly Viewership Minutes**
- **Market Share% By Genre Across SECs**
- **Overall Top 15 Channel** (Based on Ratings & Reach)
- **Top 10 Ent Channels** (Based on Ratings & Reach)
- **Top 10 News Channel** (Based on Ratings & Reach)
- **Top 10 Local Ent Channels Relative Share** (2012 vs. 2013)
- **Top 10 News Channels Relative Share** (2012 vs. 2013)
- **Overall Top 10 Programs**
- **Top 10 Talk Shows**

Average Viewing Time Per Day | 2012 vs. 2013

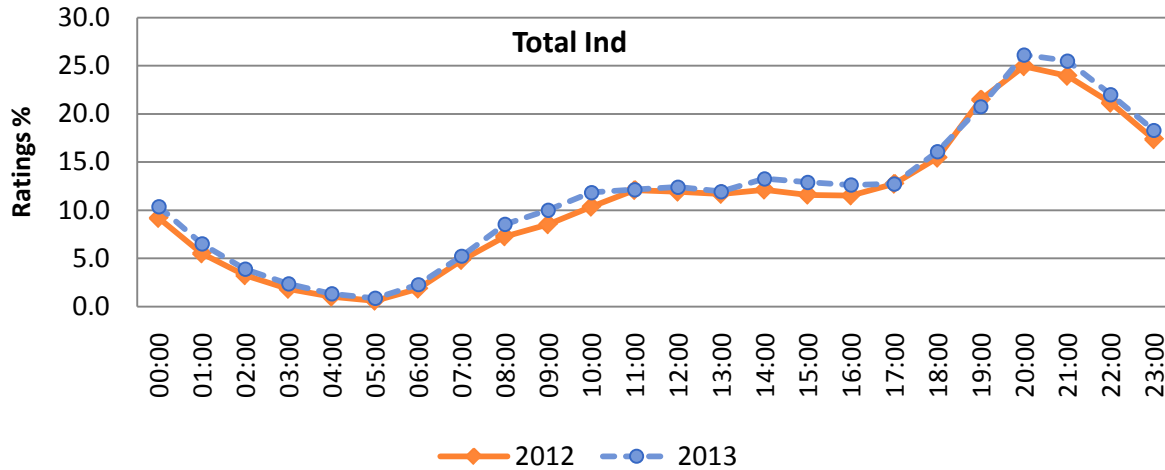


Viewing Time Per Day has increased in 2013. Females' viewing increased 13 minutes as compared to 2012.

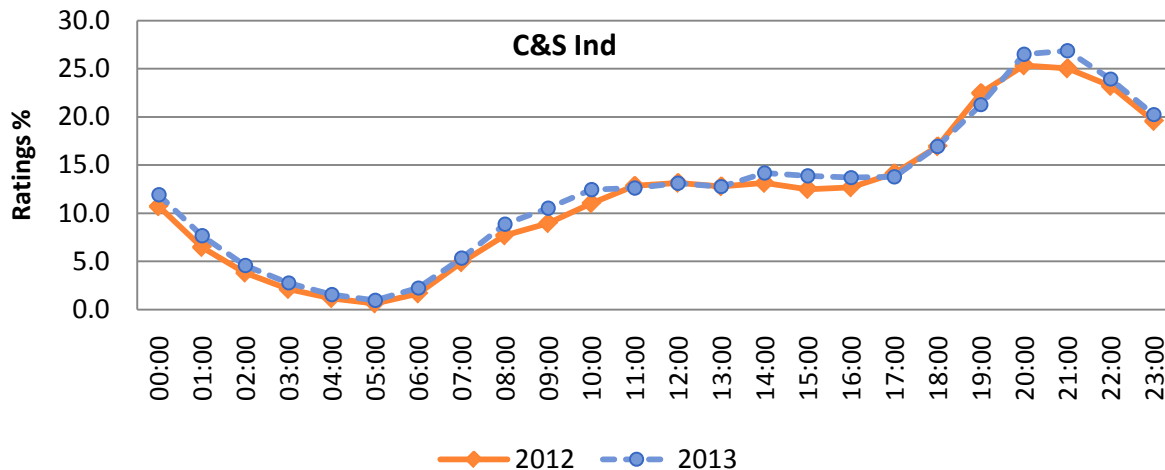


Time Band Utilization | Ratings% Jan To Dec 2013

Viewership during the Morning slot has been increased by 16% on total and 15 % on C&S



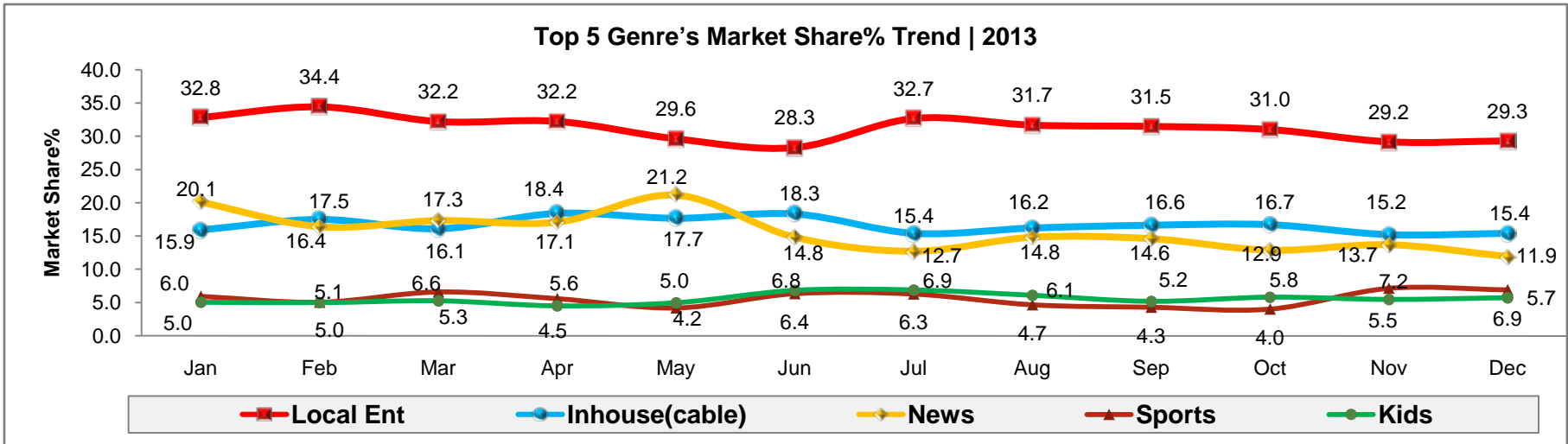
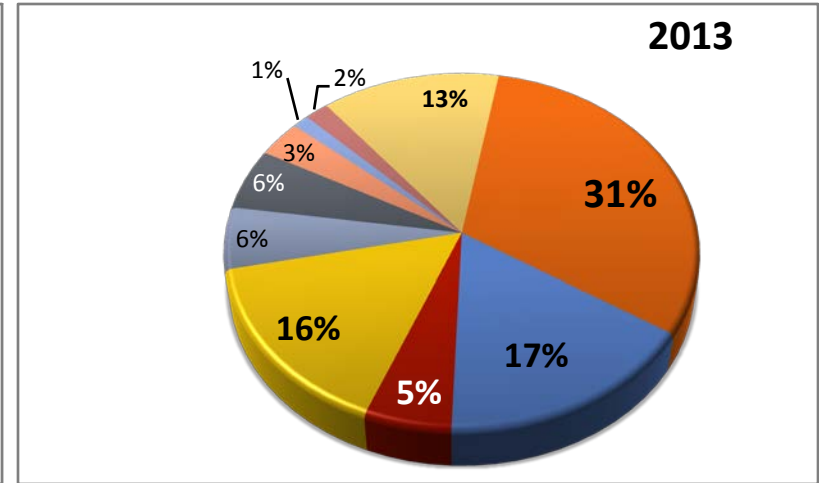
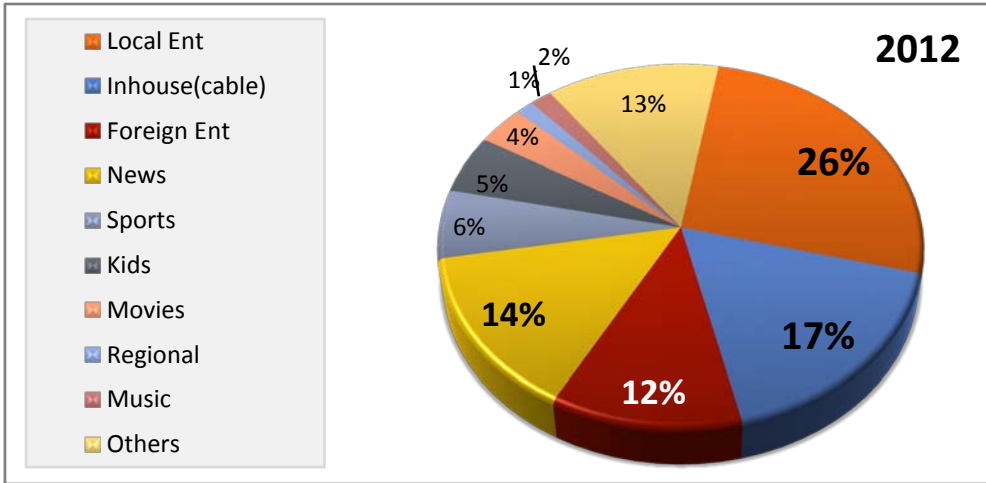
Total Ind			
Time Band	2012	2013	Ch%
08:00 - 11:00	8.7	10.1	16%
11:00 - 17:00	11.8	12.5	6%
17:00 - 19:00	14.1	14.4	2%
19:00 - 21:00	23.2	23.4	1%
21:00 - 23:00	22.5	23.7	5%
23:00 - 00:00	17.4	18.3	5%
00:00 - 00:00	10.9	11.7	7%



C&S Ind			
Time Band	2012	2013	Ch%
08:00 - 11:00	9.2	10.6	15%
11:00 - 17:00	12.9	13.4	4%
17:00 - 19:00	15.5	15.4	-1%
19:00 - 21:00	23.9	23.9	0%
21:00 - 23:00	24.1	25.4	5%
23:00 - 00:00	19.6	20.3	3%
00:00 - 00:00	11.8	12.5	6%



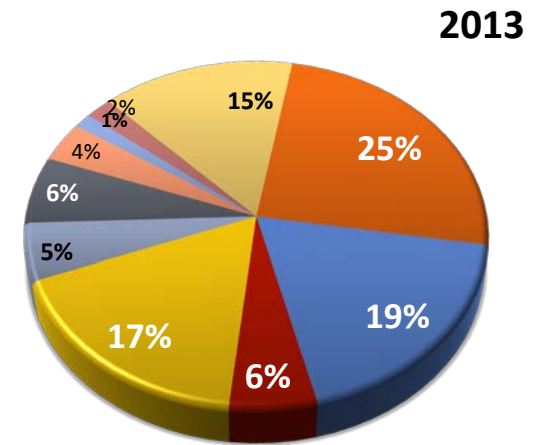
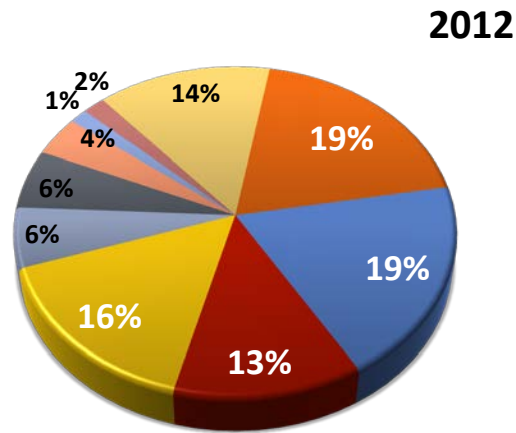
Genre-wise Market Share% Total Ind | 2012 vs. 2013



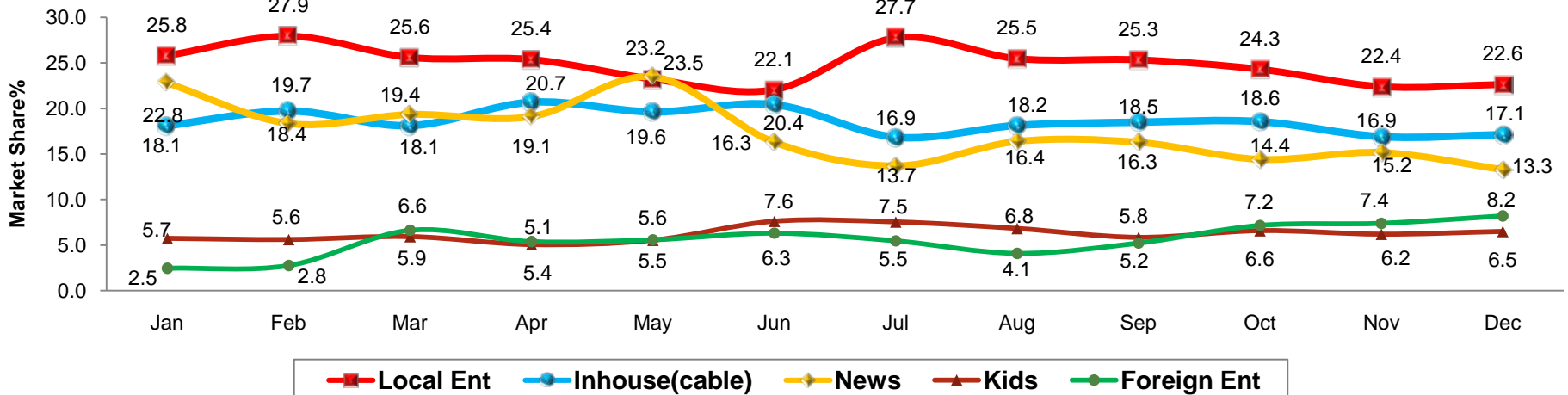


Genre-wise Market Share% C&S Ind | 2012 vs. 2013

- Local Ent
- Inhouse(cable)
- Foreign Ent
- News
- Sports
- Kids
- Movies
- Regional
- Music
- Others

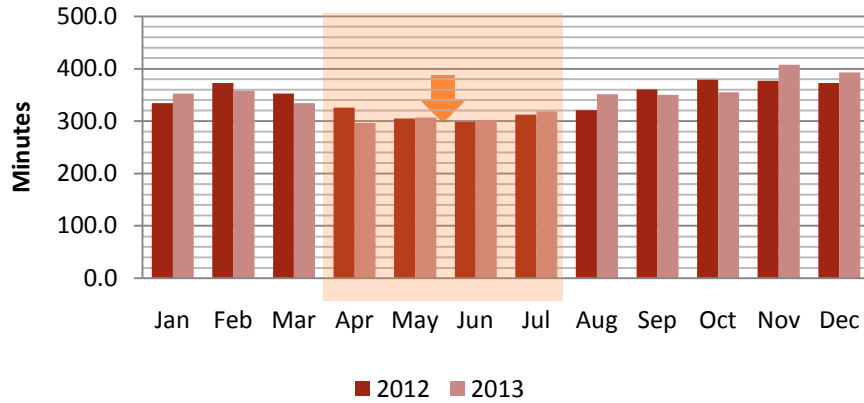


Top 5 Genre's Market Share% Trend | 2013

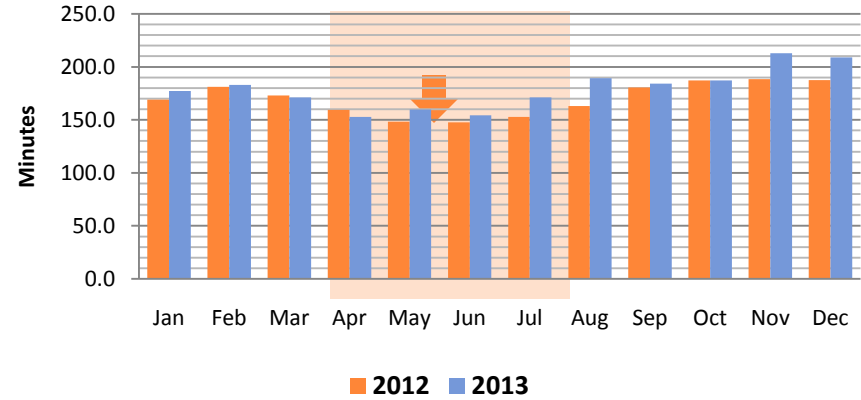


Monthly Minutes Consumption | 2012 vs. 2013

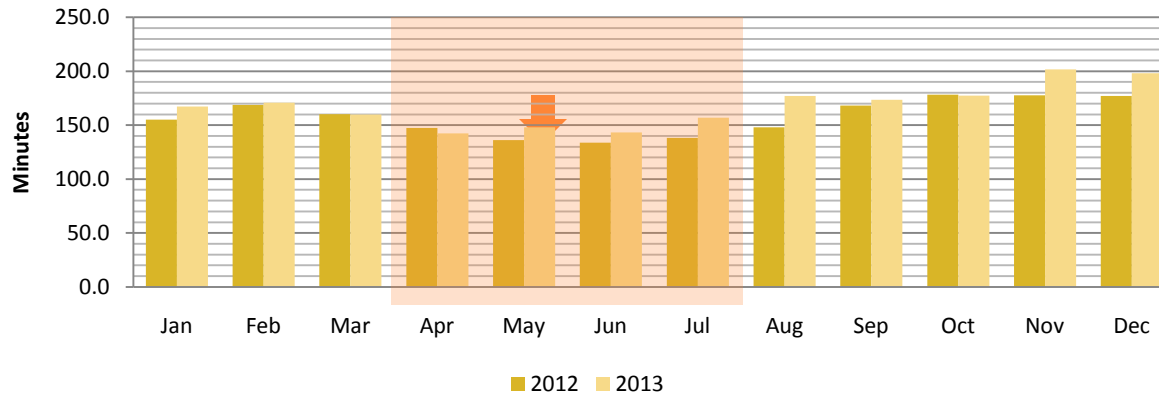
Households



C&S Ind



Total Ind

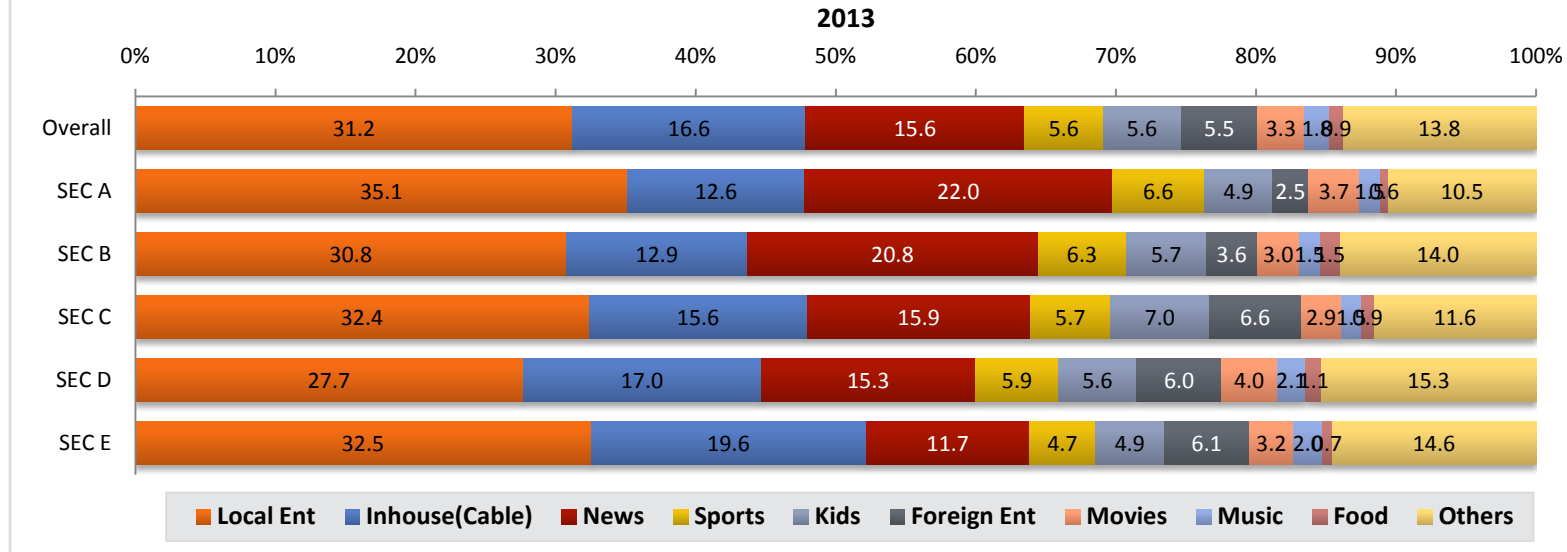
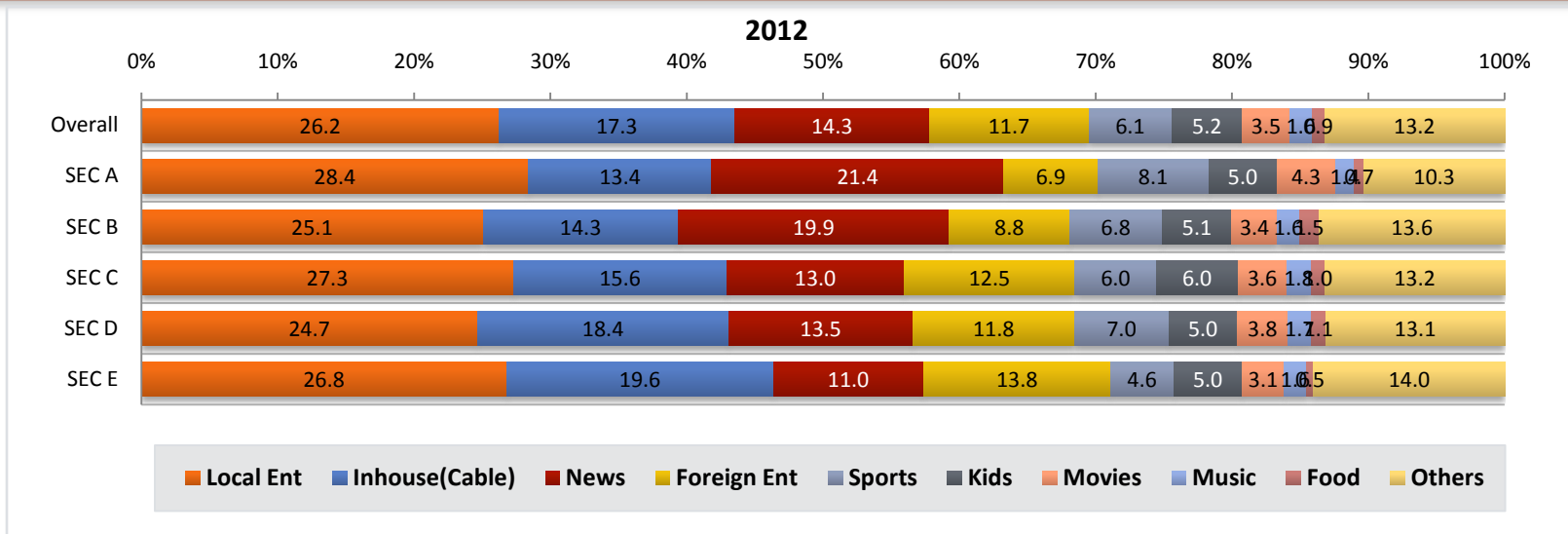


Viewers drops in the heavy load shedding months, the impact can be seen from Apr to Jul

Average Minutes Consumption has been increased in 2013 particularly May onwards.



Genre-wise Market Share By SECs | 2012 vs. 2013

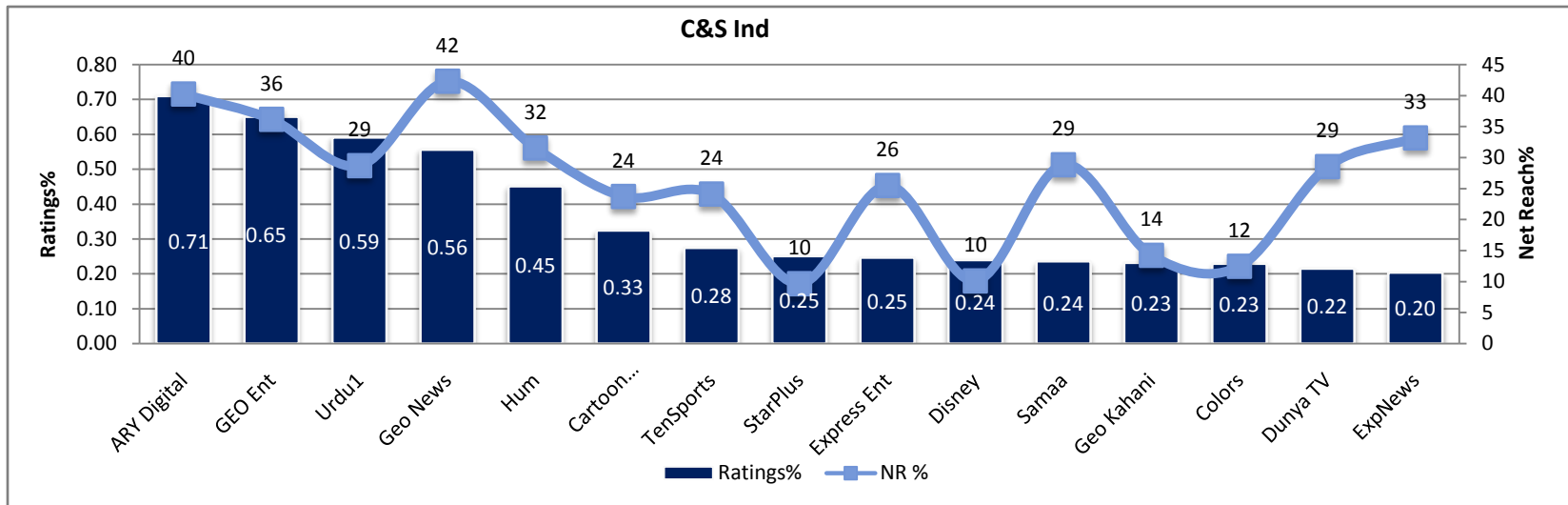
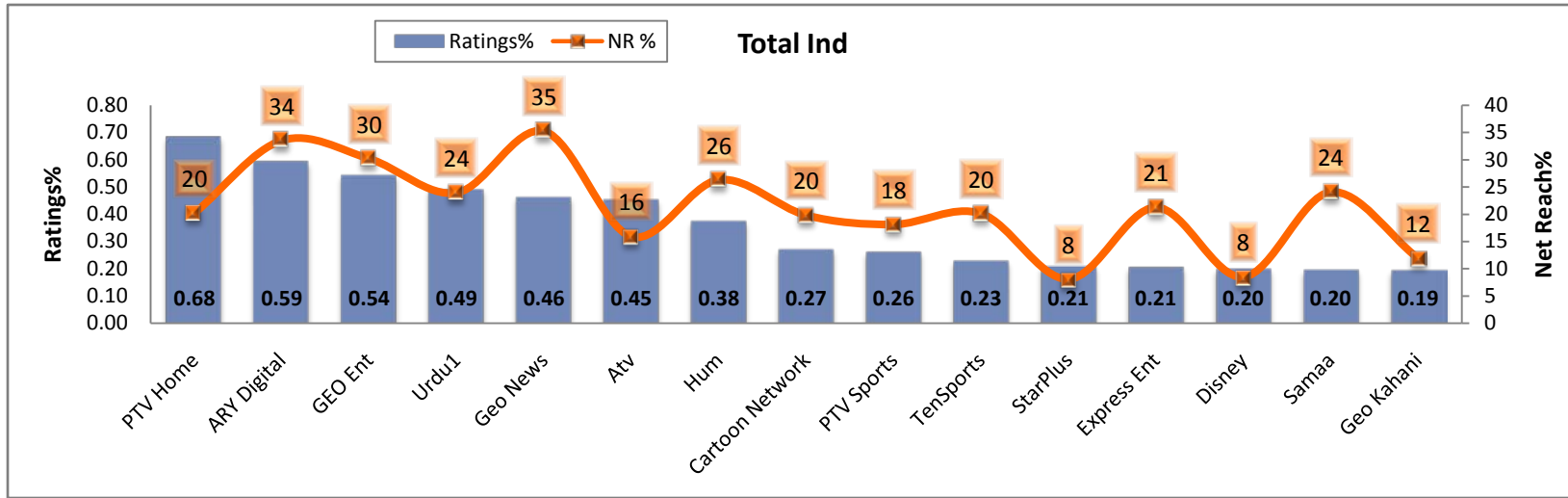


*Others | Regional, Religious, Food , Edu Info etc.

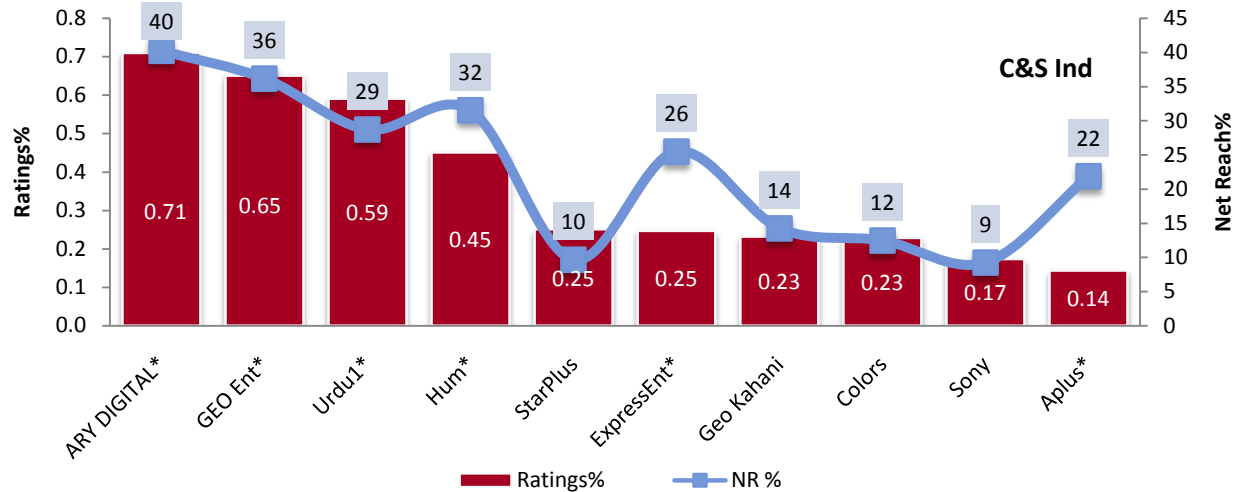
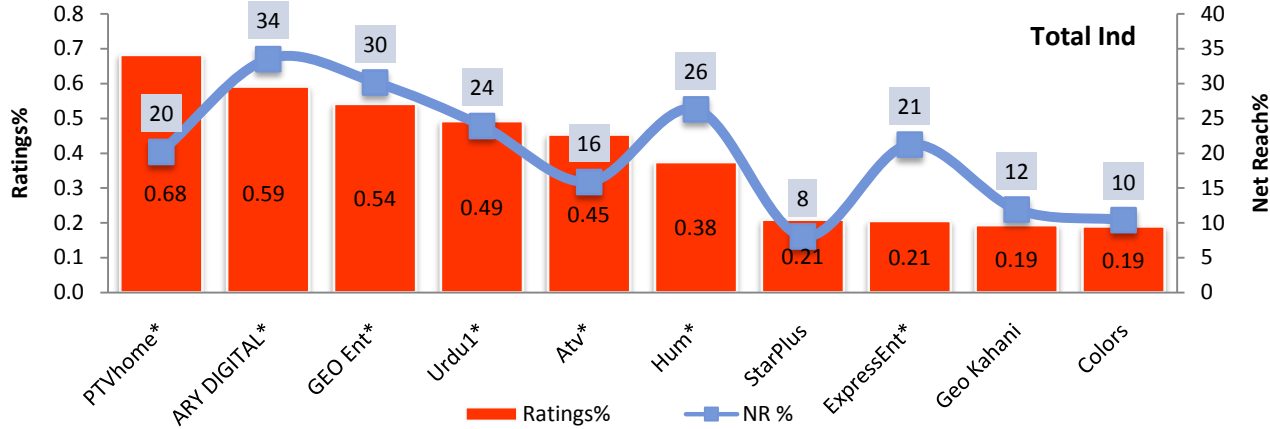
Local Ent Market Share increased on all SECs in 2013.



Overall Top 15 Channels 2013 | Total VS. C&S

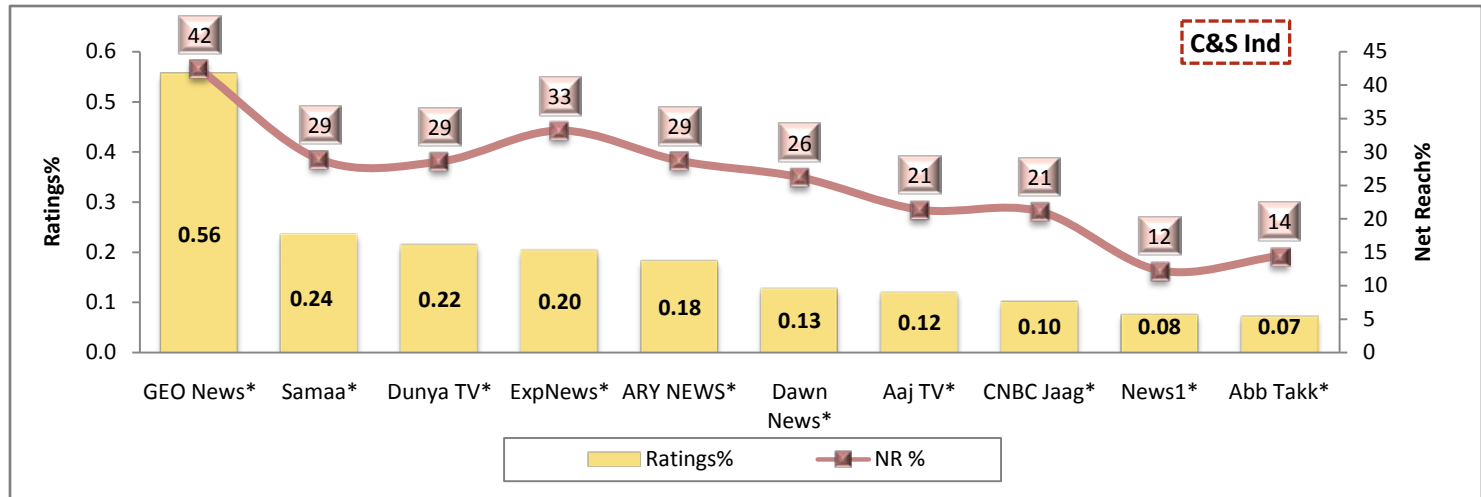
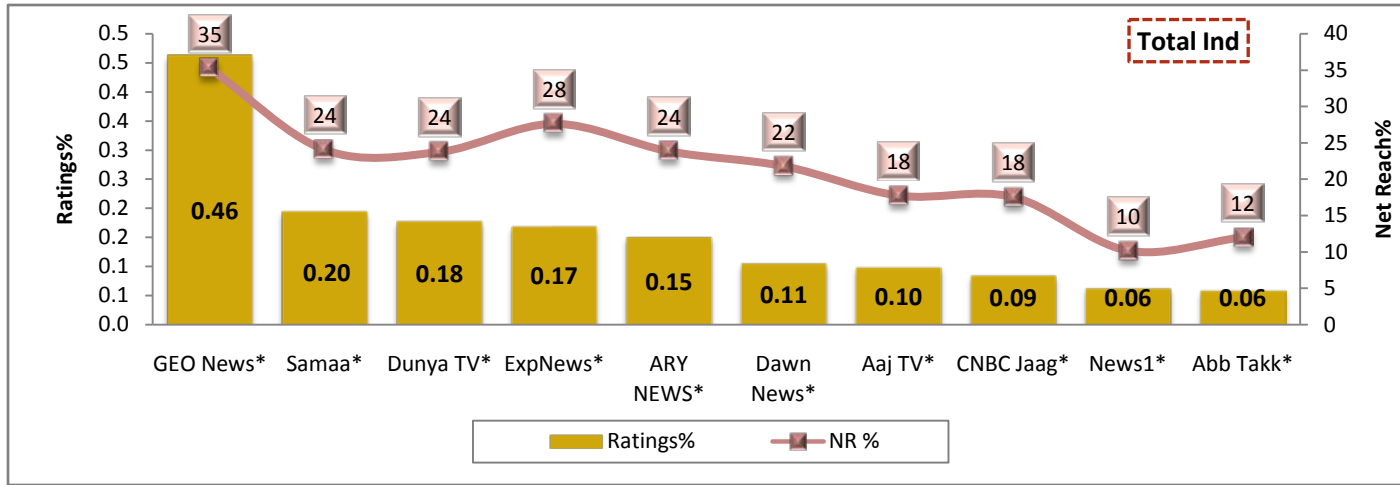


Top 10 Entertainment Channels 2013 | Total VS. C&S

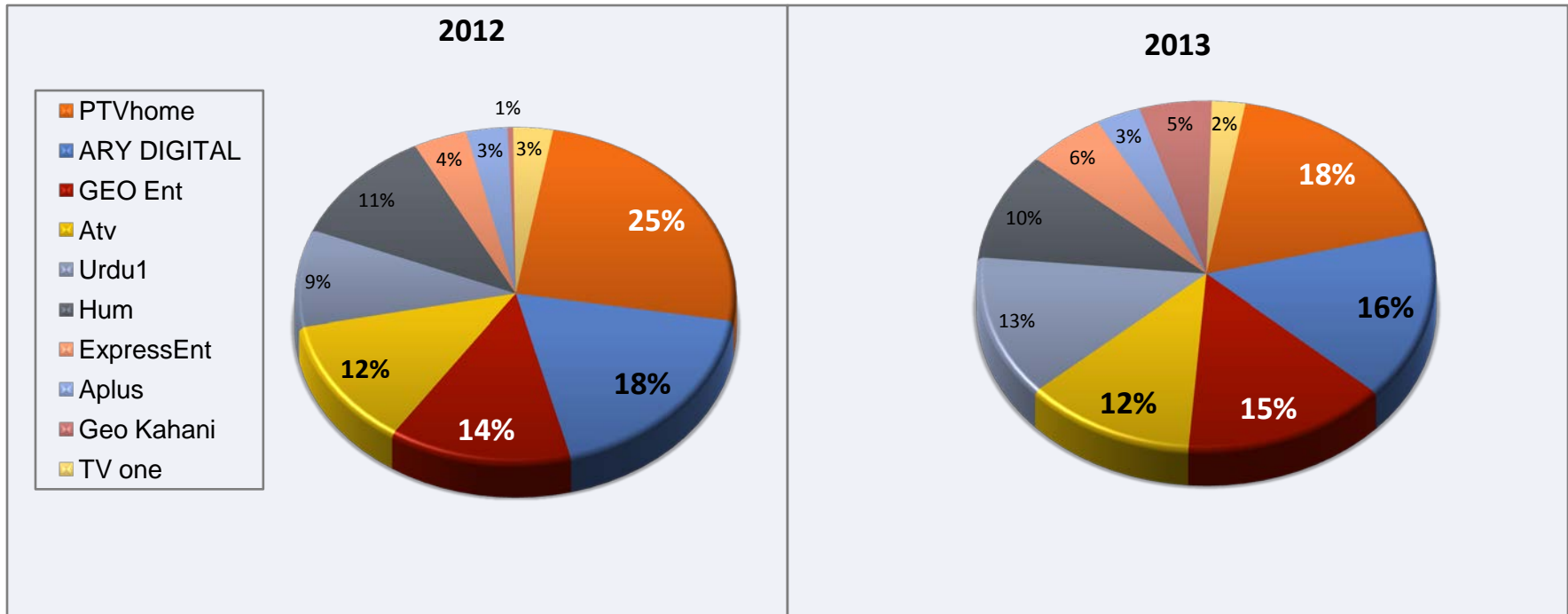




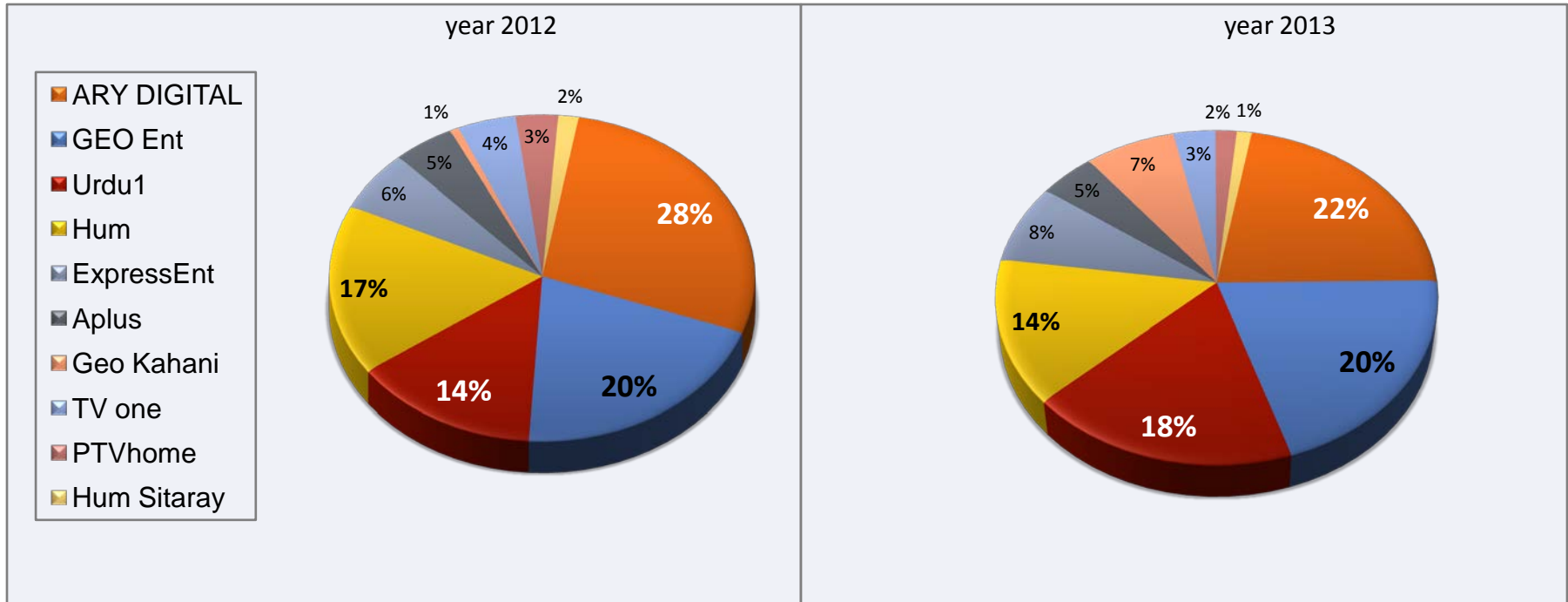
Top 10 News Channels 2013 | Total VS. C&S



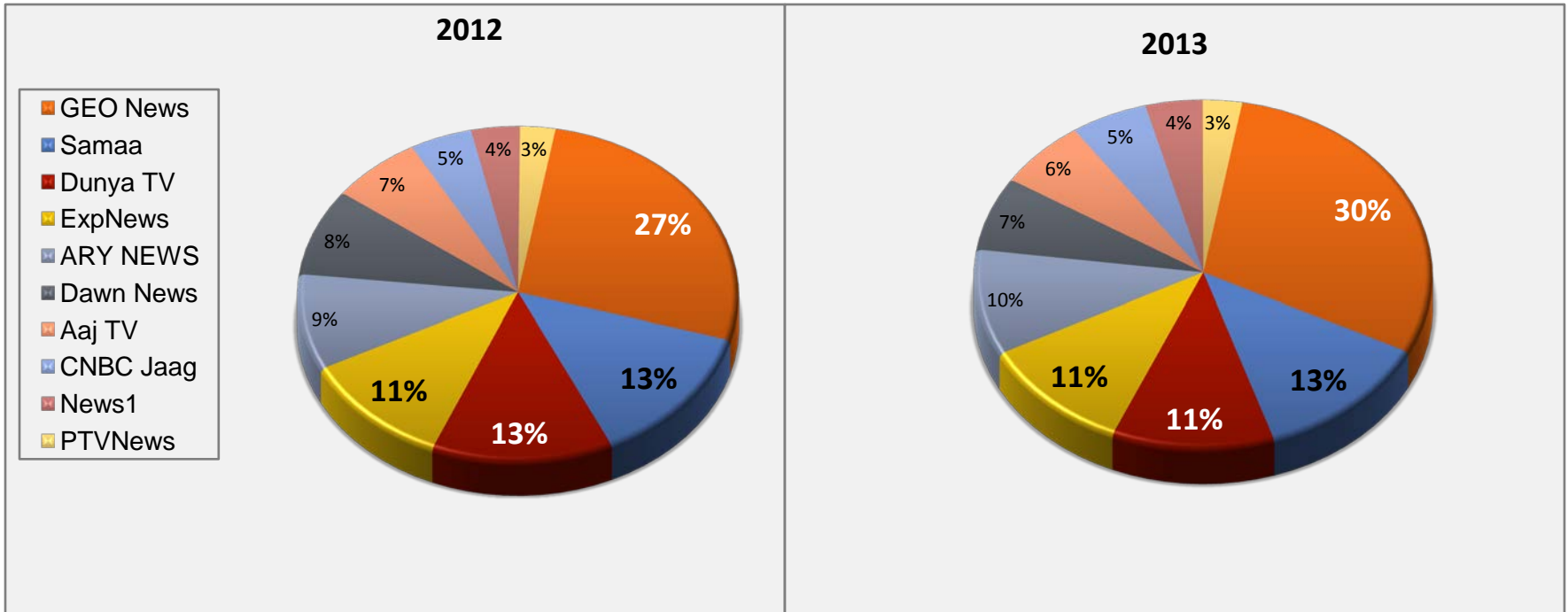
Top 10 Local Ent Channels' Relative Share% | 2012 vs. 2013 | Total Ind



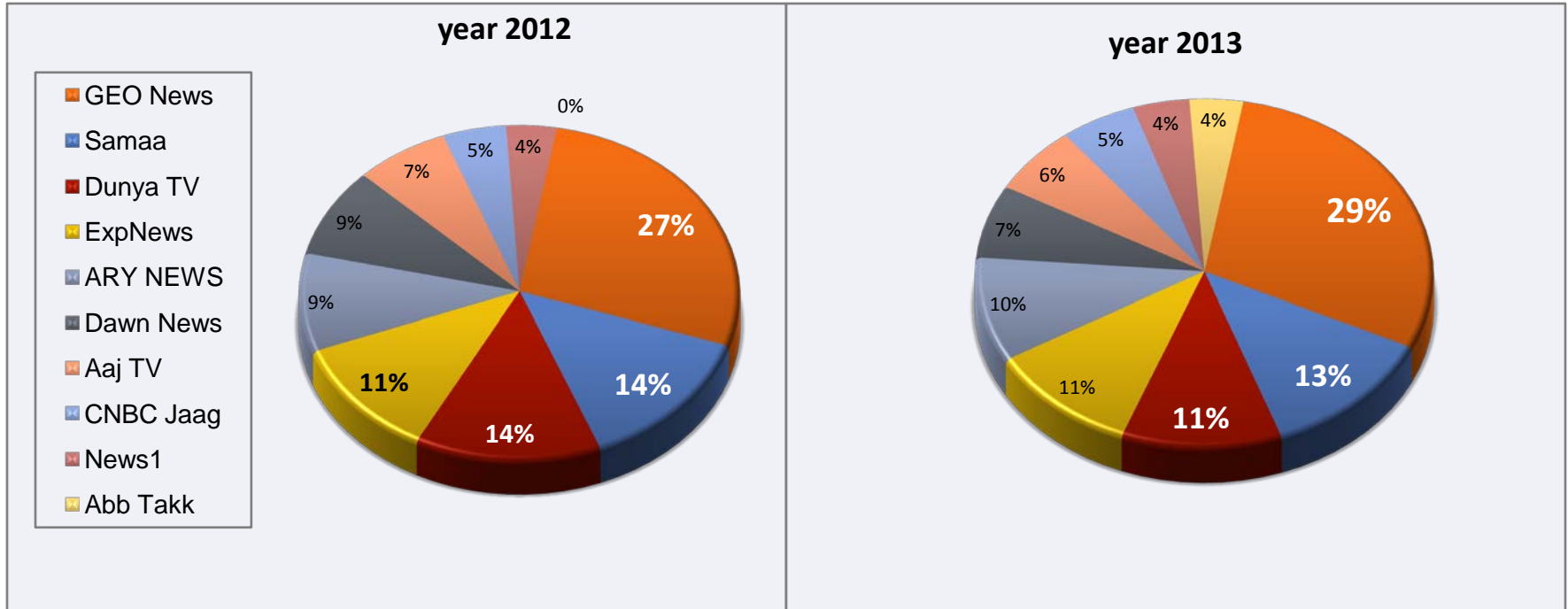
Top 10 Local Ent Channels Relative Share% | 2012 vs. 2013 | C&S Ind



Top 10 News Channels Relative Share% | 2012 vs. 2013 | Total Ind



Top 10 News Channels Relative Share% | 2012 vs. 2013 | C&S Ind



Overall Top 10 Programs | Jan to Dec 2013

*Amir Liaqat's "Lohe Qurani" in the holy month (Ramadan) is the top show for 2013 which captured 36.9 and 40.9% MS on Total Ind and C&S Ind respectively

*Out of top 10 programs 3 are Turkish and Two Indian the ratio between foreign and local content is 50 | 50

Total Ind

Rank	Date	Day	From	Until	Dur	Channel	Program Title	Ratings%	Ratings'000'	Market Share%
1	27.07.13	Sat	19:47	20:47	42'	GEO Ent*	Lohe Qurani	10.7	3488.2	36.9
2	11.05.13	Sat	23:15	23:59	43'	GEO News*	Election Cell 2013	8.4	2732.4	31.1
3	28.07.13	Sun	19:27	20:02	17'	ARY DIGITAL*	BulBulay	7.0	2297.9	28.0
4	17.02.13	Sun	20:01	20:59	38'	Urdu1*	Fatima Gul	6.2	2032.5	18.7
5	04.12.13	Wed	19:58	21:01	39'	GEO Ent*	Asmano Py Likha	5.6	1819.1	15.6
6	31.10.13	Thu	21:00	22:03	39'	Urdu1*	Feriha	5.5	1809.2	18.6
7	05.12.13	Thu	19:59	21:03	39'	GEO Ent*	Man Ke Moti	5.3	1743.1	15.0
8	12.01.13	Sat	20:59	00:04	3h 4'	GEO Ent*	Sur Kshetra	5.3	1741.7	23.0
9	10.01.13	Thu	20:29	20:53	17'	Urdu1*	Diya Aur Bati Hum	5.0	1625.4	19.2
10	06.02.13	Wed	19:31	20:58	59'	ARY DIGITAL*	Aks	5.0	1616.4	18.5

C&S Ind

Rank	Date	Day	From	Until	Dur	Channel	Program Title	Ratings%	Ratings'000'	Market Share%
1	27.07.13	Sat	19:47	20:47	42'	GEO Ent*	Lohe Qurani	12.8	3488.2	40.9
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6	31.10.13	Thu	21:00	22:03	39'	Urdu1*	Feriha	6.7	1809.2	21.1
7	12.01.13	Sat	20:59	00:04	3h 4'	GEO Ent*	Sur Kshetra	6.6	1741.7	25.5
8	05.12.13	Thu	19:59	21:03	39'	GEO Ent*	Man Ke Moti	6.4	1743.1	17.8
9	10.01.13	Thu	20:29	20:53	17'	Urdu1*	Diya Aur Bati Hum	6.0	1625.4	23.3
10	06.02.13	Wed	19:31	20:58	59'	ARY DIGITAL*	Aks	6.0	1616.4	21.2

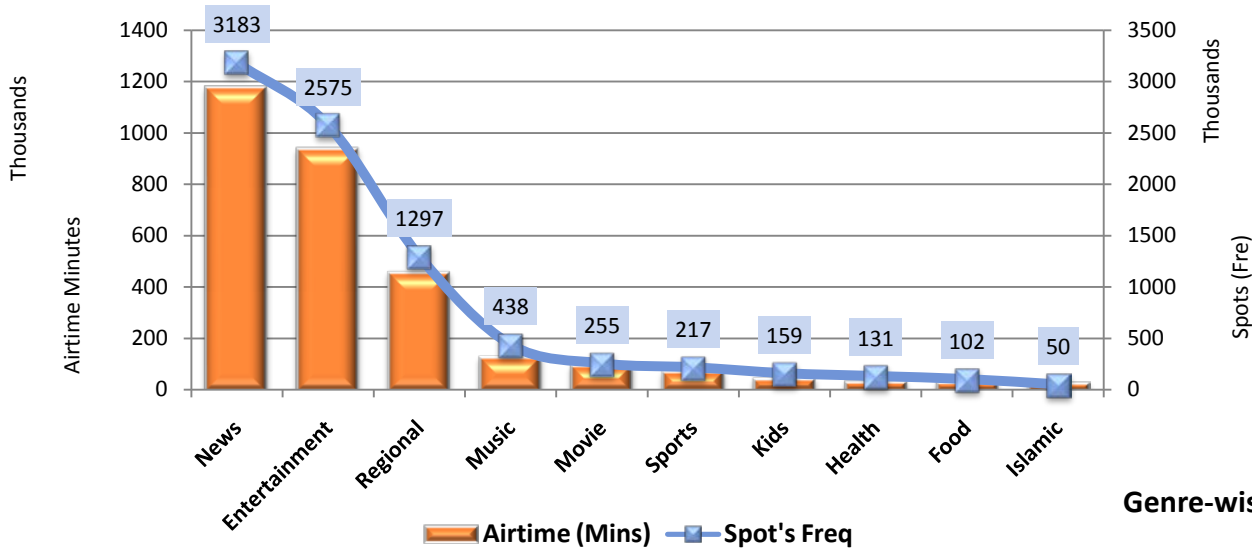
Top 10 Talk Shows C&S Ind | Jan to Dec 2013

Rank	Date	Day	From	Until	Dur	Channel	Program Title	Ratings%	Ratings'000'	Market Share%
1	17.01.2013	Thu	20:06	20:59	38'	GEO News*	Capital Talk	4.5	1229.3	14.5
2	17.01.2013	Thu	22:46	23:59	1h 3'	GEO News*	Aaj Kamran Khan Kay Saath	4.5	1215.1	20.2
3	12.05.2013	Sun	22:04	22:33	17'	GEO News*	Meray Mutabiq	3.8	1025.7	12.4
4	15.01.2013	Tue	23:05	23:56	37'	GEO News*	Aapas Ki Baat Najam Sethi Kay Saath	3.1	843.1	14.2
5	22.02.2013	Fri	23:03	23:54	37'	GEO News*	Khabar Naak	2.7	742.4	11.6
6	13.01.2013	Sun	22:06	22:57	37'	GEO News*	Awaam Ki Adaalat	2.6	697.1	9.8
7	17.01.2013	Thu	19:01	19:32	22'	ARY NEWS*	Off The Record	2.3	637	8.5
8	15.01.2013	Tue	22:03	23:21	52'	ARY NEWS*	Khara Sach	2.3	621.8	9.4
9	03.03.2013	Sun	23:02	23:59	38'	Dunya TV*	Hasb-e-Haal	2.3	619	9.3
10	12.01.2013	Sat	22:03	22:58	38'	GEO News*	Jirga	1.9	500.5	7.1

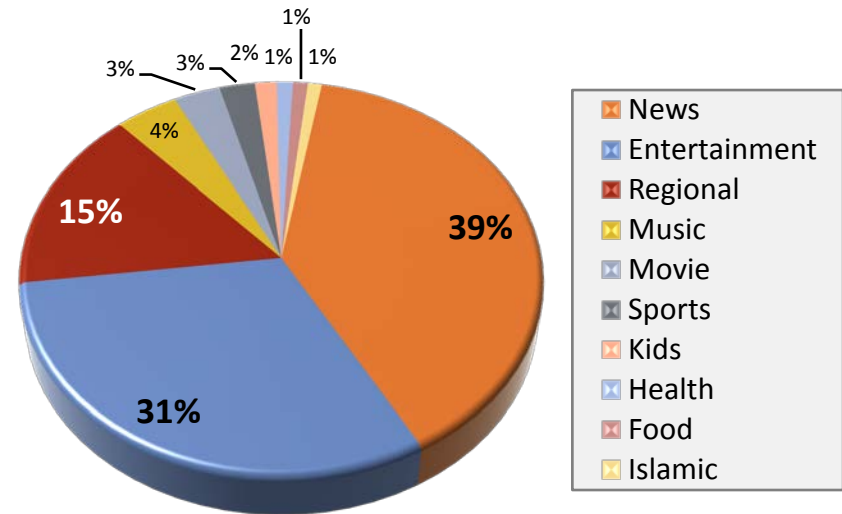
INDUSTRY AIRTIME ANALYSIS 2013

- **Industry Airtime Minutes By Genre**
- **Top 10 Product Categories**
- **Top 10 Advertisers**
- **Top 10 Brands**
- **Top 10 Ent Channels** (In Terms of Airtime Minutes)
- **Top 10 News Channel** (In Terms of Airtime Minutes)

Industry Airtime Minutes By Genre | Jan to Dec 2013

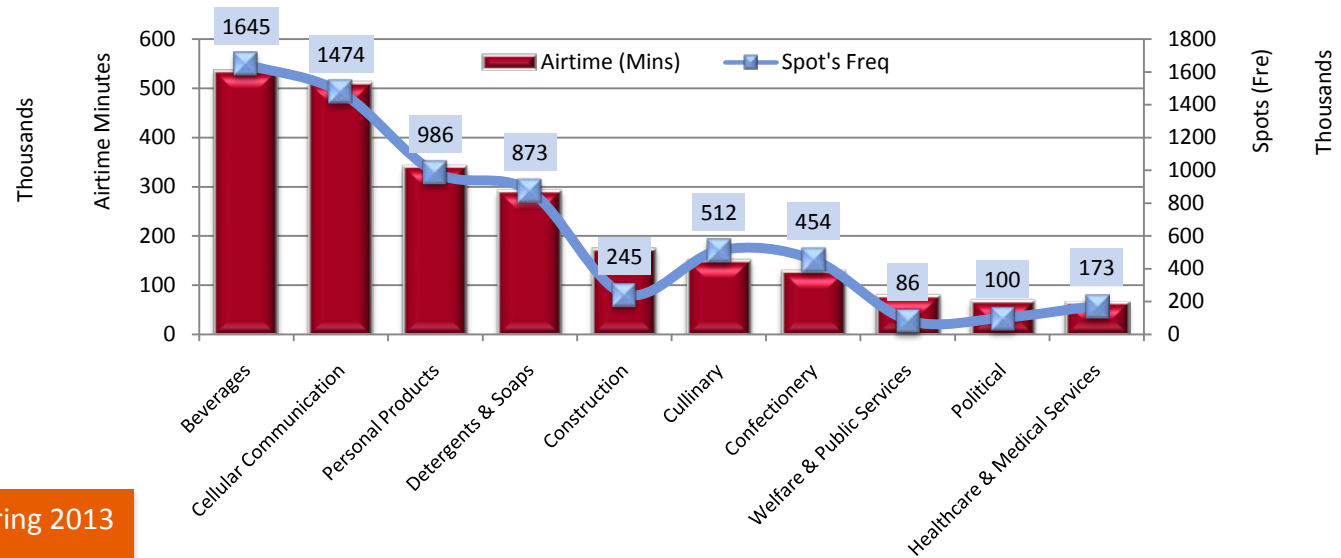


Genre-wise Share% In Airtime



Though Ent genre is leading in viewership but still News genre getting more share in Commercial Airtime.

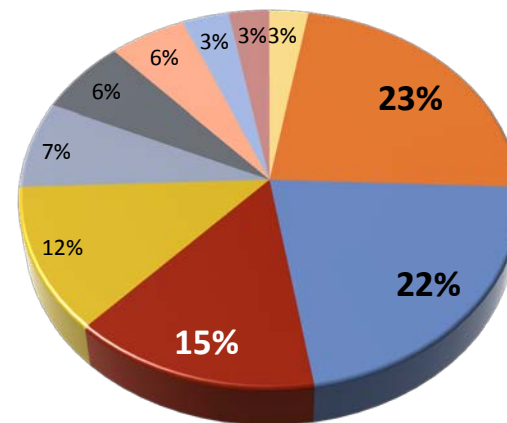
Top 10 Categories Based on Airtime | Jan to Dec 2013



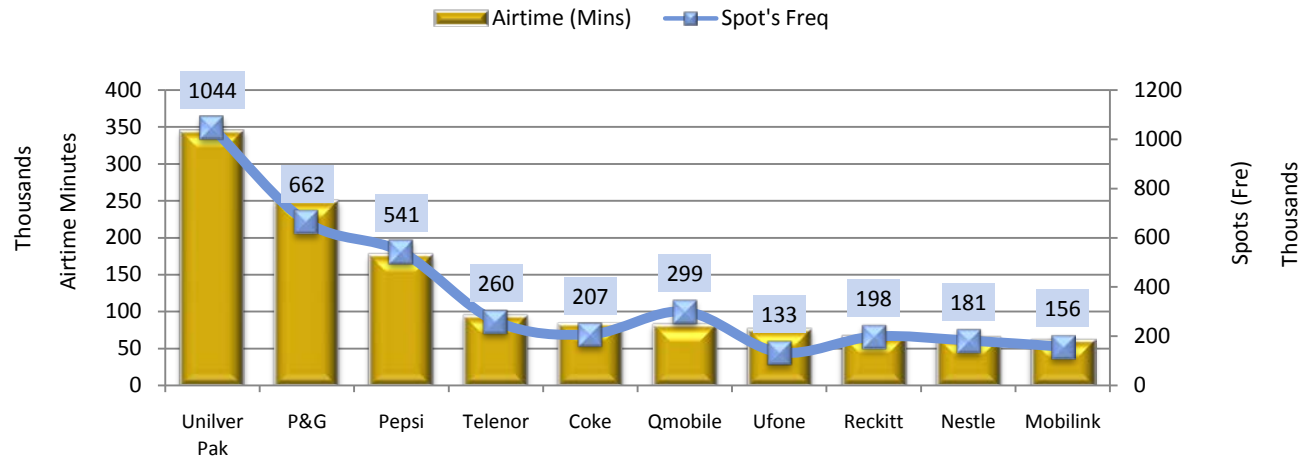
Beverages remained the top category during 2013 followed by Cellular communications

Relative Share% In Airtime

- Beverages
- Cellular Communication
- Personal Care
- Detergents & Soaps
- Construction
- Cullinary
- Confectionery
- Welfare & Public Services
- Political
- Healthcare & Medical Services



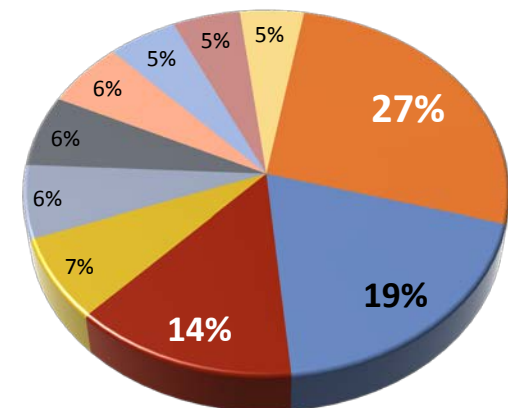
Top 10 Advertisers Based on Airtime | Jan to Dec 2013



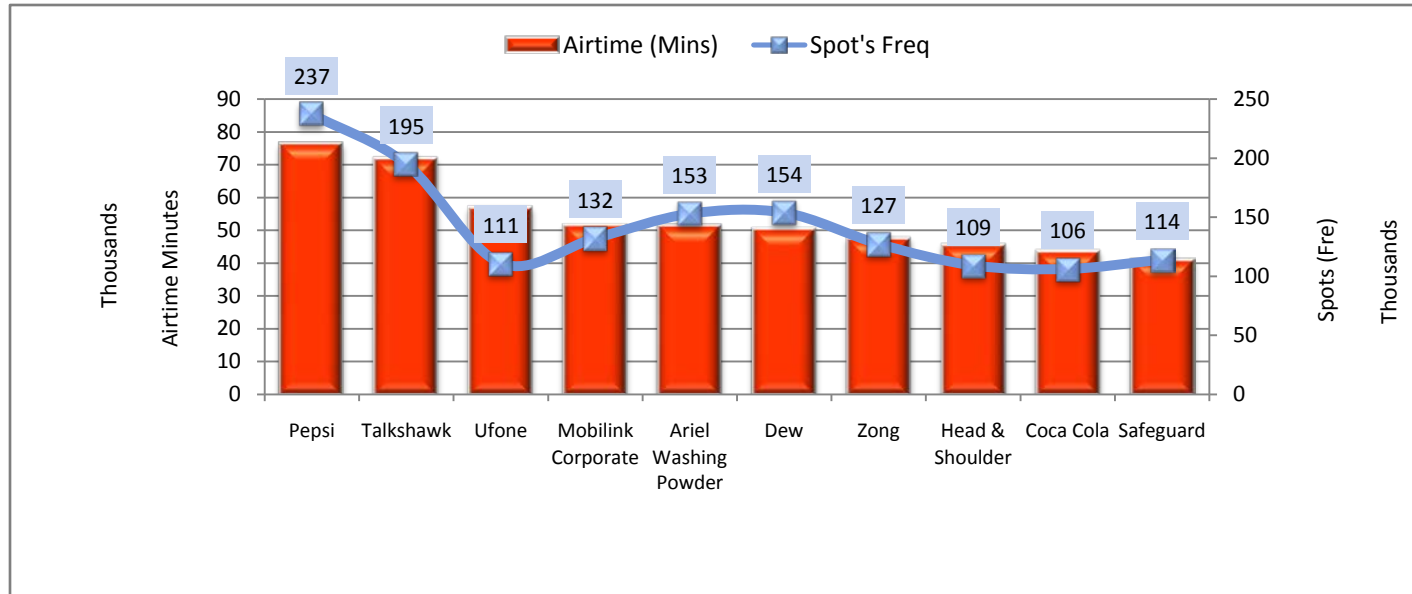
Unilver leading the top-10 advertisers charts followed P&G .
 Interestingly Q-Mobile aired more minutes than Ufone and Mobilink

Unilver Pak	P&G	Pepsi
Telenor	Coke	Qmobile
Ufone	Reckitt	Nestle
Mobilink		

Relative Share% In Airtime



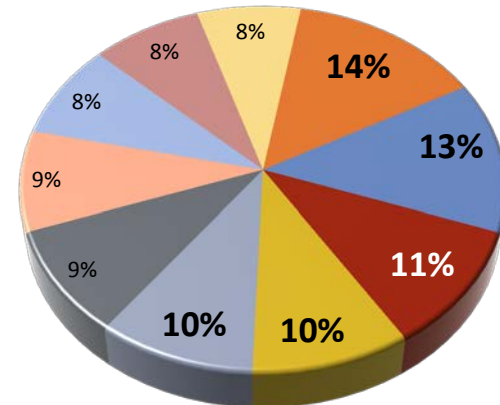
Top 10 Brands Based on Airtime | Jan to Dec 2013



Pepsi is leading top 10 brands with 2,37,000 spots followed by Telenor Talk Shawk

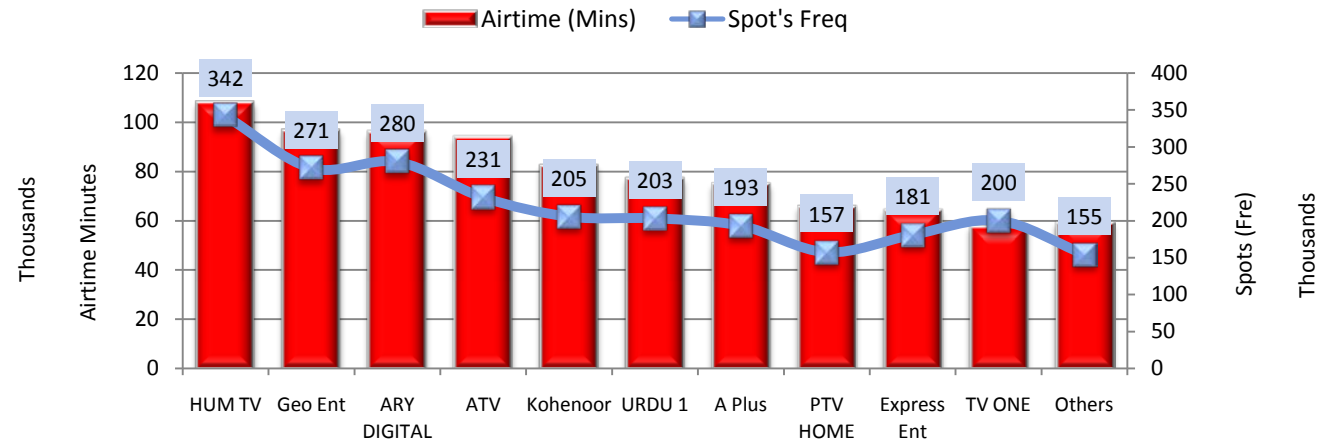
While Coke is @ number 9 with 106,000 spots during 2013 which is less than half of Pepsi's frequency.

Relative Share% In Airtime



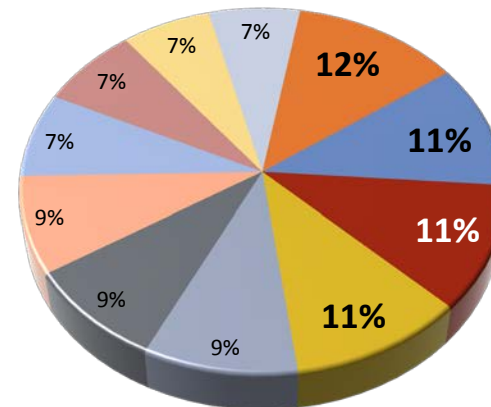


Top 10 Ent Channels Based on Airtime | Jan to Dec 2013



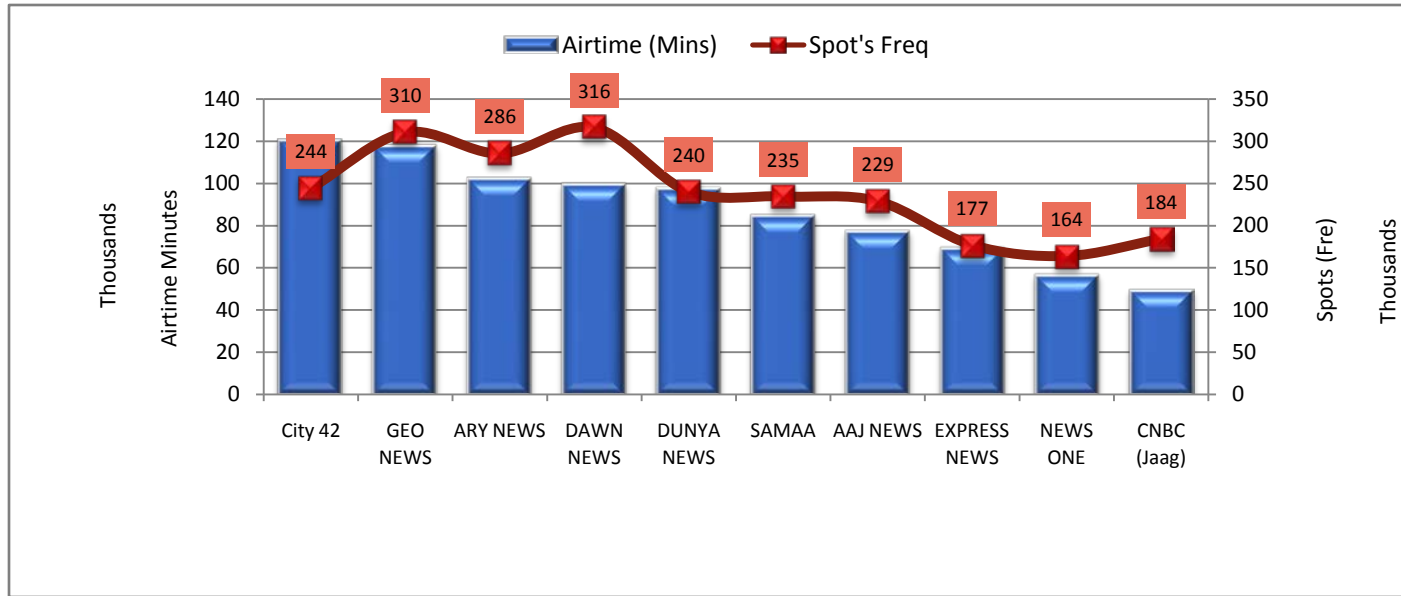
HUM TV is on top among Ent Channels followed by Geo Ent

Relative Share% In Airtime

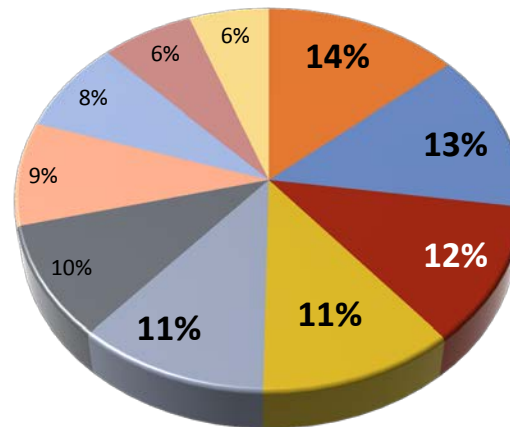




Top 10 News Channels Based on Airtime | Jan to Dec 2013



Relative Share% In Airtime



- City 42
- GEO NEWS
- ARY NEWS
- DAWN NEWS
- DUNYA NEWS
- SAMAA
- AAJ NEWS
- EXPRESS NEWS
- NEWS ONE
- CNBC (Jaag)

Among News Channels City-42 is top of chart followed by Geo News ,
On average both channels Airing over 300 commercial airtime minutes per day



Thank You 😊